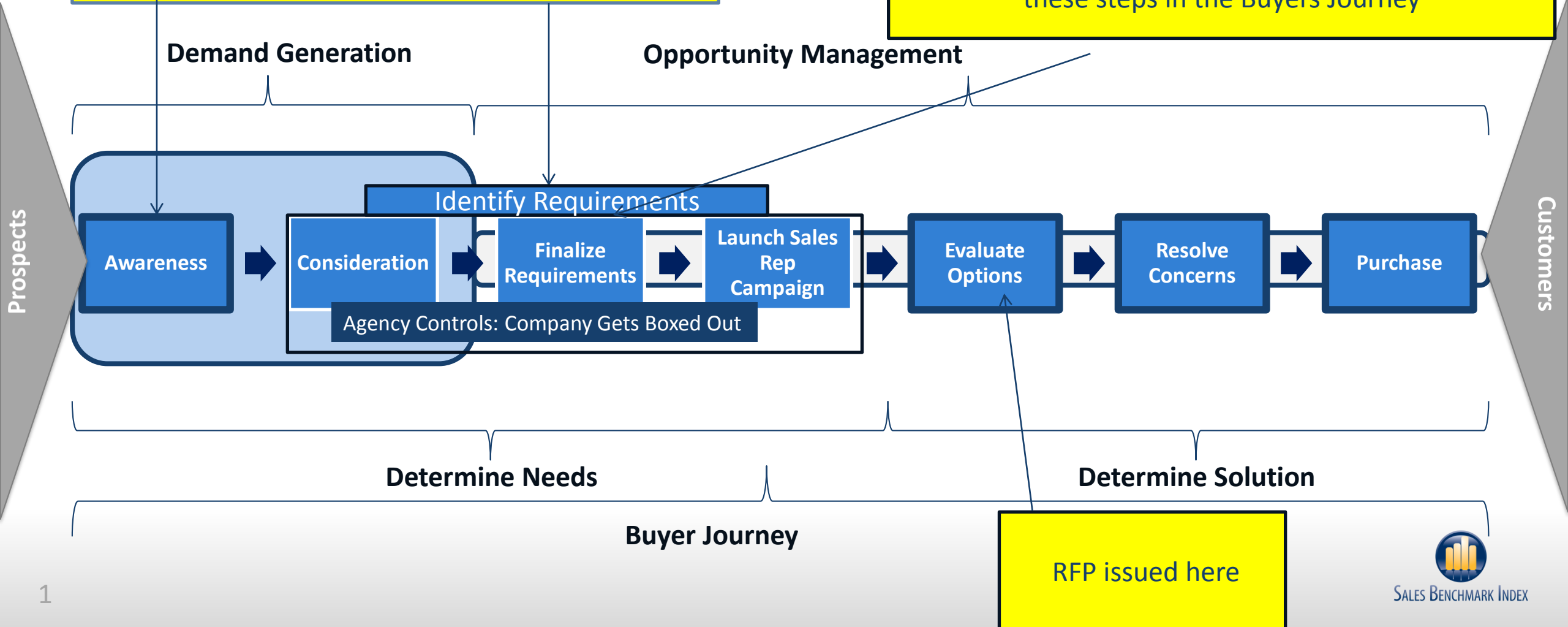
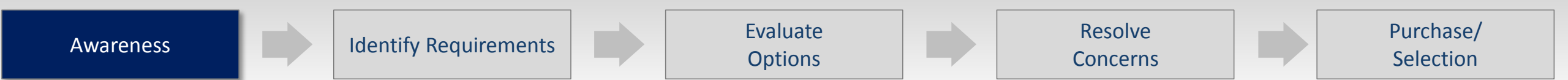


Netting out the Buyer's Journey: Current State

Today, Sales Reps are managing this part of the buyer's journey. Pitching the Customer or Channel Partner but missing key steps in the buying process

Sales is still "pitching" the client instead of asking what their requirements are. Sales is missing these steps in the Buyer's Journey





Awareness

Definition: Buyer becomes aware of a Business Need/Problem.

- I can tell the Buyer is in this stage because the Buyer...**
- Is inquiring about new industry trends or new capability.
 - Expresses concerns about current problem
 - Is unsure of their precise need (Confusing Symptoms with Root Cause).
 - Has experienced a recent change
 - Is presenting/discussing objectives for the upcoming fiscal year.

- Activities**
- **First Step:** Review Buyer spend history, campaign history, job aids, past interactions in the CRM
 - Review past Quarterly Business Reviews (QBR).
 - Identify any new key influencers and decision makers.
 - Use BANT criteria to qualify and create opportunity in the CRMi
 - Hold initial discovery meeting with the Buyer. **(MI#1)**
 - Inform Channel Partner of agenda/interaction if applicable (if not with the Channel Partner).
 - Ask the key decision maker about business objectives.
 - Explore the problem / uncover needs via questioning skills.
 - Ask “why now?” and “uncover the trigger event”.
 - Tie Thought Leadership to Buyer problem through industry or new product insight.
 - Identify potential decision drivers.
 - Validate Competitive Footprint
 - Gain agreement on next steps (Date AND Time of next interaction).
 - **Last Step:** Send Opportunity Email. **(MI#2)**

- Job Aids**
- Internal**
- Opportunity Assessment
 - Personas
 - Call Plan
 - BANT Qualification Guide
 - QBR/Campaign Review
- External**
- Opportunity Email
- B = Budget
 A = Authority
 N = Need
 T = Timing

Exit Criteria: Buyer states a marketing solution is needed and responds positively to an Opportunity Email. (or return to Nurture)

Awareness



Identify Requirements



Evaluate Options



Resolve Concerns



Purchase/ Selection

Identify Requirements

Definition: Buyer clearly defines their needs and success criteria for a solution.

I can tell the Buyer is in this stage because the Buyer...

- Tells us about conversations with their client (Channel Partner)
- Issues a Request For Information (RFI).
- Asks us for industry trends & competitive insights.
- Tells us their tactics, success metrics, strategy.

- Asks about The Company’s capabilities (examples below).
 - Specific Products
 - References, case studies, best practices.

Activities

- **First Step:** Conduct internal opportunity planning (ASSESS THE COMPELLING EVENT).
- **Get in the Channel Partner box:** guide the Channel Partner through the Buyer’s Journey. (MI#3)
 - Determine if sales specialists and account management should be involved.
 - Discuss buyer requirements and conduct Channel Partner needs assessment (HELP THEM).
- Meet Channel Partner or direct client decision maker. (MI #4)
- Present Discovery Findings.
 - Basic requirements, needs, and wants of the Buyer (challenge Buyer’s conventional wisdom).
- Uncover spend and budget process.
- Establish/Document Requirements – write RFP sections where applicable. (MI#5)
 - Provide insightful Thought Leadership through the Channel Partner to the customer (make them look good).
- Internally match high-level solutions and relate back to buyer objectives/requirements.
 - Brainstorm solution options and discuss with decision maker.
- Identify all buyer stakeholders (the “buying decision” team).
- **Last Step:** Document the actual requirements for the solution options. (MI#6)

Job Aids

Internal

- Opportunity Assessment
- Personas
- Call Plan
- Needs Analysis
- Relationship Plan

External

- BRD Framework

Exit Criteria: Buyer (through the Channel Partner or directly) has identified the critical requirements and requested a proposal in writing from the Company (or return to Nurture)

Awareness



Identify Requirements



Evaluate Options



Resolve Concerns



Purchase/ Selection

Evaluate Options

Definition: Buyer is determining the optimal way to solve the problem or meet business needs.

I can tell the Buyer is in this stage because the Buyer...

- Requests price proposal/launches RFP.
- Has communicated budgets.
- Requests Product specifications
- Expresses unhappiness with current partner.
- Asks us to present our recommended solution to their customer(if an Agency).

Activities

- **First Step:** Conduct internal opportunity planning.
- Assess competitive environment.
- Unsolicited RFP only: Implement RFP Strategy. (MI #7)
 - Contact your partner (if applicable).
 - Qualify RFP (Use BANT guidance).
 - Document insightful Thought Leadership that lead to the Company's solution.
 - Discuss RFP approach with customer and obtain feedback.
- RFP/Proposal: Engage the Buyer to learn more about the RFP response requirements. (MI #7)
 - Confirm RFP/proposal requirements and how they tie into client objectives.
 - Develop Multiple Solutions Options proposal with Specialists.
- Deliver/obtain customer/ Channel Partner comments on Solutions Options Proposal/RFP. (MI #8)
 - Internally match relevant solutions to Buyer objectives/requirements.
 - Discuss and select execution ideas & pricing with customer/Channel Partner
- **Last Step:** Present revised Solution Options Proposal/RFP. (MI #9)

Job Aids

Internal

- Opportunity Assessment
- Personas
- Call Plan
- RFP Strategy Guidance
- Storyboard

External

- Solutions Options Framework

B = Budget
 A = Authority
 N = Need
 T = Timing

Exit Criteria: Buyer (through the Channel Partner or directly) confirms that the proposed solution is a finalist and/or on the 'short list'. (or return to Nurture)

Awareness

Identify Requirements

Evaluate
Options

Resolve
Concerns

Purchase/
Selection



Resolve Concerns

Definition: Buyer reviews all potential risks, identifies mitigation plans, and agrees to move forward.

I can tell the Buyer is in this stage because the Buyer...

- Asks for further information on the Solutions Options Proposal/RFP.
- Asks for a meeting to discuss further “options.”
- Is having trouble ‘justifying’ expense.
- Surfaces internal concerns/risks regarding the solution (i.e. implementation/execution risks).

Activities

- **First Step:** Conduct internal opportunity planning.
- Develop/Implement a Risk Response Strategy (as appropriate). (MI#10)
 - Provide an Implementation Calendar.
 - Submit references or case studies (if applicable).
 - Document Customer/Channel Partner Concerns.
 - Involve your Company’s executive (as appropriate).
- Discuss Risk with Customer/Channel Partner. (MI#11)
- Update Solutions Options Proposal/RFP based on risk response strategy.
- Finalize Budget/Spend with Customer/Channel Partner.
- Determine negotiation strategy and tactics.
- **Last Step:** Deliver final Solution Options Proposal/RFP. (MI#12)

Job Aids

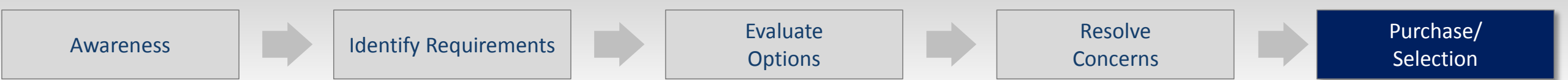
Internal

- Opportunity Assessment
- Personas
- Call Plan
- Give-Get Framework

External

- Solutions Options Framework
- Risk Discussion Guide
- Implementation Calendar

Exit Criteria: Buyer accepts final proposal/RFP response. (or return to Nurture)



Purchase/Selection
 Definition: Client/Agency approves proposal.

- I can tell the Buyer is in this stage because the Buyer...**
- Communicates approval.
 - Asks for final concessions.
 - Confirms launch date

- Activities**
- **First Step:** Conduct internal opportunity planning.
 - Review draft agreement with Buyer.
 - Ensure internal approval for all Non-Standard T's & C's.
 - Close any/all negotiations and provide final pricing. (MI #13)
 - Sign Order/Agreement and Submit (MI#14)
 - Confirm launch date.
 - Allocate creative & campaign management resources.
 - **Last Step:** Transfer to Account Management to begin implementation.

- Job Aids**
- Internal
- Opportunity Assessment
 - Personas
 - Call Plan
 - Give-Get Framework
- External
- Standard Order/Legal Templates
 - Implementation Calendar

Exit Criteria: Receive Signed Order and being Implementation (or return to Nurture).