

B2B MARKETER'S GUIDE TO OPTIMIZING CUSTOMER EXPERIENCE, FROM ACQUISITION TO ADVOCACY



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ABOUT THIS GUIDE

This report compiles key information to help B2B marketers with their optimization efforts and is brought to you by ON24® and NetLine.

Trying out new approaches makes being a marketer exciting. Even when faced with limited resources, figuring out what works and what doesn't can be both creative and rewarding.

There comes a point where once campaigns are up and running, it's not about either getting things moving or reinventing the wheel. So what should marketers do in this scenario? How can CMOs and CROs lead change? And how can marketers focus on being better, rather than getting hung up on being "the best"?

Optimization provides an answer. By both fostering a culture of continual improvement, and by looking at the whole customer journey from acquisition and conversion, through to driving retention and loyalty, marketers can continue to improve their results.

This guide provides advice for both leaders and practitioners on how to make the changes that will improve the entire customer journey and maximize lifetime revenues - and how webinars are a key ingredient to making that happen.

Read on to discover:

- Why optimization should cover the entire customer journey and not just the stages traditionally 'owned' by marketing.
- The steps you should take to build an optimization culture.
- How you can assess the performance of each of your channels to optimize for reach and acquisition.
- Why optimizing for engagement results in a stronger marketing-generated pipeline and more conversions to opportunities.
- A step-by-step process to get your customers to advocate on your behalf.

SECTION I: INTRODUCTION

WHAT IS B2B OPTIMIZATION AND WHY IS IT IMPORTANT?

Before this optimization e-book, ON24 and NetLine produced the *B2B Marketer's Guide to Scrappy Marketing*. This report was about getting marketing done fast with limited resources, finding out what works well—and what doesn't.

However, there comes a point where once campaigns are up and running, reinventing the wheel doesn't seem like the best thing to do. So what should marketers do in this scenario?

Optimization is the answer.

WHAT DO WE MEAN BY OPTIMIZATION IN B2B MARKETING?

Unfortunately, the definitions for optimization that apply to B2B marketers might be somewhat lacking.

Merriam Webster defines optimization as “an act, process, or methodology of making something (such as a design, system, or decision) as fully perfect, functional, or effective as possible.” But while “functional or as effective as possible” might be applicable, there's no way to define perfect—and as we covered in the scrappy marketing series, pursuing perfection can often hold marketers back from doing anything at all.



The idea of conversion rate optimization has been commonplace since at least the early 2000s, with Moz defining it as “the systematic process of increasing the percentage of website visitors who take a desired action.”

But while that might be fine for businesses that transact exclusively online with just one buyer, the reality of B2B marketing means such a limited approach is simply too narrow.

OPTIMIZATION IN B2B MARKETING SHOULD COVER ALL OF THE CUSTOMER EXPERIENCE

For many B2C marketers, the customer is a single person, who more often than not is acting alone.

Things are more difficult for B2B marketers.

As customers are businesses or organizations with multiple employees, there are often multiple people who must be marketed to—a critical factor contributing to the rise of modern account-based marketing. The book *The Challenger Sale* covered how the number of people that get involved in a buying process has grown, with the latest analysis estimating that the average number of stakeholders may be greater than 10 individuals. Naturally, decision making is taking longer. As such, the typical way in which B2B marketers measure performance—the number of marketing-qualified leads (MQLs) they generate—isn't enough

to truly impact the bottom line. **A whitepaper download or simple handover to sales cannot be the endpoint of conversion.**

Putting the customer first and optimizing the outcome of such a process needs a wider view and should not be siloed within marketing and outside of sales and customer success. It should start with understanding the experience of all stakeholders within a target account, ideally working back through their journey to find out where improvements can be made. This can lead to a better customer experience and more marketing-influenced revenue.

WHY IS OPTIMIZATION IMPORTANT—AND CRITICAL TO LONG-TERM SUCCESS?

At a simple level, optimization can help provide any marketer with some easy wins. By identifying key points in the buyer journey and making the process simpler, easier and of a higher-quality, marketing can increase its contribution to the bottom line. But there's also a bigger picture at play. The reality is that the length of time for which companies can enjoy success is shrinking.

Analysis by Innosight has found that the average tenure for companies on the S&P 500 has shrunk from 33 years to 24 in 2016. By 2027, that length of time is forecast to be just 12 years. In the next decade, **about half of these large public companies are expected to be replaced by**

newer firms on the index. Companies need to change to stay competitive.

It's also not just companies that need to change. Individual marketers need to optimize their own skills in order to maintain their employability in an increasingly tough environment. By bringing optimization into their own work, they will be able to demonstrate continued results even as competitors up the challenge.

In the short term, optimization is also important as key factors can change rapidly. Targets go up at the same time as the costs in acquiring new customers rise. Meanwhile, potential buyers disengage after being deluged with poor-quality marketing and sales outreach efforts.

THE MARGINAL GAINS OF OPTIMIZATION ADD UP

However, there is good news even among the challenges that B2B marketers are facing. Continually adding small gains adds up over time to an improved experience throughout the buyer journey—whether at the qualification stage, during an interaction with the sales team or even as they consider renewing or upgrading.

Ultimately, this creates an ever-rising lift in performance that can help your company to be a lasting success.

ON24 TIP

MAKE SURE YOU SET A STRATEGY BEFORE BEGINNING YOUR OPTIMIZATION EFFORTS

While it's always preferable to do something rather than nothing, optimization will work best when you review your own data and create a strategy with goals against which you can work. To find out how Hortonworks managed to optimize its marketing to create 25% fewer webinars but with 120% more influenced pipeline, [sign up for the on-demand webinar.](#)

WHY B2B MARKETERS SHOULD OPTIMIZE FOR THE ENTIRE CUSTOMER JOURNEY



In this section, we'll make the case that when it comes to optimization, focusing exclusively on the early stages of the customer journey is an approach that can both limit your success and create a disconnected experience for those considering buying from you.

OPTIMIZATION NEEDS TO BE ALIGNED WITH HOW CUSTOMERS TAKE THEIR JOURNEYS

The previous article touched briefly on how the customer journey for B2B purchases differs to those within B2C.

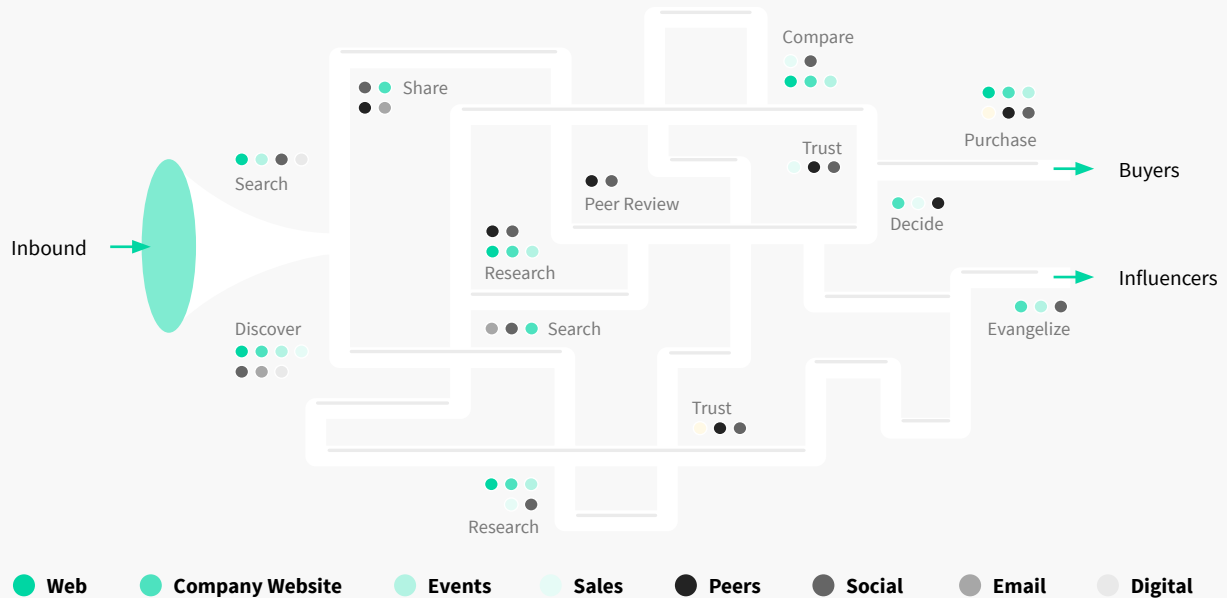
While those selling to consumers often only have to deal with a single individual and can manage almost their whole experience through the website, B2B marketers have to contend with multiple people in a buying unit, lengthier and more complex sales cycles, and the fact that the ultimate point of revenue is looked after by

departments other than marketing—those being sales and customer success (i.e. post-purchase and renewals) teams.

Buyers and buying teams also do not take linear paths. Instead, they choose their own journeys by interacting with a mixture of self-service content and conversations with people, as illustrated in the image below from ON24's e-book on The Engagement Imperative.

While optimization will indeed get results at the early stages, ignoring other touchpoints that may traditionally be in the domains of sales and customer success represents a missed opportunity.

TODAY'S BUYERS CONTROL THEIR JOURNEYS MORE THAN VENDORS DO



Source: Forrester

CUSTOMERS AND PROSPECTS DON'T CARE ABOUT SINGULAR POINTS AND EVENTS

In marketing, the measurement of performance often comes down to a single event or trigger. For example, when a lead form is completed or a prospect passes a lead score threshold that makes them qualified to be passed to the sales team.

It might be tempting for marketers to simply look at optimization in terms of only their targets—for example, the number of MQLs generated or the total value of marketing-sourced pipeline. Your targets might align processes and actions in your company, but the customer doesn't care about your arbitrary targeting methodology or thresholds.

As such, B2B marketers looking to make a real impact need to approach optimization from the customer's perspective. This means looking at each part of their journey and finding out how to improve it, regardless of whether that step is typically owned by marketing.

The mindset around optimization needs to be wide. And if marketing is supposed to 'own' the customer experience, its responsibility cannot simply end when there is a handover to sales.

THE WHOLE CUSTOMER JOURNEY HAS VALUE

Because the whole experience of interactions between a prospect or customer shapes their decision to ultimately make or influence a purchase decision, optimization needs to look at the journey in its entirety to have the most significant impact.

Furthermore, because retention is almost always far cheaper than acquisition, and because existing customers make the best advocates, any approach to optimization should look across the entirety of the customer journey.

A THREE-STAGE APPROACH TO THE CUSTOMER JOURNEY

So, how can B2B marketers tackle this complexity without inducing too much confusion? Your organization may already have customer journey maps that break down each stage. In this case, that framework may provide a good start when it comes to optimization.

If you don't have buyer journeys already mapped out, we recommend dividing the journey up into three stages for the purposes of optimization:

Stage 1: Acquisition

This part of the customer journey is the one traditionally associated with marketing. Questions to ask as part of your optimization efforts include:

- What can we optimize to increase our reach across our total addressable market?
- What can we optimize to increase coverage within target accounts?
- How can we optimize our on-page conversion rates for landing pages and lead forms?
- How can we optimize the research stage of the customer journey to encourage more content downloads and consumption?
- How can we optimize engagement during webinars and other events to qualify prospects for sales?

Stage 2: Engagement and Conversion

This stage of the customer journey is typically owned by both marketing and sales, with the latter taking more control as the sales process progresses. Questions to ask here for your customer engagement marketing include:

- How can we optimize the handover from automated marketing to direct sales conversations?
- How can we optimize the self-serve experience even as prospects are speaking with colleagues in sales?
- How can we optimize the interaction between salespeople and prospects?
- How can we optimize the sales experience through content and collateral?

Stage 3: Retention and Loyalty

This stage of the customer journey comes after purchase. In many companies, the salesperson responsible for closing the deal then hands off to customer success or an account manager. Optimization questions to ask here include:

- How can we optimize the onboarding experience?
- How can we optimize how customers educate themselves and find out more about the product or service?
- How can we optimize engagement for existing customers?
- How can we optimize customer advocacy?

ON24 TIP

BRING YOUR COLLEAGUES IN SALES AND CUSTOMER SUCCESS INTO YOUR MARKETING CAMPAIGNS

As prospects, leads and customers get handed over to different teams, there is a risk of causing a disconnect in the experience they are having. To help smooth the transition, bring your colleagues that will be having follow-up conversations into your marketing campaigns. It can be as simple as using their name on an email, or as involved as hosting an entire webinar program. Download ON24's guide on [Using Webinars for Customer Engagement](#) to find out more.

WHAT ARE THE BARRIERS TO OPTIMIZING THE B2B CUSTOMER EXPERIENCE?



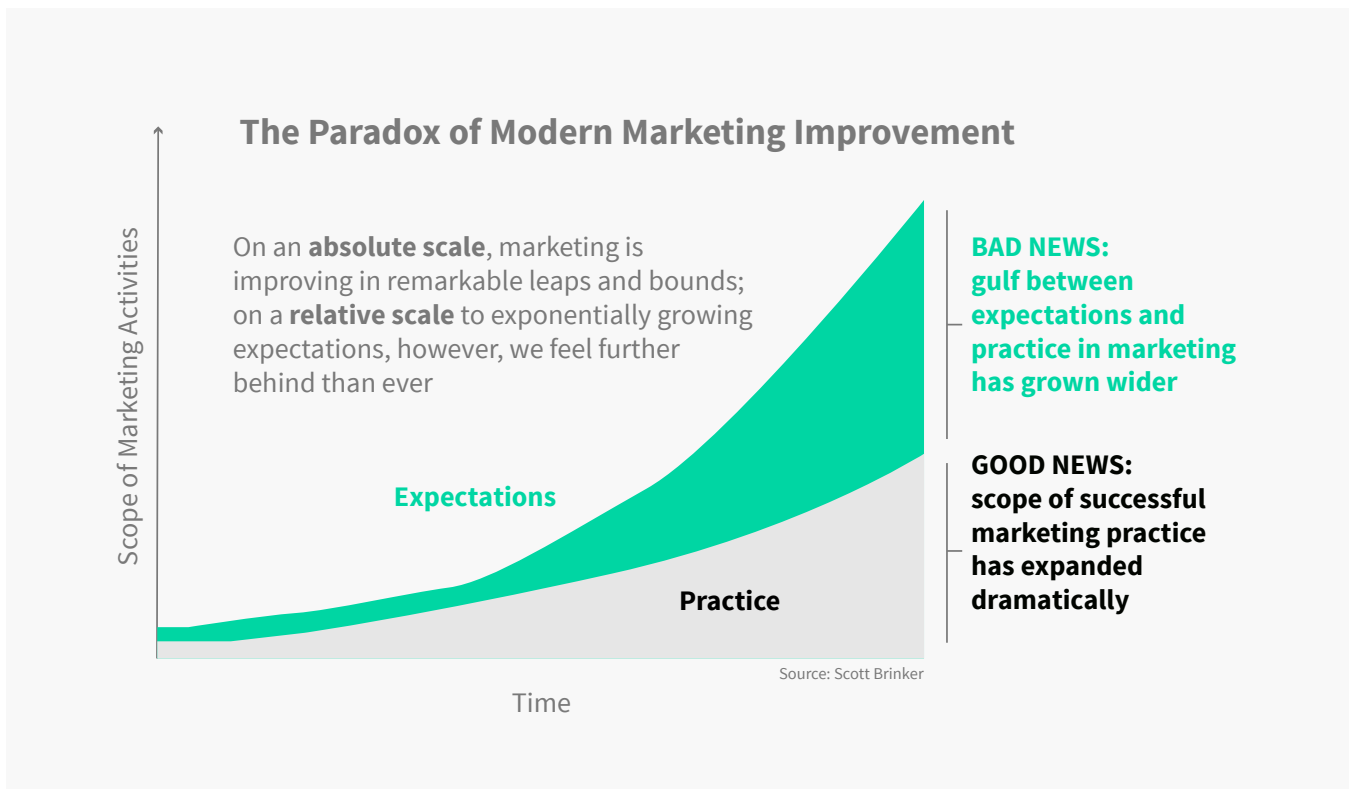
The previous section on the theme of B2B marketing optimization made the case that marketers should optimize for the entire customer journey—not just the part that happens before the handover to sales.

Taking such an approach can drive optimization in a direction that focuses on not just the metrics of a single department, or even on the metrics of a single company. Instead, the approach can change to one that puts the customer first.

WHY THE SPEED OF TECHNOLOGICAL CHANGE MAKES A FOCUS ON THE CUSTOMER ESSENTIAL

Editor of chiefmartec.com, Scott Brinker, has described a conundrum that is present within businesses today—namely that **while technology changes at an exponential rate, organizations change logarithmically**. This phenomenon has been dubbed Martec’s Law.

What this means is that although marketing is improving all of the time, the gap between expectations and practice keeps on getting wider.



Brinker suggests that one solution to this issue is that **marketers need to “ruthlessly prioritize” what changes they need to make.** If companies don’t change in this fashion, there is a risk they will join the rapidly growing cohort of companies that are disappearing.

In terms of the theme of optimization, focusing on the customer and their experience provides a lens by which we can ruthlessly prioritize any efforts.

A survey of more than 12,000 marketers by Adobe and Econsultancy found that **companies with a “very advanced” level of customer experience were almost three times more likely to have exceeded their business goals “by a significant margin.”** So it comes as no surprise that the same report notes that the top priority for B2B marketers in 2019 was optimizing the customer experience.

That being said, there are a number of likely hurdles that B2B marketing leaders will have to overcome to make sure they can effectively optimize the customer experience across the entire buying journey.

Indeed, a customer experience study by Harvard Business Review Analytic Services found that about half of marketers are struggling to use technology to create experiences that are the same as face-to-face interactions.

FOUR KEY BARRIERS THAT MARKETING LEADERS NEED TO REMOVE

1. Siloed incentives and targets

The standard revenue model for B2B organizations typically divides up targets based on the various stages of the customer journey.

For example, the most commonly used metric for marketers, according to a study by Demand Gen Report, is the MQL. After this, a sales development team might then be targeted on new opportunities or meetings booked, while more senior sales team members are then actually targeted on the number and value of closed deals. Customer success teams might then focus on renewal volume and value.

These are all worthwhile metrics to optimize for. However, **in the absence of joint incentives, each team might work separately to game the figures they personally are responsible for in a given month, quarter or year.**

Marketing might chase MQLs that are unlikely to result in sales; sales development team members might book meetings that aren't qualified; salespeople looking for a bonus might ignore a swathe of opportunities in pursuit of deals they can close quickly before the month-end; customer success teams only reach out a few weeks before renewal. Put together, this can lead to a disconnected experience, which ill-thought-through attempts at optimization might actually exacerbate. Backing this point up is the fact that, according to the [Harvard Business Review study](#), having a siloed organizational structure is the most commonly-cited barrier to more customized customer interactions.

As such, **B2B marketing leaders need to get buy-in and joint ownership for shared objectives** from the very top.

2. Poor relationships with sales and customer success teams

Siloed incentives and targets are often both caused by and a cause of ineffective relationships between teams responsible for revenue. **When teams are also split physically, nurturing and improving relationships can be a further struggle.**

So, how can relationships be improved? In our post on [making your marketing team more agile](#), one of the discussed approaches was to adopt the eight-step change model proposed by John Kotter.

In this model, after initially creating a sense of urgency, the second step is to **build a coalition of people that can help drive through change in different departments.** Look to identify colleagues in different teams that are open to optimizing the whole customer journey and can evangelize on your behalf in their own teams.

3. Disconnected data and ineffective technology

When it comes to optimizing the entire customer journey, another common challenge comes down to disconnected data.

If it cannot be ascertained which efforts earlier in the customer journey impacts closed deals or won renewals, a holistic approach to optimization becomes difficult to develop.

Even if data on each customer touchpoint is captured, **if your technology systems such as marketing automation and CRM do not bring this together, identifying the opportunities for optimization can become at the best case tedious**, and in the worst case, it can lead to the wrong conclusions.

Overhauling a technology stack can be a daunting process, so instead, marketing leaders should look for areas that can bring rapid improvement. Identifying a small number of data fields such as

the lead source or marketing campaign IDs that can be included within CRM systems, or sales opportunity stages and values that can be passed back to marketing automation platforms, can help greatly in choosing priorities for optimization. ON24 Connect provides an easy way to pass data from webinars into both CRM systems and marketing automation platforms.

You might find out what campaigns and content really drove results, and which need to be either optimized or revisited.

4. A lack of accurate customer insight

Even if you have shared targets, great relationships and a marketing technology stack that captures every single possible data point, it's still possible that the customer intelligence you have is limited, or captured only in the heads of those that have direct contact with them.

Make sure that you are speaking with both your customers and also the prospects that chose not to buy. Webinars are of course one way to do this, but there are other methods too. Surveys, phone calls, interviews, or even just a meeting for coffee can help to identify which parts of the customer journey were lacking—and as a result, find out what can be optimized further.

ON24 TIP

OPTIMIZE THE EFFICIENCY OF YOUR SALES AND CUSTOMER SUCCESS TEAMS BY BRINGING MARKETING DATA INTO THEIR WORKFLOW

Marketing technology can collect masses of data on what your prospects and customers are engaging with, all of which can bring valuable insight to your sales and customer success teams. But if this data isn't clearly making its way into their workflow (e.g., in contact and account records within your CRM) they won't be able to make best use of it. To find out more about the data you can pass to your marketing and sales tech stack through webinars, check out ON24 Connect.

NETLINE TIP

UNDERSTAND YOUR PROSPECTS CURRENT BEHAVIORS

Insight into what kind of content is currently resonating with people from all job levels, industries, company sizes, and job functions is valuable insight to understand your prospects. Analyzing real-time, custom buyer engagement behavior with free tools—like NetLine's Audience Explorer—helps you leverage data from those outside of your direct contact, and more importantly, those who are in-market. Optimizing your strategy with relevant data through a friendly tool is a great way to get your team exposed to the optimization mindset.

WHY B2B MARKETERS SHOULD BENCHMARK THEMSELVES FOR OPTIMIZATION



In the first sections of this report, we have covered why you should optimize for the entire customer journey and common barriers to optimization success.

In this section, we'll explain why you should benchmark your company's own performance (using both internal and external sources of data) before starting out on your optimization journey.

BENCHMARKING HELPS TO NEGOTIATE SUCCESS TACTICS

All marketers have heard the adage “what gets measured, gets improved.” In that case, having at least a baseline of measurement helps to set goals for optimization.

However, **understanding the degree to which something can be improved is critical.** It allows you to determine what is realistic and achievable. It also helps you to prioritize efforts where the greatest impact will be.

Using external industry benchmarks and figures are often highly valuable in this regard—and also act as baselines if you aren't able to access

historical performance because it hasn't been measured previously.

If you are looking at optimizing areas that need help from other teams, benchmark data will help demonstrate the potential impact of working together. Likewise, if the CEO or others give marketing unrealistic targets, then benchmarking can help negotiate goals and expectations.

BENCHMARKING CAN IDENTIFY BOTTLENECKS ACROSS THE CUSTOMER JOURNEY

The typical B2B customer journey has many steps before a sale is even made. Inevitably there is drop-off at each stage of the process.

Benchmarking can help to identify where the bottlenecks and drop-off points are compared to the average. For example, if on-page conversion rates are lower than industry norms, this presents an opportunity for optimization. If the time between a lead being marketing qualified and sales accepted is excessive, optimization can work on improving that.

If there is excessive drop-off after initial sales

meetings have been booked, marketing can provide content and campaigns to keep prospects at this stage engaged with the aim of reducing lost opportunities.

BENCHMARKING HELPS TO PRIORITIZE WHAT'S IMPORTANT

There is potentially a huge amount of data available to B2B marketers today to help them gauge effectiveness. However, such a long list of metrics can easily become overwhelming.

Having benchmark data available allows marketers to identify where the quick wins and biggest levers are. Other areas of improvement can be put on to a longer-term list that can be actioned depending on resources later down the line.

Benchmarks from external sources can also be valuable in this regard because B2B marketers can all too easily pursue paths that might not pay off in the manner expected.

For example, NetLine's 2019 State of B2B Content Consumption and Demand Report found that **while marketers often target their content at the C-suite, 86% of all content consumption**

activity occurs below the C-Suite—suggesting that marketers could benefit from prioritizing efforts on the buying committee.

WHERE TO FIND BENCHMARK DATA TO PLAN YOUR OPTIMIZATION EFFORTS

The first place you should look is within your own systems to identify what data you have at your fingertips. Once you have this, you can look for external sources to identify what good performance looks like.

For webinars, ON24's annual Webinar Benchmarks Report contains figures across a whole range of metrics, while our previous article on [How to Measure Webinar Success](#) contains some ideas on optimizing each.

Industry surveys and analyst reports are also a good place to turn to find data on anything from content preferences for B2B buyers through to lead generation figures.

Whatever metrics you choose to investigate, remember to keep in mind the customer journey as a whole. By doing so, you'll avoid gaming singular metrics and make sure your efforts enhance the entire customer experience.

NETLINE TIP

CHECK YOUR ASSUMPTIONS ON CONTENT CONSUMPTION AND EXTERNAL AUDIENCES

It's all too easy to assume that your most effective content should be targeted at the most senior decision makers, companies with a large employee headcount, or any other criteria you may have used in the past. However, you could be missing out on an active audience that has a need and can influence sales. To find out more, download NetLine's 2019 State of B2B Content Consumption and Demand Report.

SIX KEY STEPS TO BUILDING AN OPTIMIZATION CULTURE



Earlier we covered what is optimization in B2B marketing and why it's important; why marketers should look at the entire customer journey and not just the top of the funnel; the barriers to optimization; and the importance of benchmarking.

As a marketing leader, your next job will be to identify and set goals for your optimization efforts. But making optimization an ongoing process requires a cultural change too—without this, individual contributors will not pursue continual improvement proactively and of their own accord, putting your organization at risk of decay and decline.

To make this happen, we've put together a few steps that will help you build an optimization culture not just in marketing, but across sales and customer success too.

I. GET BUY-IN FROM THE TOP ON AN OPTIMIZATION VISION

Before you can get other teams to follow you on an optimization journey, you need to make sure you have support from everyone involved.

Bring up your optimization vision during team conversations if your company is in the process of dismantling silos among teams and targets; you will be talking about working collaboratively in the first place and team members will be receptive to your suggestions. Taking the vision to a higher level should be part of your conversation here.

2. WORK OPTIMIZATION INTO OBJECTIVES AND KEY RESULTS

As you set collaborative targets, look to also establish measures that demonstrate optimization in action.

Regardless of the performance review and management techniques your organization uses, or whether they are formal or informal in nature, look to get optimization on the to-do list for everyone.

3. MAKE SURE EVERYONE KNOWS ABOUT THE OPTIMIZATION VISION

If you want everyone to work towards optimizing each part of the customer journey—particularly if you will be setting objectives and targets—everyone first needs to know that there’s a shared vision towards optimization. If they don’t know, then they won’t take the necessary steps.

Schedule a time to come together with leaders from sales, customer success and more broadly across the business to share the optimization vision with everyone.

If you’re part of a large and distributed organization, webinars can also be highly useful as a communications platform for businesses to get the word out.

4. ALLOW ANYONE TO SUGGEST AND MAKE CHANGES IN PURSUIT OF OPTIMIZATION

Great ideas can come from anywhere. However, to make them a reality, everybody needs to feel that they can both suggest ideas and that they are empowered to put them into action.

Cited earlier, our post on [How to Make Your Marketing Team More Agile](#) also notes that removing a fear of failure is a critical step to getting people to shift into a ‘test and learn’ mentality.

Within recent years, the Japanese idea of *kaizen* (translated as “change for better”) has become popular as an approach that allows employees to suggest and make changes. Toyota is particularly famed for this approach and has reportedly implemented the vast majority of changes that those on the front line have put forward. All of this has energized employees.

5. ENCOURAGE KNOWLEDGE SHARING TO CELEBRATE SUCCESS AND LEARN FROM WHAT DOESN'T WORK

To both maintain the momentum for optimization and spread the word about what’s working well, make sure that the results—both effective and ineffective—are visible for people to see.

One practice from the world of software development is the sprint retrospective. The agenda is simple and typically just has three points: what worked well; what could be improved; and what should be done next time? ON24 client Atlassian has a [guide on how to run a retrospective](#), but these points could also be incorporated into any existing meetings you currently have.

To spread this knowledge even further, consider adding these points to your company's own online communication spaces—whether that's on an intranet, a company wiki, or even a channel on a messaging app such as Slack or Microsoft Teams.

6. REWARD AND INCENTIVIZE OPTIMIZATION EFFORTS ACROSS YOUR ORGANIZATION

To keep up the good work, make sure you acknowledge optimization efforts, even if an attempt didn't result in a positive uplift.

How you should best do this is up to you, but this should be a regular occurrence. Even if optimization gets on to annual targets, rewarding efforts on such a time scale is unlikely to be enough to reinforce positive behavior. Both informal rewards, such as buying snacks for the team or even just saying thank you, and more structured incentives such as those connected to compensation, should be frequent enough to keep optimization front of mind for everyone.

Good luck with your efforts on making optimization a success in your organization!

ON24 TIP

**AS TEAMS BECOME DISTRIBUTED,
INCREASE THE QUALITY OF YOUR
INTERNAL COMMUNICATION TO
SHAPE COMPANY CULTURE**

When working remotely was a near impossibility, leaders could communicate effectively and celebrate success in person because everyone was in the office. However, trends such as remote working, using freelance talent and globally distributed staff means that new methods need to be adopted to shape culture and encourage best practice. To find out how webinars can help, check out [how ON24 is used for internal communications](#).

SECTION 2: OPTIMIZING FOR ACQUISITION

HOW B2B MARKETERS CAN OPTIMIZE FOR REACH AND ACCOUNT COVERAGE

In the first report of this optimization series, we've explored why optimization in B2B marketing is important, what are the common barriers to optimization and why you should benchmark your own performance.

We also covered why optimization should be done across the entire customer journey. The first step in that journey is an acquisition.

Many marketers might see acquisition as the point at which a visitor becomes a known prospect. **But if you aren't reaching them in the first place with your demand generation marketing, turning them into a known (and cookied) prospect is impossible.**

This section will explore some steps you can take to get a high-level view of how well you are currently doing in reaching your target customers and accounts so you can take steps to optimize your efforts for reach.



CLEARLY DEFINE YOUR TARGET CUSTOMER

While you can simply optimize reach in terms of “more impressions” or “more website visitors,” what you really need is “more impressions from potential customers” or “more website visitors from potential customers.”

Of course, the nature of impressions and visitors is that prospects are largely anonymous at the earliest stages of the customer journey. However, by focusing on your ideal prospect, **you can keep your reach optimization within the bounds of those who could become your customers.**

Take the information from your target customer profiles that you use in your marketing planning. Job titles, industries, headcount, geographies, technologies used — all of these can help when figuring out how to optimize your campaigns. Target account lists can also be helpful.

From a campaign perspective, make sure you have a clear idea on what your target prospects are researching. As covered in ON24's scrappy marketing series, external and internal data sources can be valuable and ensure your view on their needs aligns with what the data demonstrates.

GET A CLEAR PICTURE ON YOUR FIRST-PARTY DATA AND WHO YOU KNOW ALREADY

To a large extent, the prospects and customers you already have in your database are those who will have already been reached. Your job now is to help convert them or, if they are customers already, to retain and engage them.

Make sure to remove these contacts from the equation if you are optimizing for reach. At the earliest stages (i.e., before they MQL), there may be no need, but if you are paying to send early-stage messages to your existing clients, you'll waste money and potentially damage your customer experience.

Organizing who you already know against who you don't is also an opportune time to see when your last data cleansing efforts have taken place. Doing so allows you to get a more accurate view of whether these contacts can already be considered 'reached' or if they actually need to be removed.

ASSESS YOUR CURRENT REACH ACROSS EACH OF YOUR CHANNELS

| SOURCE / CHANNEL | IMPRESSIONS | CTR | VISITS (NEW VS RETURNING) | TOTAL COSTS | AVERAGE CPM | AVERAGE CPC |
|---------------------|-------------|-----|---------------------------|-------------|-------------|-------------|
| DISPLAY | | | | | | |
| SOCIAL (PAID) | | | | | | |
| SOCIAL (ORGANIC) | | | | | | |
| SEARCH (PAID) | | | | | | |
| SEARCH (ORGANIC) | | | | | | |
| REFERRALS (PAID) | | | | | | |
| REFERRALS (ORGANIC) | | | | | | |

The next stage of optimizing for reach is to bring together the data on each of your channels to get a view on how well they are performing against each other and a variety of metrics. Such an effort might look like the table below, which may already be in your standard reports.

This will help you get a quick overview of:

- Where are we driving the most impressions?
- Where are we most efficient at driving impressions?
- What is actually driving clicks and visits? And at what cost?

You'll likely want to dig further into each channel to look at the individual campaigns you are running, **but this high-level view will help you to start exploring where you might focus your optimization efforts.**

On the other side of the coin, **there may be areas where you simply can't collect the data.** For example, if you work with a referral partner that only sends traffic to your landing pages, you might never know the impression count. By its nature, direct traffic doesn't have impressions as this represents visitors coming directly to your site.

Likewise, it might be difficult to accurately estimate the costs of organic or "free" impressions and visits — but do try to work out a figure based on employee time or agency rates where possible.

If you are using an account-based marketing tool, there may be views within your current platform helpful for assessing your reach for particular target accounts across different channels.

Also, look to segment out these figures between new and returning visitors, along with known and unknown contacts.

IDENTIFY WHAT AREAS YOU MIGHT WISH TO OPTIMIZE

Once you have this high-level view, you can start to identify possible areas worth prioritizing for your optimization efforts.

Compare your performance against benchmark data you can find. For example, are you paying way more than average for your impressions? Is your clickthrough rate subpar? Is your reach through organic channels below where you would like it to be? Have there been any significant changes over time? Are you paying unnecessarily for visits from known prospects or customers? From an account-based marketing perspective, are there some channels that just aren't getting through?

From this information, choose what areas you will focus on for your first optimization steps.

Also, always keep conversion in mind. You don't want to optimize for visitors that will simply arrive and bounce, never to be seen again.

SET A GOAL TO OPTIMIZE AGAINST – AND CONSIDER DEDUPING AGAINST KNOWN CONTACTS

With your optimization priorities in hand, you can now set a goal for your reach optimization efforts. Make sure that any goal is SMART — that is, specific, measurable, achievable, realistic and time-bound.

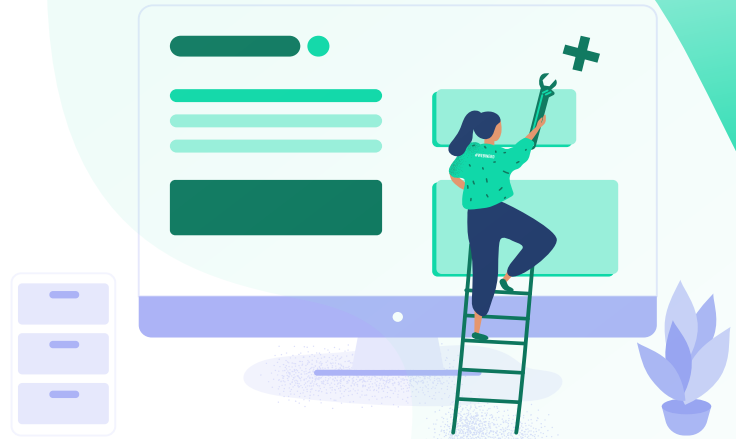
As you run your campaigns, **consider adding any existing contacts to an exclusion list for your paid efforts.** This will help you save money, focus on reaching new prospects, and keep the customer experience high.

ON24 TIP

WHEN OPTIMIZING FOR REACH, DON'T FORGET ABOUT THE EXPERIENCE

While you'll need to make sure your outreach is getting in front of enough of the right audience, it's likely to fall flat in the long run if your offer doesn't promise something worth engaging with. Consider personalizing your creative and directing people to highly-targeted pages. Check out [ON24 Target](#) to find out more.

HOW TO OPTIMIZE B2B LANDING PAGES



In the previous section, we examined how you can set goals to increase your reach by examining the impressions and visits your channels are driving.

Let's assume now the number of visits to your key converting pages — whether they are for demo requests, whitepapers and webinars, or a hub containing all of these — is sufficient. Also, let's assume whatever you are offering is compelling enough for someone to fill out a lead form so you can turn an anonymous visitor into a known prospect.

Below are some steps and strategies you can experiment with to optimize conversion for your demand generation efforts.

MAKE SURE YOU KNOW YOUR BASELINE AND SOURCES SO YOU CAN SET A GOAL

Before you begin to make changes to your landing page, you need to understand what your baseline is so you can optimize accordingly. At the very least, look into your analytics to understand how many visitors are coming to the landing page and how many are converting.

You also ought to have an understanding of the source of your traffic. If the source changes significantly, the overall conversion rate may change. Ideally, you want this to be consistent to figure out exactly what works and what doesn't.

You may also want to set the landing page up with a dedicated optimization or testing tool or use the testing functionality within your landing page builder (if you have one). These tools have the benefit of not requiring historical data because they can run at least two variations of a landing page simultaneously. Some tools also offer multivariate testing, allowing you to change several elements at once, with the 'winning' option being presented from then on.

MAKE A CHANGE AND TEST THE IMPACT

For this post, we'll assume you are making just one change. You can make this change as an A/B test format (i.e., where two variations are shown and a test is run live) or you can simply make a change and contrast it against your historical baseline.

Once the change is made, you will need to wait for a period to collect enough data that will enable you to make an accurate decision. If you are receiving a lot of visits, then you will need less time to get a valid picture.

If you want to assess the validity of the result to a level of statistical confidence, a free calculator at AB Testguide can help determine whether you have enough data to come to a particular conclusion. Dedicated optimization or A/B testing tools almost always have this functionality built-in.

WHAT YOU CAN CHANGE TO OPTIMIZE YOUR LANDING PAGE

Okay, so it's time to try to optimize your landing page performance. Note that when it comes to optimization, success or failure of a test might be significantly different from your original expectations.

If you're using ON24 Target, you can pretty much edit any of the below elements using the page builder function.

Optimize the headline and value proposition

Most landing pages have a large headline, often with a strapline or value proposition underneath them. They are typically the first thing that people read — if they read anything at all.

In his 1968 book *Confessions of an Advertising Man*, ad legend David Ogilvy said:



ON THE AVERAGE, FIVE TIMES AS MANY PEOPLE READ THE HEADLINE AS READ THE BODY COPY. WHEN YOU HAVE WRITTEN YOUR HEADLINE, YOU HAVE SPENT EIGHTY CENTS OUT OF YOUR DOLLAR.”

He also remarked that particular phrases such as 'How To' can generate interest — and Google's own search data shows that in the 21st century, searches containing the phrase 'how to' have rocketed.

Optimize the call-to-action and key copy

Once you've tested the headline, try changing the copy in the call-to-action and body text.

Bullets can be particularly effective in making text scannable and concise. Research by Nielsen Norman Group has found scannable formats can increase usability by 47%.

Optimize the imagery and creative

Got images on your landing page? Try changing these around. Use images with or without people, of different genders and even emotional states.

Consider putting a video in the mix, too. If you have a webinar you've already done or that is always-on, try including a clip to see if that boosts form fills.

Personalize the offer

If you can, try personalizing the offer relevant to the visitor. For example, if your landing page is part of your account-based marketing strategy, incorporate the logo of the brand directly on the landing page.

Some testing tools also allow you to make changes based on the source of the traffic.

Optimize the form

There are lots of ways you can optimize a form to increase conversions, along with technology that allows forms to be filled in more easily.

At the very least, remove fields you do not need to make sign-ups easier for the user. As covered in ON24's guide on *The Engagement Imperative*, many people resent filling in forms and even add false data, making it nearly impossible to maintain

a clean database.

Also explore adding in autocomplete to various fields, testing your form validation and consider using progressive profiling (which is included in many marketing automation form builders) to gradually collect data over several visits, rather than asking for it all at once.

Consider using a timed pop-up modal or widget

While pop-ups can interrupt the user experience, you might want to experiment with offering a modal that suggests a new offer if someone hasn't converted on that page for some time.

Some modal designs can also preview the

content, making it more enticing to download and engage with.

DON'T FORGET ABOUT THE EXPERIENCE AFTERWARD

Even though this post is about optimizing what is happening directly on the landing page, ensure the experience following the conversion is engaging and beneficial for your new contact.

Test your landing page to make sure users actually receive the content and that they aren't immediately bombarded with further emails, even if they have a high lead score. And consider using retargeting for those who don't quite convert — if they've come once already, hopefully you can

ON24 TIP

CONSIDER USING CONTENT HUBS WITH MULTIPLE ASSETS AS WELL AS SINGLE ASSET LANDING PAGES

Identifying a visitor by collecting contact details is a necessary first step in acquisition. But they'll need to engage more than once to progress along their buyer journey. To help them on their way, create dedicated hubs with multiple assets that they can consume rapidly. Explore ON24's Engagement Hub to find out how you can engage audiences beyond a single lead capture.

NETLINE TIP

OPTIMIZE THROUGH DATA-BACKED TRENDS

Leveraging content consumption data to optimize your content positioning, format, headline, etc., helps you emphasize relatable messaging to maximum engagement. Based on over 4 million content downloads, the most popular title elements include '25 Tips', 'How to', 'Report', 'Secrets', and 'Guide to', as told in NetLine's 2019 State of B2B Content Consumption and Demand Report. Keep an eye on data-backed trends to reach and engage target professionals, companies, and industries.

HOW TO OPTIMIZE WEBINAR ATTENDANCE FOR LEAD ACQUISITION



In the previous section, we covered how to optimize your landing pages to turn more of your unknown visitors into known prospects.

As a tactic widely preferred by buyers, chances are you use your landing pages to get people to register for webinars. But if you want to engage those prospects and turn them into leads, you'll need them to actually attend the webinar or watch it on-demand.

You can optimize to drive both attendance and viewings as you host a webinar. Below we'll explore some of the metrics you can use for setting optimization goals along with some key tactics to help reach them.

WHAT KEY METRICS SHOULD I LOOK AT FOR OPTIMIZING WEBINAR ATTENDANCE?

When optimizing for attendance and setting goals, there are a number of metrics to choose from. Just remember to take into account your performance across a series of webinars rather than the performance of a single session. This will keep you focused on long-term performance and improvement.

Here are a few key metrics to consider when optimizing for webinar attendance:

Attendance percentage rate

There are plenty of benchmarks in ON24's Webinar Benchmarks Report, and on average 56% of registrants to all webinars with more than 100 attendees end up tuning in.

But this percentage figure varies across function and industry. For example, marketers saw a 39% registration to attendance conversion rate.

Look at your own percentage attendance rate and use that as the start of your optimization efforts.

Number of attendees

As well as the percentage attendance rate, look at the total number of attendees you drive through your webinar program.

You might want to consider promoting more webinars (even if the percentage attendance rate may drop) to lift the number of attendees going through your program to your desired level.

Number of qualified attendees

The purpose of your webinar program is likely to drive leads. So, remember to check the number of qualified registrants that actually view your webinar.

How you define qualified will be up to you, but it may include areas such as:

- The number of attendees from organizations with a particular employee headcount.
- The number of attendees who are sufficiently senior or in a decision-making level position.
- The number of attendees who work at one or more of your targeted accounts.

Always-on views

One central benefit of webinars is that attendance can grow long after a live webinar has ended. After all, prospects ought to be able to access your events at a time and place that suits them.

As such, you can add always-on views to your total attendance numbers. Alternatively, you can optimize for on-demand views separately.

WHAT CAN I CHANGE TO OPTIMIZE ATTENDANCE?

Okay, so you have a metric to optimize against. Now it's time to drive improvement. Here are a few ideas you can use to get started on optimizing your events.

Personalize your communication

Once someone has registered for a webinar, personalize your communication and encourage them to attend.

Around two-thirds (68%) of ON24's customers personalize their webinars to their audience, but there are other ways to personalize your efforts. Calling out their company, industry or other key data points in your reminder emails is a great way to provide more targeted outreach.

Make attendance compelling

Any webinar you run should provide value to the attendee. But you can experiment with the values you use to drive attendees to a webinar.

For example, you could offer a complimentary white paper not available elsewhere; offer free tickets to a live event for attendees; or even just offer to answer questions in real-time.

On that last tactic, Atlassian managed to drive more than 1,100 attendees to a fireside chat session by having the CEO on the panel to take questions from the audience.

Experiment with the time and date

ON24's benchmark data shows that, on average, webinars held midweek and lunchtime to early afternoon are the most common option offered. But while these times might work for some organizations, it might be different for yours.

Try making your webinars available at different days and times. Using Simulive and Sim-2-Live, you can even have your pre-recorded sessions

appear when you want them, with the option to roll over into live audio and Q&A at the end of the session.

Experiment with your reminder emails and send them from your team

There are a number of ways you can change your reminder emails to optimize performance. These can include changing the days and times of your reminder emails, the subject lines and body copy, and even the use of imagery within them.

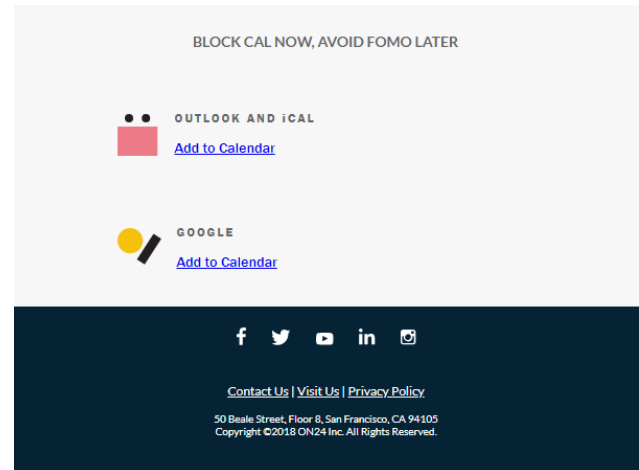
Another powerful way to optimize your attendance rates is to send them from an email address belonging to a real person. Consider sending emails on behalf of the sales team or account managers that will build a relationship with them, the webinar presenter or even the CEO of the company.

Finally, consider the counterintuitive approach of emailing registrants after the webinar has started. Sending a reminder email that the event is underway may remind busy would-be attendees that they can still join in on the event.

Offer calendar options and invites

To help remind people to attend, also look to add calendar invites to help registrants tune in on the day and the time.

As Jack Wildt, Senior Manager of Demand Generation Operations at ON24, noted, MAPs like Marketo can integrate with ON24 and send reminder emails. ON24-powered registration emails can also add calendar options to great effect, as shown in the screenshot below.



Amplify your webinar outside of your direct audience.

If you need help reaching and engaging your ideal audience, consider syndicating your live webinar on a credible platform to expand distribution to relevant B2B audiences. Finding a partner, like NetLine, with robust reporting features to not only amplify your content but help you optimize it in real-time helps you fill registration quicker.

ON24 TIP

BENCHMARK YOUR ATTENDANCE RATES AGAINST YOUR OWN INDUSTRY

ON24's Webinar Benchmarks report contains a wealth of data on attendance rates and always-on webinar views. But there are also splits of the data available across a host of industries. Explore our benchmarks for the technology sector, media and publishing, finance, professional services, life sciences, manufacturing and associations.

HOW TO USE WEBINARS TO BOOST MQLS

In the previous section, we covered how you can optimize webinar attendance for lead acquisition.

But just because someone attended a webinar doesn't make them a marketing-qualified lead ready to be handed over to sales. We should also note that **the pursuit of MQLs shouldn't cause you to lose sight of optimizing for the entire customer journey.**

Even so, MQLs are a common metric for marketers, and there are at least two key ways that you can use webinars to turn attendees into MQLs if that's a goal for your optimization efforts:

1. You can optimize your data collection to better identify those ready to have a conversation and who would be a good fit for your company's offerings.
2. You can optimize how you engage your attendees to progress and nurture their buying journey, as measured by an increased lead score.

Take a look at the following steps to optimize MQLs within your webinar process.



IDENTIFY WHAT MAKES UP AN MQL

Take a look at your lead scoring criteria to find out what the indicators of an MQL are for your team and company. Deciding these criteria should be a collaborative effort between sales and marketing to ensure a high likelihood of any leads being accepted.

Typically your lead score will be broken into two elements:

1. **Personal attributes** — these might include elements such as seniority or job title, firmographic criteria (e.g., company headcount, company revenues) and details related to BANT (i.e., budget, authority, need and time). It might also include technographic criteria (i.e., the technologies they use which indicate a good fit for your offerings).
2. **Behavioral attributes** — these will represent the behaviors you are looking for to demonstrate progression along the buying journey. For example, you might assign points to viewing certain pieces of content, a separate score for webinar registration and another one based on attendance and/or engagement.

MAKE SURE YOUR WEBINAR PLATFORM CAN SEND DATA TO YOUR LEAD SCORING SYSTEM

Chances are your lead scoring happens within your marketing automation platform, although in some instances data may go to your CRM first. Either way, make sure your webinar platform is connected to your martech/sales stack, that the key data fields are mapped and you can trigger updates to your lead scoring. While you might be able to export data manually from your webinar to upload afterward, this will add time to your process and potentially reduce the overall impact of your efforts. Here, [ON24 Connect](#) can help and save you time.

The data fields you choose should align with the areas that impact lead score. If you're just getting started with using webinars for lead scoring, it might be easier to only use a small number of fields to test how everything works before adding additional elements later.

At the very least, make sure you can send registration and attended status (i.e., attendee or no-show) to your platform, along with any other key fields in your registration page.

Over time, you might wish to include more data fields. For example, ON24 calculates a number of values across several webinars for its [Prospect Engagement Profile](#), which can be pushed to your own systems.

SET UP YOUR WEBINARS TO COLLECT DATA

There are two ways you can collect the data you need:

1. **At registration** — Consider the information you want to collect, but remember asking too much may impact the performance on the landing page.

2. **During the webinar** — As your attendees tune in, their engagement can be measured to provide the behavioral data points you need to impact their lead score and raise them to MQL level. In addition, polls and surveys create a great opportunity to collect data manually if you need them or chose to not include those fields at registration.

ENGAGE YOUR ATTENDEES TO DRIVE BEHAVIOR – AND LIFT YOUR LEAD SCORES

Attendance is half the battle. If you don't provide an engaging session you will miss both the opportunity to create a great experience and the chance to drive actions that will impact lead scores.

[ON24's Webinar Best Practices series](#) has a lot of tips on how to drive engagement, but a few ideas you can implement now include:

- Deliver calls-to-action to download resources and assets, sign up for free trials or request a demo.
- Run polls and surveys to collect data. If you want people to stay tuned for longer, don't share the results straight away — instead, deliver them later in the session.
- Encourage sign-ups for future events and on-demand webinars.
- Tell the audience to submit questions either during the webinar, before or both.

All of these engagements can help attendees progress in their buyer journey and provide data to lift your lead scores.

MAKE BEST USE OF YOUR ON-DEMAND WEBINARS

There are still opportunities to look for to drive additional MQLs once your webinar is over. Our post on [How to Market Your Webinar After It's Finished](#) details the steps you can take to drive additional registrations and engagement.

All great webinars have a long shelf-life, meaning you can promote them on an ongoing basis. Consider adding them to a content syndication platform such as [NetLine](#), which can also be connected directly to your marketing automation and lead scoring system.

ASSESS THE RESULTS AND LOOK FOR OPPORTUNITIES TO OPTIMIZE

Once you've run a few webinars and collected some data, you'll have a benchmark to work against. Look at where you can improve your efforts and set yourself optimization goals to achieve them.

To save you time, you can [refresh your existing webinars](#) with optimization in mind, rather than planning them all from scratch.

NETLINE TIP

SYNDICATE YOUR WEBINARS AND CONTENT TO MAXIMIZE YOUR POTENTIAL FOR LEADS

Chances are that only a small section of your total addressable market is visiting your website, but they are still turning to third parties to get the information they need. As we shared above, connecting with a larger, more relevant audience can be done through a content syndication platform, like [NetLine](#), and can push your content across a wide range of external sites and publications specific to the criteria you've deemed a good lead.

SECTION 3: OPTIMIZING FOR ENGAGEMENT AND CONVERSION

HOW TO DESIGN WEBINARS FOR CUSTOMER ENGAGEMENT, NOT MARKETERS

In the first mini-report, we covered how you can optimize your marketing efforts at the acquisition stage of the customer journey — from improving your reach across channels and optimizing your landing pages to using webinars to drive attendees and turn them into MQLs.

Regardless of the medium you use to acquire, engage and convert your customers, a focus on metrics can help you achieve your key goals. But too narrow of a focus, and you run the risk of losing sight of the bigger picture.

Webinars are no different. Even though webinars provide plenty of data you can use to set optimization goals against, from the basic (e.g., attendee count and percentage) right through to granular (e.g., questions asked, polls answered), chasing these goals will be fruitless unless you make sure you build your webinars for your customer first. With that in mind, here are some points to consider.



YOUR CUSTOMER WANTS TO ENGAGE ON THEIR OWN TERMS – NOT YOURS

Our earlier report, *The CMO's Guide to Building an Optimization Culture* demonstrated that customers don't follow linear paths when it comes to their journey. While we might want them to download a particular piece of content, or sign-up to a particular session, we can't force them. Even with the best possible lead scoring and profiling technology, it's impossible to know exactly which path an individual will choose on their journey, or what interaction option they'll prefer.

Make sure both your webinars and your on-site experience offer plenty of different ways to engage, both live and on-demand. This will help visitors to choose their own journey — and allow you to collect the engagement data to improve that journey over time.

WHAT INTERESTS YOU DOESN'T NECESSARILY INTEREST YOUR CUSTOMER

Offering many interactive opportunities isn't enough. Even if you have a lot of content on your website, plenty of resources in your webinar consoles, and lots of polls and surveys, none of it will matter if your content doesn't help your customer.

Before you create any asset or incorporate any interaction, ask yourself: does this help address the needs of my target audience? Is it compelling? If the answer to either of these is “no,” rethink what you are offering.

Use detailed customer personas as an aid to review your content offerings if you already have them. If not, build those personas out as soon as you can.

A SINGLE EVENT IS NOT THE ENDPOINT OF SUCCESS

As you choose how to optimize your B2B marketing efforts, you will need to use some quantitative indicators to measure performance, set goals and take steps to reach them.

However, **while these metrics are both insightful and important for you, they are of no value to your customer.** They care about addressing their own needs and priorities — both today and in the future.

Whenever you run a campaign, make sure to keep this at the front of your mind. Look to address their immediate needs and demonstrate you’ll be there to offer value in the future.

So how can you do this with webinars? First, as mentioned above, make sure your webinar

addresses the needs of your customer. Second, make sure the next interaction they have will offer value too; if a great webinar is followed by a poor experience, you’ve lost the chance to keep the momentum of that relationship positive. Third, keep running webinars of regular value to your buyers to keep them engaged.

FOCUSING ON ENGAGEMENT AND CUSTOMER EXPERIENCE WILL PAY OFF

There’s a chance that after reading this far, you might be asking whether the pursuit of quantitative optimization can actually align with the customer experience.

The good news is that the hard-to-measure changes you make in improving the quality of your content and how you are delivering it does result in a measurable difference.

Assessing its own data, ON24 has found a **high webinar customer engagement score correlates with a lift in the pipeline metrics that marketers are often targeted on.** An engagement score of 4-6 led to a 38% conversion of attendees to sales accepted leads. However, a more dramatic finding was that a score of 6 or higher led to an 89% conversion of attendees to SALs.

NETLINE TIP

LEARN WHAT YOUR TARGET AUDIENCE IS LOOKING FOR

A key factor to keep in mind prior to content creation is assessing whether you’re truly addressing the needs of your target audience. In order to better understand what topics and formats are resonating with your ideal buyer, using free tools — like NetLine’s Audience Explorer — that give you access to real-time, custom content consumption insights helps inform and confirm your direction. Not to mention, analyzing real-world data points also ensures your targeting strategy is capturing the hungriest audience.

ENGAGEMENT PREDICTS OPPORTUNITIES

6+ Engagement Score



89%

Conversion of Attendees to SALs



53%

Conversion of MQLs to SALs



4-6 Engagement Score



38%

Conversion of Attendees to SALs



25%

Conversion of MQLs to SALs



ON24 TIP

FOCUS ON THE QUALITY OF THE EXPERIENCE TO AVOID TURNING YOUR AUDIENCE OFF

Today's B2B buyers are overwhelmed with low-quality approaches and low-quality content. Make sure that your webinars stand out and are compelling enough to view. To read more about why a high-quality experience is critical, read our e-book on *The Engagement Imperative*.

HOW TO STRUCTURE AND OPTIMIZE YOUR WEBINARS FOR ENGAGEMENT AND CONVERSION



In our last section, we made the case that even as you look to optimize the performance of your B2B marketing and webinars, it's vital that anything you create should be built for the needs of your customers.

The good news is that careful optimization can produce a win-win where you meet your goals and customers gain value from your interaction.

Earlier, we covered how to optimize webinars for attendance and driving MQLs. But we shouldn't stop there, because webinars can provide a valuable tool in establishing and strengthening connections across the entire customer journey. Indeed, data from SiriusDecisions shows that buyers see webinars as one of their preferred channels.

Delivering engaging webinars helps to drive conversations and ultimately, conversations that will deliver conversions when the sale is made.

With that in mind, here are some steps you should take to structure and optimize your webinars for engagement and conversion.

BE CLEAR ON CUSTOMER NEEDS AND WANTS

Before you begin with planning your webinars, make sure you are clear on the exact needs of your target customers. What do they want to achieve? What is valuable for them?

Getting clarity on this aspect will make sure that any webinar program you deliver provides a compelling reason to engage.

DEFINE YOUR GOALS AND KNOW YOUR BENCHMARKS

You can use webinars for a whole variety of goals. So, what are the metrics you would like to improve? The number of free trials or demos taken? Meetings booked with sales? The number of customers who successfully onboard or complete a training program?

Use your own figures to set a SMART goal you can achieve through optimization — that is, a goal which is specific, measurable, achievable, realistic and timed.

You may find it helpful to have a [marketing brainstorming session](#) which can help you align your own goals to the needs of your customers.

DESIGN AND PLAN YOUR WEBINARS WITH THESE IN MIND

Now that you have both an understanding of what your customers need and what you want to achieve, you can plan accordingly.

To see continual improvement, you'll need to deliver or promote more than just one webinar to optimize against your goals. With that in mind, here are some areas to consider:

- **What value will you deliver through your content?** Think about what you'll present, what assets you'll share, what questions you'll look to answer.
- **What engagement options will you offer?** In addition to the content, how else will you offer attendees and viewers the opportunity to engage? Will you take questions? Will you ask and respond to polls? Will you show a video or do a screenshare?

- **How will you structure your webinar console?** With many potential options to drive engagement, think carefully about how you will design the webinar console to make the most valuable widgets and interaction points as accessible as possible. Also consider branding your console to improve its visual appeal.
- **When will you encourage engagement through your delivery?** Planning the delivery of your webinar should be more than just running slides. During your delivery, plan when and how you will encourage your attendees and viewers to interact. For example, you might plan polls at the beginning and in the middle, Q&A throughout the session, or reference the assets as you present.
- **When will you deliver calls-to-action?** If you have a particular goal in mind (for example, to get attendees on a free trial or demo), plan how and when you'll ask attendees to take that next step.
- **How will you take the conversation further?** The webinar shouldn't be a single event where you speak with your attendees. Instead, look for opportunities to develop conversations that can continue after the session. Having your sales or customer success colleagues on board can be particularly valuable here.

ASSESS PERFORMANCE AND OPTIMIZE ACCORDINGLY

After you have sufficient data, assess your performance and look for areas where you can optimize your webinars.

For example, you might vary the layout of the webinar console to prioritize particular engagement options. You might also change the times at which you deliver engagement options and provide a call-to-action.

USE SIMULIVE AND ALWAYS-ON TO MAXIMIZE OPTIMIZATION OPPORTUNITIES

Every live webinar will have difficult to control variables. However, by running *simulive* and *always-on* webinars, you can make changes without even having to record the session another time.

Simulive and always-on sessions also offer the benefit of making webinars available whenever anyone wants to access them. ON24's *Webinar Benchmarks Report* also notes that buyers are increasingly accessing webinars that have already been broadcast, so offering content in this way helps to serve your customers in a flexible manner.

DON'T FORGET THE POST-WEBINAR OPPORTUNITY

Once your live webinar has wrapped, or when your viewer has finished with their session, look to optimize the post-webinar experience.

Consider how you can continue the conversation. Some options include:

- Inviting them to your next webinar.
- Sending a personalized message after attendance.
- Providing additional useful information to help them with their goals.

ON24 TIP

USE YOUR WEBINAR'S ENGAGEMENT SCORE AS A METRIC FOR OPTIMIZATION

The best webinars offer a wide range of choices through which your prospects can engage. But it can be difficult to separate all the different elements. For an easy-to-use metric, ON24's *Engagement Score* combines multiple behaviors into one number that you can benchmark your performance against.

HOW TO USE WEBINARS TO BOOST SALES AND SQLS



In the previous section, we looked at how to optimize webinars to increase engagement and drive conversion. However, from examining your performance across the customer journey, you may find a bottleneck at the point where marketing hands its MQLs over to sales — even if your sessions have been brilliantly engaging.

Where this problem might identify itself is in the proportion of MQLs that become sales-accepted leads and sales-qualified leads.

Because this has an impact on marketing's contribution to pipeline, it's something marketers need to monitor and find ways to keep the process moving forward smoothly. In this section, we are going to see how you can use webinars to improve this metric.

FIND OUT FROM SALES WHAT'S BEHIND SALES AND SQLS

Because marketing's job does not stop at the handover of an MQL to sales, you need to monitor your CRM for what happens to those MQLs. Does a lead become a SAL or an SQL, or did it get disqualified somewhere along the way? And, if they were disqualified along the way, why?

The best way to find this out is to go directly to the source. **Speak to sales directly and identify**

what stops leads from being accepted. Are leads going cold because they aren't being picked up as quickly as they should be? Is there information about the leads that marketing isn't including in their lead scoring process that is causing leads to be rejected when they get to sales? What questions and approaches do sales use to qualify a lead?

USE THESE ELEMENTS TO OPTIMIZE YOUR WEBINARS

In B2B sales, getting to conversion means you need to start a conversation. So, you can use your webinars to ask the questions sales reps typically pose and begin the conversation during your session. As an example, if sales wants to know about potential budgets, you can build a question about budgets into a poll and then pass those results over to sales.

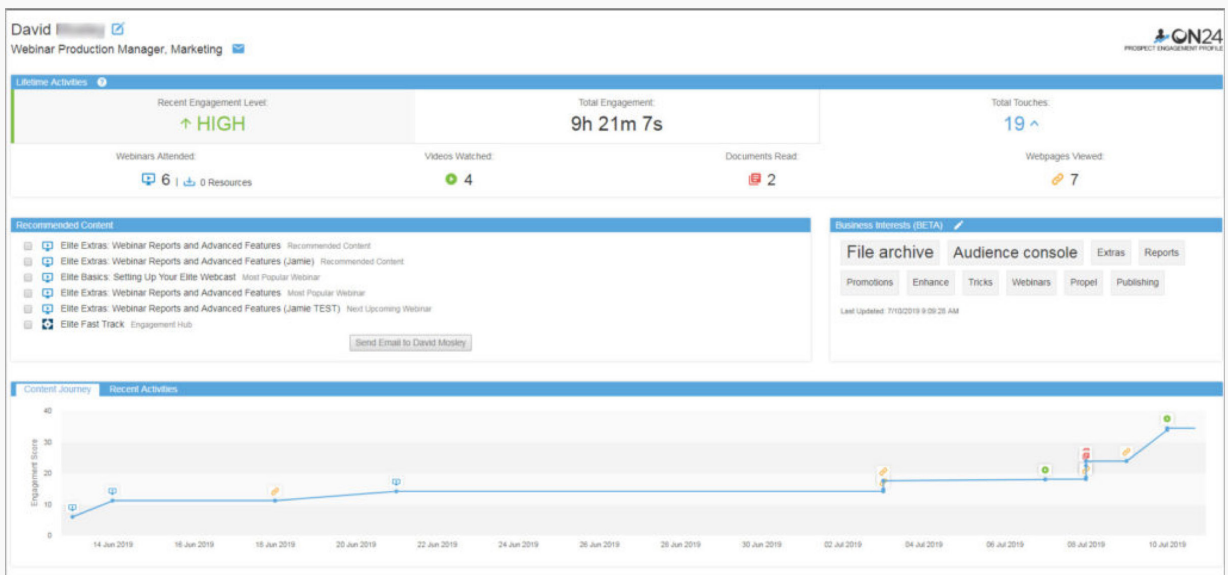
While it's always possible for marketing to start conversations within a webinar and then manually hand prospects over to sales to continue and expand those conversations, **it's also helpful to have someone from sales on the webinar.** They can either be out in front presenting or in the background doing Q&A.

Keep in mind it's not all about metrics. You want to enable your sales team to develop one-on-one connections. Webinars can help with that.

BRING WEBINAR DATA INTO THE WORKFLOW OF YOUR SALES TEAM

Another way you can help marketing leads to become sales-accepted leads is to **bring the insights gained through your webinars into the tools they use** — namely, the customer relationship management platform.

ON24's Prospect Engagement Profile can help here, as sales team members can see the actions and engagement points an individual takes during a webinar. This can help improve conversations by providing talking points based on what they have read or consumed.



ENCOURAGE WEBINARS AS AN ALWAYS-ON SALES ENABLEMENT TACTIC

All marketers want sales to have the tools they need so that they can do their jobs effectively. **Webinars act as a great sales enablement tool — both as a live session and one that is always-on, ready for viewing.**

For example, if the sales team is struggling with qualifying a lead because it has either gone cold or they are not getting a response, sales can invite them to attend a live webinar to ask questions, or refer them to a past webinar that they can watch on their own time. This can help to reignite engagement and conversation which can move the lead closer towards being sales-qualified.

ALIGN PROMOTION OF WEBINARS SPECIFICALLY FOR THE SALES STAGE

Consider creating webinars specifically for leads qualified by marketing, but have not yet progressed into opportunities. Typically these will be aligned further towards the end of the buyer journey, containing information to help them become engaged and interested in speaking to sales.

This could include doing customer webinars, where you invite brand advocates to discuss how your product or service has made them successful. Also, consider creating an on-demand demo webinar — Sage Intacct, for example, manages to drive 50% of their webinar pipeline purely from a daily demo webinar.

Use your marketing automation system to identify and target just those leads which have reached MQL status, but are yet to become SQLs.

MONITOR, TEST, IMPROVE

No matter what you are doing, be it amending your webinars to fill in the gaps for SALs and SQLs, creating webinars as a sales enablement tactic or creating webinars specifically for that stage of the buyer's journey, you need to always be monitoring, testing and optimizing over time. And don't forget to make sure marketing gets credit for opportunities in your CRM.

ON24 TIP

MAKE DATA FROM Q&A AND POLLS AVAILABLE TO SALES TO HELP WITH THEIR CONVERSATIONS

In an ideal world, your sales team will be present on your webinars to jump in on relevant questions and respond to the data your attendees are sharing. But that's not always feasible. To help them kickstart conversations and accept leads, bring that data into their workflow. For more information, check out ON24 Intelligence.

HOW CONTENT HUBS CAN ENCOURAGE ENGAGEMENT THROUGH CONTENT BINGEING

Throughout the past few sections, we've talked a lot about driving engagement and how it shouldn't stop just because marketing has handed over a lead. Equally, engagement shouldn't cease once sales closes a deal and customer success takes over. We want to keep buyers and customers, alike, engaged throughout their journey.

One way to keep engagement going is to have a place where buyers and customers can access content anytime they want. One way to do that is to create content hubs where anyone can access a veritable buffet of information as they see fit.

Demand generation portals such as [NetLine](#) are well-known for acting as one-stop-shops for a buyer's needs. But you should also create and optimize your own — and if you're an ON24 customer, [ON24's Engagement Hub](#) can help you create one. Read below to find out why and how.



WHY ARE CONTENT HUBS SO VALUABLE?

There are a whole host of reasons why content hubs are valuable to your customers, leads and your entire marketing team.

- **Content hubs provide an opportunity for continual engagement.** Whether your content hubs are used for early-stage marketing or existing customers, providing a hub allows your audience to access content whenever it wants in one location. And as you can continually update them, there are ample opportunities for optimization.

- **Content hubs allow buyers to educate themselves easily at their own pace.** Whether someone wants to learn everything as quickly as possible by consuming binge-worthy content, or if they prefer to ‘snack’ on content over time, having a single place allows them to engage content however it suits them without needing to search across multiple locations.
- **Content hubs can be personalized to fit your exact customer.** This can be particularly valuable if you’re engaged in account-based marketing or are targeting specific industries, roles or verticals.
- **Content hubs provide a resource for marketing, sales and customer success.** If anyone wants to send a lead or a customer to your website for further information, content hubs provide an easy and convenient resource.

WHAT IS CONTENT BINGEING AND WHY IS IT VALUABLE?

Netflix and other streaming services have made binge-watching, where viewers devour an entire TV series in one sitting, a common occurrence.

B2B marketers can encourage prospects and customers to consume content in a similar manner through content hubs. Presenting a lot of content of value in one place entices them to engage more than if they had simply been put in a

drip campaign or nurtured slowly over time. This webinar-bingeing approach offers the following benefits:

- **Bingeing allows for rapid learning.** Whether your prospect is trying to educate themselves on how to solve a problem, or a customer is learning how to use your product, bingeing allows that process to be accelerated.
- **Bingeing provides intent data.** The information collected as a user engages can be used by marketing, sales and customer success to help tailor their approach to that individual.
- **Bingeing helps to develop and strengthen relationships more quickly.** As people become more acquainted with your company and its offerings, conversations — and the conversions that follow — become easier.

HOW CAN CONTENT HUBS AND CONTENT BINGEING BE OPTIMIZED?

If you haven’t yet created a content hub, start off by creating key pages with compelling value propositions. Grab the viewer’s attention with titles and calls to action expressing how watching your webinars and downloading your content will help with a certain pain point or get them through a particular stage of their journey.

Once you have a baseline to optimize against, you can try to optimize the performance of your content hubs:

- **Test different content.** Explore both different themes and messages, and different types of content. You'll also want to embed and organize multimedia assets that will entice viewing video clips, signing up for webinars and downloading resources that viewers can engage with.
- **Create and test multiple content hubs.** See if different approaches work with different audiences, and use the lessons learned to improve your other hubs.
- **Use marketing automation to drive relevant visits.** Whether you're trying to push a prospect over the line to become qualified, or if you're trying to re-engage a customer that hasn't been seen in a while, invite them to check out your content hub. You can also use ad targeting to create a custom audience of people who haven't turned up recently and bring them back in.

NETLINE TIP

REMEMBER THAT BUYING UNITS ARE MADE UP OF A RANGE OF PEOPLE. USE CONTENT TO ENGAGE THEM ALL.

It's tempting to go straight for the most senior decision-maker when creating and promoting your content, but that only accounts for a fraction of the content consumed by your target accounts. 86% of all content consumption activity occurs below the C-Suite. To benchmark your own performance, download [NetLine's 2019 State of B2B Content Consumption and Demand Report for Marketers](#).

SECTION 4: OPTIMIZING FOR RETENTION AND LOYALTY

HOW TO USE WEBINARS TO OPTIMIZE CUSTOMER SUCCESS



A key part of retention and loyalty is ensuring your customers get value from your product or service. This is the key responsibility of your account managers and/or customer success team. But, as marketing should focus on the entire customer experience, this vital aspect of customer marketing shouldn't be forgotten about.

Here are the steps you should take to use webinars in optimizing that process.

FIND OUT THE KEY STAGES OF YOUR CUSTOMER SUCCESS ACCOUNT JOURNEY

To optimize customer success, you need to go to the source. Meet up with your customer success team or account managers and look at their customer success account journey. Examine each step of the journey and the processes customer success goes through to pinpoint where marketing

can help. While your organization might have its own approach, typically a customer success journey will consist of the following.

1. Onboarding

Look at how customers are brought on board.

What are the first steps the customer success team takes to welcome customers to your product or service and help them to get value?

Are they using resources like webinars to do this? Once you know what these steps are, you can start to figure out how to optimize them.

2. Product or Service Usage / Delivery

Evaluate how customers are using the product or service after onboarding. Ask what key steps are involved and **determine what the customer success team wants customers to achieve.** Then you can figure out how can marketing can help encourage the customer to take the right behavior.

3. Continued Use

While it's always important to make sure your customers start using your product or service, it's also just as critical that they continue to use it. **If they do not continue to engage, any renewal or repurchase conversation will be far more challenging.**

Again, as marketers, we need to ask what is it that the customer success team wants to see customers doing and what role marketing can take to help them achieve this.

4. Repurchase / Renewal / Upsell

This brings us to the final step: getting the customer to stay with your business and potentially adding on to what they already have. To assist customer success with this process, **it's good to know how and when these conversations about renewals, repurchases or upsells happen.** What kind of message does your customer success team want to deliver?

It's also helpful to know what kind of information marketing can provide to customer success, such as engagement data and usage. Providing this information enables customer success to tailor their conversations with customers in the right direction.

IDENTIFY THE METRICS TO MEASURE, TEST AND IMPROVE

This leads us to metrics and the data marketers can provide to customer success across each stage of the customer success account journey.

These metrics will vary across companies and products, but they may include adoption actions used in the onboarding stage of the journey, the number of active seats, or how many logins have happened over a period of time, giving customer success an idea of how much usage is occurring.

Metrics are essential to customer success for two reasons. First off, **metrics help to identify customers that are at risk of churn.** Knowing who is likely to churn gives your team the opportunity to take steps that retain customers and improve ongoing relationships.

Second, **metrics can also reveal those customers that are doing well with the product or service, leading to upsell opportunities,** or which customers could become brand advocates.

IDENTIFY WEBINARS THAT COULD ADDRESS METRICS AND CUSTOMER SUCCESS STAGES

The next step for marketers is to use these metrics and identify what webinars can be created to help optimize the customer success journey.

For example, if the goal is to increase the number of customers using the service/product, **look at what webinars or campaigns marketing can create** to improve the active user metrics.

CREATE AND RECORD THESE WEBINARS

You've identified and prioritized what metrics you need to address. Now, it's time to create the webinars and focus on the outcomes you hope to achieve.

For example, if your goal is to optimize continued use, then a webinar educating users on more advanced features of the product/service may encourage them to put these features to use.

MAKE THESE WEBINARS ALWAYS-ON AND ENABLE YOUR CUSTOMER SUCCESS TEAM IN DELIVERY

Lastly, make sure these webinars are always on for consumption and available to your customer success team. **If the customer success team is aware of and has access to these resources, they can also use them in their own interactions.**

Always-on webinars provide continuous access to informative content, allowing customers to access information when and where it's most convenient for them.

ON24 TIP

GET YOUR BEST CUSTOMER SUCCESS TEAM MEMBERS TO PRESENT WEBINARS

Your colleagues in customer success will be intimately familiar with how your customers can get the most out of their relationship with your company. As such, convince them to speak directly to the accounts they are looking to retain and grow. To find out about a leading EdTech company does this, watch our on-demand webinar on [Securly's Guide to Scaling Customer Success](#).

FIVE WAYS WEBINARS CAN REDUCE CHURN RATES



In our previous section, we talked about how to optimize customer success by identifying goals within the customer success account journey. Each stage of that journey will have its own performance indicators, but, ultimately, retained revenue and customer lifetime value is the goal.

However, a metric on the flipside of customer lifetime value is churn. As ON24's CEO Sharat Sharan has said before:



THESE ARE TWO SEPARATE METRICS, BUT THEY'RE SO INTERWOVEN THAT MARKETERS SHOULDN'T THINK OF ONE WITHOUT THE OTHER. CUSTOMER LIFETIME VALUE IS THE NET PROFIT YOU CAN EXPECT FROM ACQUIRING A NEW CUSTOMER—A NUMBER THAT INCREASES WHENEVER YOU REDUCE CHURN."

So, how can webinars help with your optimization efforts in terms of reducing churn? Here are a few points.

I. INCREASE ONBOARDING SUCCESS

Reducing churn starts as soon as your customers start the onboarding process. Interactions must be optimal from the get-go, and the customer must be able to derive value from the product or service they've just paid for.

Webinars can optimize the onboarding process by educating your customers about your product or service. These webinars can bring the customer up to speed, show them how to use the core functionalities of your service and walk them through their first actions, whether it be setting up things like software or using the product for the first time.

Keep in mind, webinars don't necessarily need to educate. Onboarding webinars can just as easily be used to make the customer feel welcome and help them to start deriving value from the product or service.

2. WIN NEW USERS TO AN ACCOUNT

In most cases, there is usually more than one user of a product or service within a company. For instance, with software, there are often a number of regular users across an entire company. So, **one way to help reduce churn is to get as many people as possible on the team or within the company actively using the product or service** so that they can see its value.

Once again, webinars can help with the onboarding process of new users, but they are also a useful resource in increasing adoption. Webinars can be used before onboarding as a way to answer questions such as ‘What is this?’ and ‘Why does it matter?’ They can also be used from an account-based perspective where you invite a selected group of stakeholders and answer questions one-on-one.

3. CONTINUALLY EDUCATE AND UPDATE

Once onboarding is done, you’ll want to make sure your customers continue to use your product or service throughout the life of the contract. This means ensuring you are continually **educating and updating** customers on new features or new products. What better way than webinars to spread the word and make sure your customers are aware of new features and explain how these new features will benefit them?

Additionally, companies often experience a shift in staff with employees leaving and new ones coming in. **Having access to onboarding and educational webinars, thanks to the always-on nature of webinars, allows new employees to get up to speed with the product or service** and learn on their own time.

4. BUILD LASTING CONNECTIONS

Another way to reduce churn is to build lasting relationships with your customers. And the best way to do this is to engage with them.

Webinars, by nature, are built for interaction. Beyond the fact that webinars can be live, other functionalities, like Q&A and poll questions, also encourage engagement. **Webinars also help you to identify people within your account you can begin to build relationships with**, as high engagement will likely indicate a willingness to have conversations.

If you are at all apprehensive about whether you can create an engaging webinar, have no fear. ON24’s Webinar Best Practices Series can help you out with that.

5. CREATE CUSTOMER ADVOCATES

Building connections leads right into the last way webinars can help reduce churn. Once you've made and strengthened these relationships with your clients, **webinars give you the opportunity to turn them into customer advocates** both within their own company and externally.

Get them involved in a webinar. A simple and low-effort way to do this is to invite them to take part in a panel discussion.

This is a win-win for both you and your client because while they are helping you out with advocacy they are also raising their profile and positioning themselves internally as an expert.

ON24 TIP

**COLLATE WEBINAR ENGAGEMENT
ACROSS AN ENTIRE ACCOUNT FOR A
BIG PICTURE VIEW**

Webinars are great for tracking the engagement of a single contact, but they can also provide an overview of how an account as a whole is engaging. This can help get a better picture of that account's health. To find out more, check out ON24's Account Engagement Profile.

HOW TO USE WEBINARS TO CREATE BRAND ADVOCATES



In this section, we'll investigate how you can use webinars for your customer advocacy marketing. Let's get started.

IDENTIFY SEVERAL POTENTIAL ADVOCATES WITH CUSTOMER SUCCESS

As part of your optimization efforts, you may want to consider focusing on how many users you can turn into brand advocates. Can you increase the number of customers who can either join you on a webinar or take part in a case study?

There are a few ways of identifying how many potential advocates you have. Sit down with your customer success team and, together, **identify how many users could make compelling advocates for your product or service**. Also, examine engagement and usage data in your CRM and any other metrics that can help you pinpoint potential advocates.

It's important to create a list with more advocates than you need, as not everyone will be able to assist due to commitments at work and elsewhere.

IDENTIFY WHAT YOU WANT THEM TO DO FOR YOU

Once you have your shortlist of advocates, you now need to identify what you want them to do for you.

Try keeping it small at first. It might even help to create your own customer advocate journey. Perhaps start by asking them to sign-off on a quote singing the praises of your product or service and then progress into participating in a full case study and then taking part in a webinar or presenting at a live conference.

Make them an offer they can't refuse

We aren't talking Godfather style here, of course. You or your customer success team can send out an email asking them to do whatever you'd like them to do (provide a quote or case study or participate in a webinar) and **offer them an incentive or reward**. The incentive can be anywhere from a discount or some swag, or as simple as a thank you. It's up to you and what you think will properly reward them for their efforts.

Suggest webinar formats that make it easy

Once you have their involvement, suggest webinar formats that will make it easy for the advocate to participate.

The interview and panel formats are perfect for this because all participants need to do is to show up, have a webcam ready and answer questions. They can even be pre-recorded so being present at the time of broadcast isn't necessary.

Get them to commit to a particular time, place and activity

Once you have a potential advocate's interest, **secure their commitment in their calendar**. This will help both you and your new advocate to plan accordingly.

BE FLEXIBLE ON TIME AND COMMITMENTS IF NEEDED

That flows right into the next point: be flexible on the time and commitment required.

Keep in mind, your advocates are busy professionals and other priorities might come up, so **being respectful of their involvement and flexible on commitments can only help to strengthen your long-term relationship**.

GET THEIR NAME IN FRONT OF POTENTIAL PROSPECTS AND CUSTOMERS

Once you've got the content from the advocate, whether it be a case study or a webinar, get your advocate's name out there for people to see.

This is important because not only is this the job you wanted them to do, but **it also reassures your advocate that their input has been useful and valued** and that their advice is reaching audiences.

REWARD THEM AFTER THE WEBINAR AND BUILD ON THEIR EXPERIENCE

Make sure to reward your advocate after they've participated in the webinar. Rewards can be either material or immaterial; **just make sure they feel supported and appreciated** for their time and efforts.

Lastly, build on their experience over time so they continue to deepen the relationship with you. Ensure they feel valued and happy to speak up.

NETLINE TIP

USE YOUR CUSTOMER ADVOCATES TO BRING A HUMAN TOUCH TO YOUR CONTENT

Some of the most popular content is built upon a framework that is relatable. Blending work and life into interesting bits of useful knowledge are the secret recipe for engaging content. As such, encourage your customer advocates to speak about their lives outside of the day job to build deeper connections with your customers and prospects. More information on the typical personal interests of B2B buyers can be seen in NetLine's 2019 State of B2B Content Consumption and Demand Report for Marketers.