



# Welcome!



Source: Dilbert strip, retrieved from: <https://dilbert.com/strip/2016-10-15>

- How to kickstart your journey
- Work on your goals
- The fundamentals for B2B
- Marketing & sales
- Last take away

Hello and welcome. My name is Frank. I'm a marketing and sales operation manager at a young B2B stand up. Today we'll be looking at different insights on marketing and sales environment, working from the strategic level all the way down to operations. To do so, we'll look at how you can kickstart your journey, walking down, setting up your goals, fundamentals of B2B as well as how marketing sales can efficiently work together to create value.

Notes

Summary



0m 05s



Source: Frank H

## There is no straight line to the top, so be efficient

- KISS: Keep it Simple Silly
- Do not reinvent the wheel
- Data over experience over gut feelings

There is no straight line to the top, so you have to be efficient. To do so, three golden rules stuck with me. First, one is Kiss principle. Keep it simple, silly. No need to overengineer everything that you have to do because complexity does not sell. You need to streamline your communication, streamline the actions that you want to do as a team, especially within a marketing and sales environment. Second, everyone had to create something before you. It's not the first time that someone is to develop a team, develop a concept, a strategy or an operation, go around, ask questions, get in touch with people. Do not reinvent the wheel when it comes down to these challenges. And finally, data is key. Everything that you need to be built on and base your option on. You need to be data driven approach. Then if you don't own possessed data or sufficient data to move your style forward, base it on experience. Talk to experts, bring people with enough years of experience in this field. And finally, if none of these two apply, go after you got feeling. But this is the last resource that you need to use to develop your marketing and sales strategies and operations.

Notes

Summary



0m 31s



Source: Frank Hugl, Nufenenpass 2021

## There is no straight line to the top, so be efficient

- KISS: Keep it Simple Silly
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- Data over experience over gut feelings

For example, if we look at this photo, the end of the year goal is this mountain that you have at the top of the Hill and you stand all the way down there. You will see that the first milestone you will reach is your first client. You get cash in. You manage to get tremendous growth over the couple of weeks, months or maybe half a year. But then as soon as you secure your first client, you question yourself because you did not expect such a low growth. Some things didn't work out after the first client. You don't really have a streamline of new clients coming in. The pipeline dries out. You don't really understand. So you need to ask yourself questions and then pinpoint solutions so that you can move forward. This can be done in different options. The first one is to really look after details. You need to analyze data trend lines. You need to look at different evolution of your objects that are moving through marketing and sales pipelines. But you also need to use your lights to search for innovative ideas and new solutions or new concepts. Because the road that you will have to take is not clearly defined, you need to find yourself your own path to success so that's at some point you'll be able to reach the goal that you fix yourself at the beginning of the year.

Notes

Summary



1m 39s



# Work on your goals, outside-in

- Before you jump into the unknown, be aware that:
  - You aren't special, nor is your idea. So, understand how you can add a unique value out there, and fast!



So this end of the year goal needs to be set as a team. Thinking about an outside in approach. Before you jump into that, be aware that you're not unique, you're not special. Many other companies actually have similar offerings. Many other startups are thinking the same way as you do within Switzerland, Europe, the US or anywhere around the globe. So you're one out of many. The only way you can differentiate yourself is to really understand how you can drive your added value proposition through all the activities that you will have to do as a team.

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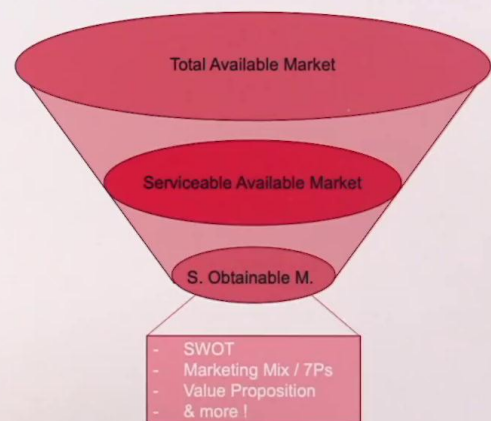
Summary



2m 53s

# Work on your goals, outside-in

- Before you jump into the unknown, be aware that:
  - You aren't special, nor is your idea. So, understand how you can add a unique value out there, and fast!
- Set the stage and invest time and effort behind the scene:
  - Do your job of defining strategic insights with the help of SWOT, marketing mix, TAM SAM SOM, and many other tools. Visit [12Manage.com](http://12Manage.com) to get valuable business definitions
- Finally, work within your organization:
  - Map your goals, then set the major milestones someone needs to go through before being a customer
  - Be purpose driven, then define who does what & when



To be able to work on your goals, you need to think first outside of your company before you Zoom into what you're capable of achieving. This will allow you to understand the landscape better so that you can see what the others are doing. You can understand if the market is ready to receive your value proposition activities and then you can easily pinpoint where you like resources and when you need to do to overcome those challenges. One of the many tools that can be used to do so is the TAM SAM SOM where you as a team will have to understand the total available market. For example Switzerland. And once you do so, you want to Zoom in within Switzerland. Understand what proportion of the Swiss market can be serviced by a product. For example, It companies for your It based product. But within the It companies, only a fraction of these will actually have or receive value from your product. And this will be the last point which is the serviceable attainable market and this is where you can actually type in. This is extremely important because you can put your goals into perspective and you can really understand what is achievable and what is not.

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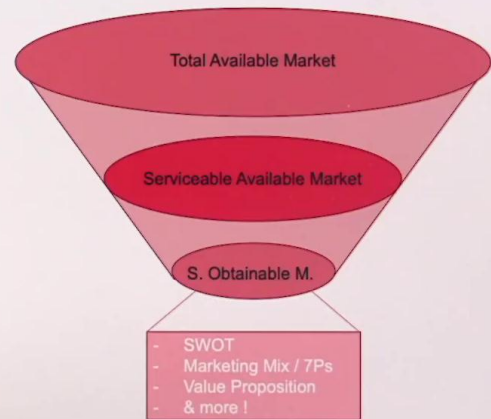
Summary



3m 25s

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Then once you've done this, you need to within what can be achievable to understand what are the spots, what are the marketing strategies and any other tools that can actually help you understand the landscape from outside? SWOT is a very generic term that many people use in companies quite old, but still extremely valuable into your efforts at understanding what you can offer as a company strengths, weaknesses, opportunity and threats. You want to really understand what others are doing, what you can do, and how you can fill in the gap. This gap can be conveyed through the marketing mix where you want to look at a variation of different Ps, the 7Ps as we call usually, which is about what product do you have, what team you have, what structure do you have overall so that you can push this value creation into the market so that people are ready to buy your services. Value proposition connected to this is really about what activities you can do so that you can solve the pain points potential customers will have to face in the future or right now. These different elements are key factors into understanding how you can position yourself into a market.

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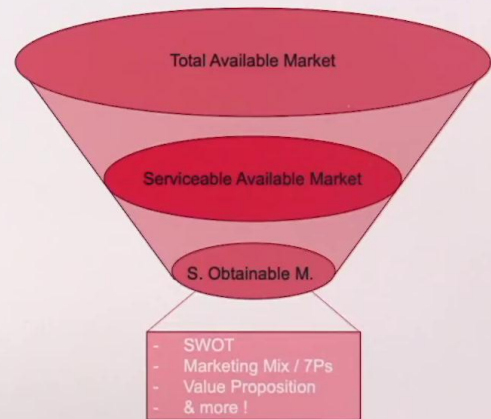
Summary



4m 40s

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Only then, you can look within your company to really streamline the activities that each team between marketing sales will have to do. To help you out, visit the website [12manage.com](http://12manage.com) that will give you valuable business insights, definitions and ongoing conversations on a variety of different topics.

Notes

Summary



5m 56s



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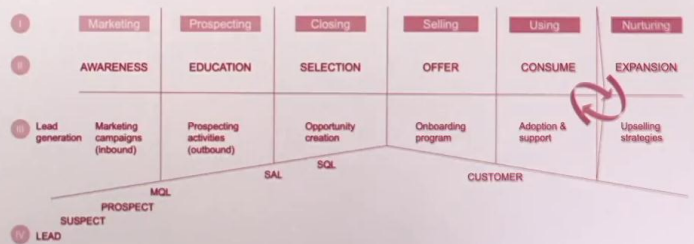
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Finally, work within your organization. Once you understand what's happening outside, you need to Zoom in into your own resources and define the work between the departments. For marketing and sales, everything can be connected into what we call the lifecycle. Lifecycle basically looks at how the journey of someone will go through within your company. Usually everything starts with marketing engagement. On the marketing, you can do two sets of activities, inbound related and outbound related, which defines how you want to approach someone out there. For Inbound related approach, people actually willingly went to you. This is done via Advertisement, via social network campaigns, via digital paid ads that people might actually Google, search and then land into your profile on your platform. The outbound way, however, is you're researching and finding out potential targets that you believe have a good fit with your company. You go on LinkedIn, you find a company, you know the target person within that company and you send him a message on LinkedIn because you believe he will be a potential user. Doing those two activities is mainly driven by marketing and feeds into whatsales then does, which is closing ABC always be closing as some say.

Notes

Summary



6m 15s

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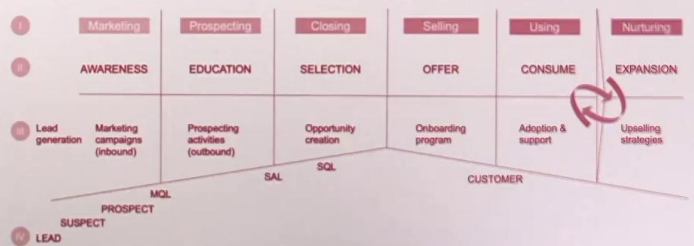
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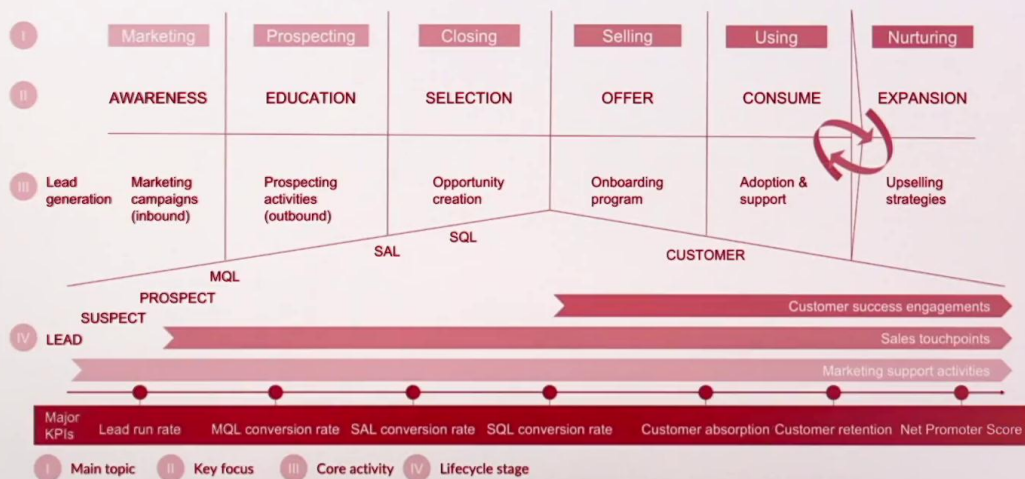
This usually starts after the occasion phase and then go through the funnel of someone who joined your prospecting activity. To do this, sales will mainly focus into sales acceptance leads, meaning that yes, someone who enters our pipeline can be a good sales all the way down to sales qualified. This person actually has a need that we can solve and we can sell our product efficiently to that target so that eventually they will become a customer. The final phase, all the way down the line is for all the customers that you have. You need to make sure that they will remain with you and not fade away into the competition. So always through this entire funnel, be purpose driven. Clearly define who does what, when and how, so that altogether between marketing and sales, you can add value to your effort.

Notes

Summary



# Scratching the fundamentals: from AIDA to KPIs



- AIDA: where marketing shines (MQL) ; BANT: where sales takes the lead (SQL)
- Lifecycle: the journey a lead takes until she/he becomes a customer
- Lead status: the attitude a lead has with regards to us
- Define in advance KPIs you need to track

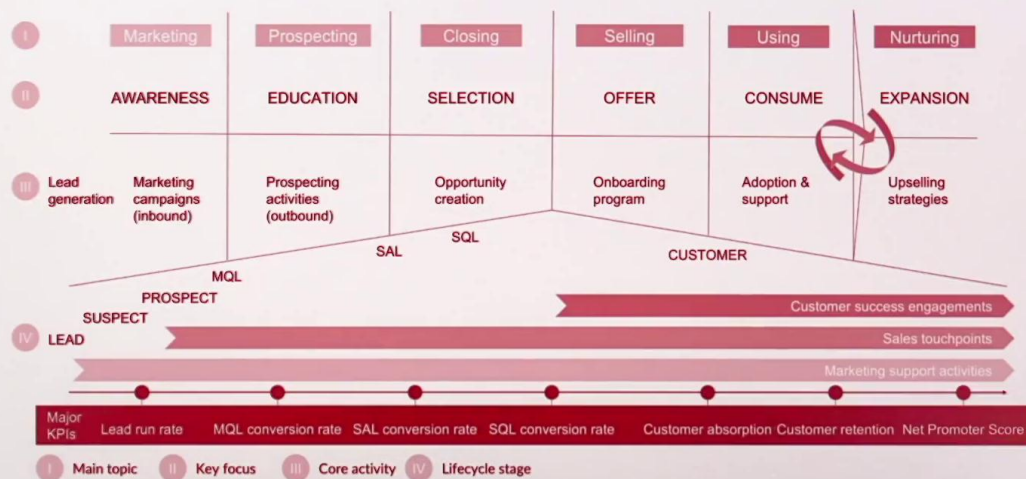
Moving on to scratching the fundamentals and zooming in into this pipeline. We want to cover the concept of AIDA all the way down to KPIs. AIDA is a marketing technology that States how you can drive attention, interest, desire and action into your target groups. Remember we talked about inbound and outbound marketing activities? This idea concept fits exactly within those two activities. Whenever you engage with someone out there, you need to be sure that you fill in those terms. Attention, do you have their attention? Do you know what they need? Do you understand who they are? And do you see how you can get them into committing into your company? This is an interest stage. Can you raise the interest? Do they feel what you want to offer? Adds value to the pain points. Desire, make it Time now. What they want to go for only exists today, not tomorrow. They need to commit as soon as possible so that you and them can be a partner. And in action. They become a customer. They purchase your goods, they go into your servicing. This is defined by marketing, but then fits into the concept of BANT which is where salespeople take the lead. BANT is another acronym that stands for budget authority need and time.

Notes

Summary



# Scratching the fundamentals: from AIDA to KPIs



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As soon as you convert from the marketing level engagement into what we call self qualified Lead. Someone who reaches that level when you want to create an opportunity, needs to have the budget for your product or your service. The authority meaning that, this is an end user of your product, but he also has the power within his company to actually make the payment and accept this new offering. Do they have a need? This is the most crucial one. Many people will go for a product they don't even need and will churn within a few weeks or a few months. It's really important that when you make an offer, you really need to understand the pain points so that you can leverage on this need. And the time is also important. They may not have the fundings today, they may not have the time to invest, but maybe in two weeks, in three weeks it will be the right time to approach them again. And this is a sales concept that is primordial into converting people more efficiently from the sales qualified lead into customers. Lifecycle is the second concept. Everything starts usually with the lead, which is someone we may have some information about but we're not quite sure who they are.

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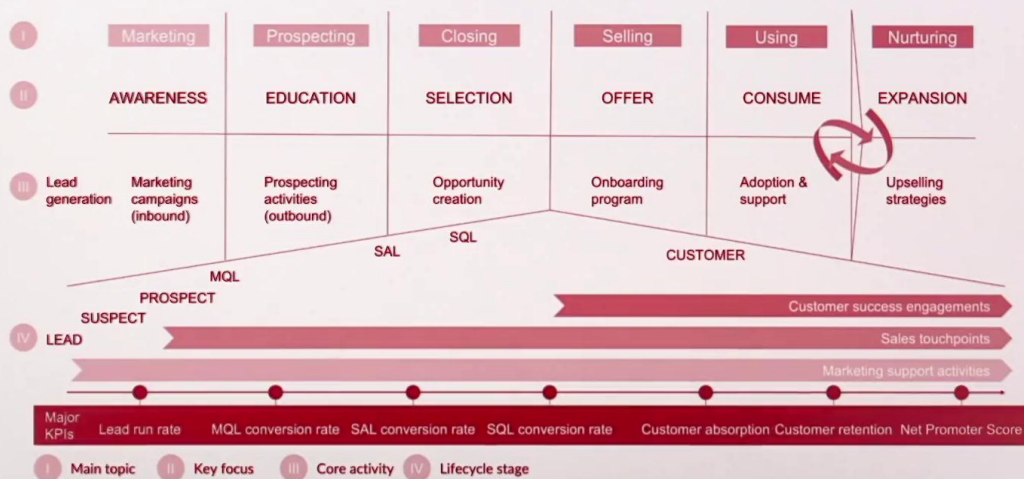
Summary



9m 59s



# Scratching the fundamentals: from AIDA to KPIs



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It could be we only have info@email address or generate company name, but we know no one inside. We add more information using marketing activities so that someone can become a prospect and can be ready to be engaged by sales. The objective of sales is to convert these guys into becoming a sales accepted lead, meaning that yes, as I mentioned before, there is potential to sell something to them. And then SQL is really defined with there's a need and there's a time. This lifecycle helps define the actions that everyone within the company between marketing and sales potentially also product will have to take to support the conversion of a lead into a customer. Lead status is the second level. This is what attitude a lead has within this lifecycle. How do they behave with you? Are they interested? Did you manage to convey the information they need at the right time? So that they continue being interested? Or will they, for example, turn into a not interested face because we're doing a transition within a company. It's not the right time, it's not the right fit. Let's talk about it later in half a year. This will help you salespeople really understand, when and what type of engagement they have to do with the target company.

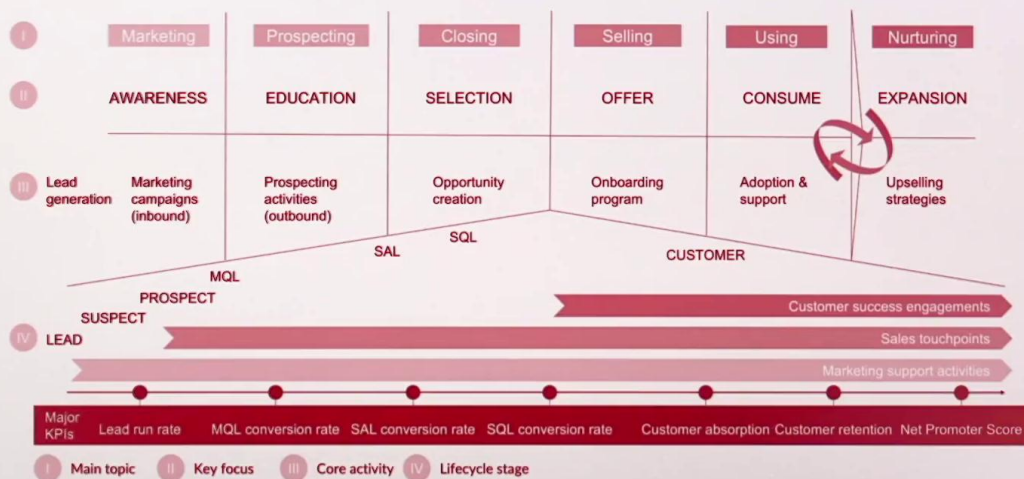
Notes

Summary



11m 10s

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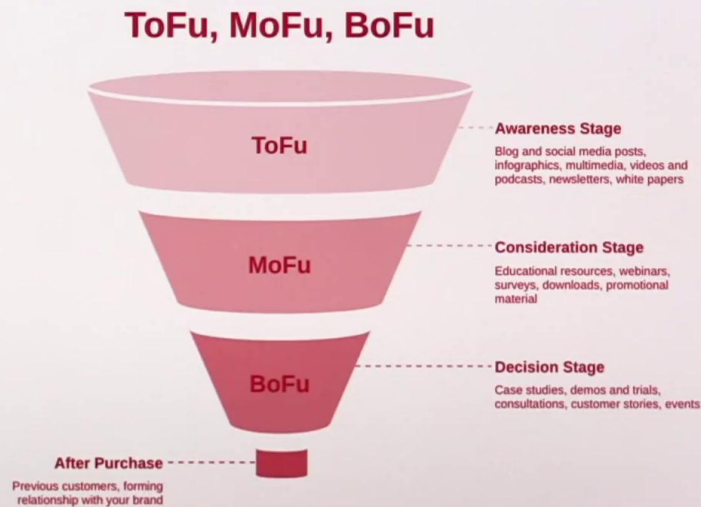
The next point is defined in advance the KPIs you need to track. This is really important because before you can measure anything, you need to collect data points obviously. And because you start everything from scratch, you will not have any data points at hand. So if you want to have NPS or conversion rates in six months, you need to collect data today. And to know what data you need to collect, you need to set what KPIs you want to look for. Obviously, everything will change over time. What you do today may be completely outdated in two weeks, but look at the entire lifecycle of your customer from its assumption point of time all the way into conversion and really understand. What metrics do you want to measure and start building data sets as of today through the funnel, communication is key and you need to adapt it.

Notes

Summary



# Communication is key and must be adapted



- Throughout the lifecycle, we communicate differently
- With the help of your digital channels, share your collaterals at different point in time to maximize conversion

This concept of ToFu, MoFu and BoFu comes from the marketing level and defines how and to whom you are communicating with. At the top of the funnel, the ToFu, we want to raise the awareness. Here, you want to share some posts on social media. You want to add some videos, some small stories about your employees to raise awareness about what you're doing. For example, see your small article online activities that you're doing with current events in Switzerland or abroad so that people understand what you do and are aware of what you do once they start engaging with you, meaning they already have some sales related actions with you. They had you on the phone, they had you via email exchange. You can start the middle of the funnel engagement. This is where you can raise the consideration willingness into becoming one of your customer. In this, you want to share some webinars where you engage actors, leaders of this field to share insights and knowledge with those targets. And once they convert, you want to focus on the bottom of the funnel or after purchase. This is where you will use existing customers information so that you can motivate the newly arrived, soon to be arriving customers so that they stay with you over a long period of time.

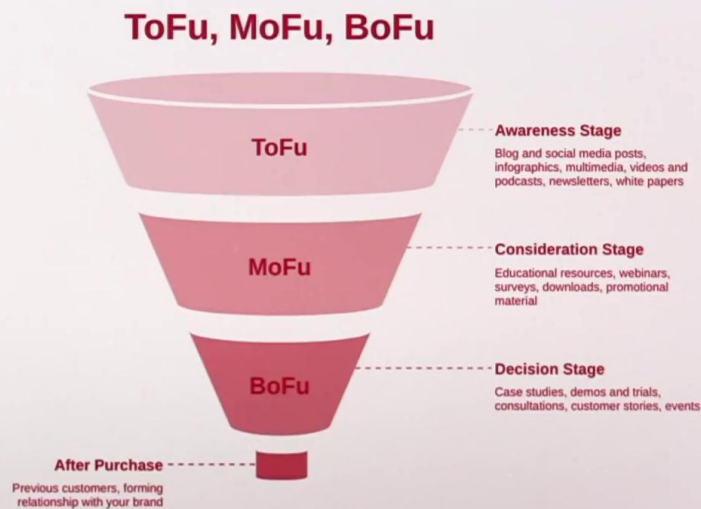
Notes

Summary



13m 26s

# Communication is key and must be adapted



- Throughout the lifecycle, we communicate differently
- With the help of your digital channels, share your collaterals at different point in time to maximize conversion

What is important is you will have to heavily rely on the digital channels that you own, but you will create a tremendous amount of collateral on a marketing level and you need to clearly understand when and to whom you can share this collateral so that you can maximize the conversions of anyone who enters your pipeline.

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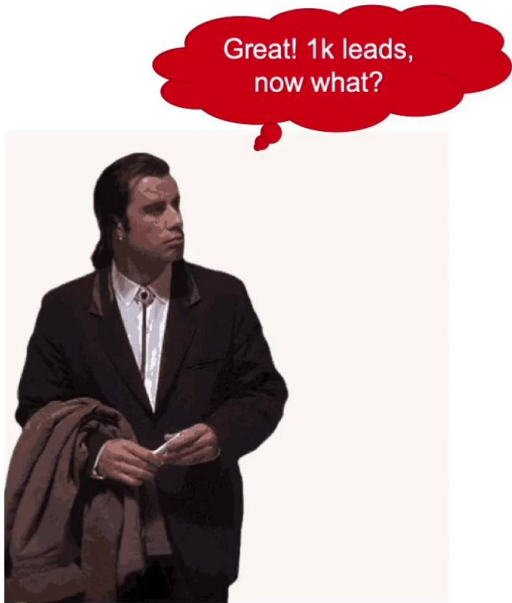
Summary



14m 49s



# Sell first, market later!



Source: Tenor, retrieved from: <https://tenor.com/view/john-travolta-lost-where-confused-gif-12587594>

- At the start, sales is more important than marketing
- The end user may not be the decision maker
  - Sales know whom to talk to, use them to define your personas in marketing
- Marketing brings collaterals for sales
  - Define together who receives what information
  - Work in common to set objectives and KPIs
- Keep both departments in sync
  - Regular updates, discussions and feedback from all employees
  - Be transparent between teams
- Be straight to the point, avoid shiny stuff
  - Leverage on your target's critical pain point
  - Get a digital footprint: Ads, social media, etc.

To do so, you need to keep both departments in sync. It's really important that you keep having feedback loop with everyone involved in the decision process for the marketing and sales, from top level management all the way down to end employees. This because the one on the phone, the one selling knows exactly what pain points are coming back and he has the first data point that marketing can use to leverage powerful content that can then convert those leads easier in the future. So be transparent between the teams. Communicate openly. Be regular at sharing points. If you have any problems, transpose those problems across departments so that everyone understands what is going on. Finally, be straight to the point. Avoid shiny stuff when you communicate to your targets, especially within the B2B environment. Because all your target companies mainly want three things. They want good quality product, they want it now, and they want it cheap. So you need to really understand how you can leverage on the pain points so that your added value really fits their needs. Don't forget to get digital. Use your footprint to convey information through multiple channels so that everyone understands what you're doing, no matter who is communicating out there.

Notes

Summary



15m 10s

# Try. Fail. Learn. Adapt. Push.



- There is not one size fits all, but:
  - Benchmark yourself and replicate what others did
  - You will make mistakes, it's a given. What matters is you learn from it and do better next time
- Nothing is set in stone!
  - What worked last week may be outdated today
  - Be fast at adapting: sales & marketing have this unique luxury product doesn't have
- Once it's action time: drop the strategy, do the work
  - Don't engineer it. Do the job, deliver, push, be chaotic
  - Once you have a better picture of where you go, implement better processes then streamline them

It's important that what sales advocates on their level through LinkedIn, through email and calling matches with what marketing is doing and that you base everything using numbers, B2B people love numbers. One last note before we leave. Remember, there is no one size fits all. We merely covered the ground of marketing and sales, with some key takeaways some theories, some concepts, but your company is different than anyone else. So benchmark yourself. Understand what others did in some part so that it can replicate it and make it better. Of course, by doing this, you will make mistakes, it's a given. What is more important is that once you do those mistakes, learn from them, implement change and move forward. Connect to change. Nothing is set in stone. What you might have implemented last week within marketing, sales may be completely outdated in two weeks because the market has changed. Product is less likely to evolve that fast because of its complexity and composition. But the unique chance that you have with marketing and sales is that you can be adaptive quite quickly. So use this to leverage action with your target and to this once it's action time, drop the strategy.

Notes

Summary



16m 26s

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Yes, it's important to set the rules, to do the backstage work, to really list concepts on a piece of paper. This will not sell your product. You need to take action. You need to call, you need to talk to people. You need to engage so that your product is moving into the market. Don't engineer it. No processes at the beginning are needed. You need to start somewhere. You will reach cars in marketing and sales. But it's important that you go through this chaotic step first to really understand what is the added value activity that you can regain from it and then you can structure it, push it and make it better so that your effort can be streamlined. Once you do this half a year down the line, look back, understand what happened and make it better for next time. I hope you enjoyed it and I wish you great success with the idea. Goodbye for now.

Notes

Summary



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