

SPECIAL REPORT

SMB Success: A Unified B2B Sales & Marketing Approach

Learn from our over 5,000 CRM implementations

DECAYING METHODS: The Old Approach is Broken

The conventional B2B sales and marketing approach is proving ineffective in the modern landscape, causing many businesses to face challenges such as insufficient pipeline and missed opportunities. They struggle to generate qualified leads and adapt their processes for success. Staying competitive in today's crowded market is a daunting task. In this informative report, ClickDimensions sheds light on the limitations of current practices and provides a fresh perspective aimed at helping small and medium businesses (SMBs) that sell to other businesses.

Building upon our experience from our involvement in over 5,000 implementations of CRM and marketing automation software, along with our work with Forrester, Gartner, and Sales Benchmark Index, we've innovated a game-changing solution for SMBs, we're calling the Unified Sales & Marketing solution. This is a streamlined approach that focuses on the buying journey and aligns sales and marketing departments. In this way, SMBs can create a seamless customer experience and achieve better outcomes. This approach emphasizes personalized and targeted strategies, understanding the needs of target accounts, and leveraging data-driven insights to optimize performance.

To thrive in this new era, businesses must align their sales and marketing strategies with the buyer's journey. ClickDimensions' Unified Sales & Marketing approach enables SMBs to overcome the limitations of traditional practices by streamlining the revenue stack. This involves aligning sales and marketing teams, implementing modern technology tools, leveraging data analytics, and adopting a customer-centric mindset. By embracing this holistic approach, SMBs can drive engagement, opportunity conversion, revenues and sustainable growth in the evolving B2B landscape.

BUSINESS BUYING: Groups, Complexity, and Challenges

Gone are the days of a single decisionmaker

According to Forrester research,

80%

of B2B purchases now involve informal 'buying groups' ("Forrester", 2021), consisting of six to ten stakeholders ("Gartner", 2018) from various departments or functional areas within an organization.



Currently, each stakeholder conducts independent research through self-service, search engines, and social networks. Capturing their attention amidst the information overload and limited attention spans has become increasingly challenging.

As a result, the buying journey has become unpredictable and non-linear, and obtaining positive decisions has become more difficult than ever.

MISALIGNMENT: Sales and Marketing Processes vs. the Buying Journey

Many companies make the mistake of structuring their sales and marketing processes solely around sales activities, disregarding the buyer's journey. This approach fails to cater to the buyer's specific needs, expectations and preferences. The buyer's journey encompasses stages such as awareness, consideration, evaluation, and decision-making, each requiring different information and interactions. Ignoring this journey can result in a lack of relevance and ineffective engagement with the buyer.

Relying solely on sales activities leads to ineffective resource allocation. Neglecting to evaluate customer needs may result in premature or pushy sales tactics, potentially alienating the buyer. It also misses opportunities to nurture relationships and provide valuable information throughout the buyer's journey.

Overlooking the buyer journey means missing valuable insights into buyer behavior. Understanding motivations, pain points, and decision-making criteria at each stage allows sales teams to tailor their approach and messaging effectively. By solely focusing on sales activities, organizations fail to gather the necessary data and insights to optimize their strategies.

By neglecting to prioritize the buying journey, missed opportunities for engagement can arise. Winning business involves a progressive process, rather than isolated interactions. Each stage of the buyer's journey presents chances to provide valuable information, address concerns, and build rapport. Failing to recognize and leverage these touchpoints leads to backsliding and lost opportunities for meaningful interactions and conversions.

OUTDATED TERMINOLOGY: Rethinking the 'Lead'

The traditional understanding and handling of leads in businesses have significant flaws. Decisions to buy are not made by individuals or accounts alone but rather by buying groups. Although B2B demand generation strategies usually aim to target various buyer personas, the existing processes and systems still revolve around the concept of "leads" or "accounts." This leads to confusion when it comes to lead scoring and management, as it mistakenly combines an individual's engagement with a company's buying intent. However, in the era of buying groups, individual leads no longer accurately represent the decision-making process.



Lead:

One individual contact that has engaged with an organization in some way.



Buying Group:

6-10 stakeholders with different needs who all have input into a purchasing decision.

Most CRMs and marketing automation platforms have a common limitation: they adhere to the practice of converting only one lead into the primary contact for an opportunity. This narrow approach restricts the scope of automated marketing efforts and hinders sellers from gaining visibility into the actual buying group and its process. However, a buying group consists of multiple contacts within an account who are potential candidates for your offering. By embracing the concept of the opportunity, you can identify relevant contacts within the buying group and customize your messaging based on their roles and their position in the buying journey. This enables a more targeted and effective approach to engage with the entire buying group and maximize your chances of success.

Delaying or overlooking the identification of buying group members hampers targeted marketing efforts and the discovery of valuable stakeholders.

Moreover, the historical approach to leads poses operational challenges. Customer Relationship Management systems (CRMs), like Dynamics CRM, can create duplicate records with separate lead entities. Disposing of leads eliminates valuable interaction history, hindering account nurturing. Often, small companies resort to simply using Outlook contacts for leads, neglecting seamless integration with CRM and compromising data consistency and protection.

It's time to reconsider the prioritization of leads within CRM systems, and instead center the concept of the opportunity for better marketing, visibility, and protection of company interests.



The Unified Sales & Marketing Solution for SMBs: A Better Approach

Sales and marketing practices and platforms have fallen behind the changing buyer experience. To address this, ClickDimensions has developed the best practices for small and medium businesses(SMBs) selling to other businesses and a streamlined approach to organizing the revenue stack.

The **Unified Sales & Marketing Solution** is based on three main components:



Decades of experience and involvement in over 5,000 CRM and marketing automation implementations.



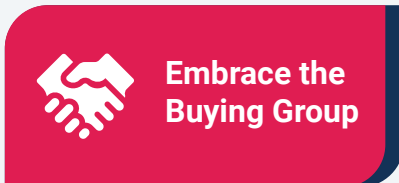
Research and recommendations from Gartner, Forrester, and SBI, simplified for practical application.



A combination of buyer-centric views and Forrester's revenue waterfall.

This approach **simplifies complex** processes and systems associated with unifying strategies, making them attainable for businesses of all sizes.

It involves just five fundamental actions for executing a Unified Sales & Marketing Approach:



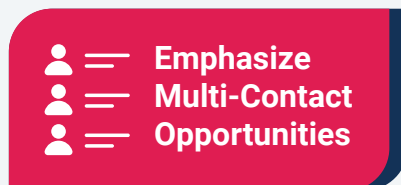
**Embrace the
Buying Group**



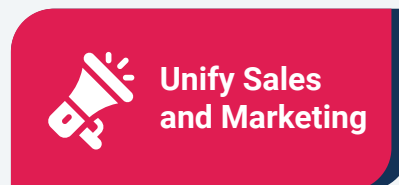
**Organize
Around the
Buying Journey**



Rethink Leads



**Emphasize
Multi-Contact
Opportunities**



**Unify Sales
and Marketing**

1

Embrace the Buying Group

Expand your focus beyond individual leads and prioritize engagement with the collective buying group. **Engaging with multiple stakeholders enables deeper customer understanding, broader relationships, and the discovery of additional business prospects.** When a buying group reaches a consensus, it can potentially lead to securing larger contracts. By addressing the entire group's needs and concerns, sellers can effectively meet customer requirements and expedite the decision-making process.

2

Organize Around the Buying Journey

Prioritize the buying journey over the sales process. Divide the journey into stages, each with a primary question implicitly asked by the buying group. Here are the common buying stages and associated questions:

STAGES



Companies may have different buying processes, but eventually, they will progress through each stage. A buying group may also regress to a previous stage so it's important to validate progress and use prospect behavior to confirm stage transitions based on exit criteria. This creates objective status and can be tested by management.

3

Rethink Leads

Redefine leads as genuinely interested contacts, simplifying lead generation and management. Focus on attracting interested contacts with the right personas in target market accounts. In CRM, match the contact to an account and create an 'unqualified opportunity' to screen the contact quickly. Nurturing and qualification happen with the unqualified opportunity, not within a lead. Streamline the process for more efficient and effective account and opportunity conversion and management.

4

Emphasize Multi-Contact Opportunities

Identify and influence members of the buying group early on for more effective marketing and sales efforts. This approach enables targeted marketing, provides better context for sales reps, and enhances visibility into the opportunity. Instead of focusing on lead scoring, adopt a holistic approach involving account scoring, contact engagement, and opportunity scoring. Differentiate between new, cross, upsell, and retention opportunities within an account, considering the involvement of various members of the buying group. Tailor messages and interactions to address individual stakeholder perspectives and concerns, increasing the likelihood of success.

5

Unify Sales & Marketing

Transform the relationship between sales and marketing into a unified team to optimize activities and support the buying group throughout the entire buying process. **Organize sales and marketing around influencing the buying group's "job to be done" at each stage.** Move away from the "over the wall" approach of passing leads without collaboration, shift from 'marketing-owned' to 'sales-owned' at the time of qualification and involve both departments in every stage, with marketing more active in the early stages and sales more active later on.

Create visibility into opportunities by tracking the account's stage in the buying journey and the actions of sales and marketing at each stage. Measure both teams on shared metrics, such as qualified pipeline or bookings, to foster alignment and collaboration.



Challenges in Modernizing Sales & Marketing for SMBs:

While larger companies with ample resources are increasingly embracing the modern buying journey and understanding the significance of buying groups, small and medium-sized businesses (SMBs) face a daunting challenge in making this transition. The evolving B2B buying journey has outpaced the capabilities of sales and marketing technology available to SMBs, hindering their ability to keep up with the changing landscape. However, there are solutions available that offer strategic approaches, customized solutions, and specialized capabilities tailored specifically for SMB teams.

At ClickDimensions, we have had the privilege of working with both big companies and SMBs, which has allowed us to observe the distinct approaches taken by larger enterprises. Based on our experience, we have identified four primary barriers that hinder SMB adoption of these innovative practices.

1

Affordability:

SMBs face financial constraints to their adoption of CRM and marketing automation technology. The cost of software and the complexity of implementation lead to limited interest in investing in new systems. The technical and training aspects of implementation may be time-consuming, with a long time to see benefits.

2

Lack of a defined lead-to-revenue process:

SMBs frequently struggle with CRM projects because they lack a clear process for converting leads into revenue. Keeping up with the changing B2B landscape and ensuring their processes are up to date can be challenging for SMBs, resulting in unsuccessful CRM implementations.

3

Limited marketing resources:

While the significance of marketing, particularly content, digital, and automation, has increased, SMBs often undervalue its role compared to sales. Consequently, marketing teams in SMBs are often understaffed or lack the necessary skill sets to drive successful marketing efforts.

4

Barriers to adoption:

Successful adoption requires buy-in from various departments, including support from the CEO. Dissenting opinions within the organization can impact the perception of new initiatives, necessitating clear communication about the purpose, benefits, and expectations of the changes for each team.

Success with a Unified Sales & Marketing Solution for SMBs

As with any change, the move to a Unified Sales & Marketing Approach must be set up for success by first laying some groundwork.

Build Support:

Clearly communicate the purpose and value of unifying Sales & Marketing to stakeholders, ensuring they understand its benefits and implementation process. Start by getting your sales team (VP and reps) onboard, as marketing will likely be the easier sell. This will assist to gain consensus and foster alignment for sales and marketing management.

Simplify your CRM:

Enhance visibility for everyone involved in the buying group and their respective stages in the buying process. That's a significant advantage. Make the transition to a streamlined CRM system that prioritizes opportunity-based processes. By maintaining a cohesive view of the buying journey, you'll establish a robust framework for your sales and marketing processes. Focus on what you're moving to rather than what you're moving from to simplify your CRM and expedite implementation and adoption.

Customize Sales and Marketing Tactics:

Tailor your sales and marketing tactics toward influencing the buying group and helping them progress along the buying journey. Use an assessment matrix based on factors such as target market size, product line, buying process complexity, digital marketing maturity, and sales team size to help inform those tactics.

Show your results:

Provide the CEO and sales leadership with a well-defined onboarding plan and timeline, and deliver measurable results in terms of pipeline, revenue, and other KPIs. This will instill trust in the Unified Sales & Marketing approach and showcase its effectiveness.



Execute Sales & Marketing unification with ClickDimensions PowerPack

ClickDimensions PowerPack is designed to help businesses adapt to the changing buying process, and execute a Unified Sales & Marketing Approach. Developed with the core principles of Sales & Marketing unification, PowerPack empowers small to medium businesses to drive engagement, opportunities, conversions, and revenues. By combining essential solutions such as Marketing Automation, CRM, and Sales Engagement, PowerPack addresses the unique challenges faced by SMBs, enabling them to succeed with a straightforward unified approach to the marketing and sales process, all at an affordable price.

Selected References

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About ClickDimensions

Trusted by over 3000 organizations across the globe, ClickDimensions is the solution for small to medium businesses that unifies all your sales and marketing efforts and gives you more control. For far too long, SMBs haven't had the capability that large enterprises have to unify the customer experience and minimize things like broken handoffs and recycled leads. The end result? Wasted time and lost opportunities. ClickDimensions helps SMBs take control by giving them a way to reach every target, see every interaction, and connect everything together – all from a single platform.

With the release of their new PowerPack, ClickDimensions introduces an innovative new solution for SMBs looking to enhance their sales and marketing processes. PowerPack combines the three most critical sales and marketing automation solutions: Marketing Automation, Sales Engagement, and CRM, to improve processes end-to-end. This results in quicker opportunity turnaround, faster and more efficient communication with prospects and customers, less burdensome processes which make the entire sales cycle an easier and more efficient one for SMBs. To get a demo of the new ClickDimensions PowerPack and see how it can work for you, [GET IN TOUCH TODAY!](#)