



Strategic. Human-Centered. Business Solutions.



Marketing Tech Talk



Speaker

Dan McGraw

CEO/Senior Business Strategist

Three Goals for Today

1. Understanding your buyer(s)
2. Importance of the process
3. The role of technology

Quick Poll

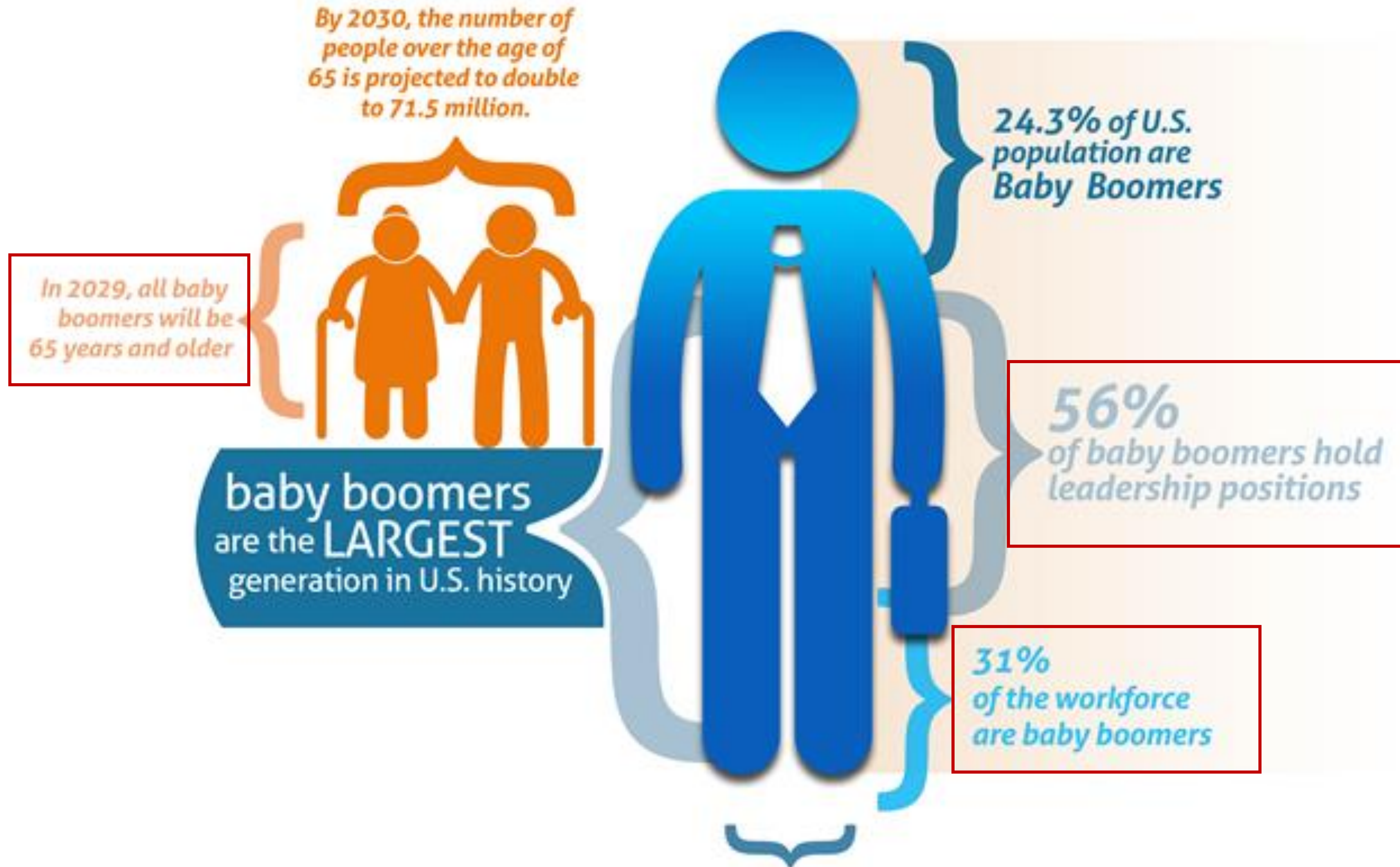
1. Consider your product commodity?
2. Consider your product relationship driven?
3. Business to Consumer (B2C)
4. Business to Business (B2B)

Repeat sales are almost always relationship-based, no matter your business. Know your data!

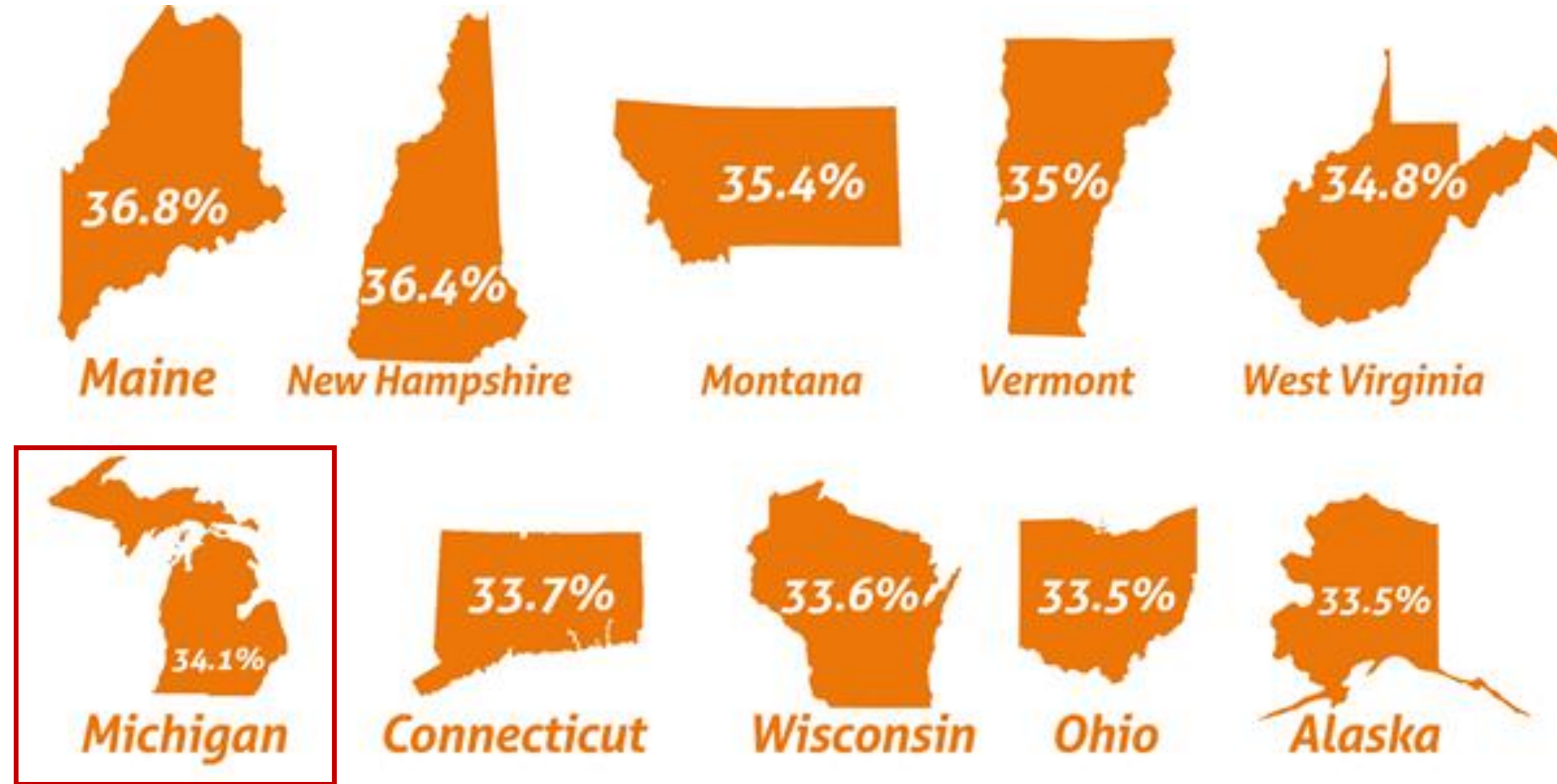
1. Understanding your buyers

Today and tomorrow...

BABY BOOMERS ARE THE LARGEST GENERATION IN U.S. HISTORY



Baby Boomers



THE STATES WITH THE HIGHEST PERCENTAGE OF BABY BOOMERS

EDUCATION
PETROCHEMICAL UTILITIES
FINANCE
FEDERAL GOVERNMENT
ENGINEERING
DEFENSE MANUFACTURING

Knowledge-Intensive industries that will experience brain drain

Businesses owned by baby boomers will be affected

4 MILLION COMPANIES (MAKING UP 66% OF ALL BUSINESSES WITH EMPLOYEES) ARE OWNED BY BOOMERS

ESTIMATED \$10 TRILLION WORTH OF BUSINESS WILL CHANGE OWNERSHIP IN NEXT 20 YEARS. SOURCES: AARP, MIT, GENQUITYCO, MBA@UNC

Engaging in the Digital Age

2017 This Is What Happens In An Internet Minute



2018 This Is What Happens In An Internet Minute



Engagement has Changed!

Getting the handshake (Then)

- Events & Trade shows (seeking knowledge)
- Email Marketing
- Cold call
- Reputation (word of mouth)

Common Theme

Buyers seeking knowledge
(still holds true)

Getting to the handshake (Now)

- Social (Informed Seller)
- Systematic approach -w- marketing
- Content is King (information)
- Reputation

Data is King!

1. Leverage historical data to establish a baseline
2. Leverage historical data to pinpoint trends
3. Integrate marketing into the entire organization
4. Insist on engagement consistency

Benefits of Data & Business Intelligence

10%

businesses commercializing data by 2020

**NEARLY
DOUBLE**

operating margin

\$40k

more revenue per employee

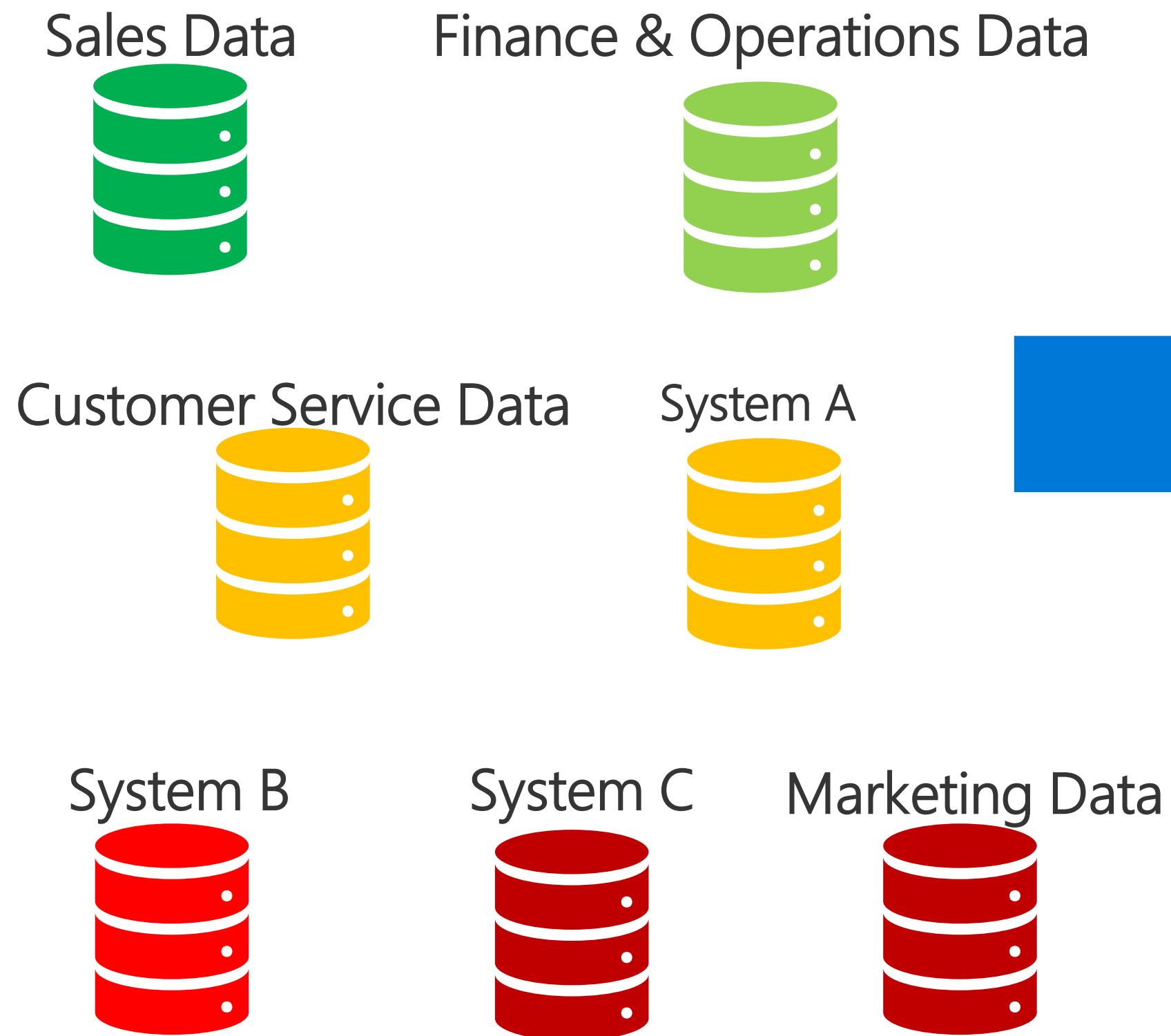
\$100M

The most digitally transformed enterprises generate on average \$100 million in additional operating income each year

50%+

higher average net income on revenue

Consolidate Data



Evolve & Integrate



Your Employees

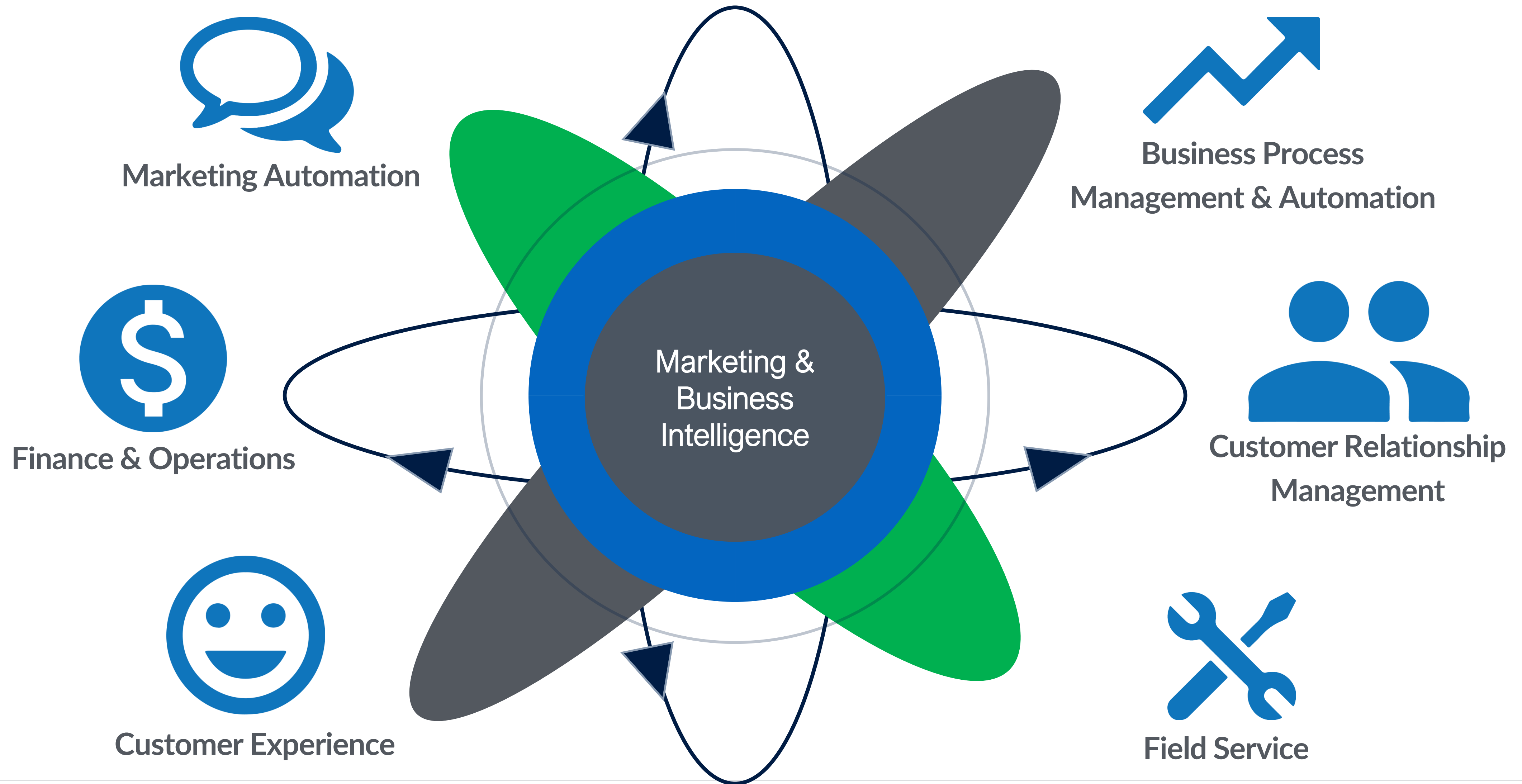
- Common UI
- Consistent Processes
- Data Integrity & Accuracy
- Secure



Your Customers

- Consistent Experience
- Fast Resolution
- Brand Integrity
- Repeat Business
- Increased Sales

Uncovering the data!



2. Build the Process

If you build it, they will come!

Define a Systematic Approach

Key capabilities



Create Buyer Personas

- **Persona:** Fictional person that represents your ideal buyer
- **Helpful** when making strategic decisions about how to have successful interactions with customers
- **Three to five personas** is ideal
- **Example questions** for developing personas:
 - At what size company does he work?
 - Where does she live?
 - How does he access information online?
 - What does her typical day look like?
 - What are his biggest challenges?



Stephen

Role: CEO

Age: 40-55

Location: Atlanta



Catherine

Role: Office Manager

Age: 30-40

Location: Los Angeles



George

Role: Sales Associate

Age: 25-35

Location: Denver

Create Customer Journey Maps

- Tells the story of the customer's experience from initial contact to loyal relationship
- Can help organizations identify potential shortcomings and opportunities along their customers' paths



Educate the Organization on Customer Experience



Boosts Customer Loyalty



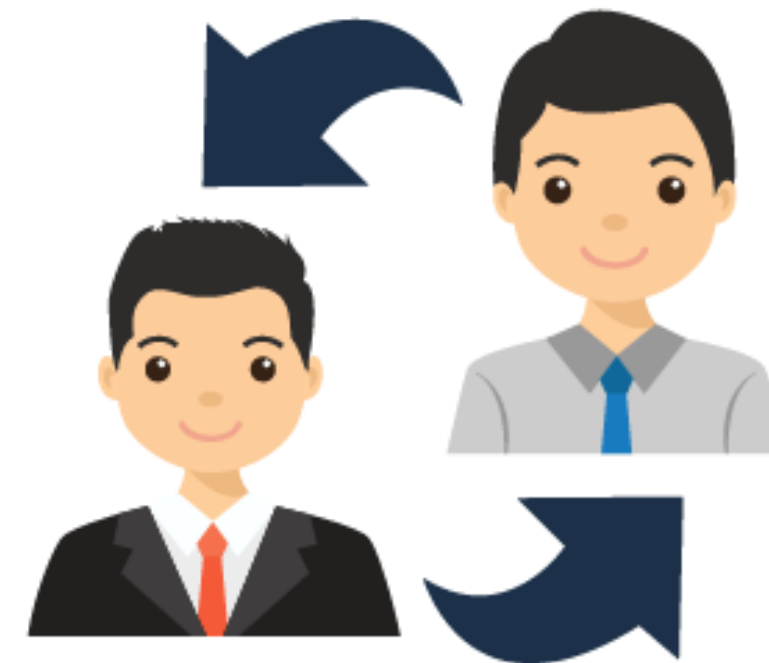
Attracts New Customers



Increases Revenue



Creates a Competitive Advantage



Engages Employees



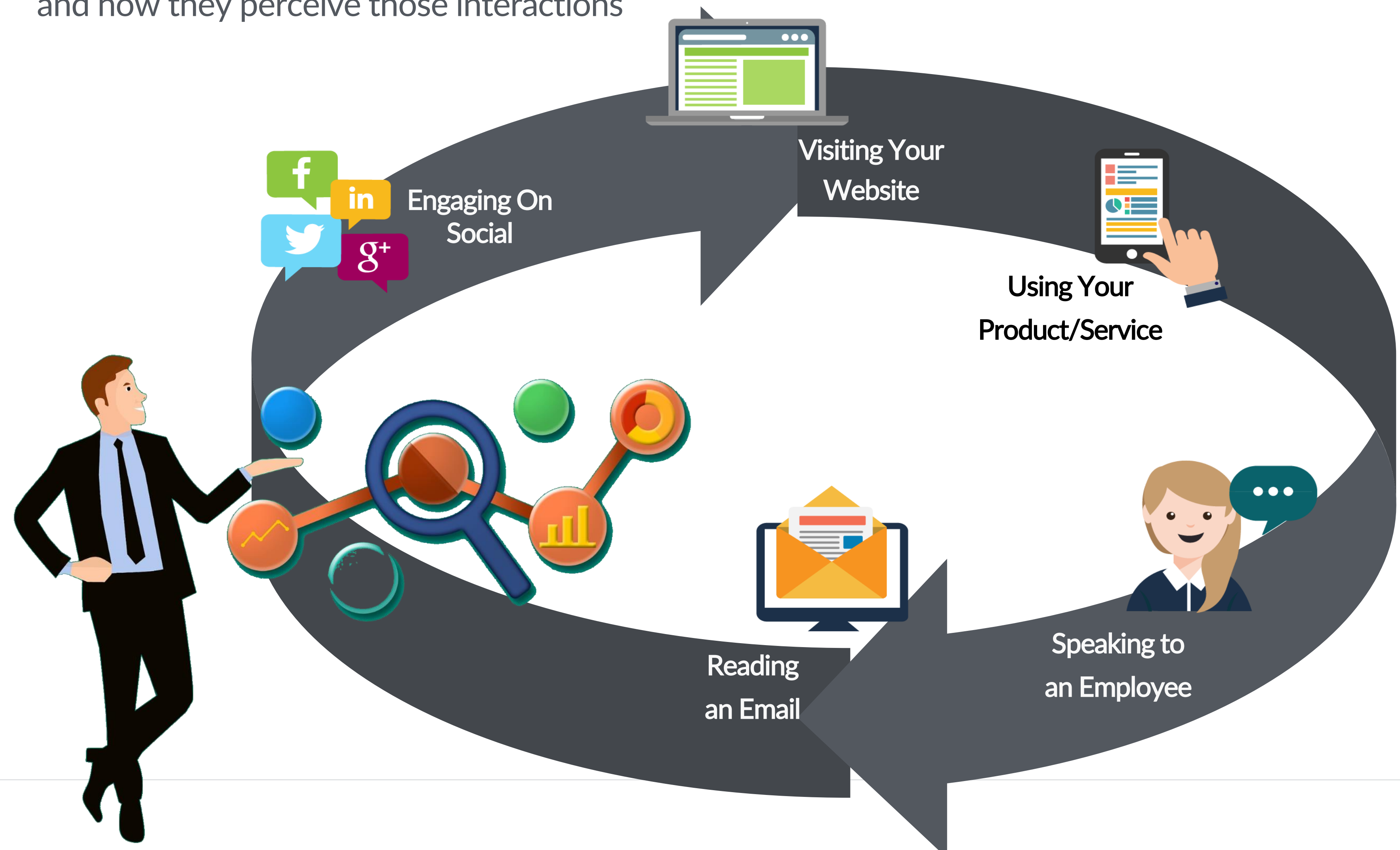
Transforms Organizations

Sales & Marketing are ONE!

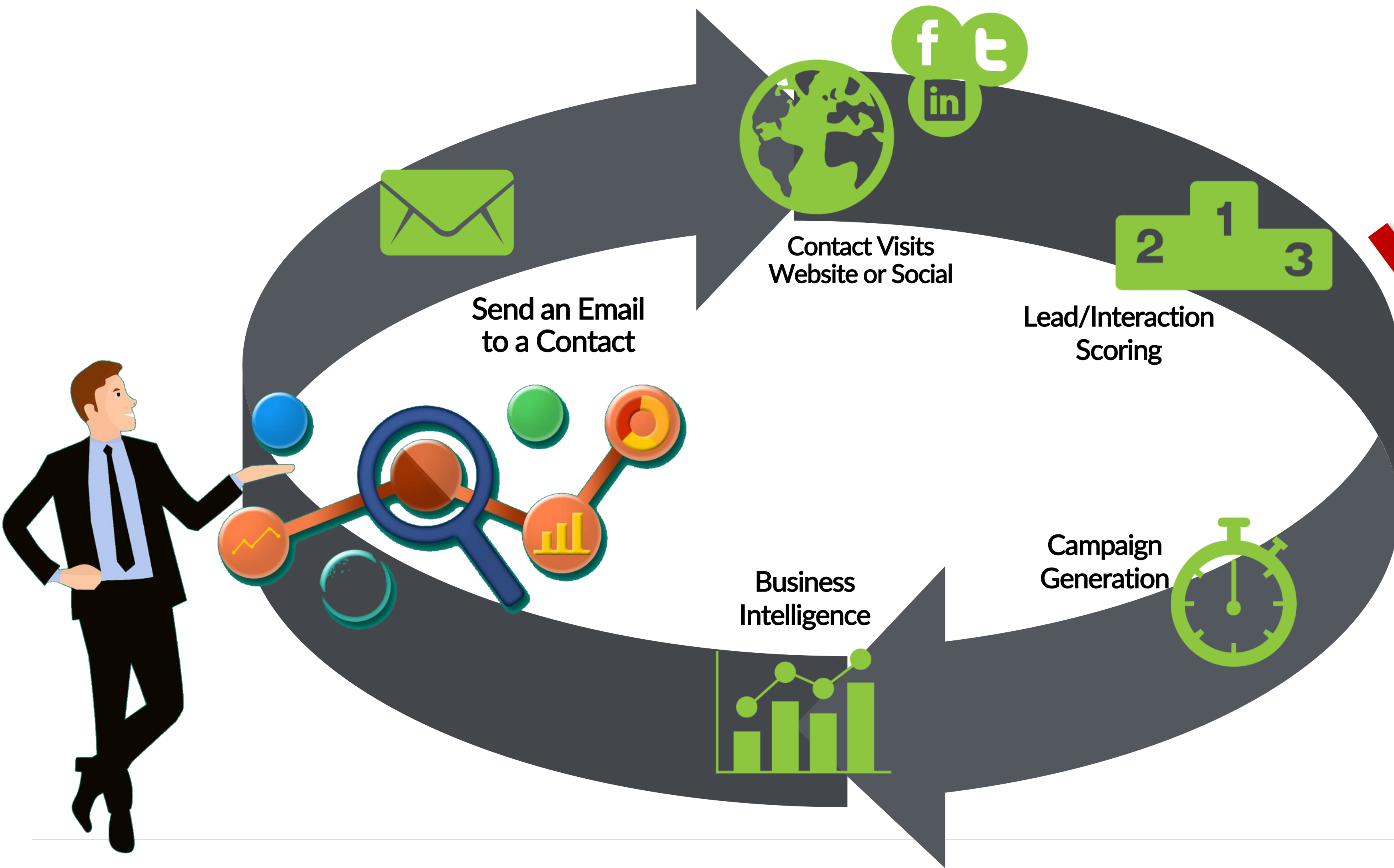
what does it mean ...

- Social Selling requires a purposeful strategy and is not a specific technology
- Customer Engagement is made up of every interaction a customer has with your organization and how they perceive those interactions

Warm Leads
Generated
Here



Create a Sales Ecosystem



**Hey Sales,
we Love You!**



3. Leverage Tools

Adopt Marketing Automation Tools

- Leverage what you have, budget what you can
- Not all tools are of equal importance across businesses



Email Marketing



Web Intelligence



Lead Scoring



Campaign Automation



SMS Messaging



Reporting



Form Capture



Surveys



Landing Pages



Social Discovery

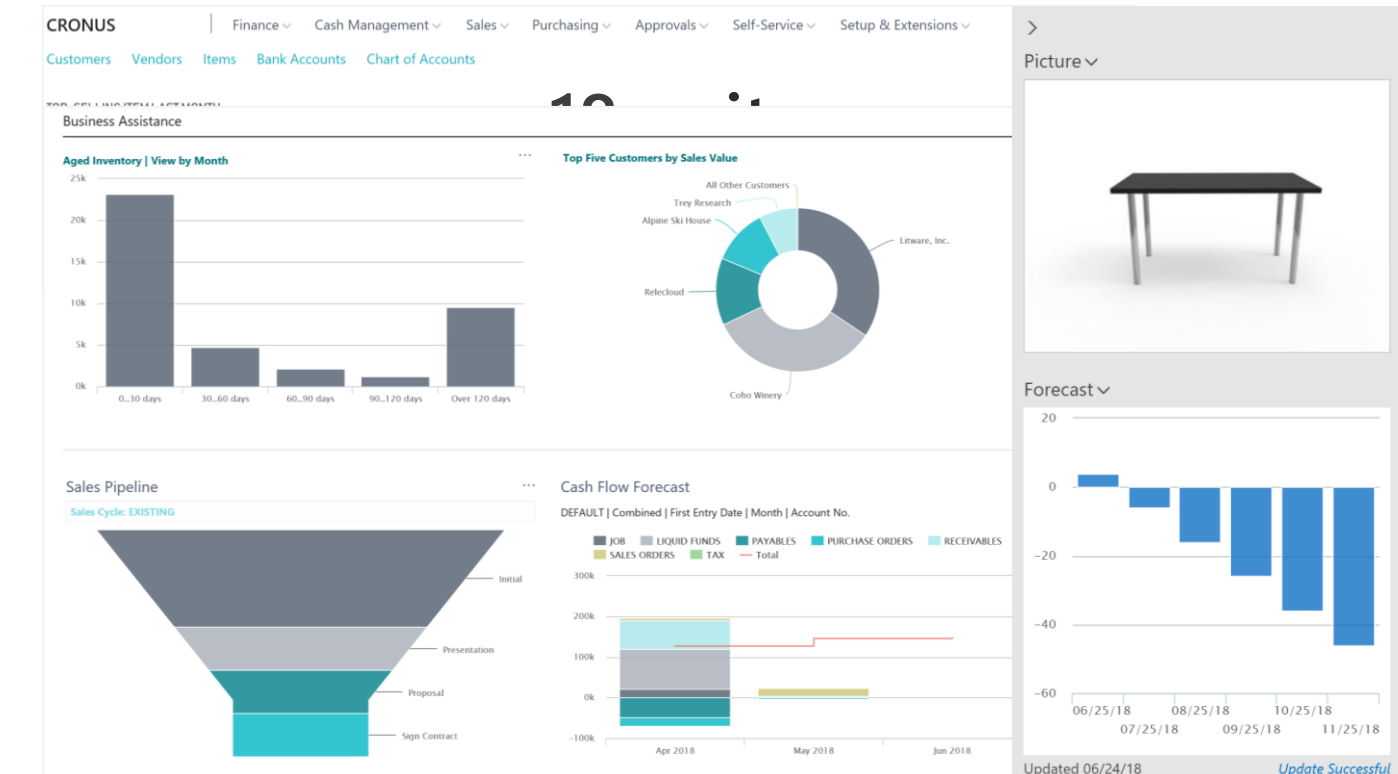
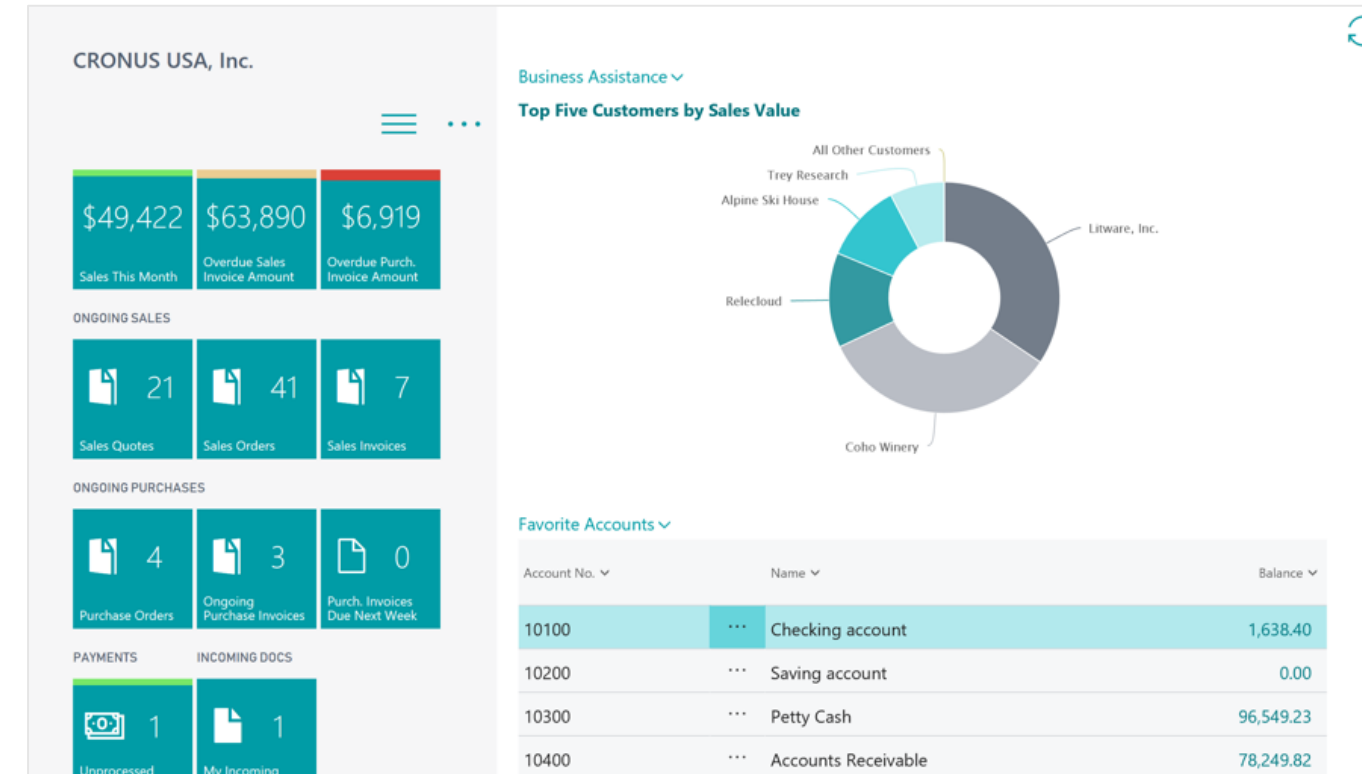
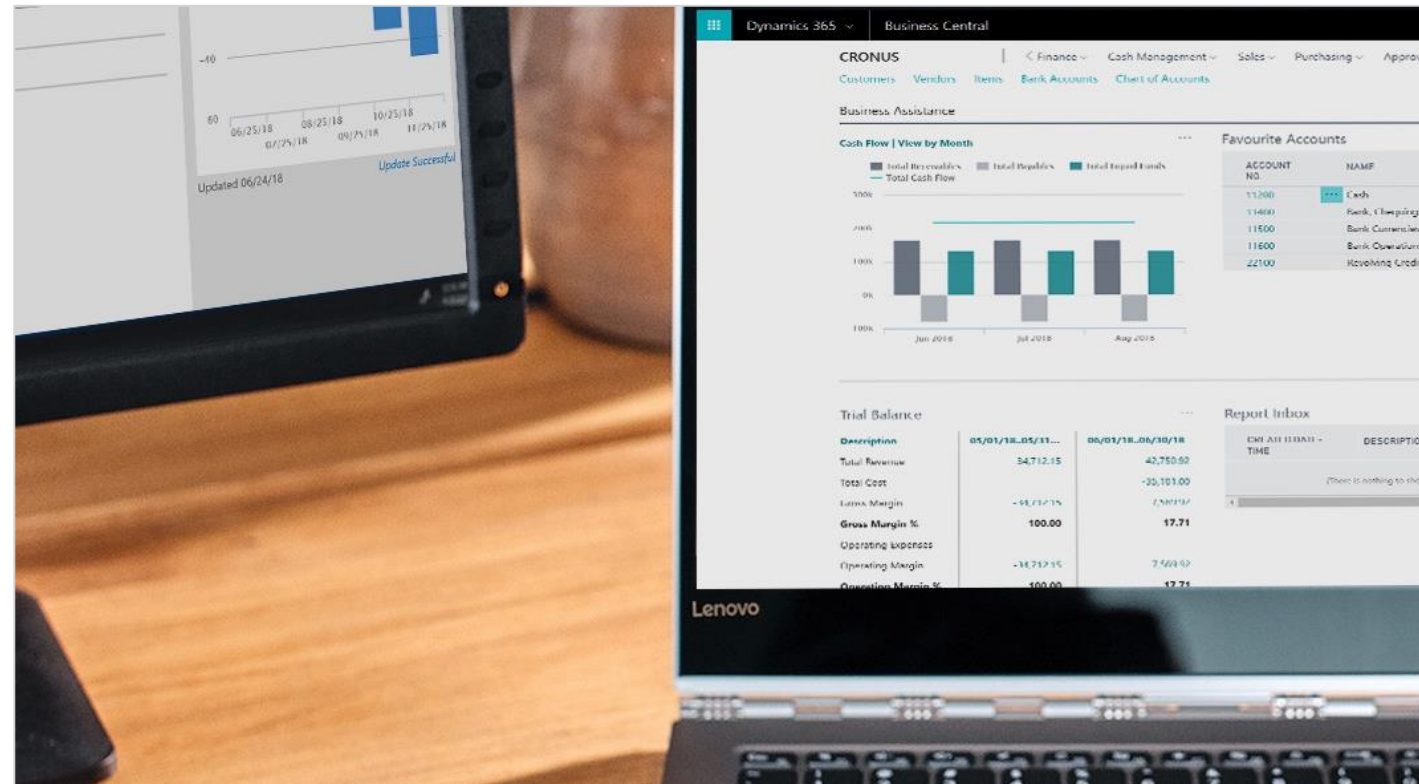
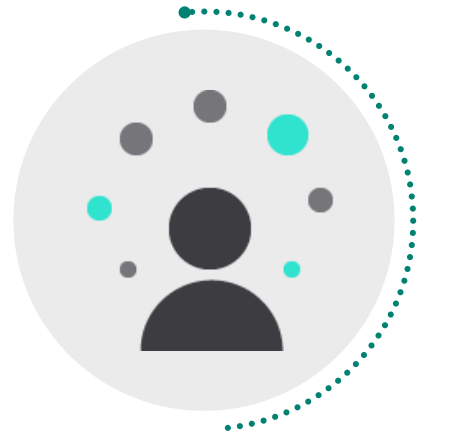


Event Management



Training & Support

Build Intelligent Insights



Get an end-to-end view of your business

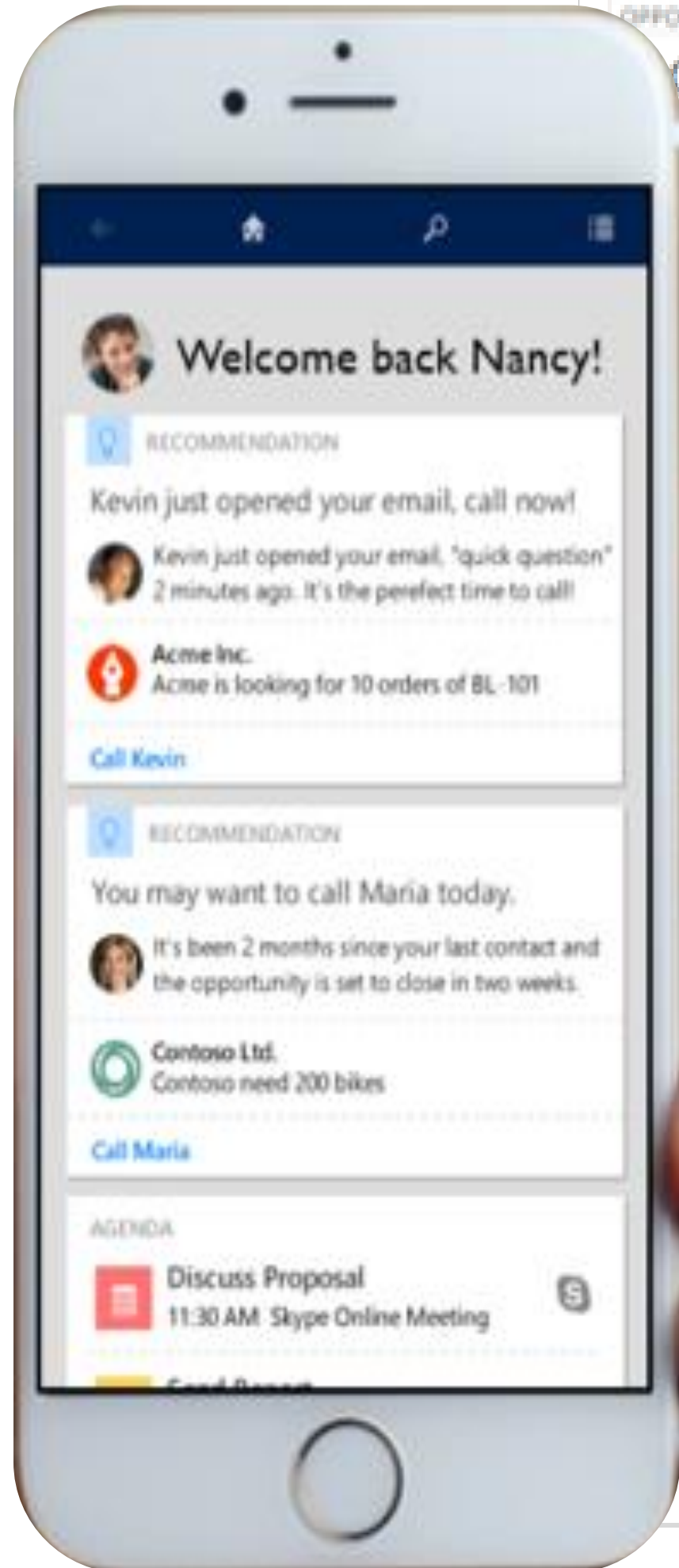


Sell smarter and improve customer service



Guide employees to optimal outcomes

Contextual Insights



Microsoft Dynamics CRM | Sales | Opportunities | 6 orders of Product ... | Search CRM data | Katie Jordan Contoso

OPPORTUNITY | Orders of Product SKU JJ202 (sam... | Est. Close Date 2/22/2016 | Est. Revenue \$10,000.00 | Status In Progress | Owner Katie Jordan

Quality | Develop | Propose (Active) | Close | Next Stage

RELATIONSHIP HEALTH

Good relationship score based on 167 interactions.

Keep it up → Next Interaction | Today 11:30 am Meet the stockholders
← Last Interaction | Mar 4 Review Progress

	ALL INTERACTIONS	TIME SPENT	RESPONSE RATE
This	60	50	75%
Top 20%	28	20 hours	62%

How does this compare to top 20% of won deals at this stage? [How is this calculated?](#)

	Emails	Meetings	Updates	Time
This	23	8	7	23 hours
Top 20%	28	5	4	20 hours

RESPONSE TIME

	Us	Them
1.3 Hour by Us	4.8 Hour by Them	

What does it take to close the top 20% of deals? [How is this calculated?](#)

	Emails	Meetings	Updates	Time
Top 20%	54	9	12	46 hours

Connection Strength

Michael Niko 05/15/2016
Gloria Mor 03/26/2016
Amnon Tamari 12/13/2015

4. Mistakes to Avoid!

Avoid these Mistakes!

- 1. Not fully understanding current data**
- 2. Not integrating marketing fully into the business (transparency)**
- 3. Not identifying what works**
- 4. Not experimenting across multiple mediums**
- 5. Not establishing and measuring to KPI's frequently**



Thank You!