Chief Marketer B2B Special Report

Multichannel Lead Nurturing

Knowing who to connect with and how to create engagement at every stage of the B2B funnel

B2B buying decisions don't happen in an instant. They're the result of multiple touches, in multiple platforms, over days, weeks, months, and sometimes, even years. Nurturing leads in this type of an environment has numerous challenges.

"A great nurturing program involves a multimedia strategy and provides information that is useful and not a sales pitch," notes Ruth Stevens, president, eMarketing Strategy. "In some instances marketing automation has narrowed our mindset as nurturers to email only, and that's a limitation. Email can get spammy—just because someone has opted-in doesn't mean they want to be bombarded with irrelevant messages."

One of the biggest challenges in nurturing leads is creating a true collaboration between marketing and sales, notes Stephanie Crockett, partner, Eric Mower + Associates. Some salespeople tend to not have a lot of confidence in how nurturing through automation can help their process and rely more on the relationships they've built over time.

Many of the companies B2B agency Bader Rutter works with sell through channels. A key challenge is nurturing leads through the entire journey when channel partners might not always remember (or necessarily *want*) to share information, notes Patrick Smith, executive director, Bader Rutter.

"How do you manage that data in the multichannel space and harness the power of CRM with the behavioral data and learn from all that intelligence?" he says.

B2B marketers need to recognize up front what the

true needs are of their audience, and then create a strategic foundation to engage them, Smith says. After all, each buyer and/or audience segment might follow a different path on their journey to purchase.

That gets even more challenging today, as many B2B buyers complete much of their buying process before ever engaging a vendor. Knowing when to hold back and not pressure people from a sales standpoint is key here, notes Smith.

"You need to let nurturing take its course and not act too quickly," he says. Prioritize audiences and understand their role in the buying pro-

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THE NUMBERS GAME

FIGURING OUT WHAT MOVED THE NEEDLE.

For many B2B marketers, attributing which parts of their marketing campaigns really contributed to the sale is a continual problem.

"Marketers say they measure each touch, and you need a lot of touches before someone is ready to buy," notes Ruth Stevens, president, eMarketing Strategy. "We can track how many touches were involved in a sale, but it's hard to say what actually closed the sale," she notes. "They often end up throwing up their hands at the end [in frustration]."

Attribution is a challenge, agrees Lianne Wade, vice president and account director, Wilde Agency. Many large financial marketers look at how much sales increased in a quarter, but don't get down to tracking things like how specific aspects of campaigns drove the needle. "We haven't been able to get them to track to the degree we'd like."

Warren Sukernek, director of marketing for Triumvirate Environmental, admits that attribution can be a little messy. They try to simplify it and look at first or last touch. "A typical sales journey can be six to nine months, so there are multiple touches throughout the sales activity."

Medigain uses Hubspot to track campaign success, using tags to know what content people have downloaded or which webpages they've viewed, says Clint Hughes, vice president of marketing.

But not all marketers are so diligent in their tracking efforts, and that can be frustrating, notes Patrick Smith, executive director, Bader Rutter.

"We make a lot of assumptions," he admits. "It's easier to consider the final action, and many folks are still using the 'last touch wins' approach. Attribution is a key thing on my team's radar, because that gets to the point of where clients should spend their money."

"They're satisfied with things like cost per click but we want them to go beyond clickthrough rates, and that's a significant challenge," agrees Stephanie Crockett, partner, Eric Mower + Associates. *—BNV*

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cess. In some cases, it makes sense to go after the decision maker, while in others there are numerous constituents to engage.

Marketers are getting more focused in their nurturing strategies, creating less content that is more targeted to their audience's needs, notes Cyndi Greenglass, senior vice president, strategic solutions, Diamond Marketing Solutions.

"Content is becoming more thoughtful, rather than trying to go into every direction," she says. "They're figuring out which channels work best for which parts of the funnel."

Marketers must remember to repurpose content, she says. Some people are visual learners, while others like to scan text. Create content and then chunk it out in different ways, for different channels and customer segments.

"Don't shoot 50 new videos—shoot one and cut it up into digestible pockets," she says, noting that you should remember to make mobile presentations responsive and friendly for all devices. "Then turn the information into a print article."

A content strategy is vital to make sure your content meets the needs of your audience, your campaigns and the channels you use.

"Content itself should be unique and proprietary," Smith says. "There's nothing worse than trying to engage an audience with content they could easily find elsewhere in a Google search."

Having content in multiple places and formats can help you reach prospects who might not necessarily want to share their email address but would be very interested in perusing a blog, he says. When they're more engaged with your brand, then they'll happily register for an ebook.

A personal touch can work well in the nurture environment, says Greenglass, with B2B brands asking how they can help the prospect where they are in their buying journey. "It helps continue the conversation."

Before automation, most nurturing was done by phone and that can still be a vital part of the process. Of course, says Stevens, not everyone today is inclined to pick up their phone early in the process, and that's a challenge.

So where *are* conversations starting? It depends on the industry, says Greenglass, but often discussions start in highly targeted vertical communities online, as well as industry conferences where people share information.

The bottom line is that the prospect owns the conversation, she says. Marketers need to figure out what the prospect is interested in and wants, and then let

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them identify the next step. "You need to customize the funnel," says Greenglass. "Don't push it."

Still, the temptation to make contact immediately is great, especially with all the competition coming at prospects from every side.

"There's so much noise out there," says Lianne Wade, vice president and account director, Wilde Agency. "Financial advisors, for example, are inundated with offers and information, and they have a short list of providers they will use. The question is how do you get on that short list?"

The key is creating a holistic program that speaks to them in a relevant fashion, says Wade. Financial advisors want to do right by their clients and provide education—providing them with support to make this happen is a great way to build a relationship.

Online tool kits are a great way to target this audience. Tools that can help advisors do things like guide their clients through understanding complex insurance needs such as long-term healthcare really resonate, she notes. These tools could take a number of forms, such as calculators to help customers learn how much coverage might cost, and what they might spend on healthcare over the long-term, to assist in their legacy planning.

Triumvirate Environmental provides 50 to 60 different services related to environmental consulting and hazardous waste disposal, and serves the healthcare, education, life sciences and industrial markets.

The sales cycle depends on how prospects come into the funnel, notes Warren Sukernek, director of marketing for Triumvirate. Prospects who come in via search might be responding to some sort of pain point or issue they need to solve quickly, so the sales cycle is fast, maybe only two months. Large accounts looking to sign new contracts after their current deal with another firm expires might take six to nine months.

The company's customer base covers the entire East Coast, with a strong concentration in the Boston area, where there is good awareness and word of mouth between referrals and clients.

Triumvirate conducts ongoing nurturing and education programs targeting each market area with multiple components, including webinars, email series and whitepapers.

Regulatory and safety issues are of significant interest, with webinars focusing on broad topics like bio safety and animal allergens, to more niche concerns like the risk of peroxide–forming chemicals in laboratories.

The webinars work to engage both prospects and customers, Sukernek notes.

"We've had several attendees who have participated in about 25 webinars, and maybe 25% of our audience has participated in six or more," he says, noting that 40% of webinar attendees are typi-

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Triumvirate Environmental finds that webinars work well to reach decision makers in fields like biotech.

OFFLINE OPTIONS

DIRECT MAIL CAN STILL CUT THROUGH THE CLUTTER

Direct mail in B2B still works, she notes, particularly with the right offer and list.

"Not all decision makers consume information in the same way—some read emails on their tablets, while others read print trade publications or open direct mail," Stephanie Crockett, partner, Eric Mower + Associates, notes. "Marketing has become more individual and today's customer has so many options.

Direct mail can be highly effective later in the consideration process, when things are closer to conversion, says Cyndi Greenglass, senior vice president, strategic solutions, Diamond Marketing Solutions.

"In B2B, direct mail is still an opportunity," she says. "People are overwhelmed in their email inbox and a direct mail piece that is relevant and meaningful can cut through."

Direct mail works particularly well in tandem with email, says Lianne Wade, vice president and account director, Wilde Agency. A warm-up email message can alert prospects that a direct mail piece is coming about a new product or service and get the conversation started. After the mailing, follow-up emails can highlight certain elements of the new offering, to paint a more complete picture, referring recipients back to a targeted landing page, adding more value.

"Direct mail has the benefit of being tangible," she says. "It breaks through and provides information they can refer back to." —*BNV*

4 STEPS TO CREATING OMNICHANNEL ENGAGEMENT

It's an omnichannel world, and marketers must engage customers and prospects across multiple touchpoints. How can your brand ensure customers receive the same message across various channels, especially at a global level?

Here's four steps to make omnichannel engagement happen:

1. **Audit your current online engagement strategy:**

   The first step is to look at how your brand engages with customers right now. Start by looking at the company's engagement solution—or better yet, have an outside professional audit the performance of the solution and how it's impacting marketing initiatives. A thorough analysis should reveal key insights into the brand's current customer engagement processes and opportunities, as well as provide actionable recommendations for improvements.

2. **Consider various tech solutions:**

   There is a growing number of possibilities when it comes to marketing through omnichannel engagement. Envision them, keeping in mind that they all should be part of the same customer journey.

- **Desktop:** Whether through live chat or automation, marketers can make that personalized connection with the customer by using behavioral data and resulting business rules.
- **Mobile:** If opting for live chat in the mobile environment, use the space wisely, keeping the smaller screen in mind. Some ideas for optimal user experience may be leveraging transparent backgrounds and chat windows that can be minimized while still being able to track the conversation in progress. With automated engagement solutions, such as product guides, the best designs incorporate easy touch control, with larger buttons and quick replies to choose. Both of these engagement styles need to have the same smooth experience as on desktop to represent the same brand feel.
- **In-store:** There are great ways to integrate engagement strategies in the brick-and-mortar store. For example, next to products on the shelf, a retailer or manufacturer might display QR or SMS codes that invite the customer to pull out their phone and engage with an agent, find more product information with mobile guides, or receive a special offer as incentive to purchase.
- **Multimedia ads:** Brands can also use QR and SMS codes to engage with customers from print, TV or radio ads. These bridges from offline to online environments allow customers to connect in two-way conversation with the brand and continue on their journey to purchase.
- **Bringing the touchpoints together:** One way to connect all your touchpoints together is with a customer ID link. For example, a brand might assign the customer a unique identifier at the beginning of the journey, say when that customer uses the SMS code seen in an ad to chat with an agent. As the customer continues to reach out using the same mobile phone, the unique ID lets any agent know where that customer has been and in what stage of the purchase process they are. In that way, the brand is giving that customer one story instead of five different stories.

3. **Develop a plan for improved engagement marketing:**

   With the auditor's insights and recommendations in hand, and the brand's desired engagement marketing journey and engagement partners in mind, the brand decision makers can now enter the next step of determining a process towards transformation by evaluating:

- **Design:** Decide *how* to engage with customers in the brand's marketing initiatives. Is it best to use proactive invitations or reactive click-to-chat, or both? What about offering automated features to let customers help themselves? Utilizing strategic, targeted offers?
- **Strategy:** Decide *where* to engage with customers. Which product or marketing pages are best for customer engagement? Should the

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brand engage with them during the checkout phase to encourage upselling? Determine *which channels* make the most sense for your brand. Is mobile relevant to you, and if so, are smartphones or tablets (or both) more important? What about merging offline and online media ads through chat or guides? Determine *when* and *how often* to engage with customers. And equally as important, decide who *NOT* to engage.

- **Branding:** How should the brand integrate its message, feel or culture into the engagement solution? What image should the brand create through its marketing plan? How should the brand distinguish its customer experience from competitors'?
- **Logistics:** The most strategic or creative plans will fall short without careful planning of operations, quality assurance and optimization. It's important to plan the screening, hiring and training of staff, as well as determine staffing levels and hours of operation. What is the appropriate compensation and motivation for desired staff behavior? How often and how should the brand analyze data, such as chat transcripts and CSAT feedback? Who will build the business rule library? Develop a plan for continually testing and optimizing business rules, graphics, scripts, etc.

4. **Implement, Measure, Improve, Repeat:**

Whether the brand executes an internal customer engagement program or works with a partner to implement the new engagement plan, it's critical to regularly measure the results through QA testing, voice of the customer research, and cross-device measurement using such tactics as the unique customer ID links. Brands should consider making all the necessary adjustments, and then measuring again, continually optimizing the program as customers evolve.
—George Skaff, CMO, TouchCommerce

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cally existing clients. "Webinar content moves them through their buying journey, helps with cross-selling and builds brand awareness outside of our existing territories."

When Triumvirate maps out its content journeys, the primary target is the decision maker, but content is also built to reach influencers, such as the indi-

Educational content like updates on the new ICD-10 codes help Medigain reach decision makers in private medical practices.

viduals at the facilities who actually do the work, or those in charge of finances or the actual purchasing process. In some accounts, he notes, like small biotech start-ups, the decision maker and the user who helps implement the solution might be one and the same.

Triumvirate publishes content in multiple social channels, but the only one that really resonates is LinkedIn, he notes.

The core role of social in nurturing is providing thought leadership, says Bader Rutter's Smith. Most B2B professionals use social as a way to seek information, from peers or trusted sources, but don't necessarily want to create relationships with vendors there.

Revenue cycle management firm Medigain works with large private practices to manage their billing systems. Clients are private specialty practices with four or more doctors, billing over $200,000 a month. Physicians aren't really active socially on a professional basis, because there's a lot of things they simply can't reveal in a public forum, says Clint Hughes, vice president of marketing,

The sales cycle to get a client on board with Medigain can go anywhere from six weeks to two years. Content is created to reach both physicians and administrators. You have to reach them both, because while the administrator might do the initial research, the doctor who owns the practice makes the ultimate financial decision.

Much of the content centers on giving information around new developments in healthcare laws. For example, a big issue now is ICD–10, the tenth revision of the International Statistical Classification of Diseases and Related Health Problems list from the World Health Organization. This new update will

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have over 14,000 codes and the variety can be confounding. For example, there are individual codes for very specific injuries, like walking into a lamppost or being hit by a ski. There are separate codes for being bitten by a turtle and being struck by a turtle, and six codes pertaining to macaw-related injuries.

"There are five times more codes in ICD-10 than ICD-9, and it is already causing a lot more labor," says Hughes, noting that content clarifying these new codes and other rules and regulations positions Medigain as a trusted resource, both for prospects and existing clients.

Educational content is also vital for the New York State Energy Research & Development Authority (NYSERDA), which promotes products and services related to clean energy technology for businesses and residences.

NYSERDA has an integrated marketing communications platform to drive engagement and nurturing leads, which are passed on to an external sales arm. Emails in the nurturing process speak to needs in particular niches, such as driving down costs or improving patient care for the healthcare industry.

Much of NYSERDA's marketing centers on building awareness of the benefits of clean and sustainable energy options to different levels of decisions makers. "Marketing is based on the needs of the various verticals like healthcare, education or the commercial sector," notes Mary Chick, director, market insights, NYSERDA. "Their pathways to decision making can be very different. Particularly in the commercial space, sustainability isn't part of the [consideration] process, so we need to help them understand how it can aid them in capital planning."

The learning curve of understanding the benefits is a big part of NYSERDA's content marketing efforts. "A lot of [the decision makers] don't have confidence in the energy savings and the cost impact, so we need to deliver more information to the market," Chick notes.

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