

A man with a beard and short brown hair, wearing a dark blue blazer over a white button-down shirt and blue jeans, is smiling broadly while looking at a smartphone in his hands. He is standing in a bright, modern office environment with blurred figures of other people in the background.

7 Steps to Integrate B2B Sales and Marketing with Data

The sales landscape has shifted. Here's how to adapt.

Overview

Let's face it: in today's B2B landscape, the buyers call the shots. Buyers today are proactive, research their own options, and often include many decision makers rather than just one who can be wooed on a golf course or over dinner.

So, where does that leave the salesperson? To succeed in this new landscape, sales professionals must understand how the buyer's journey has changed and unlock the advantages that data analytics and statistical modeling can offer. Sales and marketing teams must also learn how to align their efforts to present a truly coordinated experience.

Read this paper to learn how to take advantage of untapped opportunities for helping sales teams evolve in today's buyer-empowered landscape.

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The new buyer's journey

The traditional buyer's journey can be summed up in three parts: awareness, consideration, and decision. Today's buyer's journey is no longer linear or product-specific. The new buyer's journey is shaped by a quest for information. Thanks to the internet and smart devices, people have access to more information than ever before, which has changed the way they look for solutions to their problems.

Instead of contacting a sales executive, people are more likely to conduct their own research first. They are also turned off by pitches that repeat information they already know or are irrelevant. As a result, sales teams need to understand the unique needs of B2B customers, which may encompass a team of decision makers. They must identify where exactly individual buyers are on their journey, what the buyer already knows, and where sales and marketing can add value.

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Enter advanced analytics. As generic and interruption-based advertising loses effectiveness, marketers and salespeople must find new ways to bring in leads and close deals. The smarter approach is for marketing to create materials the buyer is actively seeking out. This requires a close alignment between the marketing and sales teams to collect and act on data insights throughout and beyond the sales cycle.

Align sales with the buyer journey through insight

Understanding the buyer's intent and needs is essential for building an ongoing relationship and driving repeat sales. So, how can sales organizations innovate to stay ahead of buyer expectations? It starts with placing the buyer's unique requirements at the forefront of all that they do.

Here are 7 steps to aligning siloed sales activities and processes with the key friction points in the buyer experience.

1. Populate the buyer journey with personas. Build a buyer-focused journey map that shows the key objectives, activities, and conversions that buyers engage in as they make a purchase.

For example, in B2B buyer acquisitions, the buyer's journey will likely include various types of buyers who play different roles in the purchase decision. In this case, it is useful to include multiple buyer types or personas in the journey and show how and when each is involved in the overall purchase. Personas are also a helpful tool for organizing the different expectations, needs, and behaviors of your buyers to deliver the appropriate response.

2. Harness data to understand the buyer's goals.

Your buyers interact with your brand to fulfill specific wants, needs, or expectations, i.e., goals. A goal could be something specific, such as to get information about a certain product, or to explore options.

People leave a trail of behavioral information when they search websites, read an article on a company site, download content, or comment on a blog post. Computational models can capture relevant bits of information like this and piece it together with CRM data and other data systems to gain insight into the intent of a buyer.

3. Create buyer journey stages. Once you have an understanding of your buyer's goals, organize the goals as stages within the buyer journey map. The stages can be

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broadly defined, such as the buyer's goals within the first and second interactions with your brand or more specific, such as "opened account" for a map that models a bank's buyer experiences.

Internal processes should be mapped onto the buyer journey stages only after establishing a buyer-centric stage model.

4. Add internal systems and processes. With a buyer journey map in hand, you can now overlay your sales process onto the map.

Combining buyer-facing and internal processes on one map creates visibility to the internal resources and systems that are responsible for delivering the buyer experience and to understand how the different stages in your sales funnel relate to the buying process.

For example, it may make sense to overlay the sales qualification phase with the stage where the buyer is trying to understand a product's requirements to evaluate its effectiveness.



5. Track outcomes and look for barriers. One of the key things to look for at each stage of the buyer's journey are friction points or barriers. Did communication stop at a certain stage of the sales cycle? Where can you push through?

Are there mismatches between the sales and buying process? For instance, are you delivering the right information at the right time? Buyers who comparison shop typically want content that helps them compare vendors, whereas buyers who are trying to justify a purchase may want information about the return on investment. Mapping content to particular points in the buying process ensures that you're delivering relevant information.

6. Keep an eye on buyer emotions. Research has shown that human behavior is largely driven by emotion—even if we are not aware of it. Even the most rational and extensively researched purchasing decisions are affected by the buyer's emotions (e.g., am I comfortable taking a risk with a new vendor or should I play it safe with a familiar brand?)

More and more companies are realizing that capturing their customer's emotions throughout their journey is important to truly understand their experience. For instance, there may be a difference between how buyers want to feel in each stage of the journey map versus how they actually feel at each stage.

Sentiment, emotional, and behavioral analytics are just some of the ways to gain insight into buyer emotions. For more information on this topic, read our ebook, "Get Smart About Customer Emotions."

In addition to emotions, it can be helpful to include other types of experience evaluations. Here are a few suggestions:

- Score the importance of a touchpoint, tool, or resource to buyer satisfaction.
- Measure how much time it took for sales to help a buyer accomplish a goal relative to how much time buyers expected it to take.
- Measure buyer satisfaction before and after a sale.

7. Take a forward-looking view. While eliminating barriers to the buyer experience is important, it's just as critical to find opportunities for innovation. This is another area where statistical analysis and data modeling can help. For instance, by looking at year-over-year changes in outcome measures for dissatisfied, neutral, and satisfied buyers, companies can uncover patterns that may fuel ideas for new ways to improve the buyer experience.

Case Study

We used data analytics to help a global auto manufacturer deliver \$10 million in incremental profit in just two months, and approximately \$65 million to date.

The Challenge: To convince customers to sign a new lease and continue doing business with the same dealer.

The Solution: Our relationship with this client began with the buildout of an integrated CRM system that enables a higher level of customer service and support. The next step was to use aggregated insights to build deeper engagement with customers near the end of their lease.

A proactive outreach program was designed to delight customers with an exceptional experience that would steward them out of their current contract, and into their next new-car moment.

Each campaign began with a direct mail offer to existing customers who were pre-approved for a new lease. The first interaction was followed by relevant, personalized, multichannel inbound and outbound programs. Multiple campaigns ran concurrently, with offers tailored primarily by the remaining time on a customer's lease.

For example, some customers with three months remaining were offered a waiver of their remaining payments and an opportunity to move into a new lease early. Analysis of the results continued to optimize the program by identifying the "sweet spot" where customer response was strongest. Offers were adjusted based on hard facts, and more resources are applied to the campaigns that generate the most renewals.

This manufacturer now delivers a seamless experience that is more personal – and more profitable. For customers, everyone they speak with knows who they are, from the dealership to the service center to the OEM contact center.

The CRM solution aligned the customer's purchase, service, and dealer history with the manufacturer's legacy systems, bringing the customer's entire journey into view at every touchpoint. For employees, every customer contact became an opportunity to add detail to an ongoing story that was shared with other business units (such as parts, service, or consumer affairs).

The evolving profile followed the customer everywhere, including to the local dealer – who was now better positioned to complete a frictionless customer experience. For business leaders, robust reporting and analytics provided a true 360-degree view of the customer. Sales were matched back to individual campaigns to see what's working, or which program could be adjusted to work better.

The Results: The Lease Loyalty program worked. To date, our associates generated 80,473 new sales, resulting in \$10 million in profit from the program, and a total of \$423 million in incremental profit from new sales. In addition, contacted customers were shown to be 50 percent more likely to renew than those who were not contacted.





Conclusion

Quotas and revenue targets will always be important standards for sales teams, but to succeed in today's market, salespeople must prioritize the buyer or customer. At the same time, creating a sales organization that is buyer-responsive is an ongoing process.

Being receptive to data insights and new ways of analyzing an issue will help sales organizations stay nimble and be disruptive instead of being disrupted.



About us

TTEC (NASDAQ: TTEC) a leading global technology and services provider focused exclusively on the design, implementation and delivery of transformative customer experience for many of the world's most iconic and disruptive brands. The Company delivers outcome-based customer engagement solutions through TTEC Digital, its digital consultancy that designs and builds human centric, tech-enabled, insight-driven customer experience solutions for clients and TTEC Engage, its delivery center of excellence, that operates customer acquisition, care, growth and digital trust and safety services. Founded in 1982, the Company's 56,000 employees operate on six continents across the globe and live by a set of customer-focused values that guide relationships with clients, their customers, and each other. To learn more about how TTEC is bringing humanity to the customer experience, visit www.ttec.com.



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