FROM MIXED MESSAGES

TO CUSTOMER CLARITY

How a shared Customer Scenarios Playbook aligns marketing messages and sales conversations

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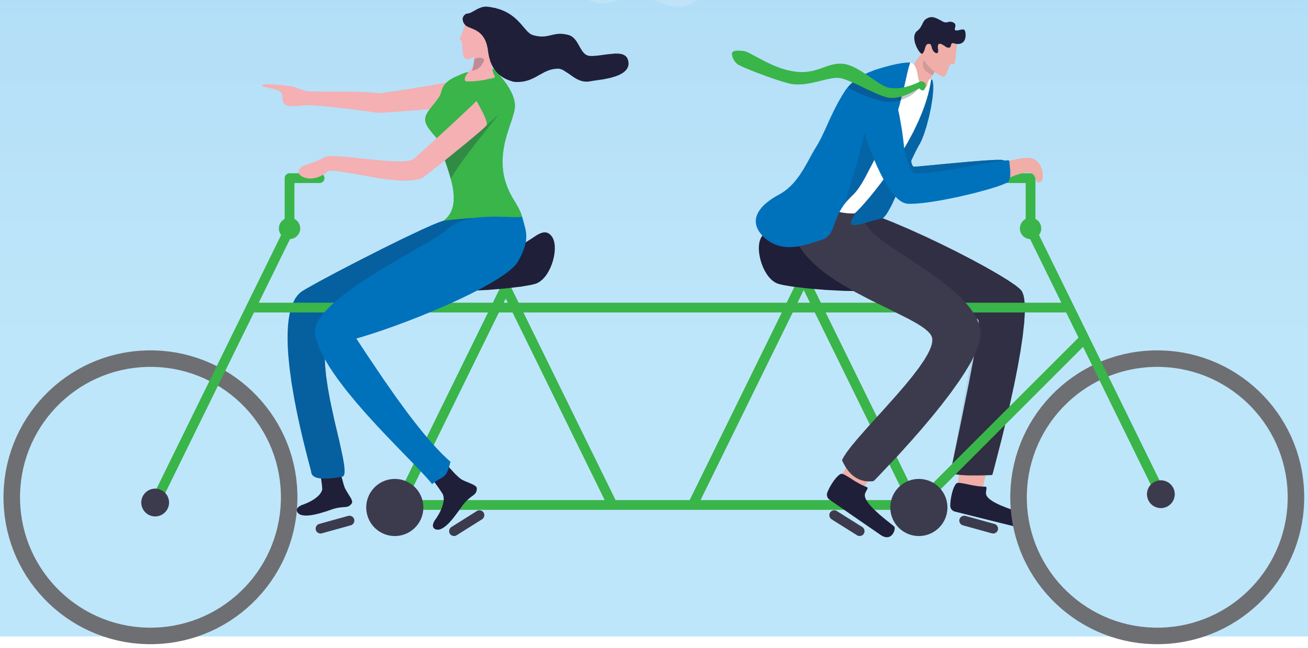
HOW DO WE STOP CONFUSING CUSTOMERS?

Sales and marketing both ultimately contribute to the organization's growth, but their immediate objectives, KPIs, and timelines can be very different.

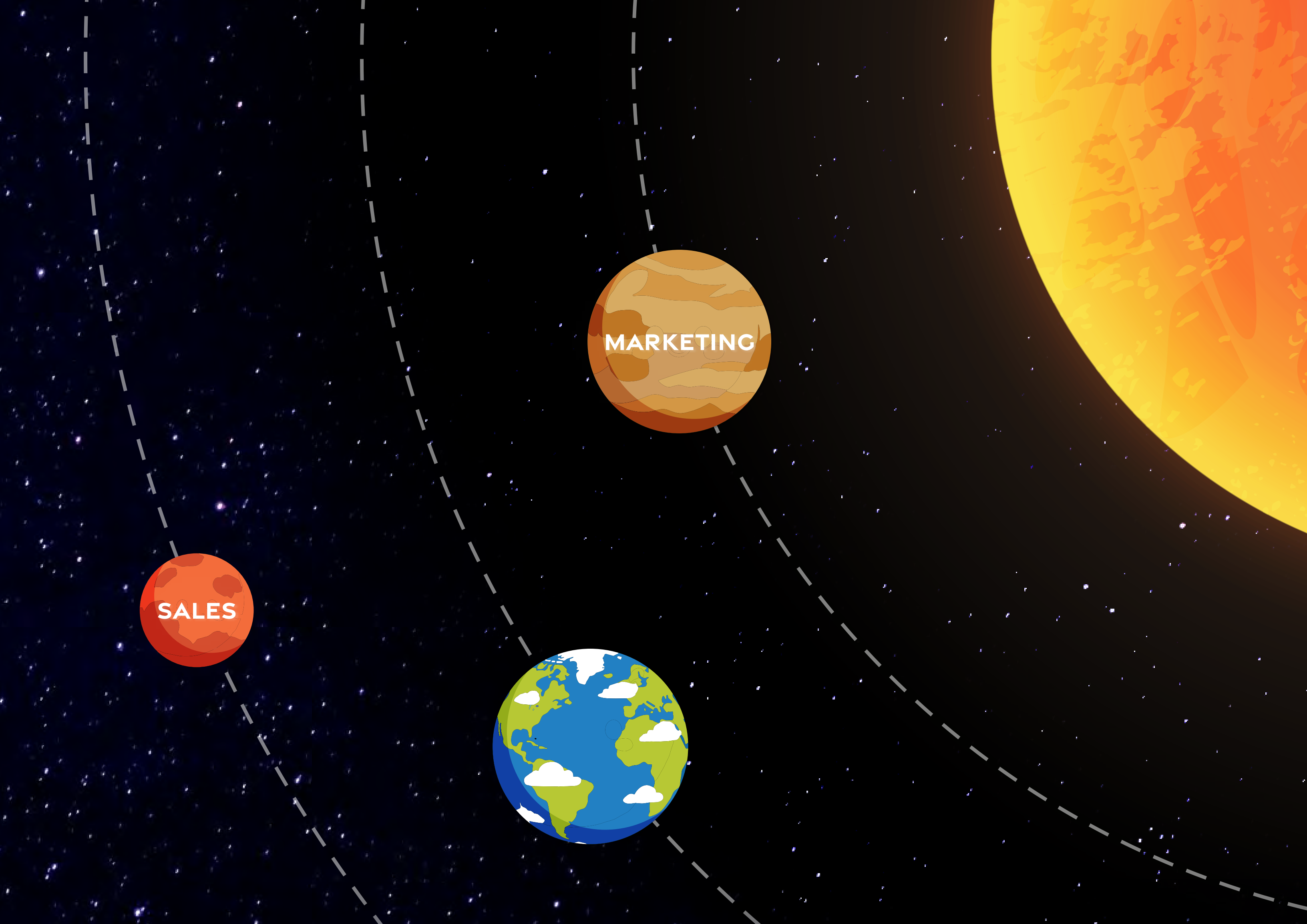


Marketing and sales may be working toward the same business goals, but too often their approach is from different perspectives. Although both ultimately contribute to the organization's growth, their immediate objectives, KPIs and timelines can be very different. It's a common lament in many organizations, especially B2B companies, that it's just so hard to get marketing and sales on the same page.

It can feel as though ***Sales is from Mars*** and ***Marketing is from Venus***: two teams living in different worlds, each with its own priorities, processes, and point of view.

The consequences of misalignment are significant. When marketing and sales are not working from the same page, companies lose revenue, waste marketing resources, and consume valuable sales time. The figures below help put the scale of the problem into perspective:

- **Lost revenue:** IDC has estimated that an inability to align sales and marketing around the right processes and technologies can cost B2B companies 10% or more of annual revenue.[1]
- **Wasted money:** 60% to 70% of content produced by B2B marketing organizations goes unused.[2]
- **Wasted time:** Only 7% of salespeople said the leads they received from marketing were very high quality.[3]



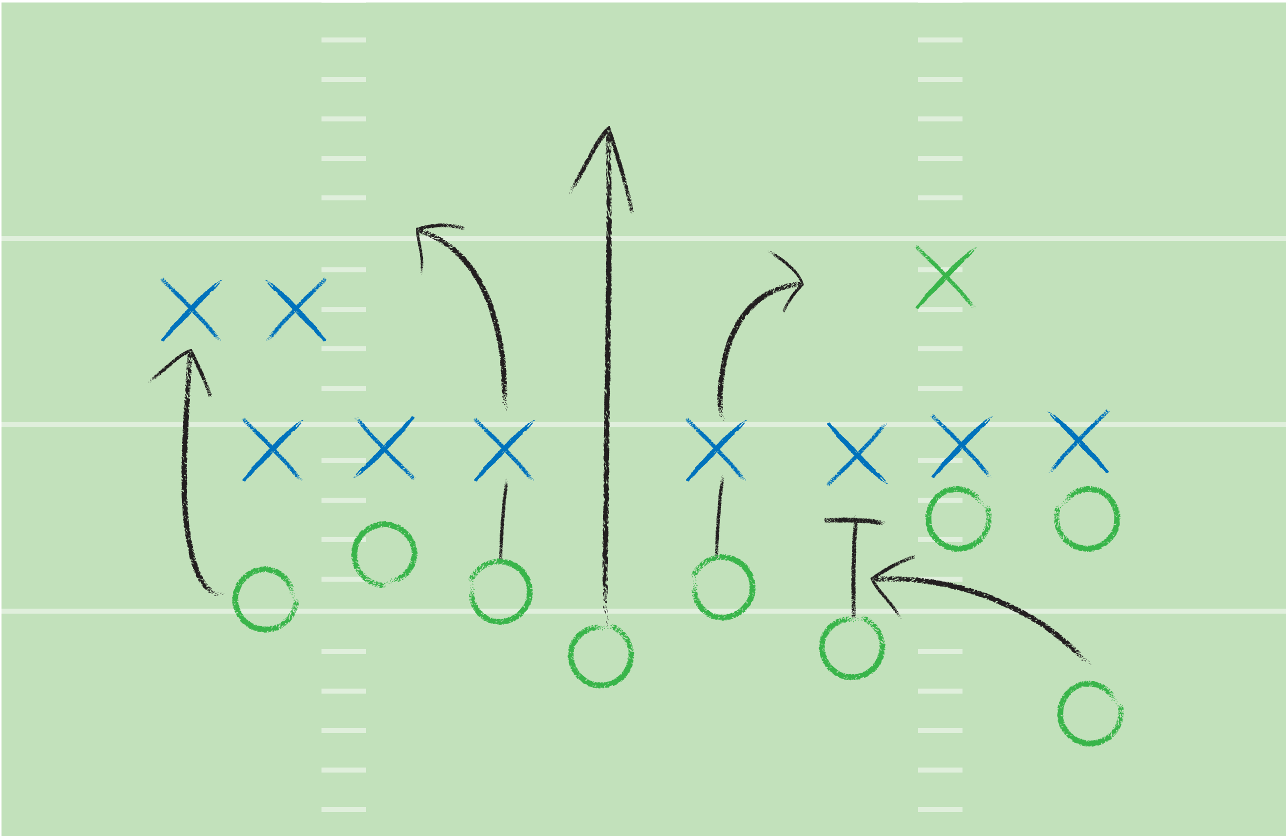
It can feel as though Sales is from Mars and Marketing is from Venus: two teams living in different worlds, each with its own priorities, processes, and point of view.

These figures are eye-opening for anyone responsible for managing the process—and they do not account for the potential impact on customer retention, expansion, and long-term brand value.

Based on these costs and losses, it's no wonder many organizations are working hard to get marketing and sales aligned and on the same page. Recently a major research project was conducted by HLK agency specifically focused on sales and marketing alignment in complex B2B organizations. Their research suggests many organizations are addressing this disconnect by implementing new technology and tools; changing processes; or making changes to their structure (all at significant investment). To date, these same organizations are reporting these initiatives are having limited success, while some are saying it's worse than before.[3]

This same research posits that the underlying cause of misalignment is that people involved in different departments have trouble understanding each other. And this lack of understanding drives a lack of trust and mutual respect—which makes sense considering they have been constantly playing the blame-game for years.

So where does alignment begin? With a focus on the customer's real-world situation.



BUILDING A PLAYBOOK

Sales and marketing do not need to think or work identically. They perform different roles and bring different value to the customer relationship. What they need is a common point of reference—a shared understanding of the customer objective, buying stage, pain point, and preferred way of interacting.

A **Customer Scenarios Playbook** provides that common point of reference. It matches marketing messages and sales conversations to the customer's real-world situation or scenario.

Begin by creating a cross-functional team of people that include representatives from marketing and sales who are tasked to build the playbook. In addition, many companies have sales enablement and customer success departments who should also be represented.

Building the playbook collaboratively is essential. Marketing contributes the brand strategy, positioning, and messages it wants the market to understand, while sales contributes the real-world knowledge gained through direct customer conversations. Bringing those perspectives together helps ensure that the resulting plays are both strategically consistent and practical to use—and gives each group ownership of the outcome.

There are a number of variables or factors to consider when identifying a customer's real-world situation. The key is to identify the scenarios that are representative of your market. Then, based on the customer scenarios, develop a specific "play" (messaging and conversation) for each viable scenario. Your playbook can contain many different plays, much like the playbook for a professional sports team. In this way, you'll have messaging that resonates and conversations that convert.

The following example looks inside a **Customer Scenarios Playbook**: the variables that define a customer's situation, the decision tree that turns those variables into viable scenarios, and the messaging and conversation guidance developed for each play.

CUSTOMER SCENARIO DECISION TREE

The decision tree begins by identifying the major factors that impact a customer's scenario. In most cases there are the following **4 MAJOR VARIABLES**.

1. CUSTOMER OBJECTIVE:

Decide if the objective is acquisition, retention, or expansion. Each one requires a different approach. If acquisition, then the messaging is about disrupting the customer's current state. If retention, then the conversation is about reinforcing the customer's current state. If the objective is expansion, then the messaging is first about reinforcing the customer's current state—then conversations to disrupt (a bit) to encourage the customer to buy more.

So, within this variable, there are 3 options.

2. ASSOCIATED CUSTOMER BUYING STAGES:

Research by Corporate Visions has documented there are distinct stages that customers progress through when making purchase decisions. These stages vary depending on whether the prospect is an acquisition, retention, or expansion customer.

a) **If acquisition:** the first stage's objective is to disrupt the customer's current state and answer the customer's question: Why change? The second stage's objective is to create a sense of urgency and answer the customer's question: Why now? The third stage's objective is to show how you solve their issues and answer the customer's question: Why your brand?

b) **If retention:** the primary objective is to reinforce the customer's current state and the customer's question: Why stay the same?

c) **If expansion:** the first stage's objective is to reinforce the customer's current state and answer the customer's question: Why stay the same? The second stage's objective is to "slightly disrupt" the customer's current state and answer the customer's question: Why more (of your brand)?

PAY ATTENTION: *Seldom, if ever, will you be able to advance a customer through all the appropriate buying stages in one conversation (except maybe retention). Most of the time it will take three or even four conversations. Therefore, it's important to remember where you left off with a customer conversation—so you know where to start the next one. Taking shortcuts only reduces the probability of customers making purchases.*

So, within this variable there are 3 options—each one directly connected to the customer objective that is desired.

3. CUSTOMER SEGMENTS:

An important part of any marketing and sales initiative is to identify the brand's target audience or ideal customer profile(s).

An ideal customer profile includes criteria or descriptions such as:

- geographic (local, national, international)
- demographic (company type, company size, age, education)
- psychographic (values, culture, lifestyle, mindset)

It can be used to identify companies and/or consumers, depending on your brand's audience.

NOTE: *It's important to include decision-makers within a business profile).*

A key component of your customer profile is to clearly articulate the customer's pain point (issue, challenge, or obstacle) that is preventing their success. This will form the basis of your messaging and conversations, showing how your brand enables them to overcome their obstacles and achieve success.

Ideally, there is one over-arching ideal customer profile that identifies your target audience. However, there may be circumstances where several customer segments are your brand's target audience. If this is the case, try to keep it to at most 3 ideal customer profiles that together account for 90% of the brand's audience.

In this example, Profile A represents 80% of the brand's target audience. **So, within this variable, there is one option.**

4. CUSTOMER INTERACTION PREFERENCE/BIAS:

The best way to work with people is to treat them the way they prefer to be treated. Research conducted by Black Swan Group contends that by identifying how people see themselves, then treating them according to their preference or bias, dramatically improves the probability of success.

The research conducted by Black Swan Group demonstrates there are three dominant styles (or biases) that people exhibit when interacting with others. These describe a person's instinctive tendencies or default responses when interacting with someone under pressure, as in a sales relationship for example. The research also posits that each style is equally represented in the population.

a) Bias for Perfection:

- Prefers/strives for facts, data, analysis
- Is pragmatic, needs time to think
- Implementation is important

b) Bias for Relationship:

- Prefers/strives for mutual bonding/rapport
- Builds goodwill, shares information
- Reciprocity is important, collaborate, and compromise

c) Bias for Action:

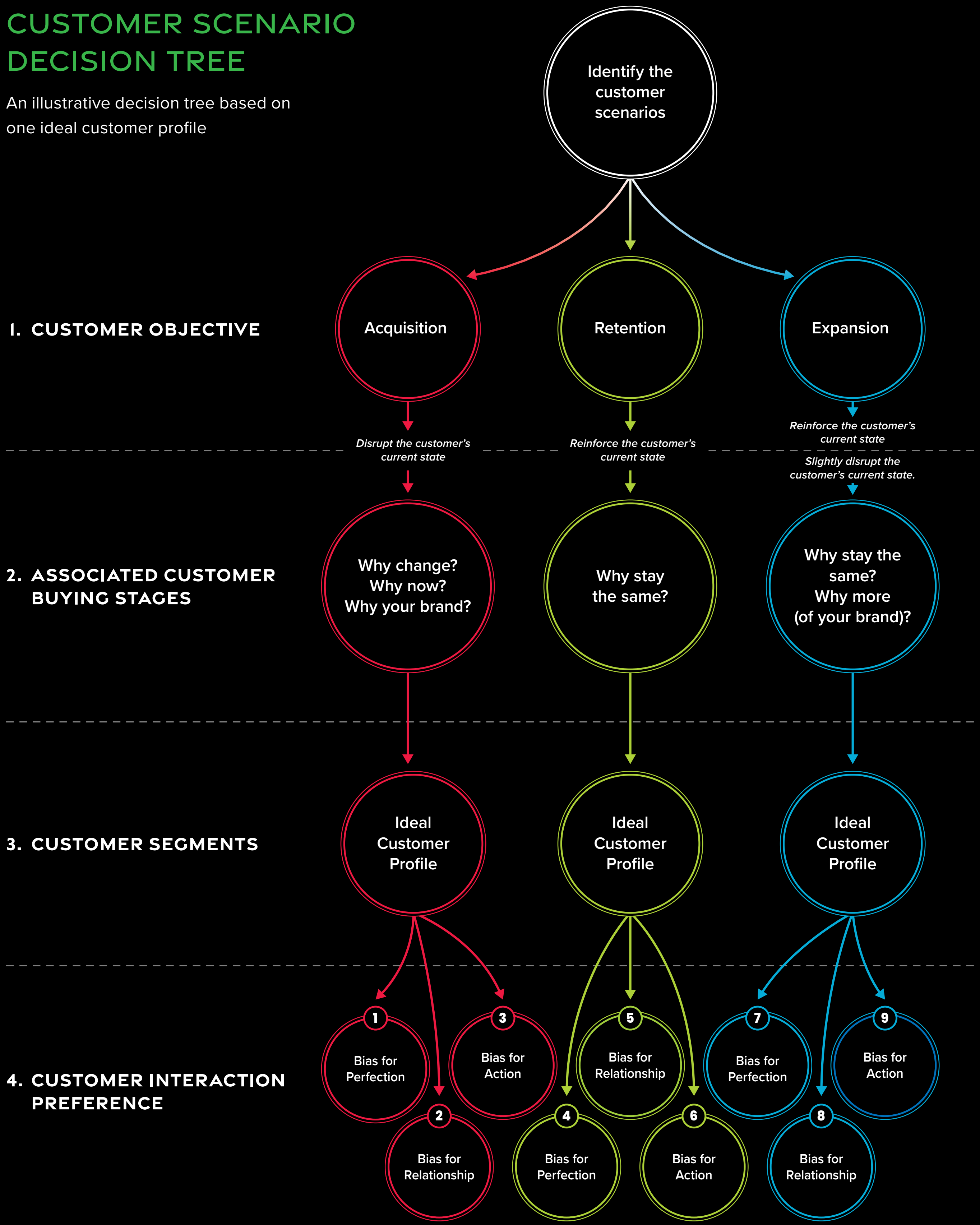
- Prefers/strives for respect of their position first
- Goal oriented, straightforward, right to the point
- Little patience for lots of data and/or rapport

While some people may exhibit characteristics across these styles—there is one dominant bias that is primary over the others. It's not that one style is better than the other—it's that their perspective and preferences are different. Understanding these biases helps you avoid misalignment and serious conflicts which can derail the dialogue. Matching your customer's style enables you to communicate more effectively.

So, within this variable, there are 3 options.

CUSTOMER SCENARIO DECISION TREE

An illustrative decision tree based on one ideal customer profile



CUSTOMER SCENARIO PLAYBOOK

Once the decision tree has identified the customer scenarios most representative of the market, a specific play is developed for each one. Each play aligns marketing messages and sales conversations with the customer objective, buying stage, pain point, profile and preferred way of interacting.

Together, these individual plays form the **Customer Scenarios Playbook**—a shared point of reference that helps marketing and sales respond to the same customer situation with one coordinated approach.

With three customer objectives, one ideal customer profile and three interaction preferences, this example produces nine distinct plays. A playbook may contain more or fewer plays depending on the customer profiles and scenario combinations most relevant to the market.

The following example looks inside one of them: an acquisition play for **Ideal Customer Profile A**, moving the customer through ***Why change? Why now?*** and ***Why your brand?*** while adapting the approach for a buyer with a **Bias for Perfection**.

CUSTOMER SCENARIO PLAY

CUSTOMER SCENARIO VARIABLES

Customer Objective: Acquisition

Associated Customer Buying Stages: Why change? Why now? Why your brand?

Customer Segments: Ideal Customer Profile "A"

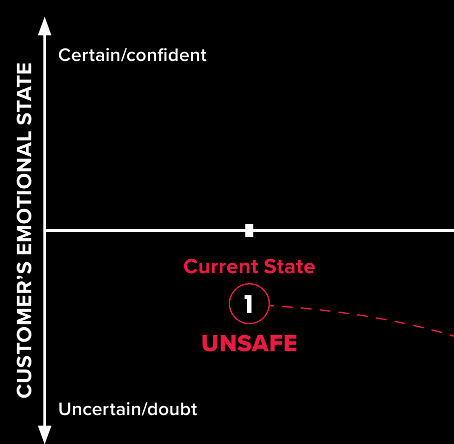
Customer Interaction Preference: Bias for Perfection

CUSTOMER'S PAIN POINT

Articulate the pain point:
Describe the pain the customer is experiencing that is preventing their success.

MESSAGING AND CONVERSATION CONTENT

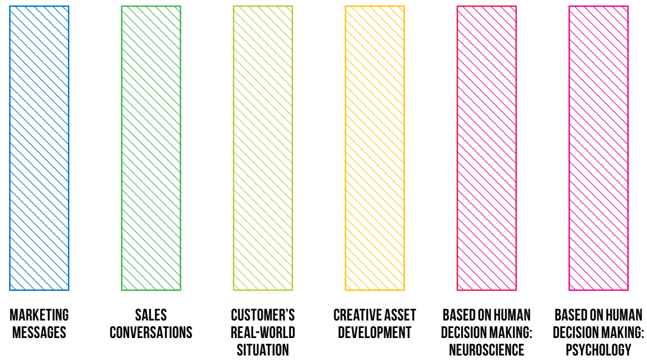
This is how your brand helps them overcome the obstacles and succeed

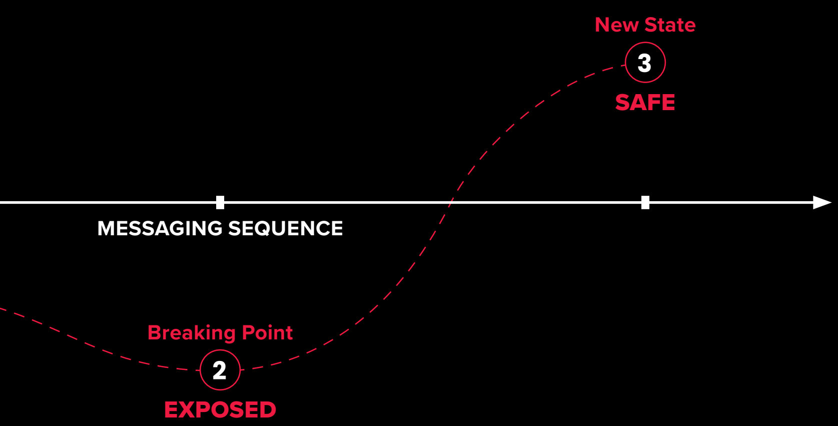


1. **Disrupt customer's current state:** ***it's unsafe***
   - Reveal under-appreciated issues that are in their market.
   - Answers customer question: **Why change?**

BRINGING THE DISCIPLINES TOGETHER

Developing an effective play can draw on disciplines and areas of expertise that often operate independently. Marketing, sales, customer insight, creative development, neuroscience, and behavioural psychology can all help shape messages and conversations around the customer's real-world situation.





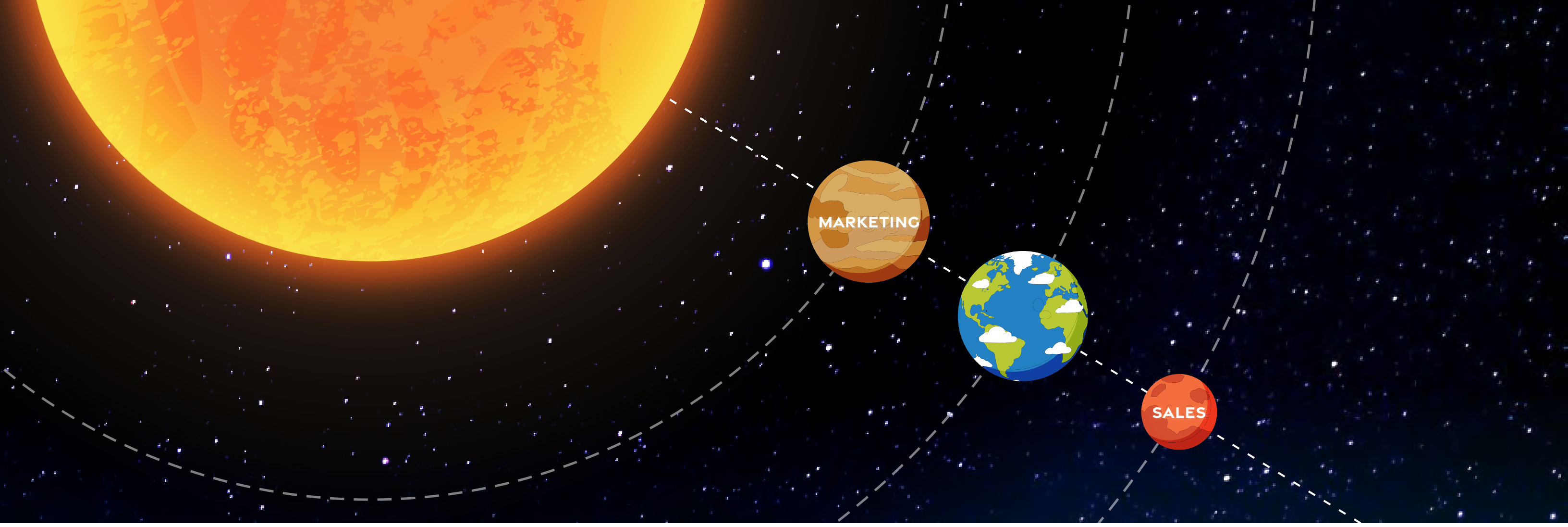
2. **Create urgency to change:** ***before it's too late***
   - Make status quo unsafe.
   - Answer customer question: **Why now?**

3. **Show contrast of new/future state:** ***it's safe***
   - Your brand enables the customer to succeed. It is the solution to the pain point.
   - Show proof to rationalize.
   - Answers customer question: **Why your brand?**

CHARACTERISTICS OF BUYER WITH BIAS FOR PERFECTION

Methodical, Diligent, Analytical, Reliant on data

- Prefers facts, data, analysis
- Throughout all the buying phases, convince them by using language and visuals within your conversations and messaging that are full of data, analysis, and research
- This mirrors their preference in how they make buying decisions—and how they rationalize their decisions



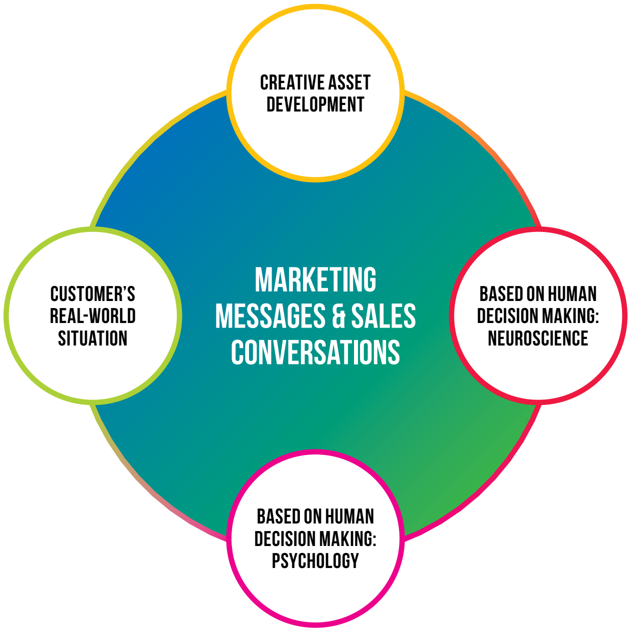
UNIQUE CUSTOMER. UNIFIED APPROACH.

Sales and marketing do not need to perform the same roles or approach every challenge in exactly the same way. They do, however, need a shared understanding of the customer and a coordinated approach to communicating with them.

That alignment starts with the customer's real-world situation. A Customer Scenarios Playbook brings marketing messages and sales conversations together within the appropriate customer scenario, helping ensure that what marketing communicates is reflected in sales conversations—and that insights gained through those conversations can strengthen future messaging.

A well-designed playbook can also connect disciplines and areas of expertise that have traditionally operated in silos. By bringing those perspectives together around a shared understanding of the customer, the playbook helps create a more unified, brand-building customer experience.

The result is more than internal alignment. It brings clarity and consistency to the customer experience, reinforces the desired brand image, supports sales and creates long-term competitive advantage.



Previously siloed disciplines converge to support coordinated marketing messages and sales conversations. Together, they help create a more unified customer experience.

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ABOUT THE AUTHOR

CLINT SZAKACS
BUSINESS GROWER

I am very grateful to have the good fortune of being involved in marketing and sales for 45 years and counting. Along this journey, I've developed a special focus and keen interest in the intersection of marketing, sales, and human decision-making. In essence, the study of influencing decisions and behaviour.

"Change is the only constant" is a popular phrase in business, and has been for some time (often a lament). My approach is different, especially from a purely marketing and sales perspective. For me, "the only constant is human nature," and at its core is the study of human psychology and neurology. In other words, how we, as humans, are hard-wired.

This approach has led to doing a deep dive into making marketing and sales work together more effectively to grow sales, retain profits, and build brands.

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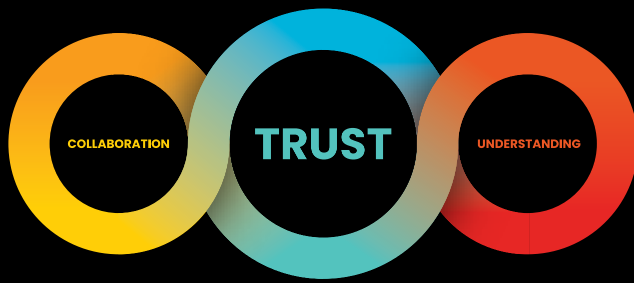
Trust is the foundation of our philosophy, creating an environment where collaboration thrives, and where we take the time to understand our clients' specific needs and the dynamics of their market. Through careful application of this philosophy, we consistently aim to surpass expectations and deliver value that extends beyond a single project, fostering a long-lasting relationship rooted in trust, understanding, and mutual, collaborative success.



To learn how to create a well-designed Customer Scenarios Playbook that builds a unified customer experience—let's talk...

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