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marketing & sales transformation

Pivoting the Business Around the Customer

Operationalising a Holistically Customer-Centric Go-To-Market Approach

The imperative to evolve marketing and sales has well and truly hit B2B organisations. Driven by digital, unprecedented shifts in buying dynamics are rendering go-to-market models increasingly less effective. Organisations now need to deliver a consistently higher standard of experience, across a broader channel landscape and more complex customer lifecycle.

To win in this new environment, profound business transformation is required, spanning people, process and technology. Marketing and sales must be reconstituted around the customer, with new levels of collaboration required to deliver the experience customers now demand.

But how do you start initiating this change? Drawing on a wide range of transformation projects undertaken by Blackdot, this whitepaper delivers best practice steps for building and operationalising a more agile and genuinely customer-centric marketing and sales model.

A NEW PARADIGM FOR ACQUIRING & RETAINING CUSTOMERS

The way B2B customers buy and interact with organisations is changing like never before.

Digital is providing enormous opportunity to build customer relationships in new and innovative ways. Organisations can now understand and engage customers more effectively, at greater scale, and at a lower cost to sell and serve.

However, digital has also significantly and irreversibly changed the way customers buy – with profound implications for how providers go-to-market and operate. The emergence of a new and higher set of customer expectations has resulted in the quality of the end-to-end experience – from consideration through to re-purchase – becoming an increasingly pivotal source of differentiation and competitive advantage.

Whilst high-performing organisations have always aspired to being customer-focused, a new approach is required – one that goes beyond good intentions to genuinely deliver a new standard of customer experience across all interactions and touchpoints. To deliver this, organisations must make a profound and transformational pivot in order to rewire marketing and sales around what the customer wants, operationally ingraining customer-centricity across the business.

So what has driven these changes? Let's recap the forces at play which have driven the need for a holistically customer-centric go-to-market approach:



NEW REALITY

Today's buyer increasingly controls the sales process

With buyers now preferring to self-educate online before engaging organisations, a far more fluid and dynamic buyer's journey has rendered the once linear sales process defunct.

Customer expectations are higher, in a more complex world

High-quality B2C digital experiences are driving B2B buyers to expect a consistent, seamless and highly relevant experience across channels.

The customer's voice is greatly amplified

Buyers are smarter, more social and digitally-empowered. Social media and online platforms provide scale for customers to share opinions.

Decision-making is now more risk-averse

Sophisticated procurement processes and a shift towards consensus-based decision-making have contributed to more complex purchasing.

The nature of B2B relationships has changed

In the past, customers may have continued to buy because they had a good relationship with a rep. Relationships are still critical but buyers now place more emphasis on value than loyalty.

Delivering differentiated value has become harder

Growing competition is driving product commoditisation in many sectors, resulting in the risk of margin erosion. Offerings targeted at broad segments are less likely to hold enough differentiated value.

IMPLICATIONS



To influence buyers, organisations must gain a deeper understanding of how their customers buy and what they want across the purchase process. Content and interactions need to be delivered how, where and when the customer wants them.

Organisations need to deliver a consistently higher standard of interaction across a new and broader range of channels and customer preferences.

With a high proportion of B2B buyers validating purchase decisions on social platforms, consistently meeting customer expectations is critical to ensure positive online opinions.

A higher standard of proof and support is required to help buyers secure approval and funding. A legacy of satisfied customers is more important than ever to withstand a higher level of buyer scrutiny.

Developing an intimate understanding of what customers want and their value drivers is critical. Sales needs to be more informed by what is happening across other channels and use this information as a source of competitive advantage.

In order to deliver differentiated value, organisations must now develop more tailored customer offerings and compete on a higher standard of end-to-end customer experience.

THE CHALLENGE OF REORGANISING AROUND THE CUSTOMER

The shift to organise around how the customer wants to interact with us – rather than how we want to drive interactions with them – represents a fundamental change in how organisations do business.

Most businesses are traditionally organised around brand, channel or solution lines for internal efficiency. As the business has grown over time, databases, processes, cultures and technology platforms have inevitably fragmented, resulting in silos across customer-facing channels.

In today's environment where there are more channels in play, with customers traversing across them more dynamically, these legacy problems quickly compound,

resulting in 'clunk' points or a lack of consistency in the experience.

To set up the business for success, new levels of cross-functional collaboration, integration and digital enablement are required. Given the scale of the changes and complexity involved in achieving this, translating what the organisation needs to do - and in what order - is a pressing challenge for leaders. On top of this, leaders also need to take the business on the transformation journey; all staff and stakeholders need to get behind the changes required in order to gain traction and ultimately succeed. This all needs to happen whilst simultaneously running the business and delivering near-term numbers.

WHY CUSTOMER-CENTRICITY IS SO DIFFICULT



CUSTOMER

With customer preferences and expectations more demanding than ever, making the shift from one-on-one to multichannel to omnichannel engagement is both complex and time consuming. Fragmented customer-facing channels will need to be enhanced and integrated to provide the relevant interactions demanded by today's customer.

A deeper understanding of how customers buy and what they value is required, but how do you achieve this? How will you create the agility needed to respond dynamically to a far broader set of preferences?



PEOPLE

Aside from achieving business-wide understanding and buy-in, roles and competencies across marketing and sales will need to be addressed.

How do you go about converting and educating leaders and staff who often don't realise they need to change? How will you adapt and integrate operating models to dissolve silos and create a truly customer-centric organisation?



PROCESS

The task of re-architecting legacy processes that are deeply embedded in the organisation requires significant effort. Integrated marketing and sales functions are essential to deal with the complexities of the new buyer's journey.

How do you deal with the higher volume and wider variety of interactions?



TECHNOLOGY

New tools will inevitably be needed to scale execution. New technologies and automation are key to creating marketing and sales capacity, as well as providing the data and responsiveness needed to support richer, more engaging interactions. However, with the myriad of tools available, making the right choices is difficult.

How do you make the right choices? How do you combine and integrate your new business requirements with your legacy platforms?

A PATHWAY TO CUSTOMER-CENTRIC GROWTH

Whilst every organisation's journey will inevitably be different, we have identified three broad stages that businesses typically navigate on the pathway to transforming marketing and sales around today's digitally-empowered customer.

THE THREE KEY STAGES ON THE PATHWAY TO DIGITAL GO-TO-MARKET TRANSFORMATION

#	OPERATIONALLY PIVOT TO CUSTOMER	INTEGRATE MARKETING & SALES EXECUTION	DELIVER RELEVANCE, AT SCALE
1	Secure Executive Sponsorship & Educate the Business Cross-functional sponsorship & business-wide understanding will dictate likelihood and rate of success	Lift Role & Goal Clarity Clearly defined accountabilities, KPIs and incentives are required to embed new ways of working	Break Down Enduring Silos Any remaining data, technology or functional silos must be addressed to deliver the omnichannel experience
2	Sharpen Market Segmentation Alignment across product, marketing and sales on priority audiences is critical to achieving scaled relevance	Build New Capabilities New marketing and sales skillsets are required for a more digital and data-centric operating environment	Scale Demand Generation 'Always-on' automated campaigns are required to support scaled one-to-one digital engagement
3	Map Personas & Buyer Journeys Detailed understanding of how customers buy and their preferences must underpin all execution	Develop Cross-Functional Planning Processes How each function and channel collaborate must be clear across the buyer's journey to enhance cohesion	Digitise Frontline Selling CRM optimisation and productivity tools must create sales capacity & maximise time spent with customers
4	Develop Content Strategy Compelling content is essential to engaging buyers and facilitating progress across the buying journey	Design Lead Handover & Recycling Processes Robust processes must support responsive and effective sales follow-up of marketing-qualified leads	Enhance Dynamic Content & Personalisation Maturing platforms, data and content enable the expansion of increasingly individualised interactions
5	Evolve Channel Strategy The marketing and sales channel mix must deliver an enhanced customer experience at lower cost	Embed an Integrated Operating Rhythm Joint marketing and sales forums and dashboards are key to ensuring ongoing collaboration and review	Optimise Attribution & Customer Analytics Understanding performance across the end-to-end buyer's journey is key to driving ongoing improvement
6	Validate Technology & Data Foundations Data must be accurate and core platforms must enable marketing & sales to be responsive & relevant	Hardwire Technology-Enabled Execution Automated processes, workflows and alerts are imperative to scale more integrated ways of working	Leverage Data For Continuous Improvement Customer insights must be continually utilised to drive a culture of 'restless excellence'

STEP ONE - SECURE EXECUTIVE SPONSORSHIP & EDUCATE THE BUSINESS

Many business leaders will already understand the need to become more customer-centric, knowing it will be the key to long-term growth. However, with near-term numbers looming, it is often hard for the transformation agenda to take priority over business-as-usual operations.

It is therefore essential to gain cross-functional executive sponsorship. Executives play an integral role in ensuring that transformation initiatives are prioritised and that the organisation stays committed to the transformation vision.

In addition to executive sponsorship, gaining buy-in from the wider business is equally important.

Without it, transformation will be near impossible. Educating the business will be instrumental in overcoming the internal resistance to change that inevitably arises when embarking on a transformation journey.

Behind this resistance often lies the fact that many employees will not yet have felt 'the pinch' of the new buying environment, and so are not completely convinced about the imperative to adapt. Bringing the hard risks and realities of falling behind to light, balanced by the pay-off of transformation, will be critical to success.

BEST PRACTICE TIPS



CLEARLY COMMUNICATE THE 'WHY' & 'HOW'

With transformation fundamentally disrupting many across the business, it is crucial to communicate a compelling rationale for change. What are the internal and external catalysts? What will be the upside opportunities behind successfully embedding this change? And the downside risks if we don't?

'Scar tissue' over long and painful transformation programs is common, so plan your transformation in stages. Ensure that people understand what the blueprint will look like, as well as what benefits will be sequentially unlocked along the way.



LEVERAGE PILOTS

One of the best ways to expedite the process of change is by running short pilots with clearly defined business goals and commercial outcomes. This enables the business to test and evolve new ways of working into business-as-usual operations, effectively building buy-in along the way and de-risking larger transformation decisions.

Aligning the leadership team behind a commercially robust pilot is a much easier sell than a far-reaching and expensive business-wide transformation agenda.



'OVER-ACHIEVE' ON SALES ENGAGEMENT

Educating people across the business and bringing them on board will be a significant hurdle to overcome, particularly with traditionally sales-driven business lines.

With most salespeople typically feeling a deep sense of ownership of the customer relationship, the introduction of digital channels can often be perceived as threatening.

Drawing out these concerns early, articulating a clear vision of the brighter future digital can bring to all, as well as leveraging your pilot agenda to actually show them the value - will all be key to getting sales behind the transformation agenda.

STEP TWO – SHARPEN MARKET SEGMENTATION

A significant realisation that typically has to occur at this point is that you simply can't be relevant to everyone. If your targeting is broad, you are far less likely to deliver the quality and relevance that today's customer expects.

Consciously defining and prioritising your market 'sweet spots' – those customer segments where a significant market opportunity and your core

differentiation intersect – is an important process to ensure you have clearly defined 'where you will play'.

Once clear on these priority segments, the next step is to align product, marketing and sales behind them. This cross-functional alignment will underpin the organisation's ability to be relevant to customers and deploy resources towards the most profitable opportunities.

BEST PRACTICE TIPS



DEFINE YOUR MARKET 'SWEET SPOTS'

Many organisations pursue too many market segments, resulting in solution offerings and marketing and sales efforts which are moderately relevant to most, but not dramatically relevant to any.

A useful way to identify your market 'sweet spots' is to map out your solutions against potential market arenas and then select the segments where the following three items intersect:

- We have a core go-to-market and service delivery capability
- We have a differentiated value proposition
- There is significant profit potential – ideally both high margin and high growth opportunity



ALIGN THE BUSINESS BEHIND YOUR MARKET 'SWEET SPOTS'

Once you have reduced the number of segments to target, you will need to align product, marketing and sales behind them. This is frequently difficult as plans for product roadmaps, marketing campaigns and accounts will typically already be in motion.

The key to aligning the business behind your highest potential segments is this – product, marketing and sales must realise that it is economically unviable to be relevant to everyone.

Once this realisation has set in, conscious prioritisation of audiences across the businesses is possible – a critical pre-requisite to setting up for more relevant execution.



DRIVE AND MEASURE ON-STRATEGY EXECUTION

By this stage you will have absolute clarity around which customers you are going after. You now need to focus all marketing and sales activity against these segmentation outputs.

To realise results, you will need to embed your new execution focus in your organisation's operating rhythm and dashboards.

By regularly measuring and reporting the proportion of marketing and sales activity which is 'on-strategy', your organisation can quickly course-correct and ensure the focus is maintained.

STEP THREE – MAP PERSONAS & BUYER JOURNEYS

To deliver the experience customers now demand, a deeper understanding of how they buy and what they want is required.

A subtle, yet critical mind-set shift needs to take place across the business: It is no longer about how we drive customers through the sales process, but about understanding how customers buy, and then facilitating and supporting this process in a cohesive way.

To make this shift, you need to have an intimate understanding of your key buyer personas and each of their buying journeys. What drives their perception of value? What are their needs at each stage of the buyer's journey? What are their content and channel preferences?

Answers to these questions will form the foundation for all marketing and sales execution disciplines.

BEST PRACTICE TIPS



DEVELOP YOUR IDEAL CUSTOMER PROFILE

Once marketing and sales are fully aligned behind your market 'sweet spots', you will need to build out a new level of specificity to define exactly what an attractive account looks like. Profiling accounts against the following criteria can help you find your ideal targets:

- **Size** – are they big enough?
Assessing the potential revenue and number of transactions or deal size of your prospects can help determine this
- **Attractiveness** – do we want them? This will vary dramatically amongst different organisations as it depends on what is important to them. Consider a prospect's risk profile, decision-making structure, budget and geography
- **Probability** – can we win them?
This too will vary by business, but there are some general questions you can ask to help determine probability. Are they accessible? Can we tolerate the required sales cycle time?



BUILD BUYER PERSONAS AND JOURNEYS

A common temptation when defining buyer personas and journeys is to make assumptions about customer needs, resulting in a range of biases becoming embedded in your outputs.

Given your persona's will form the backbone of relevance across all marketing and sales activity, it is critical that the fully-fledged perspective shift is made from an 'inside-out' organisational view, to an 'outside-in' customer view.

Speak to as many customers as possible and incorporate a wide range of sources to ensure your buyer understanding is neutral and complete.



ENGAGE THOSE ON THE FRONTLINE

Whilst speaking with customers is priority one, talking to sales and service staff, who interact with customers 'day-in day-out' is also key.

A 'one liner' which has been honed by a salesperson for years could become the title of your next content blockbuster.

Distribute your personas and journeys across the business and make these living documents which are continually renewed and enhanced.

STEP FOUR – DEVELOP YOUR CONTENT STRATEGY

Now that you understand your buyer personas and journeys, you can map out what content is needed at each stage in order to 'cut through' and facilitate progression. You may be lucky enough to have legacy content that you can repurpose and adapt. However, there will still most likely be a significant build required.

Considering that you need to generate content assets for each of your key segments, solution groups, buyer

personas – each with a number of journey steps – adapted for different channels, this exponential equation can quickly add up to be an unfeasible build. This is where your sharpened market segmentation will really kick in to save you. Having taken a narrow approach with your market segments, will help limit the scope of your content build. As such, you will now have the capacity to create content across each stage of the buyer's journey and deliver more relevance to your key customers.

BEST PRACTICE TIPS



START SMALL

The challenge of generating content is frequently the undoing of even the best-planned marketing and sales transformation strategies.

A common mistake is trying to do too much, resulting in strain on the operating model and incomplete buyer journeys as production is bogged down.

Start with a realistic number of buyer personas so that you can build content holistically across their buying journeys.



FOCUS ON IMPACT

Developing content that successfully 'cuts through' in a cluttered information environment is another key challenge.

Further compounding this difficulty is the increasing sophistication of buyers. With their subject matter knowledge ever growing, the standard required to expand their thinking and stimulate action (such as sharing their details to complete an online form) is only getting higher.

Retaining your resolute 'outside-in' customer focus will help you precisely address specific buyer pain points. Pulling together the very best thinking from across the business, developing unique and differentiated insights, as well as packaging with creative flair will all be key to breaking through.



EQUIP THE ORGANISATION

Many organisations build content successfully for particular campaigns or pilot programs, but deliver far more sporadic results when it comes to the ongoing need to generate fresh material.

Engaging executive sponsorship greatly assists with this challenge – firstly to ensure that the appropriate internal or external resourcing is in place, and secondly to generate accountability across the business for adding insights into the production process.

Look for process efficiencies wherever possible. Develop templates which help your thought leaders provide inputs. Repurpose material so that you can do the thinking once, then adapt a range of content assets across different formats and for different channels.

STEP FIVE – EVOLVE CHANNEL STRATEGY

It is very likely that in order to distribute content to the right places where your customers are, you will need to launch new digital channels. These could include digital marketing channels such as online search, display ads or social media. However more broadly, these could also include digital purchase or service channels, such as online support or apps that facilitate ongoing customer engagement and repurchase.

A clear plan is required to outline when these channels will be activated and how they will effectively integrate with each other and legacy channels, such as sales.

It is also important to figure out how you can ensure customers are sold to and serviced through the optimal channel mix. For example, you could migrate your lower-value customers to new and more cost-effective digital channels, allowing your expensive sales channels to focus on higher-value customers. Clearly defining this channel migration strategy and how you will incentivise any required channel shifts is critical.

BEST PRACTICE TIPS



CAREFULLY ASSESS YOUR CHANNEL MIX

Analyse the behaviours being exhibited in the customer base – both digitally and physically – which are representative of indicative buying. The objective is to adjust the channel mix to respond to these signals more meaningfully and efficiently.

In order to achieve this, new channels are likely required and account segmentation must be appropriately matched to marketing and sales channels. Channels such as inside sales are an increasingly common solution for more quickly and cost-effectively responding to emerging buyer needs.



MOVE IN LOCKSTEP WITH YOUR BUYER

A key challenge for business leaders is the need to evolve the channel mix in sync with customers so as to not be left behind and lose relevance, but to also not be too progressive and alienate more traditional buyers.

As you incorporate more digital channels it is critical that your organisation changes at the right pace. It is all about understanding your customers. If your channel mix doesn't match your target customers' buying preferences and take into account your competitors' stage of evolution, you may alienate a sizeable portion of your existing and potential customers.



CONSIDER SPECIALIST SALES ROLES

Given the level of sophistication of today's buyer, specialisation of sales roles is often required in order to lift the value of sales interactions.

Building deep sales specialisation around industry, functional or solution expertise is a proven strategy for enhancing impact.

STEP SIX – VALIDATE TECHNOLOGY & DATA FOUNDATIONS

Evolving your technology ecosystem to enable the right staff to deliver relevant customer interactions in the right channel, at the right time - is the flag on the hill. Given the complexity to get there, it is important to start laying the technology foundations and outlining what your required technology roadmap will look like. For many businesses, this process begins with uplifting data integrity. CRM disciplines and the quality of the customer database which are commonly far from perfect in this early stage. If not resolved, the ability to deliver relevance will be greatly diminished on an ongoing basis.

On the technology side, the first hurdle is often making sense of the range of solutions out there and identifying

those best suited to help you. For marketing leaders in particular, there is an exploding array of very sophisticated tools available, so understanding what they can do is challenging. There is also a need to educate both the leadership team and IT on the available technologies and why these are an important part of the picture.

Whilst the customer, people and process elements will ultimately form the foundation of your customer-centric design, it will be technology that brings scale to it. So it is important to carefully consider the technology foundations you need and work closely with IT on the roadmap for how you will prove, implement and evolve your technology ecosystem.

BEST PRACTICE TIPS



PERFORM A DATA HEALTH CHECK

Incomplete or inaccurate data can severely limit the ability to deliver relevance. For example, if a prospect's job title is incorrect, it will be difficult to segment correctly and deliver relevant messaging. As such, it is critical for organisations to perform a data health check, clean their data if inaccurate and implement internal data hygiene disciplines.



ENSURE THE CRM DELIVERS USER VALUE TO DRIVE ADOPTION

CRM adoption and usage in many organisations is poor, with data quality and customer insights suffering as a result.

Typically these adoption challenges stem from a CRM which is too complex, too difficult to use or a perception that the system is intended for managing salespeople, rather than helping them in their day-to-day roles.

A proven path to solving these challenges is coupling robust change and communications management with a CRM that is simple, enabling and actually helps salespeople sell more.



MAKE THE 'NO REGRETS' DECISIONS ON CORE PLATFORMS

Core platforms must make data accessible and actionable to the right staff. They also need to be sufficiently agile and scalable to ensure you can deliver a highly relevant customer experience.

The core technology stack should encompass a flexible customer relationship management (CRM) system, a robust content management system (CMS), ideally with dynamic content capability, as well as a marketing automation platform which can integrate well with your CRM.

SLOW DOWN IN ORDER TO SPEED UP

With pressure to adapt to the new buying environment, it is tempting to charge ahead with transformation before laying the critical foundations. To achieve long-term success, you need to achieve two broad objectives early on – get people behind your transformation agenda and understand the customer on a much deeper level.

With this ‘customer pivot’ complete, the business is positioned to begin the next stage of transformation, where the much more difficult process of functional integration takes place. In this second stage you will

test, prove and evolve a whole new marketing and sales execution engine; redesign processes, evolve operating models and hardwire new and more automated ways of working through technology. If you haven’t first laid the foundations outlined in this paper, you will inevitably need to address them at a later stage – leading to a stop-start transformation program.

RELATED INSIGHTS



How Far Progressed are Organisations with Digital Go-To-Market Transformation?

Blackdot research asked 450 business, marketing and sales leaders how far progressed their organisations were with digital go-to-market transformation. This whitepaper provides in-depth detail on the research and outlines three stages that are critical to driving digital maturity.



Adapting to the Digitally-Empowered B2B Buyer

Digital has fundamentally changed how B2B customers buy, bringing both opportunity and unprecedented complexity for marketing and sales organisations. This whitepaper explores critical questions around how organisations can adapt to the ‘new’ digital buyer.

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