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Design to Deliver Workbook

Creating Digital Experiences that
Engage Audiences & Drive Pipeline

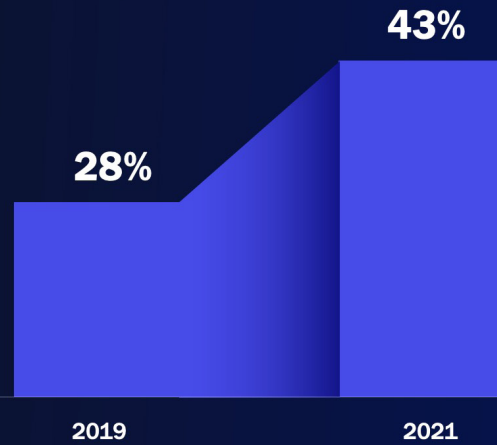## Buyers Doing More Research Than Ever

27

17

2019   2021

More Stakeholders Than Ever Before

% Buyers in a Committee Scenario

43%

28%

2019   2021

Digital Experiences Explosion

135.57%

increase in digital experiences

from 2019 to 2021

Notes:

The Myth of Digital Fatigue

74%

of marketers who increased
their digital experiences
production, saw event
attendance rates increase

70%

report prioritizing
engagement for future digital
experiences.

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Sales professionals report that quality engagement data benefits their activities

Engagement data creates Ideal Outcomes

- 55% of respondents says it improves customer retention

- 50% says it improves prospecting conversations.

Sales Values Digital Experiences

- 95% of respondents agree or strongly believe that their company's events resonate with customers and prospects.

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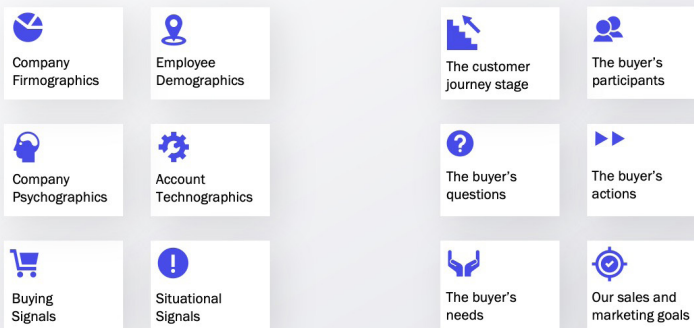
Notes:

5 Requirements for Digital Marketing Success

1. Personas And Alignment to Audience Journeys
2. Setting Up A Digital First Marketing Strategy
3. Documenting Programs
4. Driving Engagement Aligned To Buyer & Customer Journey
5. Acting On First-party Data

Personas & Alignment to Buyer Journey

Key Components

Company Firmographics	Employee Demographics		The customer journey stage	The buyer's participants
Company Psychographics	Account Technographics		The buyer's questions	The buyer's actions
Buying Signals	Situational Signals		The buyer's needs	Our sales and marketing goals

Notes:

Buying Personas

How do we find a sustainable way to update our personas consistently

PERSONA ROLE

FUNCTIONAL BIAS (HOW THEY APPROACH DECISIONS):	WHY [OUR COMPANY]:	TITLES: REPORTS TO: DECISION-MAKING/INFLUENCE POWER: BUDGET APPROVAL: DIRECT REPORTS:
RESPONSIBILITIES:	HOW THEY SHOP/RESEARCH:	PAIN POINTS:
BUSINESS GOALS & CONCERNS:	PURCHASE DECISION CRITERIA: WHERE TO FIND THEM:	USE CASES:
ATTITUDE & REPUTATION IN THE INDUSTRY:	PREFERRED CONTENT:	POTENTIAL OBJECTIONS:

The Buying Scenario

SCENARIO	DECISION AUTHORITY	PURCHASE TIMEFRAME	# OF BUYING CENTERS	# OF MEMBERS
COMMITTEE	Agreement at the executive leadership level	One to two quarters (or more)	Five (or more)	Six to 10 (or more)
CONSENSUS	Agreement across teams, functions or departments	One to two quarters (but no more)	Three to four	Three to five
INDEPENDENT	Agreement among individuals	Less than eight weeks	One to two	One to two

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Notes:

Buying Personas

BUYING COMMITTEE PERSONAS

PERSONA ROLES 👤	TITLES 📄
Business Decision Makers	
Technical Decision Makers	
Sponsors	
Business Influencers	
Technical Influencers	
Users	
Ratifier	

The Buying Scenario

SCENARIO	DECISION AUTHORITY	AVERAGE DEAL SIZE	TYPICAL PURCHASE TIMEFRAME
# OF BUYING CENTERS	**IDENTIFIED BUYING CENTERS**	**# OF MEMBERS**	**IDENTIFIED PERSONAS**

Notes:

The Buyer's Journey

Buying Phase ➡		Education ➡		Solution ➡		Selection	
Buying Decision Stage		**Loosen Status Quo**	**Commit To Change**	**Explore Possible Solutions**	**Commit To A Solution**	**Justify The Decision**	**Make The Selection**
Persona B — Interaction	Non-human						
	Human						
Content	Asset type	1. Article/publication 2. Analyst report	3. White paper 4. Case study 5. Sales presentation	6. Promotional video 7. Sales presentation 8. White paper	9. Case study 10. Brochure 11. Sales presentation	12. Proposal 13. Analyst report	14. Case study 15. Sales presentation
	Delivery channel	1. Web site 2. Web site	3. Web site 4. YouTube 5. Sales call	6. YouTube 7. Sales call 8. Web site	9. Event 10. Web site 11. Sales call	12. Executive briefing 13. Microsite	14. Sales call 15. LinkedIn

● Simulated   ● Facilitated   ● Orchestrated   ● Influenced

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What Is Strategy?

Isn't

● Theoretical

● Tactics

● Generic

Is

● Specific

● Actionable

● Tailored

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Notes:

Leverage An Audience-Centric Approach

MARKETING CONTENT	Messaging content
DELIVERY MECHANISM	Route to engage audiences
ENGAGEMENT	Interactive elements to retain attendee's attention
KEY CTAs	Actions for attendees to take during and after the event
BUYING SIGNALS	The results of engagement & CTAs

Audience-Centric Marketing Strategy

BUYER EXPERIENCE	EDUCATION	SOLUTION	SELECTION	DEVELOP	RETAIN	GROW

MARKETING CONTENT

DELIVERY MECHANISM

ENGAGEMENT

KEY CTAs

BUYING SIGNALS

Notes:

Digital-First Marketing Strategy

JOURNEY PHASE	AWARENESS	CONSIDERATION	SELECTION	PURCHASE	ADOPTION	UPSELL
MARKETING CONTENT	Thought leadership	Case study	Executive briefing	Training	Product roadmap	Account-based content
DELIVERY MECHANISM	Webinar	Content hub	Product deminar	Content hub	Webinar	Personalized content experience
ENGAGEMENT	Q&A	Poll	Survey	Subscribe	Review	Q&A
KEY CTAs	Subscribe	Request demo	Book meeting	Join community	Get certified	Book meeting
BUYING SIGNALS	Start awareness email nurture	Start account-based advertising campaign	Deliver direct mail	Send NPS survey	Alert to offer for services	Start upsell email nurture

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Documenting Programs

Key Elements

- 📋 Objectives
- 🎉 Goals and KPIs
- 🛒 Target personas and buying stages
- 🗂 Core message and themes

- 💬 Internal teams
- 🎯 External teams
- 📅 Channels
- 🗔 Content
- ⭐ Results

Notes:

The Program Plan

OBJECTIVES	GOALS AND KPIS	CORE CAMPAIGN MESSAGE	CAMPAIGN THEMES
• Increase enterprise target account sales growth and gain efficiency to support revenue goals long-term • Increase velocity and conversion of key target accounts	• Engage with 50 named enterprise accounts • Generate 20 account responses • 20% MQL to SQL conversion rate	• Building predictability into your pipeline	• Business ROI • Predictable revenue • Scalable growth
TARGET PERSONAS	**ADDRESSED BUYING STAGES**	**CHANNELS**	**CONTENT**
• Business decision makers • Technical decision makers • Executive sponsors • Purchase influencers	• Awareness • Solution • Selection	• Email • Website • Social media advertising • Remarketing • Search • SEO	• Webinars • Whitepapers • Tip sheets • Guides • Blog posts
INTERNAL/EXTERNAL TEAMS		**CAMPAIGN RESULTS**	
• Marketing • Marketing operations • Sales • Ad agency			

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Deliverable: Digital Experience Brief

DELIVERABLE NAME:
CLIENT NAME:
DATE:

BUSINESS OBJECTIVE	SPEAKERS	DATE/TIME	ABSTRACT
FORMAT	**ON-DEMAND COMPONENTS**	**REQUIRED ASSETS**	

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Notes:

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DEFINING ENGAGEMENT TYPES

Consumption

This is when there is a hierarchy of presenter to audience. The audience is mainly present to be informed and take in the information that the presenter(s) are sharing.

Participation

This is where presenters and audience members are interacting directly without a hierarchy between both that is demanded by technology. Everyone is on a level playing field as far as participation. A moderator may be anointed if there isn't a presenter sharing content.

Networking

Without an assigned moderator or presenter, all event participants are empowered to engage in conversation. The peer-to-peer nature of this engagement type allows for natural conversation flow without a strict agenda.

Notes:

Notes:

Personalization From Signals

MATURITY

RANDOM SEQUENTIAL
Buyer 1
Buyer 2
Buyer 3

ALIGNED SEQUENTIAL
Buyer 1
Buyer 2
Buyer 3

ALIGNED ADAPTIVE
Buyer 1
Buyer 2
Buyer 3

■ Education
■ Solution
■ Selection

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Polling To Influence Next Best Action

POLL QUESTION:

Would you be interested in connecting with a sales team Member?

☐ Yes
☐ No

Yes

Sales: Follow-up!

No

Marketing: Evaluate for campaign placement

SELECTION

Executive session

Request a quote
Speak with sales

Questions asked
Quotes
Meetings

Notes:

Polling To Influence Program Placement

POLL QUESTION:

How do your participation rates for mental health benefits compare to regional data?

☐ Just about the same
☐ Better
☐ Worse

Just about the same

Sales: Follow up to talk about further advancements

Better

Marketing: Events Email Campaign for Future Panelists: Tell us what you're doing well

Worse

Sales: Personal email with content recommendation that will help to alleviate those challenges with CTA to schedule more time.

EDUCATION

Thought leadership

Register for webinar series
Engage with more content

Time on webinar
Poll responses
Registration

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Content To Influence Program Placement

RESOURCE CENTER:

☐ Traditional IRA 101
☐ Roth IRA Limits
☐ Tax Implications of IRAs

IRA 101

Sales: SDR follow up to inform about upcoming product launch

Roth IRA Limits

Marketing: Email to invite them to register for Roth IRA-specific Engagement Hub

Tax Implications

Marketing: Email to invite to upcoming live session

SELECTION

Thought leadership

Speak to Sales
Engage with more content

Time on webinar
Content Downloaded
Registration

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Notes:

Reactions To Influence Program Placement

EMOJI REACTIONS:

❤️ Stocks
❤️ CDs
❤️ Bonds

Stocks

Sales: Invite to participate in beta Brokerage services program

CDs

Sales: Flagged to alert customer once product is available.

Bonds

Sales: Alert for secondary trades programs

ADOPTION

Product Roadmap

Review Certification

Account Impact
Reactions

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Design to Deliver Methodology

Marketing Strategy
- Is marketing strategy set?
- Are programs mapped to audience journey?
- Are personas defined and implemented?

Experience Design
- Is it branded?
- Is it laid out aesthetically?
- Are appropriate tools minimized/maximized for audiences?

Engagement
- Using engagement tools?
- Are they mentioned?
- Engagement aligned to the content and audience journey?

CTAs
- Using CTAs?
- Are they mentioned?
- CTAs aligned to the content and audience journey?

Action & Data
- ON24 Connect
- Integrations w/ CRM
- Integrations w/ MAP

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Notes:

Design to Deliver Scorecard

	Below Average (0-1)	Average (2)	Advanced (3)
Marketing Strategy			
Experience Design			
Engagement			
CTAs			
Action & Data			

Notes: