

# Accelerate B2B Marketing and Sales Performance with a Customer-Experience (CX) Driven Operating Model.

March 25, 2021

mcorp<sup>cx</sup>



# Welcome! Introducing your hosts for today...



**Michael Hinshaw**

Founder and President,  
McorpCX  
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- CX industry pioneer, on multiple “Global CX Thought Leaders to Watch” lists
- Best-selling author: *Smart Customers, Stupid Companies: Why Only Intelligent Companies Will Thrive, and How To Be One of Them*
- Mentor and Richard H. Holton Teaching Fellow at U.C. Berkeley’s Haas Business School



**Graham Clark**

VP Market Development,  
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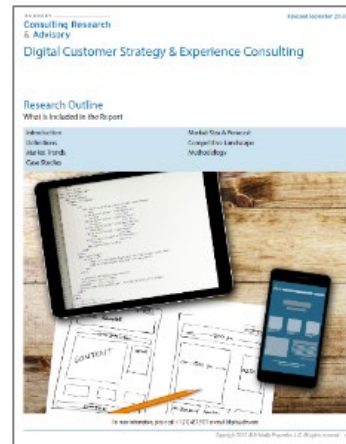
- Customer, employee and digital experience consulting leader
- Previously global head of Digital, Digital Experience and Multichannel CX at Isobar, NIIT and Mphasis
- Creator of Digital E3 frameworks for Digital and Care Operating Models.

# McorpCX: A recognized experience design and activation leader with over 19 years of leadership...

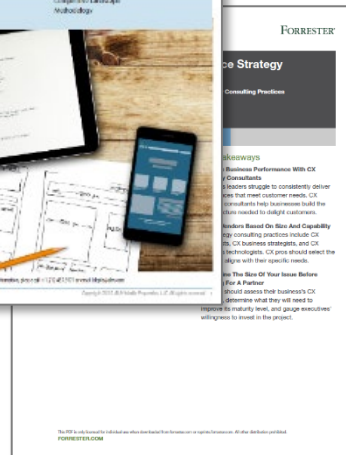
Media recognition for our thought leadership



Analyst Recognition as a Top 25 Customer, Employee and Digital Experience expert



Kennedy: Digital Customer Strategy and Experience Consulting

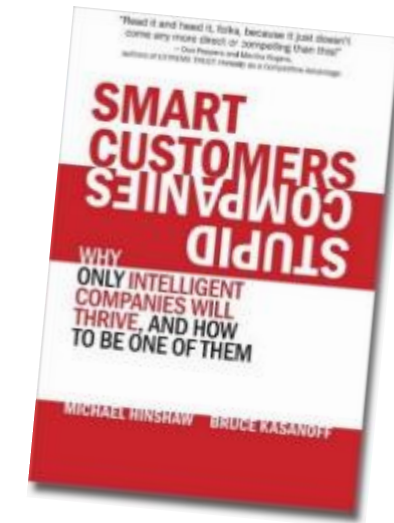


Forrester: Customer Experience Strategy Consulting



Forrester: Employee Experience Consulting

Best-selling book on Digital Customer Experience innovation



“One of the most exciting business books I’ve ever read.”

- Don Peppers  
Founder, Peppers & Rogers

# Helping activate customer-centric experience transformation—and drive results—in two core areas:

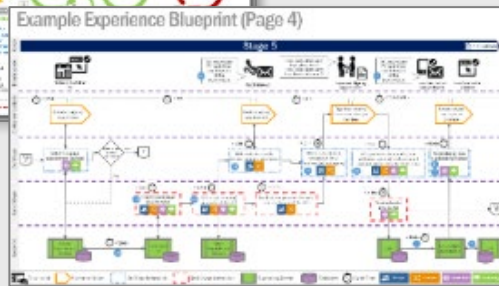
## (Re)Design and Innovate Customer and Employee Experiences



For priority personas

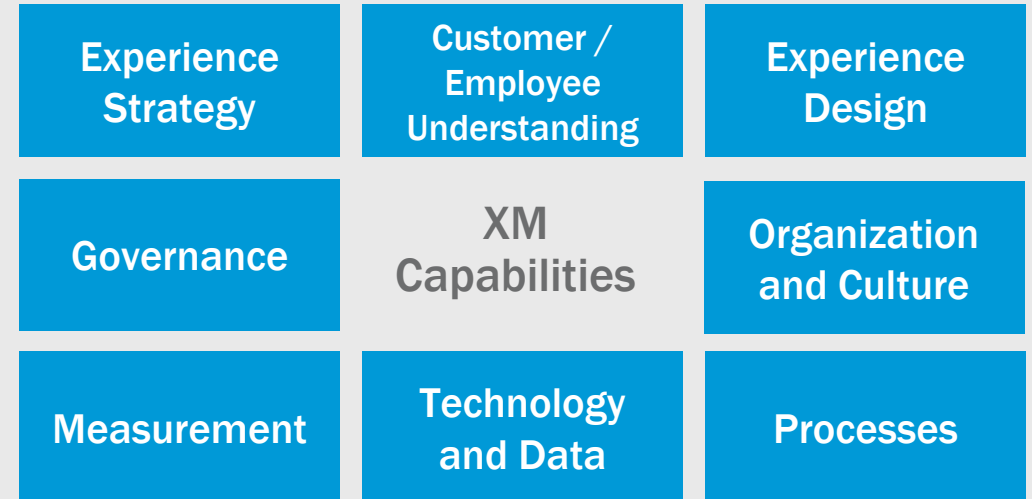


Across priority journeys



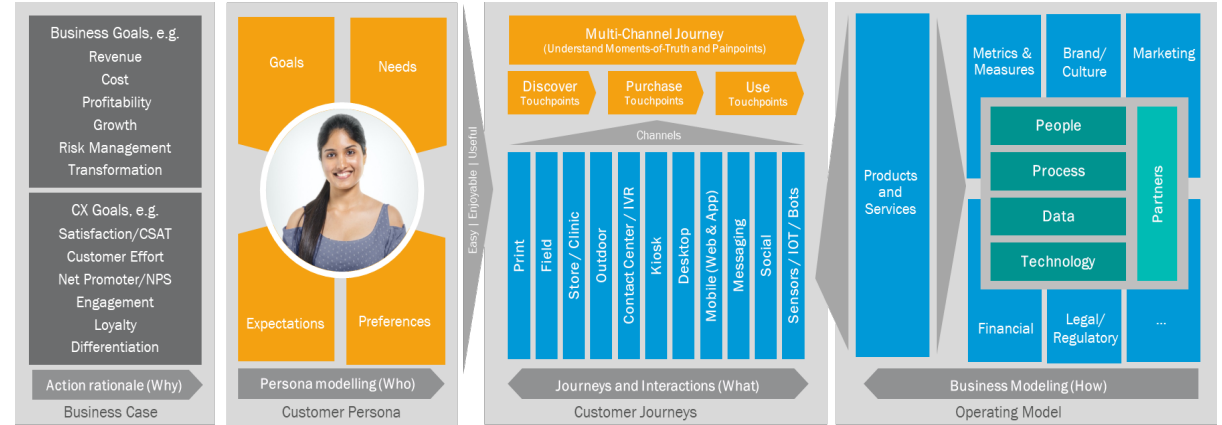
Linked to the actions, systems and capabilities to improve

## Build and Teach Experience Management (XM) Skills and Capabilities

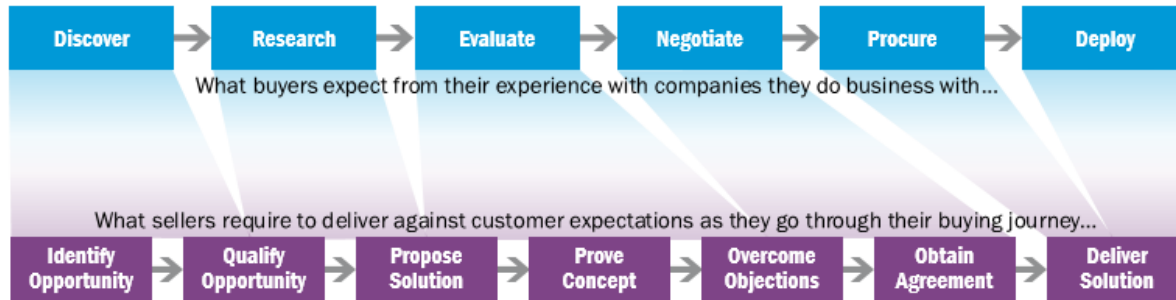


# Working with clients to accelerate B2B Marketing and Sales Performance with a CX Operating Model

**Things are starting to shift, again...**  
 We see businesses and leadership emerging from survival mode (2020) to recovery (2021, and beyond)



## Experiences occur across the Buyer's Journey



Supported by marketing and sales operations, across the Seller's Journey

**A renewed focus on key priorities**  
 Growth and competitive positioning are driving strategy; Optimizing sales, marketing and CX at the top of the list

# You can get there by understanding some key questions that CX-savvy, B2B marketing and sales leaders answer

1

Why you should make decisions through the eyes of your customers

2

How to activate and leverage a CX Operating Model, and what a 'CXOM' is)

3

How a CXOM aligns marketing and sales operations, and what it can give you

**1. Why you should make  
business decisions through the  
eyes of your customers**

**Customer Experience (CX)**  
is: “How customers  
perceive their interactions  
with you”

To radically improve this...

**Customer Experience  
Management (CXM)**  
is: “The collection of  
capabilities and processes  
used to systematically  
design, deliver, and react to  
customer interactions”

We help you improve this...



A woman with dark curly hair and glasses, wearing a black and white striped long-sleeved shirt, is sitting at a desk and smiling while looking at a laptop. The background shows a modern office with large windows, a potted plant, and a desk with a pen and paper. The overall scene is bright and professional.

**Digital-first-but-not-digital-only “smart B2B customers” are radically changing the game for the businesses that wish to serve them\***

**\*At least 80% of B2B buyers are not only looking for but expect a buying experience like that of a B2C customer...**

# No matter what channel they choose to interact with, where they are or when they do... They want it all

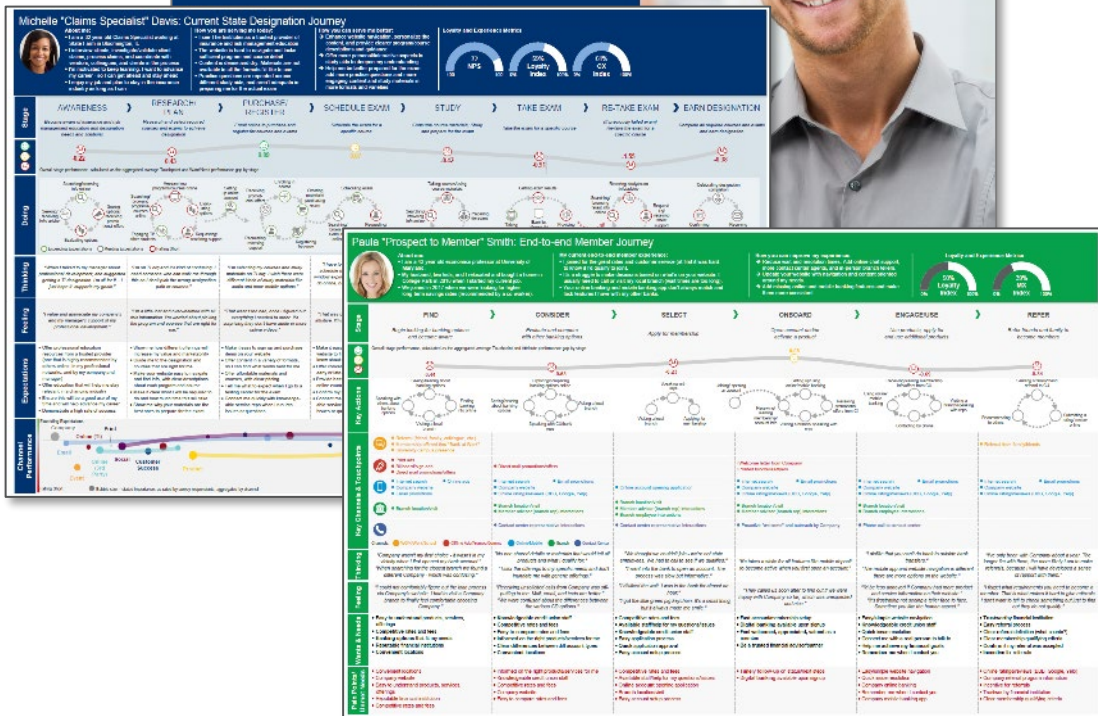


**\*91% of B2B buyer searches are carried out on a mobile device...**

# More effective sales and marketing is informed by better understanding what your customers want, think and do

“Early on, my company suggested designations for career advancement. The higher up you want to go, it really becomes a requirement.”

James “Underwriter” Lewis



Customer journey maps help cross-functional teams rally around buyers:

- Expectations, across the journey
- The experiences they have
- Their wants and needs
- Specific pain points and challenges
- Moments of Truth

They also help you more effectively measure, and better manage, your customer experiences.

# Embracing Customer Experience Management (CXM) helps drive significant payoffs for marketing and sales...

**+54%**

**Marketing return on investment**

24.9%: With Customer Journey Management, 16.2%: Without

**+24%**

**Positive social media mentions**

17.9%: With Customer Journey Management, 5.1%: Without

**+251%**

**Revenue from customer referrals**

17.1%: With Customer Journey Management, 1.2%: Without

**+1,767%**

**Greater customer "win-back" rates**

16.8%: With Customer Journey Management, 0.9%: Without

**+1,325%**

**Faster average sales cycle**

17.1%: With Customer Journey Management, 1.2%: Without

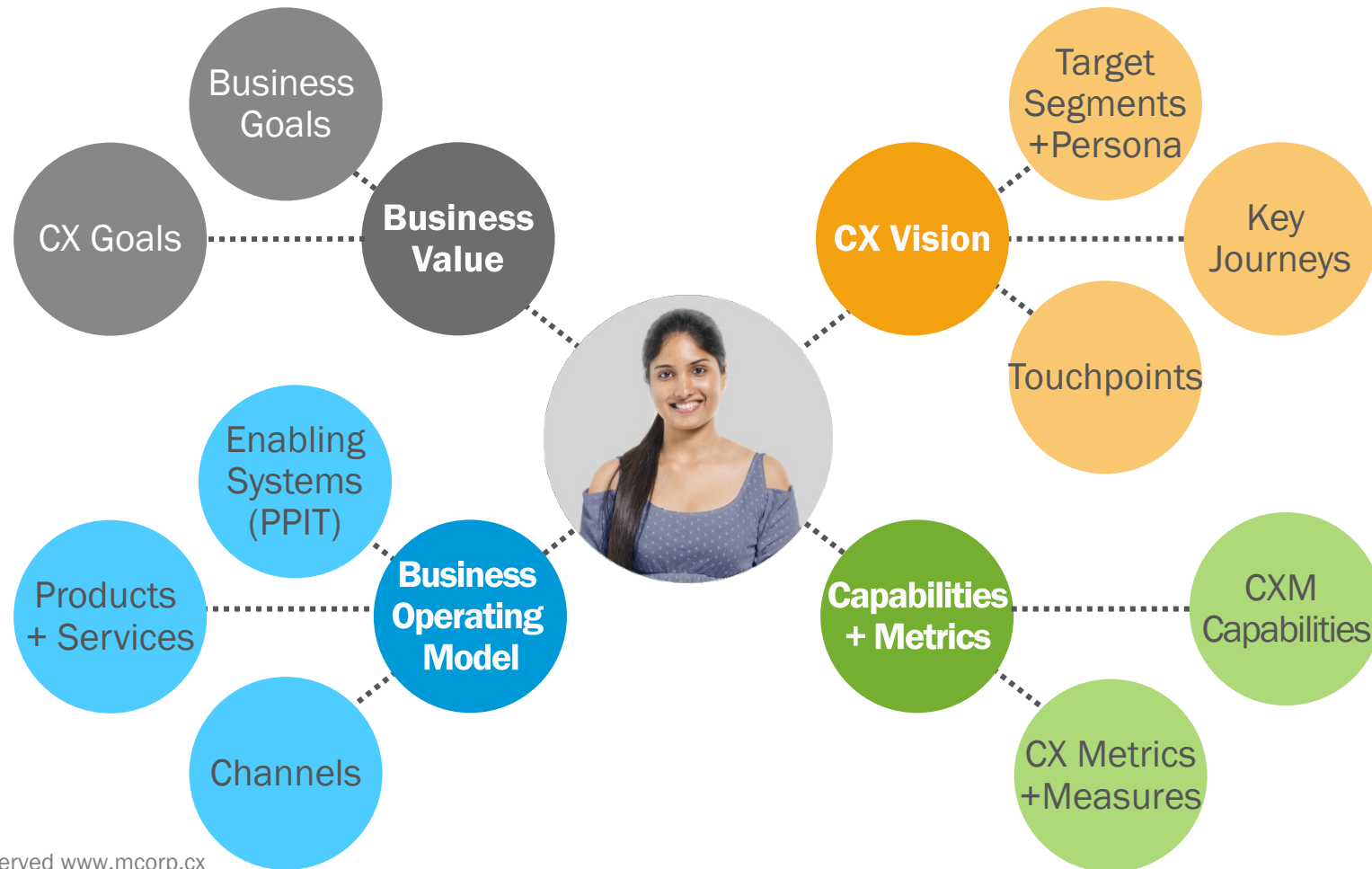
**+56%**

**More cross- and up-sell revenue**

15.3%: With Customer Journey Management, 9.8%: Without

# 2. What is a Customer Experience Operating Model?

# Putting customers' experience at the core of your business: The CX Operating Model (CXOM)



# Your CXOM drives the experiences buyers have with you, and that your sellers deliver. Key components include:

- Why:** Business Case, Action Rationale
- Who:** Target Segments, Persona
- What:** Channels, Journeys, Interactions
- How:** People and Organizations  
Processes and Workflows  
Technology and Data  
Products and Services  
Measures and Metrics  
CXM Capabilities

Delivering...

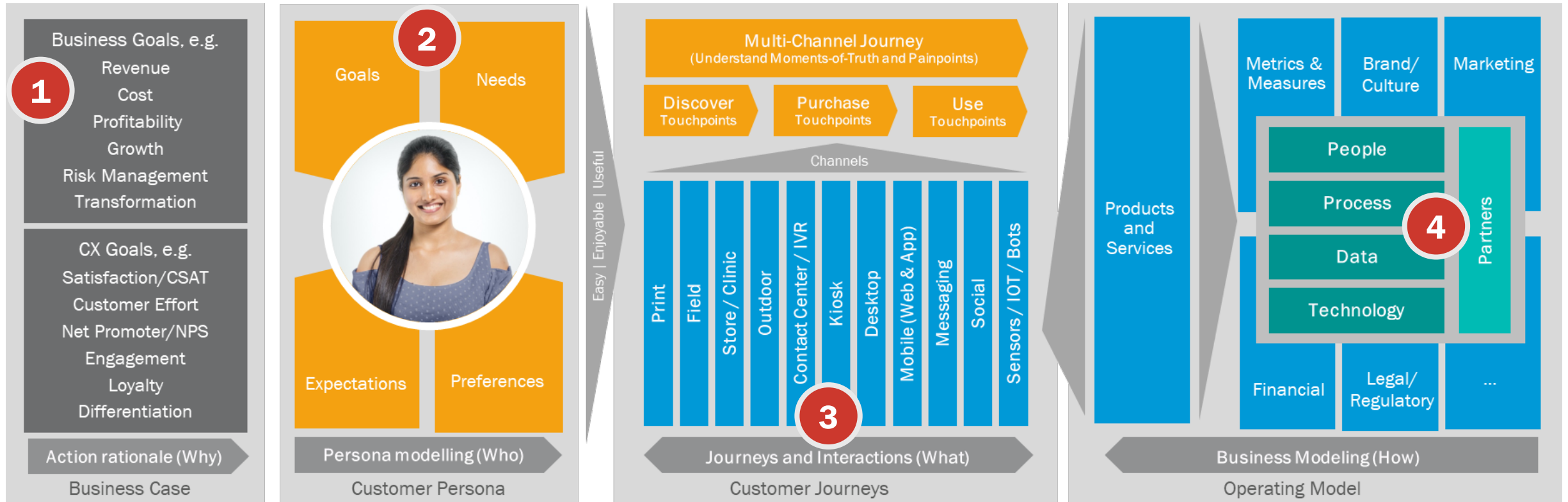
## Buyer and Seller Experiences

**Buyer Experience Screenshot:** Michael 'Advancer' Alvarez | Purchase Sub-Journey. Includes sections for 'Who is Michael?', 'How does he interact with us?', and 'How can we win his part?'. It details a process from 'Identify' to 'Get Purchase Help'.

**Seller Journey Flowcharts:**

- Multinational OEM, Client Computing Solutions, Design - Seller Journey:** A process flow from 'Identify Opportunity' to 'Account Mgmt'. Key stages include: Identify Opportunity, Qualify Opportunity, Define Needs, Propose Solution, Prove Concept, Overcome Objections, Obtain Agreement, Deliver Solution, and Account Mgmt. Each stage has associated tasks and metrics.
- Enterprise & Government, Cloud Computing Solutions, Deal - Seller Journey:** A process flow from 'Identify Opportunity' to 'Sales Mgmt'. Key stages include: Seller Theme, Understanding & Aligning to Customer Needs, Decision Maker Identification, Legal, Contracts & Escrow, BU Direction & Support, Customer Relationship, Opportunity Management, Sales Influence, and Sales Mgmt. It also includes a 'Priority and Challenging (Traits and Resources)' section.

# A CXOM improves operations, and drives performance



1. Improved customer experience drives business operating performance

2. Starting with understanding your customers view of their desired experiences

3. Knowing how your interaction channels meet their experience expectations

4. Aligning your business operating model to support all interactions



# Six key trends with massive operating model impacts

**1.**

Changing  
Customer  
Expectations

**2.**

The Need For  
Digital  
Transformation

**3.**

Changing Value  
Drivers of Customer  
Experience

**4.**

Commoditization  
Across Industries

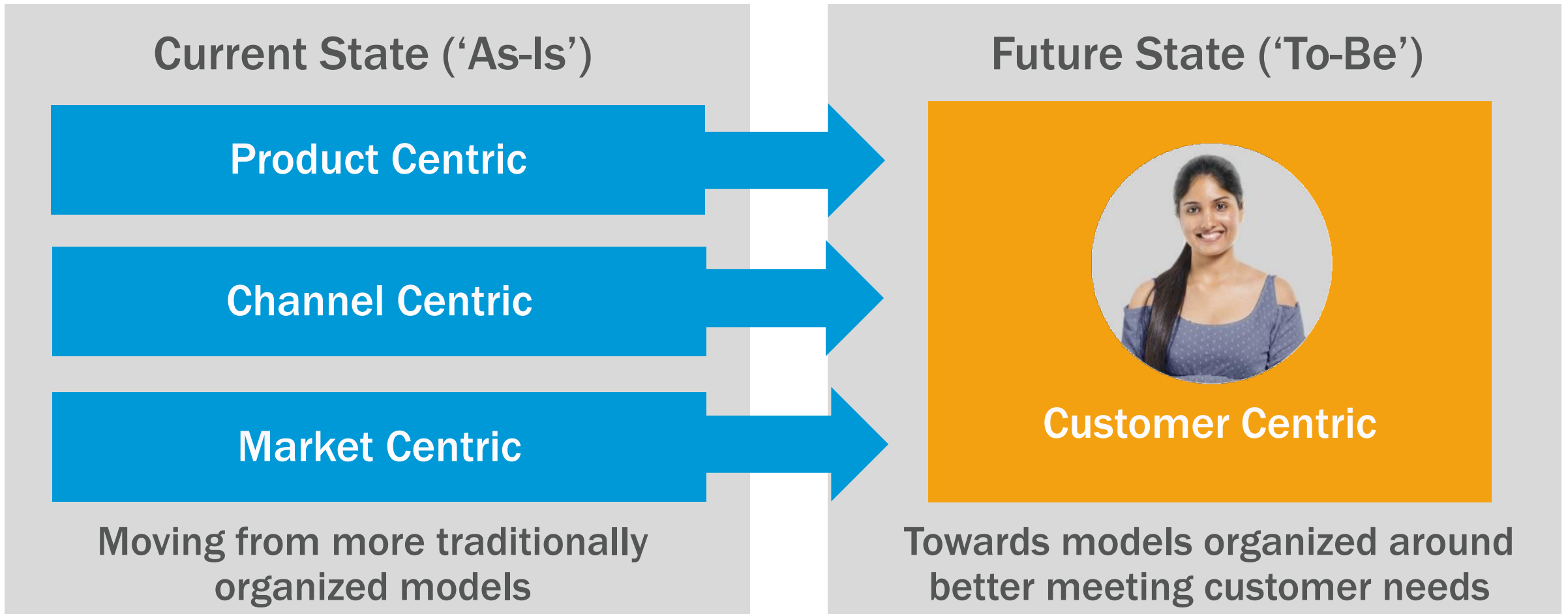
**5.**

Swiftly Evolving  
Technology  
Landscape

**6.**

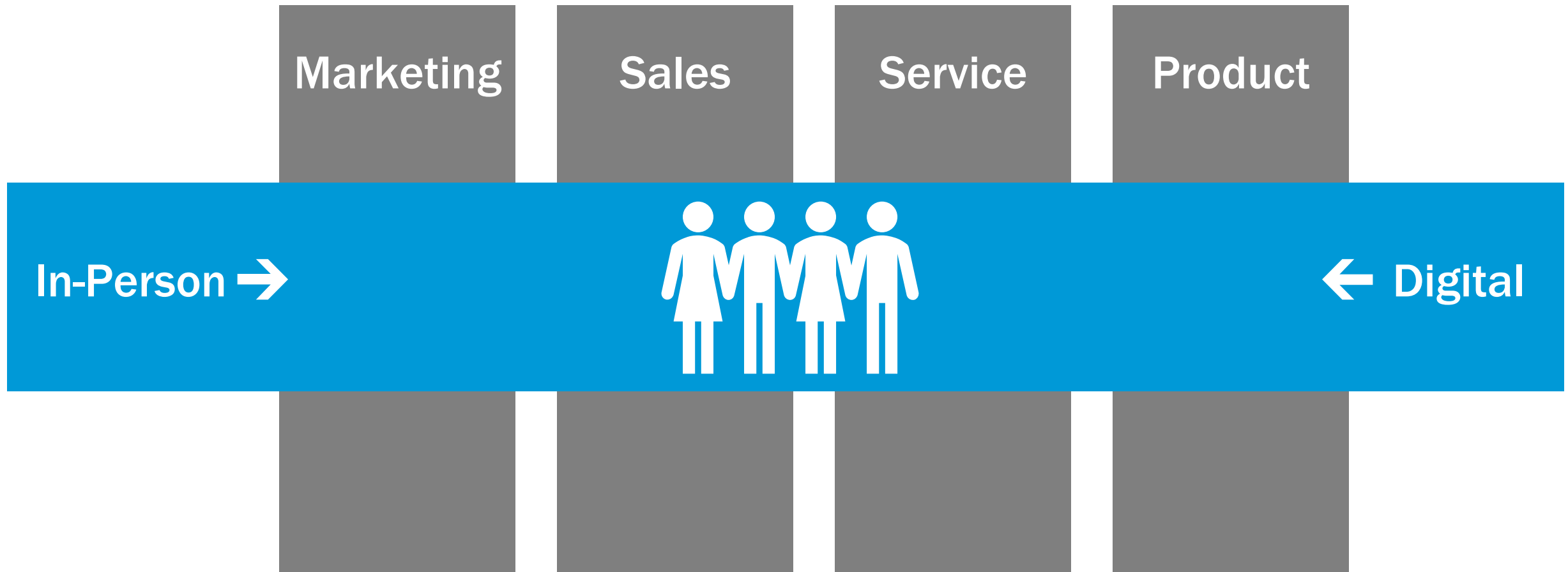
Accelerating Need  
For Speed And  
Agility

# Since all these things are happening everywhere and seemingly all at once, it's time to shift how we operate



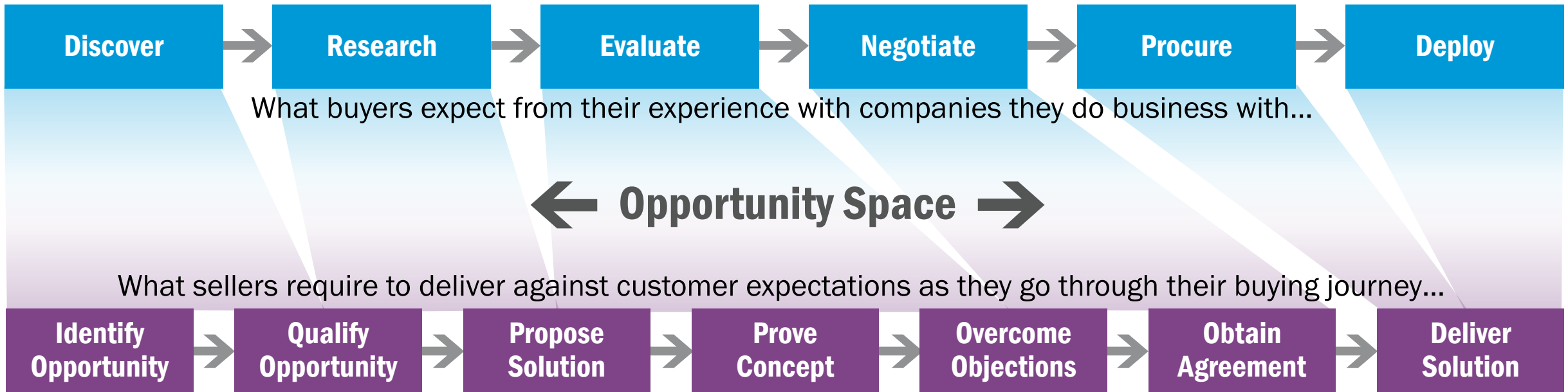
**3. How your CXOM aligns  
marketing and sales operations,  
and what it can give you**

# For B2B customers, interaction challenges exist across and between core 'experience impacting' organizations



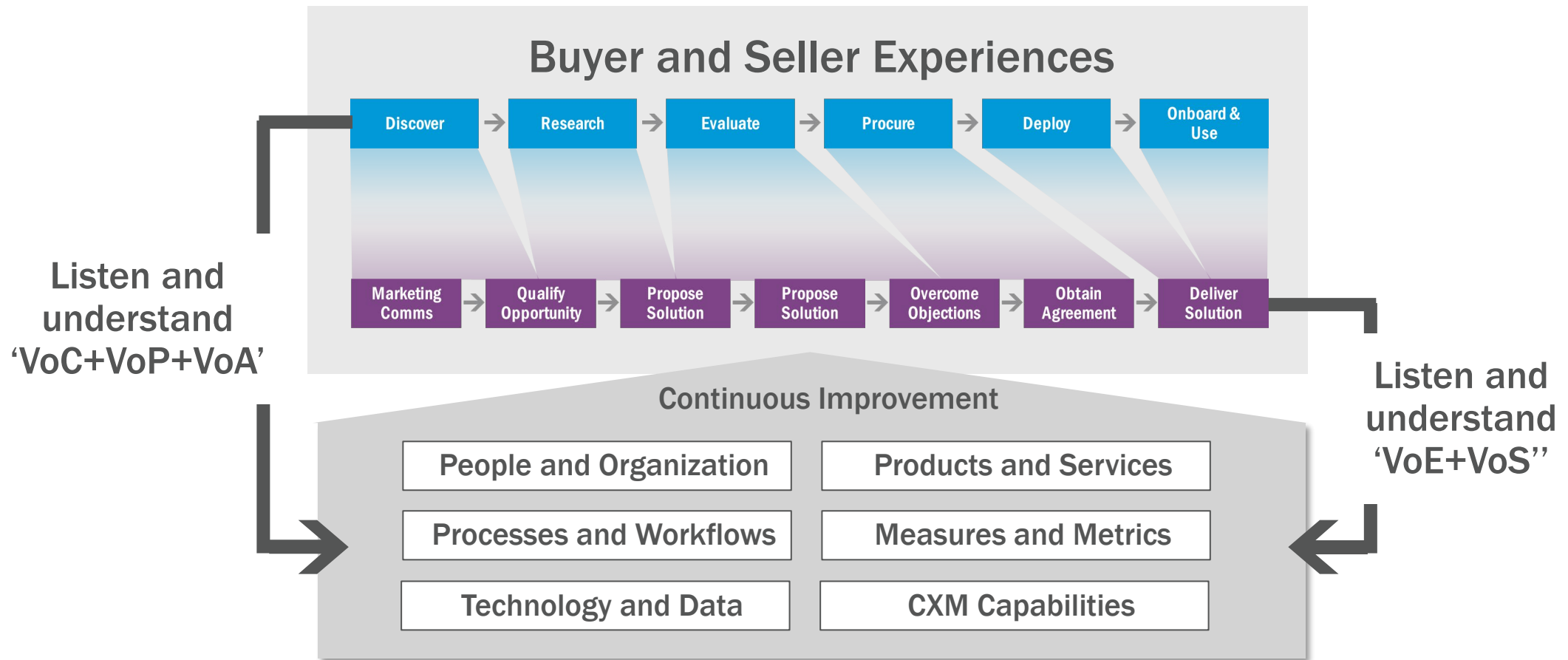
# The B2B marketing and sales alignment opportunity: Aligning and optimizing buyer and seller journeys...

Experiences occur across the Buyer's Journey



Supported by marketing and sales operations, across the Seller's Journey

# Competing to win with CX: Beyond CRM – Listening is critical to customer experience and sales optimization



# Leaders activate robust, listening and measurement systems to inform customer-centric improvements

**Robust listening systems provide operational insights that help reduce customer and process disconnects**

- Customer feedback (by buyer type)
- Partner/distributor feedback
- Seller feedback
- Operational metrics (digital and non-digital)
- Financial metrics (unique to you)
- Benchmarking
- Improvement opportunities



The Quick-Start Activation Playbook is available here:  
[bit.ly/McorpCXplaybook](https://bit.ly/McorpCXplaybook)

# Real-world example: \$3B National BFSI Company

## Business Challenges:

- Traditional sales informed long term relationship model leaves them exposed
- Top-tier of relationships worth \$10m+
- Customer innovation needs drives defections

## Distribution:

Direct and partner enabled solutions for financial services providers

**Case for Change:**  
Over \$50M

**“A 25-year, \$10m+ annual revenue customer left us despite account team assurances things were great, driving a focus on improvements.”**  
*- VP Marketing Operations and Customer Engagement*



# Real-world example: \$50B+ global technology leader

## Distribution:

Direct sales, and digital partner-enabled interaction models

## Business Challenges:

- Inconsistent communications across products, partners, digital and sales leaders
- Challenges turning sales improvement investments to business improvements

**“Our CX-aligned seller journeys let us prioritize sales improvements based on our customers’ priorities - eliminating things we felt were important but customers care little about.”**

*- Head of global sales operations improvement*

## Case for Change:

Hundreds of millions in new and recurring top-line revenue

**Your customer's needs and expectations continue to evolve; Sales and marketing leaders are evolving with them...**

# 8 key actions to maximize marketing and sales ROI

## Create Journeys

Clarify experience needs through research driven journeys

## Align Processes

Understanding how marketing, sales (and service) processes align

## Cross-Functional

With special attention cross organizational friction

## Define CXOM

And the organizations, tech, data, partners etc to deliver

## Driver Measures

With clear measurement of CX and Business drivers

## Add Voices

Voice of Sales enhanced by Voice of Customer & Voice of Analytics system

## Benefits Case

Ensure a clear and measurable case for change

## Act

Continuously act and measure to improve

# Thank you!



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