

Are your sales and marketing somehow misfiring? Given the complexity of systems and processes, it can be easy for something previously undetected to reduce effectiveness and miss opportunities. We have some relevant content from our webinar series: [What Do B2B Marketers Do Now?](#)

Below is an excerpt from our recent webinar, “[Choosing the Right B2B Demand Generation Strategy](#)”. In this excerpt, Alisa is addressing: [How to Uncover Gaps in Demand Technology, Resources and Metrics](#)

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Note: The following is the output of transcribing software from the webinar recording. Although the transcription is largely accurate, in some cases it may be incomplete or inaccurate due to inaudible passages or transcription errors. Quite often unanticipated grammatical, syntax, and other interpretive errors are inadvertently transcribed by the computer software. Please disregard these errors.

Rick: Hello, everyone. Have you ever felt your sales and marketing teams are struggling to work together? I'm Rick Endrulat, President of Virtual Causeway, and we produce the insightful series, *What Do B2B Marketers Do Now?* I know everyone's busy, so today I have a segment from our recent webinar, “Choosing the Right to be Demand Generation Strategy”. Our featured guest in that webinar is Alisa Groockock, VP, Principal Analyst of Demand Generation and ABM at Forrester. In this segment, Alisa tells us how to uncover gaps in technology, resources and metrics that might be reducing your success. With so many moving parts, it's easy for marketing and sales efforts to get off track. Discover a method to identify specific investments needed in technology, content, resources, tools and metrics for increased ROI. It could give you a huge advantage. Let's join Alisa now.

Alisa: I want to talk a little bit about each of these demand marketing or each of these marketing approaches, I should say, and get into a little bit of the weeds around some of the enablers that go into bringing each of these marketing approaches to life. So let's dive first into demand marketing. And I want to talk first about technology. So the demand marketing approach is probably the least resource intensive. So you will need a sales force, automation platform and a marketing automation platform. If you don't have either of those two things, it's going to be pretty tough to do any level of effective

marketing. So we do recommend that clients invest in what we call these kind of core sales and marketing platforms. You might be dabbling a little bit in intent and predictive analytics platforms. You might have some business analytics things that help you understand your local market or your serviceable obtainable market and data for market and persona differentiation. You're probably not going to be doing much customization here, you're going to be using your automated platforms to do any customization, if there is any, and there's not likely to be much. So you're mostly, as I said earlier, leveraging existing content. Your metrics are going to be the pretty traditional metrics that many of you probably are using today, activity level metrics like webinars conducted and how many campaigns have been executed. And you're going to look at things like share a voice and are you make an impact in terms of building awareness of market presence in those those sorts of things.

Alisa: It won't be account specific, generally speaking, because the capability simply won't be there. And it's probably not even worth it because your demand marketing is typically applied to your much larger, broader geographic territories and that sort of thing. So it's pretty basic. If we move on to the vertical marketing, you start getting into what do we know and what we need to know about specific industries. So you might have in this example the same kinds of technologies, but more industry analytics, more data related to what's going on within particular industries. You might have more resources here that can start to support those vertical marketing needs. There might be subject matter experts or you might have a dedicated resource for content or content operations. And then finally, those metrics start to be more industry specific, as you would anticipate. So you might have industry analysts that you start to get engaged, there might be industry events that you go to and you track how many attendees you have at a particular flagship industry event, whether that's a virtual event during the pandemic or an actual event, once we sort of move out of this pandemic mode. But all of those kinds of things, there are going to be industry activities going on and you might want to participate in them and track how you're doing against those.

Alisa: You'll look at market share in the industry and those sorts of things. When we start to move into the named account marketing approach, as I said before, this is where you start being in that realm of account based marketing. And so when you move into an ABM approach, you're probably going to need to bump up your technology footprint pretty significantly. So account insight tools become really important here,

being able to gather information about particular accounts and what's going on inside them. Some of our clients will use a range of third party data providers. You start needing to look at more third party data to enrich whatever you might have internally about your accounts or historical data that you might have in your customer databases. So data enrichment becomes very important. You might have account based display ads that you're going to run. So you might look at IP based targeting, which can be a little bit resource in terms of a little bit expensive. But if you've got three or four or five hundred accounts that you care about a whole lot more than any others because, you know, you've got disproportionate upside revenue potential and you have a higher odds of winning those. And they're showing signs of being in market than spending that money on that very focused targeted advertising display becomes worth the investment. This is when you start seeing teams and we have clients that we work with all the time that say to us, how do we begin to build out a team to go after these accounts, we probably need some dedicated resource.

Alisa: And so we'll start to organize or help our clients organize dedicated resources that might be ABM centric resources, where there might be field marketers that then get assigned full time or nearly full time to look after a very specific set of accounts that are in an ABM patch. From a metrics perspective, we start seeing much more account specific metrics. As you would expect, we start to see a account based marketing dashboards. We start to see, hey, are we adding contacts within these accounts that we can market to them over time? Are we having events, maybe intimate roadshow style of events where we hone in on these particular accounts and we're able to partner with sales to invite the key people from a particular set of 50 accounts to a regional event, for example? We start looking at pipeline velocity within that particular set of accounts and demand waterfall conversion rates and so forth. And then finally, when we get to the large account marketing of what people sometimes call one to one ABM, we bump that up even further. So we start thinking about advanced technologies to support this like customer engagement platforms. You might end up with orchestration automation platforms, the tech-stack starts to become quite a bit more sophisticated.

Alisa: Customer health systems, right? Net promoter scores and those sorts of things. Your center of excellence around ABM might become more robust and sophisticated. So we tend to see clients that are doing one to one or large scale marketing are usually doing a range of things. They're not only doing 20 accounts, they're typically moving up

the spectrum. They're continuing to do the demand marketing, but they're also highlighting clusters of accounts and then ultimately finding those accounts that that they want to really go big and deep with. And so they'll start to build out a center of excellence to do all of those things. And again, they'll probably have full time field marketers where one field marketer might be responsible for three to five accounts, and that's their full time job. The metrics here, as you would suspect, start to become quite a bit more granular. So C-level engagement and participation, the number of executive briefings that have been conducted, you know, what kind of win rate do you have around very particular very large deals and that sort of thing. So that's the demand spectrum model and the four marketing approaches across there. And I'm curious, Rick, what do you see with your clients? What kinds of marketing approaches are they putting in place and what kinds of questions and things are they coming to you with when it comes to these kinds of things?

Rick: Yeah, and I think part of it depends on the size of the client and obviously the markets that they play in. Me personally, when I look at this framework, I really appreciate it because it does a really great job of looking at technology, resources and metrics and talks about all three and how they interrelate and how you apply them to the different types. With many of our clients, they tend to focus really, or they forget on what they forget about one of them. They might focus wholly on the tech stack and not be thinking about metrics or whatever it is. And we spend a lot of time educating them on how all three need to be addressed and they're interrelated. What do you think? I mean, if you were to look at just across the board of the three areas, you know, technology resources are metrics, which one do you find with your clients that maybe are most undervalued or most forgotten?

Alisa: Yeah, you know, I would say clients tend to sort of gravitate towards the shiny object. And the shiny object is always the technology. So I don't know if you found this with your clients. There's sometimes a, hey, I'm going to go invest in this new platform that I just heard about in the tradeshow that I just want to. The problem with that or the challenge with that is that a platform can only do so much. So we really encourage clients to take a step back and ask some strategic questions that are more in those in the resource area and some of those metrics questions. So, you know, what is it that you're trying to strategically accomplish here? Why are you choosing those accounts? Are you just telling sales to nominate a bunch of accounts that they think are most

important? Are you investing in some of the technologies and processes, the collaboration between marketing and sales that are going to enable you to find the best accounts of the accounts that fit an ideal customer profile for you before you start going investing in a whole bunch of fancy technology platforms that will enable you to reach those accounts? Like why are you going after those accounts in the first place? The resource piece is also really, really an important area that that our clients often don't think through. Account based marketing is fundamentally a transformation initiative. So if you're at the lower end of the demand for the lower end, if you're at the end of the demand spectrum, where you're really focused on going broadly in a more traditional mode, you will probably be able to largely to use the resources that you have today.

Alisa: But the minute you start gathering more data and starting to get into even vertical industry, customized kinds of messaging and outreach, you're already into a different level of resource than you may have existing on hand in your current structure. So those are the areas that we tend to, clients gravitate towards the technology because it tends to be front of them. And vendors are out there with their messaging everywhere we go. So we often have to sort of pull in the reins or pull the breaks back a little bit on the technology investments and encourage people to think of this as some people investments. Like you need the people, the strategic skills to go in and collaborate effectively with sales. You need skills in your marketing operations and your sales teams to work with data effectively and to interpret that data and turn those into insights and then be able to use those insights to build really good contacts. You need people in your content area to be able to do some of the stuff. So that whole kind of taking a step back and figuring out what kinds of people in the team need to do their jobs differently and what new people do, we potentially need to bring in or retool or train up in order to enable them to do better marketing. You know, those are some of the trade offs, the kinds of trade off conversations that that we're tending to have with clients.

Rick: I love that you're talking about that, because with a lot of our clients, you know, once again, as you mentioned, they pursue the shiny thing and that's the tech part of it. But we always tell our clients that technology is an enabler. You need to have a very firm foundation, have the right business processes and the right resources and people in place, and then build that first and then understand how the technology can help you make that happen. You build the business process and the business strategy first and then use the technology to have that happen and don't do it the other way around.

Alisa: Yeah, that's exactly right.

Rick: I hope you found that segment helpful. I'd be happy to send you the link to the full webinar playback and the related research brief that goes along with it. You can email us at info@v-causeway.com or drop by our [website](#).

And I want to say that while the content of that webinar is really important, it may not be the most important growth strategy for your business right now. At Virtual Causeway, we've identified several B2B growth strategies. So let's schedule some time when we can figure out the One Big Thing that will have the most impact right now. In our strategy session with you we'll investigate the sales and marketing challenges you're currently facing, utilizing tools to discover your current customer experience and map these findings to a spectrum of potential growth strategies to identify that One Big Thing that will have the most impact right now. I look forward to arranging a strategy session with you to identify that One Big Thing so you can accomplish all of your growth objectives. You can reach me at **866-211-6549**. Let's talk soon and have a great day.