

## INTRODUCTION

Digital marketing — and its importance in driving revenue — has rarely been more crucial for organizations of all stripes. In fact, according to “[The CMO Survey](#),” conducted by Duke University’s Fuqua School of Business, spend on marketing is [the highest it’s been](#) since the survey started in 2008.

But simply having a bigger role to play in an organization’s success isn’t enough. To cement its spot at the table, marketing must not only generate leads for sales, but actively help sales to convert those leads into paying customers.

To make this happen, marketing and sales must align on a virtual selling strategy. Both teams need to take a step back and develop a keen understanding of how the larger marketing apparatus operates and feeds into the sales funnel. Then, they must understand and agree on how marketing campaigns — and the insights driven by those campaigns — can seamlessly inform the sales team on activities and actions that can help turn a prospect into a customer.

This Virtual Selling Playbook is designed to help you on your journey to driving more effective virtual selling results. Created primarily for B2B marketers, this playbook will help you to gain a better understanding of the fundamental principles marketing must have in place to enhance virtual selling operations and contribute to the bottom line.

The first section of this playbook details how marketing can optimize its digital experiences to help drive leads and, more crucially, make effective measurements of its performance.

The second section of this playbook lays out the fundamental principles of how marketers can tie their digital activities to sales success.

This playbook is designed as a high-level guide. So, return to it as your program matures to ensure you’re staying on track.



## OUTCOMES OF THIS PLAYBOOK:

By implementing the principles of this playbook, marketers should be able to:



### Increase conversion rates.

Measure, test and adapt key touchpoints to lift performance.



### Build faster buying cycles.

Convert and qualify potential buyers faster to accelerate revenue.



### Increase contribution to marketing pipeline.

Convert a larger share of prospects to active opportunities to lift your contribution to the bottom line.



### Improve buyer experience.

By providing sales with unique insight, their interaction with buyers will offer more value.



### Increased and accelerated pipeline.

Creating touchpoints where sales can interact early in the buying journey will increase pipeline and reduce time to closing deals.



### Alignment with sales.

Helping sales teams improve efficacy will improve departmental relationships and joint endeavors.

## WHAT TO EXPECT:

### Inputs:

- Any key metrics for marketing performance as a whole e.g. MQLs, number of opportunities, marketing-generated pipeline value.
- Baseline figures for leading metrics (e.g., acquisition, conversion, engagement scores) at a touchpoint, channel, and campaign level.

### Outputs:

- Improvements to key marketing goals (e.g., increase in MQLs or opportunities).
- Forecasted improvements to key marketing goals, based on initial tests and wider implementation.
- Improvements from baseline figures for optimized touchpoints, channels, and campaigns.

The first steps in the virtual selling process are the digital experiences brands present to prospects. To make the most out of these touchpoints, and to provide the actionable insights sales needs to drive conversions, marketers must continuously optimize and improve their digital experiences. A focused effort to improve digital experiences will also help marketers better measure and improve their quantitative performance of the digital efforts and drive. The end goal of optimization is to craft better buyer experiences and drive lasting uplifts in marketing's contribution to business success.

## PROCESS:

### 1. Review marketing goals, targets, and identify leading metrics.

Every digital interaction is measurable, which means there is a real risk of being overwhelmed by the opportunities — both real and imagined — for optimization. Avoid optimization creep by focusing your research on key marketing goals and targets. Doing so will help you to narrow down on the areas that will drive improvements that matter.

Bear in mind any leading metrics the business cares about. For example, senior leadership may be most interested in MQLs and opportunities. Leading goals you might then use could include lifting the average engagement score (if this feeds into your lead scoring) or improving the share of MQLs that become SALs.

## 2. Audit your performance of current touchpoints.

With your key goals, targets, and leading metrics identified, you should now assess your baseline performance across touchpoints, channels, and integrated campaigns. Take the time to think big. A broad, conceptual view of your marketing activities will help you to think of performance in the context of the entire buyer's journey, rather than a narrow focus on single points of interaction.

For your touchpoints, use industry benchmarks (such as [ON24's Webinar Benchmarks Report](#)) to identify underperforming areas. Landing page conversions, total registrations, percentage attendance, and engagement scores can all be assessed.

Industry benchmarks can also be used at the channel level. Examples might include cost per acquisition for net new contacts across paid media, opens and click-through rates for email, or conversion rates for content downloads.

With your integrated campaigns, assess which ones are contributing most to pipeline. You may find significant differences between them, or that the performance of particular campaigns has declined over time. Also, look at any post-engagement performance, as you may find a gap between initial and subsequent engagement.

Make sure to factor in volume and value in your assessment. A high conversion rate for a particular touchpoint will not drive much performance if the volume or value of the prospective buyers here is low.

## 3. Prioritize optimization goals for improvements.

Having the whole picture for the performance of your marketing efforts allows you to identify the areas you need to focus on to drive performance towards key goals.

To start, choose discrete areas to set goals against rather than broad aims. This will allow you to test the feasibility of improvements before promising more than you can deliver.

Then, look for areas that will have a long term impact. For example, an uplift in performance on an evergreen asset or nurture program will deliver ongoing benefits, whereas a change to a one-off campaign won't.

Once small scale success is demonstrated, you will then be in a better position to propose wider goals and request support and resources for continuous optimization.

## 4. Implement changes and tests.

With optimization goals in place, the next step is to roll out changes and tests to increase performance.

Keep the quality of the buyer experience as you implement changes. On the surface, a whole page pop-up might perform well, but visitors may be annoyed by this and damage in perception may cost you more in the long run.

Make sure you inform any key stakeholders with sufficient notice so they can implement any changes. This may include booking in design time for new creative and making sure changes to your website are in the next sprint or delivery cycle for your agency or tech team. You should also ask your direct reports in marketing to balance their commitments so they can deliver when needed.

## 5. Monitor, measure and improve.

Even if your changes are in line with commonly-accepted best practices, such as reducing the number of fields on a landing page, monitoring and measuring is necessary both to avoid making changes that are negative and to provide you with data that informs future optimization efforts.

If you are running tests, allow for sufficient time to generate statistical confidence in changes. B2B businesses typically have fewer prospective buyers and lower volumes than consumer-facing organizations. Account for this fact in your planning.

Look to connect any improvements to your key marketing goals. For example, if your landing page conversion rate is up, investigate the impact on the total number of qualified leads. This may provide data to model the impact of wider scale improvements, which can build the case for increased resources.

Finally, to deliver ongoing improvements, schedule optimization reviews in advance or add it to the agenda of existing meetings where you reflect on marketing performance. Otherwise, it can be all too easy for optimization to fall off the agenda, resulting in an opportunity cost that may be difficult to recoup.

## NEXT STEPS:

Optimization and improvement efforts should be an ongoing and regular activity to generate long-term performance uplifts. But heavy workloads for marketers makes optimization an often overlooked process. Failing to make optimization a regular activity increases the risk that marketing's performance will decline — especially as buyer behaviors and expectations change. By contrast, small and consistent optimization is more likely to deliver compound improvements over time.

Marketers should also consider how the technology available to them can help sales teams improve their performance and convert a larger share of marketing-generated leads to revenue.

## WHAT TO EXPECT:

### Inputs:

- User-level engagement data from experience touchpoints, ideally within your marketing automation platform or CRM.

### Outputs:

- Response metrics such as replies to sales outreach.
- Funnel and pipeline metrics, from MQL to total opportunity value.
- Buyer and account-level engagement scores.

Leads and opportunities generated by marketing mean little if they are not converted to paying customers. Fortunately, marketing technology can be of great value to sales teams.

Marketers (particularly those in revenue operations) should want to provide sales with both the ability to engage prospects directly and use engagement-driven data to personalize one-to-one communications. To make this happen, marketers need to coordinate with sales and organize digital experiences so the sales team has the essential context they need to turn a prospect into a client.

## PROCESS:

### 1. Identify relevant experience touchpoints for sales.

Before encouraging productive engagement between prospective buyers and sales, take some time to list out the key touchpoints where the two will interact. You may have already done this by mapping out the buyer journey or by following the steps in the first section of this playbook.

Some examples of touchpoints might include:

- When buyers browse your website, generating data in your marketing automation system or web analytics.
- When buyers access content hubs and landing pages, sharing their data for access to information.
- Live chat on your website.
- Webinars with interactive options, such as Q&A, polls and content downloads.
- When buyers interact with sales-delivered content, such as proposal decks and case studies.

## **2. Separate touchpoints between self-driven and responsive engagement.**

When buyers interact with your brand, they can either do so in a self-driven fashion or in response to sales activity. Self-driven engagement provides data to inform sales conversations while responsive engagement options provide an option for sales teams to steer the buyer journey in a personalized fashion.

Breaking your buyer touchpoints into these two categories allows you to discuss the potential plays that your sales team will use for each.

## **3. Connect with sales stakeholders to prioritize engagement actions and plays.**

Improving both the use of engagement data and the quality of interactions between buyers and sales should be an evolving and iterative process.

Meet with sales leaders and any champions you have in the sales team to present the touchpoints and collaboratively discuss how they can drive

more effective sales plays. Then, agree on which touchpoints to prioritize based on what is most likely to be effective. Some examples might include:

- Developing personalized outreach strategies based on data from self-driven buyer behavior, such as web browsing and content downloads.
- Scheduling webinar demos where a designated salesperson answers live Q&A, or designating a sales person to answer live chat on the website at specified times.
- Changing existing outreach to make it more personalized, such as inserting customized fields that go beyond “First name” and “Company name.”
- Creating account-based and persona-based experiences that perform better and can become part of the sales toolkit.
- Informing sales of key engagements directly within their preferred workflow tools, whether CRM, email or message notifications via Slack or Teams.

## **4. Design the improvement and deploy to a test group.**

Changing sales behavior is not an easy task and barriers may emerge during deployment. Issues can range from incorrect contact-level data to malfunctioning technology and tools and more. Having these hiccups can damage the buyer experience and should be minimized as much as possible.

However, optimizing and improving digital experiences means dealing with growing pains. To keep issues to a minimum, identify a small test group or champions in the sales organization to help you identify issues early and remedy them. Make sure to have technical problem solvers (such as your marketing operations or IT team) ready to respond.

Rolling out with a small and dedicated group is critical to maintaining the support of sales. If a perception develops that new processes are not helpful, it will be far harder to roll out further improvements in the future.

### **5. Measure the impact and roll out iteratively.**

Maintaining the ongoing support of sales and the wider business depends on how well you can demonstrate success. As such, make sure to measure how your changes to buyer engagement with sales impact on performance.

### **NEXT STEPS:**

Improving the buyer experience requires a strong and supportive relationship with your sales department. In particular, you will need support from sales leaders that will drive teams to adapt the way they work to changing market conditions. Make sure to continually prove the value of these improvements, while moving iteratively at a pace where sales can modify their habits and processes.

Finally, also accept that not all changes will result in drastic improvements. Some may even fail entirely. This fact reinforces the need to work with supportive teams and champions, who will understand any problems as you navigate potential hurdles and growing pains.