The B2B Marketer's Guide to Winning Customers and Proving Success

Four tactics to attract prospects, build lasting relationships, and deliver metrics that matter.

salesforce

Winning customers

Proving success

What's Inside

B2B marketing has been turned on its head over the past few years. The field has gotten a lot more competitive, customers are more demanding, and the pressure is on marketers to prove their time and budgets are moving the needle.

The good news is marketers have new tech tools at their disposal, namely improved artificial intelligence (AI) capabilities. While AI is continually evolving, it's making a big impact in the way marketers can personalize messaging at scale and measure performance to optimize campaigns and gain buy-in from leadership. These new tools are making them more productive and cost-efficient.

In this guide, we'll cover four tactics to take your B2B marketing strategy to the next level:
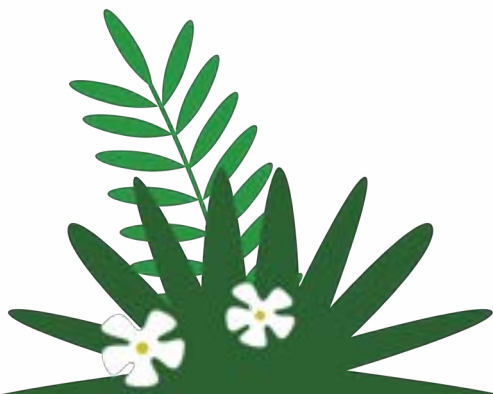
Trailblazers

We asked two Trailblazer experts to share their unique POV throughout this guide to help you improve your B2B marketing.

Anne Wave

Anne specializes in scaling programs and positioning marketers to grow. She has more than eight years of experience in email and lifecycle marketing, with a strong focus on digital analytics.

Nout Boctor-Smith

Nout is a proud email geek with more than 13 years of experience in marketing, mostly B2B, with a focus on email and CRM marketing. Her niche is tech companies that build developer tools.

1.

Think Like Your Buyer

No two customers' paths are exactly alike, but if you study many customer journeys, you can figure out their common milestones.

Different touchpoints on the customer journey provide data that informs marketers of a customer's interest in a product or service. Simplifying all of this data into one view – a buyer's journey map – can serve as your guide.

This chapter will show you how to **build a persona, read a buyer's journey**, and **use a marketing funnel** to better think like your buyer.

Know your buyer.

Who buys your products? That's the first thing to figure out. What's their title? To whom do they report? How are they measured?

As marketers learn about their buyers, they summarize this knowledge in what's known as a buyer persona.

A **strong persona is specific** and based on actual people who've purchased with real (anonymized) quotes. It will help you understand how to communicate with the buyer.

"

Building a buyer persona takes psychology, interviews, research, and time. You have to know what's important to buyers, and really know them as people.

Anne Wave

1.

The 6 buyer archetypes.

Most B2B buyers don't act alone. They sit on a buying committee that will collectively make purchase decisions for their company. If you know your buyer's role on that committee, you can figure out their needs and how much power or interest they may have.

User
The person who operates whatever is purchased

Technical evaluator
The person who installs, secures, or maintains the product

Champion
The person who most wants the purchase to happen

Executive sponsor
The most senior member of the committee

Economic buyer
The person who controls the budget

Influencer
Someone without a direct say but whose opinion matters

1.

Understand buyer purchase behavior.

Once you know who your buyer is, you need to understand their purchase behavior. What steps do they take? In what order? Where in that process does the buyer interact with your company? With this information compiled, you can produce a buyer's journey.

Buyer Journey Data to Watch

The **first place** people tend to contact you

The touchpoints **after the first interaction**

The touchpoints **at each stage**

The average number of touches per account per **closed-won** deal

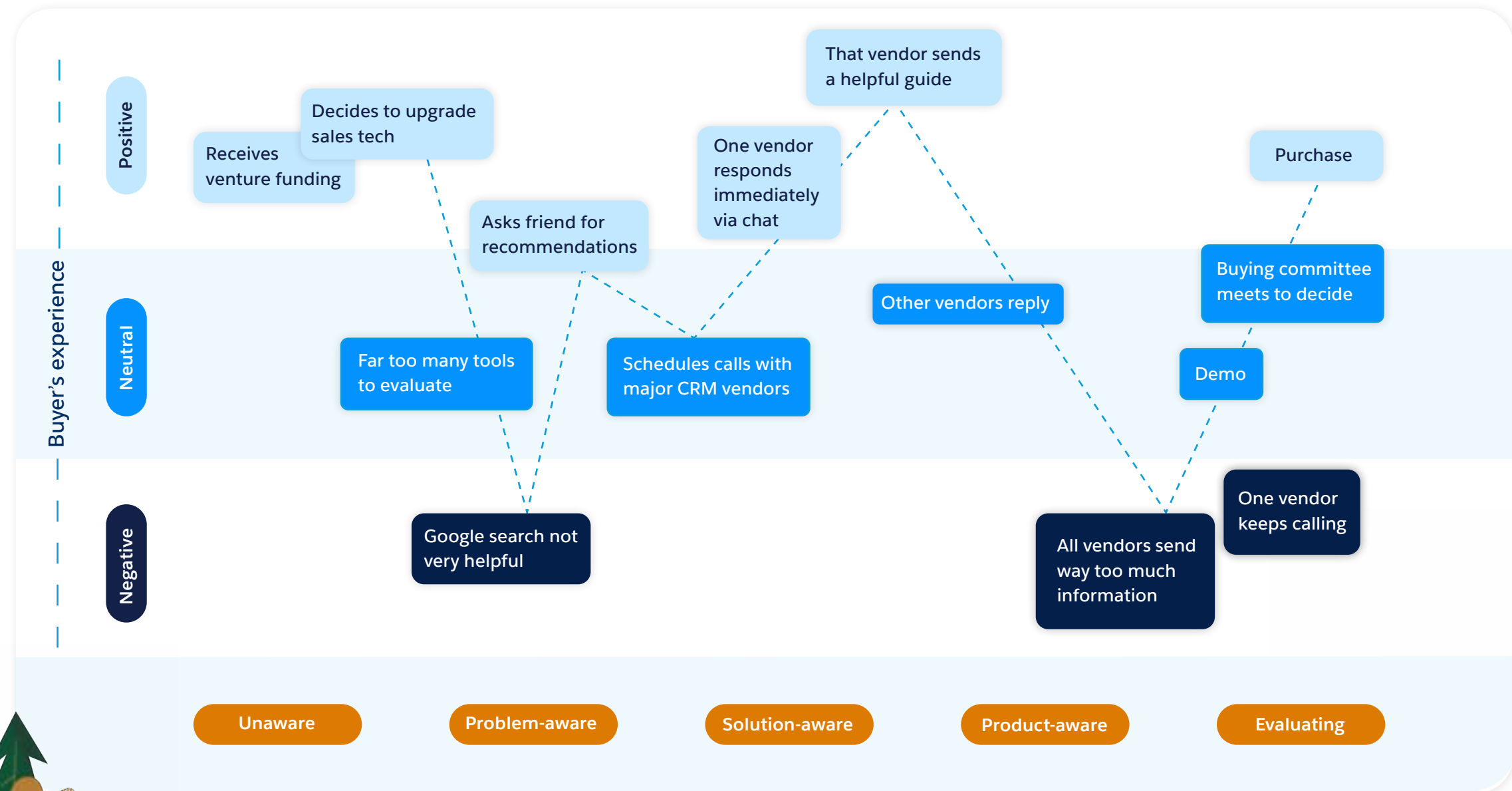The average number of touches per account per **closed-lost** deal

What **content they consumed** at each touchpoint

1.

Develop a Buyer Journey Map.

Next, examine successful journeys where someone ended up purchasing. You can work backward to figure out what paths, content, touchpoints, and personas correlated with you winning the deal. Then create your own marketing buyer's journey map of just the touchpoints where you can influence them.

Buyer's experience

Positive

- Receives venture funding
- Decides to upgrade sales tech
- Asks friend for recommendations
- One vendor responds immediately via chat
- That vendor sends a helpful guide
- Purchase

Neutral

- Far too many tools to evaluate
- Schedules calls with major CRM vendors
- Other vendors reply
- Buying committee meets to decide
- Demo

Negative

- Google search not very helpful
- All vendors send way too much information
- One vendor keeps calling

| Unaware | Problem-aware | Solution-aware | Product-aware | Evaluating |

Click here to plan your team's journey

1.

Create a marketing funnel to measure and monitor buyer progress.

Marketing funnels are a graphical representation of where your prospects are in the buyer journey. If a prospect is at the beginning, they're at the top of the funnel.
Bottom of the funnel prospects are highly engaged and close to making a purchase.

A funnel helps you:

1   Know what content or calls to action to present people with based on where they are in their evaluation.

2   Categorize your content by the funnel stage where it's most useful.

3   Measure your effectiveness via conversions, leakage, funnel progression, and funnel velocity.

4   Figure out how to spend your time.

Common marketing funnel stages

New
A prospect you need to know more about (website, trade show booth visitors, or newsletter subscribers).

Nurturing
A prospect that's not interested now, but may be in the future. Keep in touch.

Working
In active conversation. Profile the prospect through forms, downloads, and behavior data.
Marketing qualified lead (MQL)

Qualified
Prospect wants to purchase. Pass along to sales.
Sales working lead
Sales accepted lead (SAL)
Sale qualified lead (SQL)

Customer
Prospect who has purchased.

Upsell/Cross-sell
Existing customer who's a fit for an additional product.

1.

Don't send everything to everyone — get smart and segment.

You can divide your buyers into groups based on whether they'll be receptive to a specific message. This process of grouping buyers is called **segmentation**.

Segmentation makes it easier to target your customers and ensure you are sending them relevant messaging based on where they are in the buyer journey.

Here are a few ways you can segment your audience:

Status
(buyer, customer, former customer)

Persona

Funnel stage

Company type

Company size

Examples of leads removed from the funnel:

Recycles:

• A lead that was disqualified but may be interested again
• Reenters the funnel at the nurturing stage

Unqualified:

• Not interested or not a good fit
• Fake email address
• Works for a competitor
• Title is "student" or "intern"
• Their email hard bounced

2. Let AI Be Your Marketing Assistant

Artificial intelligence (AI) is one of the most powerful tools for B2B marketers, yet it is one of the most underused. AI can save marketers time, help surface insights without manual analysis, personalize interactions with customers at scale, and even assist in copy editing. In other words, think of AI as your team's marketing assistant.

There are two types of AI that B2B marketers are likely to encounter:

Predictive AI

Allows marketers to **surface insights about their customers without manual analysis – and act on them quickly.** It works by analyzing your data, recognizing patterns, and then applying those patterns to future customers and interactions.

Generative AI

Allows marketers to **create original content, segments, and campaigns, saving them time and helping them scale their work.** It works by leveraging large language models (LLM) allowing marketers to describe what they are looking for in a prompt using natural language. The LLM then pulls keywords to generate new and original content.
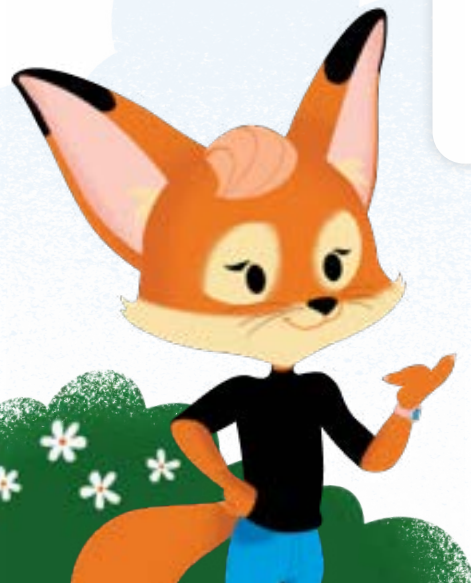
2. How AI can save marketers time:

Predictive AI

1 Lead scoring. Remove the work of maintaining a scoring and grading rubric by identifying leads that are most likely to convert to closed-won, based on how closely they look like your current customers.

2 Account scoring. Take the guesswork out of surfacing top accounts when planning ABM campaigns.

3 Personalized send times. Identify when a customer is most likely to interact with your emails based on past behavior, and then personalize email send times.

4 Suppression lists. Identify customers who might be oversaturated with email messaging and then dial down the number of messages they receive.

Generative AI

1 Copy and design. Use AI to create first drafts of email and landing page copy and design, which you can edit and modify as needed.

2 Personalization at scale. Build personalized customer journeys and offer recommendations based on real-time customer profiles.

3 Campaign briefs. Save time and take the manual work out of filling out campaign briefs.

4 Segment generation. Build out customer segments that best fit your campaign and outreach.

2. Considerations for using AI.

AI is a great time-saving tool, but there are a number of factors marketers should consider before diving in.

Relevance and Trust

Look for generative AI models that take a human-in-the-loop approach, including prompts for marketers to provide feedback as the models are being trained.

Data

Ensure AI has access to your sales data for lead and account scoring. This will ensure AI considers the types of accounts and prospects that have historically become closed-won.

Security

Make sure inputted sensitive information is not publicly accessible and is not pulling from sources you don't have permission to use.

3. Score Buyer Behavior

Nurturing leads is the act of growing relationships with potential buyers by sending them resources that are truly valuable to them. But to do this, you need to understand how engaged your buyer is. And to do that, you need to use **scoring**.

Scoring measures how interested a prospect is in your products. To score your buyer, your marketing automation system can apply each buyer a score depending on how they interact with you (usually 1–100+).

As prospects interact with you, they accumulate points. Scores can help you assess the value of your content and whether leads are interested in talking to sales. It's important to note that you can create additional scoring categories for multiple products.

Custom Redirect Click	3 points	Page View	1 point
Email Open	0 points	Site Search Query	3 points
Form Error	3 points	Social Message Link Clock	0 points
Form Handler Error	-5 points	Third Party Click	3 points
Form Handler Submission	-5 points	Tracker Link Click	50 points
Form Submission	50 points	Video Conversion	0 points
Landing Page Error	-5 points	Video Play	25 points
Landing Page Success	50 points	Video Watched 75%+	3 points
Olark Chat	10 points	Visitor Session	50 points
Opportunity Created	50 points	Webinar Attended	50 points
Opportunity Lost	-100 points	Webinar Invited	10 points
Opportunity Won	0 points	Webinar Registered	25 points

3.

In addition to scores, you can create grades.

Grades measure the value of a lead or account based on whether they're a good fit for your product. They also measure how interested you should be in a prospect.

Every lead or account is assigned a grade (usually, A, B, C, D). The lead gains parts of a letter grade for positive factors (revenue, headcount, region) and loses parts of a letter grade for negative factors. Grades help you prioritize which companies are a fit for your products and help the sales team prioritize in-bound leads.

Together, a score and a grade can reveal the complete picture of lead quality. Creating a rubric for your scores and grades is more art than science. It takes experimentation and guesswork.

Yours will never be perfect, but that doesn't mean they can't be useful. Whatever assumptions you make about why you chose the grades and scores you did, write them down and revisit them quarterly.

If a prospect falls within the desired criteria:

Company size
+ 2/3 of a letter

Industry
+ 2/3 of a letter

Location
+ 2/3 of a letter

Job title
+ one full letter

Department
+ 2/3 of a letter

Pro tip

AI tools can help create a rubric for scoring and grading leads. If trained on a vast data set, AI can apply wise insight that might otherwise take years to accumulate. Predictive AI also removes the need to revisit scoring and grading models, since the AI system creates the model.

3.

Set up automated nurture flows to improve your buyer experience.

Once you've created scores and funnel thresholds, you can start to use rules within your marketing automation platform to communicate with people based on where they are in the journey.
For example, if someone hits a score of 60, add them to the "accelerator" email stream.

Some marketing automation systems provide a visual map where marketers can drag and drop emails onto a canvas and set entry and exit criteria for each stage.

Activate nurture flows within your marketing automation system to:

1 Identify top leads for the sales team.

2 Identify top accounts for ABM efforts.

3 Decide what emails to send and when to nurture prospects.

4 Surface marketing insights to inspire tests and campaigns.

" Lead nurturing is about surfacing buying-ready accounts or those giving signals. It's giving them things to do and scoring appropriately, and building upon that until they're fully aware of your products and would recommend them.

Nout Boctor-Smith

4. Measure Success with Reports, Analytics, and Data

Demand generation marketing is beneficial because it is measurable, and if you understand your data analysis, nobody – not even the CFO – should be able to stump you with a question. This will help you with resource allocation and also justify marketing's seat at the table with sales and customer service.

B2B marketers work in partnership with sales and customer service to bring in pipeline and revenue, and they need to show how their role is working with the broader teams. Data analysis isn't just for internal marketing. Closely monitoring the data tells you what to adjust and what to stop.

For each number you're tracking, you can always ask the following questions to get a sense of its importance.

- "Would my boss care about this number?"
- "Would my colleagues in sales or customer service care about this number?"

> **What separates good marketers from great ones is knowing what to measure.**
>
> Anne Wave

4. Focus on the metrics that matter.

It is important to think about the metrics that matter, not just to marketing, but to sales, service, and your chief revenue officer.

1 **Pipeline:** The movement of potential buyers through different sales or marketing stages.

2 **Return on Investment (ROI):** The value of an investment versus its cost.

3 **Annual Contract Value (ACV):** How much an ongoing customer contract is worth over a year.

It's also imperative for marketers to understand how they are influencing ROI. One way to look at this is through **attribution reporting**, which includes first touch, last touch, and multi-touch. Each view offers a different perspective on how you're contributing to sales.

This could include:

1 **First touch** gives all credit to the first touchpoint.

2 **Last touch** gives all the credit to the last touchpoint before purchase.

3 **Multi-touch** spreads the credit evenly across all touches.

4.

Find leading indicators that suggest prospects are moving toward the end goal.

If the end goal is to drive sales-accepted leads and it takes most prospects 60 days to get there, what do marketers do in the meantime? This is where leading indicators come into play.

Most goals will probably be lagging indicators closely tied to revenue, but those numbers change infrequently and only after an opportunity is won or lost. It's like trying to drive a car without seeing the road.

If we look at **leading indicators** – short-term, fast-moving metrics like clicks, form fills, and lead scores – you can see where leads are headed and adjust.

All good marketing measurement is built upon a combination of two indicators: leading and lagging. One suggests, the other confirms.

Leading indicators

- Views
- Clicks
- Form fills
- Campaign reach
- Send volume
- Conversions
- Leads
- Pipeline

Lagging indicators

- Revenue
- Upsells
- Cross-sells
- Renewals
- Acts of advocacy
- Marketing-attributed revenue
- Customer churn rate

4.

Measure funnel progress.

The entire point of building a marketing funnel is to track progression from one stage to the next. If marketers can track progression, they know which buyers are moving toward a purchase and which are dropping out. This allows them to adjust their marketing and make a difference before they decide.

The equation for this is simple – at any given point in the day (for example, the last day of the month):

# of prospects in a funnel stage	# of prospects in the prior funnel stage	Conversion

If a marketing team uses many different marketing tools, odds are they all provide their own analytics and have different definitions for what counts as a conversion.

If you're a high-maturity organization with well-integrated tools, this will be much easier. The more integrated, the better, because the data is cleaner and it's easier to set up dashboards that accurately reflect your most important metrics.

4.

Unearth insights with AI.

Reporting can tell you what has happened in the past, but AI can predict what might happen in the future. AI allows marketers to review past successful deals that help identify actions you can take to drive the greatest amount of revenue.

Artificial intelligence can:

1 Identify leading indicators associated with positive outcomes.

2 Summarize and inform you on next best actions.

3 Notify you of anomalies and big changes you should know about.

4 Identify trends and allow you to anticipate changes.

5 Measure velocity and understand when things are speeding up or slowing down.

What Does Your Future Hold?

B2B marketing is a great place to test skills and develop new ones. It takes a daring and inventive person to nurture leads, integrate campaigns, and persuade others with data stories. Our world and the technologies we use are constantly changing. Staying one step ahead will ensure longer-term success both for yourself and your business.

As you move forward, keep these six things front of mind:

1

Make friends.
It's your job to make friends on other teams and get everyone aligned.

2

Do more with less.
Learn to be audacious but scrappy so you can thrive in any economy.

3

Measure your impact.
Know how to tell if your work produces results. Especially in terms of revenue.

4

Know your scope.
Your job is to help buyers buy. Don't beat yourself up about the rest.

5

Market internally.
To effectively support yourself and others, you have to show your impact.

6

Know your purpose.
Overcome distraction by asking, "What do I want prospects to do right now?"

Next Steps

Discover our B2B marketing automation tools.
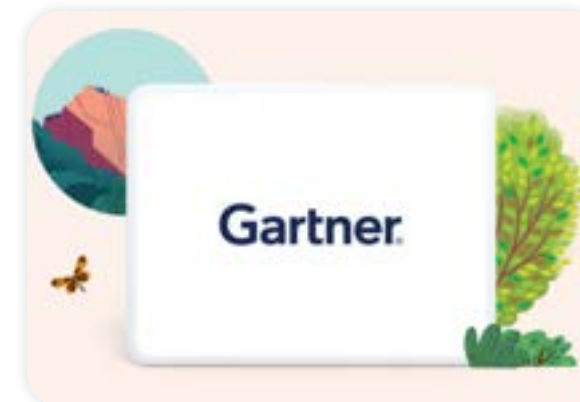
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Winning customers

Proving success

Create your Buyer Journey

Buyer's experience

Positive

Neutral

Negative

Unaware   Problem-aware   Solution-aware   Product-aware   Evaluating