

B2B Marketing Tool Kit

**TIPS AND TRICKS FOR IMPROVING
YOUR BUSINESS-TO-BUSINESS
MARKETING STRATEGY**

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DIRECT MAIL

Back to Basics

Why direct mail should be part of your B2B multichannel campaign

With increased efficiencies in manufacturing, along with the ability to hold ever-increasing content due to technology (think video chips that can hold hours of content used within the mail piece), direct mail is still a viable and critical component in B2B multichannel campaigns.

However, with the advent of these advances, keep in mind direct mail basics in order for you to garner the greatest ROI possible.

1. Understanding what your data really means is critical.

You can have the coolest, most innovative mail piece, but if it goes to the wrong audience, it is just wasted money. Data needs to be the driver of your marketing decisions when you use direct mail. Remember that all segments are not created equal, and vary your communication accordingly. Big data today means more opportunities tomorrow for direct mail. Work with a list broker to help you discover your data universe. Profile and model your customer data. Many spreadsheet programs and direct mail software packages are a great start, or call up direct mail folks, data processing firms, or even printers who specialize in mail, they are almost always happy to help.

2. Copy is paramount.

Know that direct mail is a copy driven medium. Copy creates the emotion. We all know that emotion outsells logic. Invest in great copy. It will pay you back. If you want to succeed, after you have figured out your data—both for customers and prospects—test copy messaging

to help improve results. Do people prefer long copy or short copy? They prefer well-written copy that speaks to them and creates relevance. Your copy needs to be as long as needed in order to tell your story effectively and elicit a response.

3. Vary your copy to the segments you find.

Segmentation is here to stay and it will only become more critical to your marketing success. Thus, lose the mass media mindset and understand your prospects and, even your customers, are broken into distinct categories. The key is marketing relevancy, and data + copy that speaks to each segment wins the sale. Digital printing and more sophisticated software and printing personalization capabilities make hyper-segmentation much easier today. Work with your data processing firm and printer to figure out segments and variable data capabilities.

4. What's your offer?

If you can, make an offer and always test your offers. Most people assume that their best offer is the most successful. This is seldom the case. Your offer must be credible, believable and compelling enough to get the reader to react and respond. Offer tests are interesting because they allow us insights into what will motivate someone to respond. If your offer is too good to be true, people will not respond. The key is to find the best offer with a balance between credibility and response; and that means good, legitimate prospects from your mail. A great offer that produces poor prospects is often more costly than no response at all.

5. Timing is key.

Keep in mind the timing of your mail piece and if what you are selling has any seasonality to it as far as sales trends based on history. If all your competitors' mail at the same time, can you mail sooner or

later to stand out? Have you tried a multi-tiered mailing approach?

6. Competitive factors

Know what your competition is doing. Check out their website(s), blogs, search for their digital ads and position yourself for success by differentiating your company, product or service from them. If you want someone to switch to you and you are offering up the same incentive, or less, they are not likely to buy what you are selling.

7. What format is best?

As a rule of thumb, letter packages tend to work better for prospecting. You can send self-mailers and post cards with more confidence to customers and past customers as they already know you and you have likely established credibility with them.

The old wisdom is that the letter sells and the brochure tells in direct mail. Keep that in mind. If in doubt, test formats after you have tested data, copy and messaging/offers.

8. Multichannel approach and testing

Increasingly direct mail works best as part of an integrated, multi-channel measurable marketing campaign. Use your digital work to help define what's working and what is not. Then, use that data to test in direct mail and determine if it translates well—into more business—for you on the printed side of things with direct mail. That's an intelligent approach to follow.

Direct mail has seen up and downs in the marketing planning process. Understanding its power to help close the sale, differentiate yourself and contact folks in an old, effective channel that your competition may have overlooked is reason enough to add this time-tested strategy to your marketing mix today

—Grant A. Johnson, president/CEO, Johnson Direct & Digital

ANALYTICS

A Smarter Process

Utilizing advanced analytics to improve B2B marketing efforts

B2B marketing is in the midst of a transformation to more sophisticated campaigns with new approaches to demand generation that have similar traits to B2C-type campaigns.

Technology advances in marketing analytics have enabled a much more personalized approach to B2B marketing, with targeted messages based on the specific characteristics of individuals, where they stand in the purchase cycle and their current financial status. This is a positive development given that success in today's B2B market requires a smarter analysis process that can effectively utilize a broader set of data points, incorporating the most recent business ratings, business reviews, consumer product data and social

business within a company or in functional areas such as sales, operations and finance. To fully achieve the benefits of today's marketing analytics, marketers need to set up an ongoing, internal data collection process that can rationalize all of these disparate data sources into a consistent and current record of consolidated, cleansed and enriched business data.

For companies that have both consumer-facing and B2B lines of business, there should be some indication when a company provides service to a business owner as an individual, as well as to that person's business.

The goal is to build a current, verified storehouse of customer and prospect information that can be seen in a single, comprehensive customer view. Having on-demand, real-time business intelligence will enable B2B marketers to quickly engage with prospects, spot new opportunities and fine-tune campaigns to connect with the right people at the right time with a relevant solution.

Intelligent customer profiling will give you a better picture of which marketing campaign elements are most likely to have impact.

media data into the planning process.

Utilized correctly, advanced analytics can help uncover the traits that define the most profitable customers, identify new business opportunities based on wallet share and risk analysis, offer real-time insights to make faster, smarter campaign decisions and deliver better targeted leads to the sales organization. Analytics also can more accurately assess the impact of strategy and campaign execution.

Here are four key steps for better utilizing analytics to improve B2B marketing efforts.

Collect and Consolidate Customer Information

Customer information is often maintained separately by multiple lines of

marketing campaign elements are most likely to have impact.

Identify New Prospects

A critical next step in generating growth is to identify likely prospects outside your known customer base. Analytics can help to analyze and better understand your company's market presence and share of spend within complementary industries and geographies.

With this knowledge, you can identify the best areas for market entry, expanded sales territories and new business opportunities within existing territories. And as you form new customer relationships, advanced analytics will enable you to capture relevant details about opportunities and interactions within a single database that both sales and marketing teams can use to their advantage.

Identify the Highest ROI Opportunities

Once you have a better understanding of your current and potential customer base, use predictive risk filters and data-driven intelligence to model expected responses to marketing campaigns, as measured by propensity to buy, attrition and financial distress. Also, utilize available market penetration analysis tools to evaluate your customer count against industry, geography or company-size market segments. Doing so will help optimize marketing spending and focus sales efforts toward business opportunities with the highest potential ROI.

Employing advanced analytics and following these steps can demonstrably improve marketers' abilities to make smarter decisions, lessen risk and generate higher topline revenue contributions.

—Michael Stefanick, senior vice president of Commercial Analytical Services, Equifax

Segment the Market

Once you build a comprehensive repository of customer information, conduct a marketing-focused analysis of that data to gain a better understanding of your company's current sources of revenue and profits, as well as emerging sources of risk. The output of the analysis can serve as a strategic marketing plan that identifies the most and least profitable market segments.

In addition, establish profiles of ideal clients for each target market segment in terms of firmographics and other attributes like ability to pay and the acceptable level of financial risk that your company is willing to accept. Intelligent customer profiling will give you a better picture of which

LEAD GEN

What You Need

Basic tech requirements for lead gen by channel

Investing in technology and automation can make your online lead generation activities more efficient and contribute to overall higher quality leads.

There are many basic tech requirements for lead gen and as a result, generating leads is often much less efficient than it could be. This is why optimized automation is a must. But in order to take on this challenge, it's necessary to familiarize oneself with the technical tools available in lead generation.

A big part of efficient lead gen is understanding your data and constantly looking for improvements and trends.

First, ask yourself if you are going to generate your own leads or buy from lead generation companies or publishers. In other words, do you have the resources to automate on your own or does it make more sense to outsource? Secondly, the technology of lead generation depends on the channel you use to obtain leads: Whether it is SEM, display media, email or social media, every channel has its own technical requirements.

The most important thing is to generate leads that show the highest conversion potential. In other words, if you manage to attract quality traffic, your leads are more valuable, resulting in sales. And this is where lead generation becomes very complex: Not only does it matter that you generate leads at all, the overall goal is to implement measures that help you focus

on valuable leads and sales. In this sense, it is very important to invest time and resources into tools to help you reach an optimized lead gen setup.

Lead Gen Form

It all starts with a good lead gen form. Forms are often underestimated when it comes to lead generation. Many people would be surprised if they realized how many potential leads they are missing because of not having a user-friendly form.

The simple rule is: You only have one chance to make a first impression. Begin with your design, and make forms as short as possible and easy to use. They have to be accessible on all browsers, including mobile. Building a good lead generation form is very complicated and the choice of technology is greatly important. Anything you can do to encourage and support potential customers in completing lead gen forms is a step toward higher quality.

Moreover, forms need to include user-friendly error messages and options for auto-complete, which is technically complex. For example, you don't want to have a server-based form that sends you error messages once the information was sent to the server, but you want error-messages and auto-complete to happen in real time.

Lead Verification

Lead verification is extremely important in filtering out leads that are standard, double or not usable with wrong data. There are many things you can do to verify leads without too many resources: verify telephone number, email address and other variables, check the IP address and match this with ZIP code and state.

There are plenty of companies that offer automated lead verification that can help to verify data and obtain leads that genuinely have potential to convert. Services include cross-referencing lead data with phone and address books, matching ZIP

codes with states, doing historical data checks to confirm information given in lead gen forms, or providing leads with an ID that gives insights into when and where the lead was generated.

Lead Scoring

Hand-in-hand with lead verification goes the necessity for lead scoring. This is a very tricky part because good lead scoring mechanisms will require you to implement sophisticated algorithms that can measure lead quality in reference to chosen parameters such as user behavior on the form.

Depending on the parameters you choose, you can obtain an overall lead score giving insight into the probability of leads converting into sales. Why do you need this? Because lead scoring is an excellent way to find leads that have higher potential to convert into sales and to avoid paying for leads that most likely will not convert. There are many people who say they do lead scoring by assessing the amount of leads conversion, but good lead scoring goes way beyond that and is much more of a prediction model. Lead scoring is also useful because it can inform your marketing strategies. Based on the behavior of high scoring leads, you can optimize your messaging, distribution and campaigns.

Real Time Reporting and Data Analytics

It is extremely important to have real time insight in what leads you are generating, how they convert and the cost to generate the leads. In the ideal situation, you are able to track back any lead to the source and determine the actual sales per source, including acquisition cost. A big part of efficient lead gen is understanding your data and constantly looking for improvements and trends.

— [Frans Van Hulle](#), CEO/co-founder, [ReviMedia](#)

MARKETING AUTOMATION

Calibrating Results

Why you should set up a test sample to validate your marketing automation efforts

About 20 years ago, I was head of new customer acquisition for Bear Creek Corp., the parent company of Harry & David. It was not unusual for a 1 million-piece mailing to include as many as 10 tests, each with a minimum universe of 5,000. One of the tests was always something we called a “null sample,” which was sent exactly the same offer as what was then called “the control,” which received the standard catalog. Generally, both performed about the same, assuring us that the other test samples were reliable and any differences in the test results were valid.

Applying this “null sample” approach to B2B companies today, and more specifically to marketing automation, there

is a strong case for calibrating results. A simple way to do this is to set up a null sample test by taking a percentage (10%) of random prospects and keeping them out of marketing automation. Yes, I am saying you should actually pick up the phone and talk to this group instead of waiting for them to provide you with their digital body language.

Here are three reasons to try this:

1. One of my favorite sayings is “not every senior executive wants to be treated like the human equivalent of a pinball, capturing your attention only when they have hit the right bumpers and scored enough points.” What this means is that marketing automation tends to drive smaller deals with lower level decision makers. By actually reaching out and talking to people, you will find your deal size increases.
2. We recommend that you keep previously captured data (such as any visits captured in marketing automation) when

you pull the null sample. In addition to providing fodder to keep the conversation relevant to the prospect, it will allow you to evaluate, validate or calibrate the scoring that you are using in the marketing automation scoring. For example, you might find that a white paper download skews to lower level decision makers and that the score for this activity should be lower than it currently is. Conversely, you may find that video testimonials are viewed by more senior executives and should be scored higher.

3. By actually talking to prospects, you will glean considerably more insight into their pains, their perceptions about solutions and their actual plans than you ever will via scores from marketing automation alone. I’m not suggesting you ditch marketing automation, just add the human touch back into the game and score some real home runs.

—Dan McDade, president/CEO, Point-Clear LLC

On the Same Page

Why marketing and IT must work together in an omnichannel world

CHIEF MARKETER: Is it still a challenge to get marketing and IT to play well together?

LIZ MILLER, VICE PRESIDENT OF MARKETING, CMO COUNCIL: It’s kind of a double-edged sword. Marketers want solutions now and IT departments want to save money to get around procurement, and then beta-test new technologies for six months to make sure they work. The trouble is when we go around IT and buy a solution, and it doesn’t integrate with the legacy CRM setup because the legacy system doesn’t have the data fields that you’ve decided to export.

There’s a really funny cycle that marketing is going through right now, where we are so excited about the possibilities of all the things that we can measure, aggregate and move from place to place. What we’re not doing is paying attention to what we’re buying and how the technology will fit in. Are we measuring for measurement’s sake, or are we actually measuring to a KPI and a business case? These fundamental business questions are bubbling up to the surface.

CM: How important is it to make sure that all your varying tech applications work together seamlessly?

MILLER: We tend to look at marketing technology as individual point solutions

that can pull in data, aggregate, analyze, output—all of these things. When you look at them all together, they need to work together and make sense.

In this race to automate everything, we’ve actually created this odd paradigm where we have forgotten about something that we were talking about in 2005—marketing performance measurement dashboards. That one dashboard that pulls up all of the critical things we need to know about reaching our end goals as a business. Instead, we have to look through 100 dashboards that tell us 1,000 things about the individual campaigns we’re running, but we may have lost sight of where that end post is.

—Patrick Gorman

SOCIAL

Social Events

Why you should think of B2B social like a trade show

Think back to the last trade show you attended. You were communicating just by being there. Your presence alone said your company is alive and well and that you were ready to do business with new customers. As you attended breakout sessions or panel discussions, you began to form relationships with other participants. *You were building your community.* Did you make any immediate sales? No. And yet the time out of the office, not to mention travel costs, were a well-spent investment in your company and future growth.

The SMB Gap

A recent report from the CMO Council and Penton revealed that 70% of marketers believe the small to medium sized business market (SMB) is extremely important to their business. But only eight percent of those surveyed felt they had a complete view of the SMB customer. The problem is gaps in customer contact information and connecting with decision makers.

“Organizations must look to new partnerships and intelligence sources to gain a deeper understanding of the vertical market segments of their SMB customers, including life-stage needs and behavioral shifts,” said Donovan Neale-May, executive director of the CMO Council, in a statement.

Better integration of customer data is top of mind for 45% of respondents while 36% want to gain a deeper understanding of the SMB marketplace. A third of marketers have worked with IT, sales and channel groups to learn more about their customers in the last six months.

—Beth Negus Viveiros

This is exactly how social media works. Except that you don't have to take two days out of the office and pony up for a hotel room, airfare and entry fees. And because it's online, you have access to an unlimited number of potential community members—not just those that attend the same events.

As with offline professional communities, online communities should be comprised of the same mix of industry professionals you'd find at the show: vendors, customers, prospects, subcontractors, parts and materials providers, R&D people—anyone and everyone that somehow touches your realm of the industry.

How and where do you find an online community?

Actually, your online community finds you, via LinkedIn, Twitter, blogging and other social activities. You get it started by seeding the clouds. Join related LinkedIn communities and set up one for your company to cross-pollinate members. Use tools like followerwonk to target potential participants. Go through your emails, even that old Rolodex, make a list and then go to LinkedIn and look them up. Send them an invite and then get ready to join the conversation. Once you are connected, you'll be amazed how quickly it takes off.

Now let's go back to that trade show and think about what really ties you all together. Beyond the industry itself, remember the catalog of events: panel discussions, presentations, forums. Each promises a fascinating dialogue of insight, information and opinions on an important and topical subject.

In other words, content. It's what glues online communities together, too. What are burning industry topics that will get people thinking and responding? What's on your mind today that impacts your audiences? A spike in the cost of copper? The latest coating technology? An interesting news item in an industry publication that you want to share? Post a comment on your company

LinkedIn page. Send out a tweet. Go desktop to desktop with an RSS feed.

Think like an editor.

The idea is to put yourself in the role of editor, not marketer. In doing so, you'll become the facilitator of engagement among your community members as well as its leading voice. Keep it up and you'll be a thought leader before you know it.

That's not to say you can't use LinkedIn and Twitter to share the launch of a new product or service, or the purchase of a brand new piece of equipment. Are you heading to a trade show? Guest speaking at a local industry event? Post it. Tweet it. You're not just telling people what you're doing, you're sending the message that you're busy, building your business and in demand.

I know what you're thinking. *Easy for you to say. I don't have time to gather my thoughts much less share them.* An online marketing partner with experience in custom coil manufacturing can quickly develop a strategy, set up social media accounts, start building your community for you, monitor the daily conversation across highly relevant industry publications like this one and respond with timely and insightful commentary.

Marketing's most valuable currency is a shared passion and by engaging your professional brethren through social media, you can network and make important connections and contacts all year long—no airfare or hotel room necessary. Instead of being a keynote speaker for 20 minutes every six months or so, you can be a keynote speaker on an ongoing basis.

And just as with a trade event, you will eventually get an email or a call or a referral that does lead to business. So get on LinkedIn, start a blog or begin following and tweeting on Twitter. Not only will it pay off, here's another insider's secret. Once you get into it, it's really fun.

—Joseph Nieckarz, product manager, ThomasNet

CONTENT MARKETING

Finding the Right Ingredients

What to ask before developing marketing content

Marketers and sales teams get caught up in wanting to push content out to prospects and clients because, well, everyone else seems to be doing it. But before investing in building a new white paper, creating a video or establishing feeds on six different social media platforms, stop and take a moment to consider how content will help you meet your business objectives.

Here are a few questions you should be asking before developing content:

What role will content play in the overall marketing mix? What are your expectations for what will happen next?

Content marketing should follow fundamental marketing principles—deliver the right message, to the right audience, at the right time, to achieve the desired goal. Content is a powerful tool for achieving many goals, but the key is clearly defining *exactly* what you are asking the content to accomplish.

Do you want your content to generate leads, raise awareness, provide credibility for your organization within the industry or nurture a lead through the sales process? Or maybe content can help retain current customers for you, by keeping them informed of your latest innovations.

If you're trying to reach prospects that know very little about your organization, perhaps a white paper or short informational video would be the most informative. Alternately, if you're looking to nurture a lead throughout the sales process and the prospect is already familiar with

your organization, a company blog post or contributed article provides a unique perspective that might interest that prospect.

What is your plan for getting the content in front of your target audience?

The old adage “if you build it, they will come” unfortunately does not apply to content marketing. Both resources and distribution channels need to be in place to reach target audiences. Do you know where your target audience is consuming content, or which platforms are most likely to reach various audiences? What channels have been successful for your competition, and what differentiates your content from the competition?

In some cases, you may be creating the content and inviting your prospects to come to you. In other cases, it may be more effective to take the content to them, engaging with prospects on the sites, blogs, LinkedIn groups, etc., where they are already actively looking for content.

Remember, even the best content isn't doing anything for you if your target isn't consuming it.

What resources do you have available internally to generate content?

Developing effective content takes a significant time investment on behalf of your organization—even if you're working with an outside agency to actually develop the content. Do you have teams in place to manage the content creation process, and how will you hold them accountable? Do you have subject matter experts in place that can provide authoritative perspectives and insights that solve a true pain point for your customers? And do those thought leaders have time to commit to the content creation process?

Identifying a designated content team—a small group spread across marketing and

sales, with industry thought leaders included—leaves no confusion as to who is responsible for content creation. Enforce the importance of content development for growth of your organization, and in time, hold teammates accountable by adding it to job descriptions and annual reviews.

Do you have teams in place to manage the content creation process, and how will you hold them accountable?

How will you prioritize to ensure you're creating effective content instead of just a lot of content?

Effective content ties back to business goals and objectives, so as you get started, focus on one piece at a time to ensure goals are being met. Throwing too many balls in the air at a single time clouds perspective and can decrease effectiveness of each single piece of content.

A great place to start is with your communications plan. If you've clearly outlined goals and timing in the plan, then you can prioritize the content development based on those goals. Invest in the content that is aligned with what you are trying to achieve now. Focus and execute, then move to the next priority tier.

Once you have a solid understanding of who you're trying to reach, with what messages and on which platforms, and what you are trying to achieve, you're ready to get started. Being strategic on the front end will give a purpose to your content. It will help you achieve your business goals. And it will give you the answer you need when your boss asks “so, what did that content do for us?”

—Matt Kurowski, account director, JPL

TEAM BUILDING

Assembly Time

Breaking down silos to create a better marketing team

How do you build a strong marketing team? The key to developing better individual marketers is to expose them to various sub-disciplines that strengthen their overall knowledge and create an understanding of the process dynamics. In essence, cross-training provides a 360-degree view of the marketing world.

Successful marketing departments are comprised of staff members with cross-discipline backgrounds. It's important, especially in a start-up, for people to wear several hats. For example, you might find a copywriter-turned-account manager, an account manager-turned-database marketing expert, or a customer service manager-turned-marketing operations manager. More clients than you might think expect this cross-discipline expertise when working with an agency.

In fact, it is impossible to build a strong marketing organization or department without some cross discipline training. Excellent marketing efforts aren't developed by people working in silos of expertise. A department of superstars who work together as a team communicate well and recognize the strengths, limitations, and needs of their teammates. So it is with marketing. The best results are going to come from a team that is synchronized and connected.

Looking from the outside in, I have witnessed many marketing organizations that experience internal us-against-them mentalities. Writers become pitted against marketing managers, or designers are at odds with interactive programmers. It may be PR people versus program managers. Throw in technical writers conflict-

ing with product managers, and you have potential for major dysfunction. And if we think clients don't pick up on these tensions, we are kidding ourselves.

For the most part, all of these people want to do a good job. They are guided by what they feel is right, and are willing to fight for it. And most of the time, their struggle takes place without insight into the challenges, limitations and landscape in which their counterparts are working.

To be good marketers, people must be able to walk a mile in their coworkers' shoes. This means developing empathy for customers' and prospects' situations, as well as empathy for the members of their own team.

In that spirit, try putting young creative talent in client service roles as an entry point to your company. Living the life of account services is a reality check for the true business that marketers are in...the business of solving client problems.

When these new team members transition to their jobs as copywriters or designers, they have a better understanding of project direction and client criteria. They'll ask probing questions to understand the underpinnings of the directions they are receiving. In the process, the marketing organization is building stronger relationships between account services and creative services.

When building their team, marketing directors must foster this dynamic by partnering account people with creative team members to develop or refine processes—without oversight or involvement of upper management. The teams will examine what's working or not working, identify needs such as time and input requirements, and discuss what each role must have to succeed. They not only work to understand each other's functions more thoroughly, but they also take ownership of the process, creating a better work environment. This environment of role aware-

ness leads to better collaboration of the teams and a better end product for clients. Rather than feeling guided to a particular outcome, the team is allowed to thoroughly work through the process issue.

In fact, it is impossible to build a strong marketing organization or department without some cross discipline training.

And it doesn't stop there. Other areas of the business also benefit from cross-training. Account people who understand web design, HTML, and database marketing are much more valuable in helping clients navigate through complex technical aspects of projects. The more they know, the more proactive they can be in problem-solving or setting strategy. This reduces the time spent going back to the programmers or technical team to get simple client questions answered. It also builds the clients' confidence in the account person servicing their program or project.

More and more, there's a trend of a natural confluence of the disciplines of web design and programming. Web design has transcended from pretty graphics and easy navigation to a world of data management, portability across mobile devices, and integration of applications to enhance functionality. True, the new web team could be programmer-heavy, but it's incumbent upon both designer and programmer to understand the possibilities.

Building a world-class marketing organization starts with talented people, but culminates in cross-training to understand the goals, journey and end game—with vision that extends well beyond their own laptop.

—Craig Conard, president, Sudden Impact Marketing