

Working with Buyers to Create High-Impact Buying Experiences

The Mighty Guides Expert Playbook



Table of Contents

Meet Our Experts

Chapter 1:

The Value of High-Impact Buying Experiences

Chapter 2:

Customer Research

Chapter 3:

Competition

Chapter 4:

Content Creation and Messaging

Chapter 5:

Creating Demand

Chapter 6:

Buying Journey

Chapter 7:

Buying Committee

Chapter 8:

Optimize and Measure

Chapter 9:

Building Relationships With Customers

Chapter 10:

Encouraging Customer Advocacy

Chapter 11:

Customer Advisory Boards

Expert Bios

Meet Our Experts

Kyle Lacy, the CMO of Jellyfish shared, “Managing a positive prospect and customer experience – before and after purchase – is the only thing that makes marketing relevant.” Whether you’re thinking about brand, persona, product, pain points, or sales cycle, it all concerns the buyer journey and the unique experiences you create. We interviewed marketing leaders on how they are creating high-impact buying experiences.

We hope you enjoy their insights!



David Rogelberg

Publisher

Mighty Guides, Inc.

david@mightyguides.com

(516) 234 2969



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.



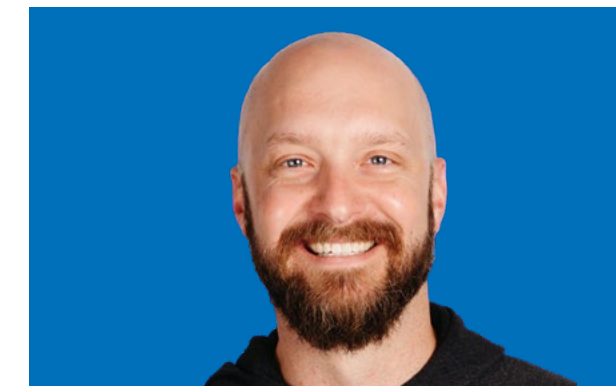
Anastasia Pavlova

Founder and CMO, Bold GTM



Justin Steinman

CMO, Definitive Healthcare



Kyle Lacy

CMO, Jellyfish



Brian Gladstein

CMO, Tufin



Ed Breault

CMO, Malbek



Reuben Braham

B2B Enterprise Marketing
Executive and Consultant

● Chapter 1

The Value of High-Impact Buying Experiences

The Value of High-Impact Buying Experiences

The Goal:

Create a buying experience that brings you new business and new opportunities.

How To Achieve This:

- Each buyer experience must provide the relevant information for the stage of the buyer's journey, at the right time, and in the channel where the buyer wants to consume the information.
- Understand your customer needs.
- Publish content that is relevant, compelling, useful, and differentiates you.
- Create a meaningful, personal connection that leaves a lasting impression and establishes a feeling of partnership with the customer.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

What are the benefits of creating great buying experiences?



Brian Gladstein
CMO, Tufin

Creating Opportunities, Driving Revenue

You know you've created a great buying experience when it creates opportunities and drives revenue.



Kyle Lacy
CMO, Jellyfish

Building a Bigger Relationship With Customers

By creating value beyond the outcome of the software's functionality, your software won't be perceived as a commodity, which causes you to lose on pricing. Instead, you'll build a bigger relationship with your customers, giving you more pricing and branding opportunities.



Reuben Braham
B2B Enterprise Marketing Executive and Consultant

Faster Conversion of Prospects to Customers

You know your buying experience works when prospects quickly turn into customers. You know you've created an excellent buying experience when they exhibit loyalty, advocate for you, grow in value, and increase your average lifecycle value by helping you bring in new business.

What do buyers look for in a buying experience?



Ed Breault
CMO, Malbek

Pain Relief and Value Realization

A buying experience starts with a moment of need and a decision to seek a way to ease the pain—whether that’s moving forward in your career or life or just experiencing something new. The instant you think you found what you’ve been searching for, it hits you rationally and emotionally, like, “Yes! I was looking for this.” And when you experience the feeling that you’re making progress, you want the ride to continue.

When your buyers see you have a process to get them to value realization and that you’re in it for the long haul, that’s the magic you need to have in the buying and selling process.



Anastasia Pavlova
Founder and CMO, Bold GTM

Right Information at the Right Time

A high-impact experience not only satisfies the functional needs of the buyer, but also delivers significant value. The experience must provide the buyer with the right information for the stage of the journey they’re in, at the right time, and in the channel where the buyer wants to consume the information.

To stay top of mind and to be a trusted choice, companies need to build relationships with prospective buyers over time with content that is relevant, compelling, and useful. They’re either in the market for your solution or not.



Justin Steinman

CMO, Definitive Healthcare

Free Advice and Ideas From Experts

How-to webinars are very effective at generating leads because you provide real value to a prospect in return for their time. Definitive Healthcare sells to people who want to sell into healthcare. Our value prop is that healthcare is complex, and we can help you understand, compete, and win in the healthcare market. So, we create webinars on how to use data to identify the right hospital executives. And, of course, the answer is to buy Definitive Healthcare. Even if prospects don't intend to buy your product, prospects will engage in the webinar chat because they're trying to get free advice and ideas from your expert. Their questions and the prospective customer's comments provide invaluable insights into a prospective customer's concerns and challenges.



Kyle Lacy

CMO, Jellyfish

Value-Filled Content, Meaningful Product Trials

To create an amazing buying experience, you need to make it interesting, valuable, and accessible. People should feel like they would have gladly paid for the experience. First, don't present findings that people have seen before. Start by doing primary research. Ask your customers five to ten questions about a specific scenario, and share what you learn. Creating a poll on LinkedIn or Twitter or creating a form and sending it to your customers can provide unique and interesting insights. Second, don't put your content behind a form. When the content is valuable and interesting, prospects will want to engage with you if you're doing it right.

Letting prospects try the product is the most important thing a marketer can do now. It no longer has to be a freemium, product-led growth strategy like Calendly.

Up until this point, self-serve demos took a lot of work to do. Instead, use one of the new platforms designed to allow customers to experience your software within a web environment. By offering ungated product tours populated with dummy data, prospects can experience your software in a meaningful way. If you sold the pain upfront, and they're experiencing it, and you did a good job of explaining the pain in the narrative of your product, then they will voluntarily raise their hand and want to talk to somebody.

The prospect journey is about showing the product—especially for complex products. You want to make sure that someone can test and use the product in a meaningful way before they buy it. You optimize around that entire experience until they sign the contract.

How can teams lay the foundation for these experiences to occur?



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Understand Customer Needs

To create an excellent buying experience, you must understand customer needs, provide personalized educational content, make customers feel important, and create momentum.



Ed Breault

CMO, Malbek

Understand Each Stage of the Journey to Satisfy the Customer's Goals

I use an industrial concept to think about the buyer and revenue journeys. I call it the “Marketing Factory Floor.” Imagine new buyers as the “raw materials” that enter a factory. We then work to move the raw materials from stage to stage in our factory until they become customers. For each stage in the factory, we think about the activities that need to occur. We then add value to the “raw materials” by satisfying their goals, completing all the activities, and educating and inspiring them to move into the next stage in the revenue journey, where the factory continues making them into customers.



Anastasia Pavlova

Founder and CMO, Bold GTM

Understand Customer Challenges, Priorities, and Goals

You need to create a meaningful connection, leave a lasting impression, and be efficient, highly personalized, and intuitive. A high-impact experience is based on a deep understanding of the buyer—their challenges, priorities, and goals.



Kyle Lacy
CMO, Jellyfish

Enable Buyers to Try Out Software Without You

Sometimes marketers of highly technical products are afraid to allow a customer to take a tour on their own. People in their organization tell them that the software is too complex to show on a website, which is usually untrue. You probably should find a new job if you can't figure out how to show it.



Justin Steinman
CMO, Definitive Healthcare

Customize Messaging to Fit the Customer

We work extremely hard to understand our target customer's business. We customize our value proposition at the industry level and then focus it on the company level. For example, we have a sophisticated solution for analyzing your marketing investment in BioPharm that allows you to optimize your global marketing spending based on near-real-time results and changing market conditions. This is a pretty specific value for a biopharma company, but we take it one step further. By understanding where a specific company is succeeding and failing in particular markets, we customize our message to show them how we can help them maintain a leadership position in markets they're doing well in or succeed in markets where they're behind.

For Definitive Healthcare, we sell our solution to many different verticals and sizes of customers. One segment that we target is very large biopharma enterprises—

and the beauty of this segment is that there are only roughly 600-700 accounts that could fit into this category. And some of these accounts are so large you can justify dedicating one person tasked with building a tightly coordinated sales and marketing plan for one account. And with tools like LinkedIn, you can serve up ads specifically for specific departments and titles you've chosen to target. You can customize your value proposition for a particular department and then push your content to them using an Account Based Marketing approach. So when our rep comes in, our target customers have heard of us and are already somewhat familiar with what we offer. In short, we're creating demand with our targeted content and advertising highly customized to the interests of specific departments within a specific company.

How can teams create a buying experience that stands above the competition?



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Accelerate Buyer Learning

AI can accelerate how your customers learn about your solution. Customers have limited time and resources to evaluate your product's suitability and impact. They don't want to read through pages and pages of content. AI can accomplish this as well as deliver your personalized content in a more omnichannel way.



Kyle Lacy

CMO, Jellyfish

Help Buyers Do Their Best Work

Creating a great buyer experience is about building a connection with a customer beyond just using the product and solving a pain point. It's about helping them do their best work. Find ways to invest in your customers so that you're upskilling them and leveling up your customer base beyond being an admin or user of your product.



Ed Breault

CMO, Malbek

Remove Friction, Make Your Experiences Addictive

When building a customer experience, you must sweat the small stuff. The stressful things for the buyer are a great opportunity to differentiate your buying and customer experience. Let's take your contracting process as an example. It's extremely stressful for the buyer, but those who put in a frictionless, easy-to-understand, modern, and transparent contracting process will win more. The technology experience will help you win when you're in the crucible of the buying/selling experience.

To create fantastic buying experiences, make your experiences addictive. Apply the same methodology game designers use and create a core loop. A core loop makes buyers want to return to learn more from you tomorrow by offering valuable and inspirational educational experiences. When brands continuously enrich prospective buyers' understanding as they move through a well-understood and mapped buying journey, the prospective buyer will eventually tap on the glass and give the thumbs up, "I'm going to buy this product!"

How can teams create great post-sale buying experiences?



Kyle Lacy
CMO, Jellyfish

Upsell, Cross-Sell, and Support Customer Success

Marketing should continue optimizing the buyer experience after the purchase. Too often, Marketing stops focusing on the buyer's experience after the handoff to customer success, which is a mistake.

Customer Journey focuses on how you surprise and delight your customers during the implementation and usage of the product. Marketing plays an important role in the customer journey. You must figure out how to support the customer success team and communicate the company's culture meaningfully. In addition, you need to upsell and cross-sell, which is usually a different motion than what the customer went through as a prospect.



Anastasia Pavlova
Founder and CMO, Bold GTM

Drive Outstanding Onboarding Experiences

High-impact buyer experiences aren't just important before the purchase, they're important after the purchase as well—starting with the onboarding experience because they grow customer value and facilitate expansion sales and renewals. If buying experiences are excellent throughout the customer lifecycle, customers become advocates for the company.

What technologies should be taken into account for improving buying experiences?



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

AI For More Personalized, Useful, Accelerated Processes

AI is a game changer. As part of your toolkit, it will accelerate and facilitate the buying process, enhance automation, and help companies engage with all of their customers rather than just the largest ones. Companies that embrace AI will lead in customer satisfaction and customer buying experience. And even if AI doesn't do everything for you, it will get you 50% of the way there, which you can then fine-tune and finesse.

Your website is your face and your customer's passport. Create a great experience with channelized or verticalized chatbots that offer more personalized and useful interactions.



Kyle Lacy

CMO, Jellyfish

Product Tours For Website Experience

For a great website prospect experience, I'm a huge advocate for product tours.



Chapter 2

Customer Research



Engage with your customers to improve your buying experience with customer research

The Goals:

- Understand your buyer's technical and business needs.
- Learn who your buyer is on a personal level.
- Customize your value proposition for every buyer.

How To Achieve This:

- Speak directly to customers and prospects.
- Listen and understand your customers' problems.
- Conduct qualitative and quantitative customer research regularly. Organize customer advisory panels and conduct buyer interviews and customer polls. Engage a research agency to help you map and understand the journey.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How does customer research support high-impact buying experiences?



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Builds Understanding of Key Personas

Whether you're a big company or a startup CMO, you must understand the buyer's needs to assemble the puzzle. You must understand your buyer, the buying committee, and the persona you're targeting to ensure you're relevant.



Kyle Lacy

CMO, Jellyfish

Sheds Light on the Full Scope of a Customer

Winners in the market take the next step to understand the full scope of a customer and their buyer's journey beyond just the product. They work to understand the customer in a much broader, deeper, and more personal way. For example, I'm a CMO, and I buy software. I just signed a contract for attribution software. When a company speaks to me beyond the software they are selling and, instead, recognizes me as a CMO and father, that is the type of stuff that builds communities and movements.



Anastasia Pavlova

Founder and CMO, Bold GTM

Reveals How Things Change Over Time

Companies need to do data analysis and qualitative customer research regularly to better understand how their assumptions change over time and learn what new signals are emerging. By understanding how things are changing and carefully measuring results, you can see which efforts are translating into a pipeline that converts to revenue.

What are some best practices as teams commence customer research?



Anastasia Pavlova

Founder and CMO, Bold GTM

Do Both Quantitative and Qualitative Data Analysis

Data analysis is an extremely important piece of the puzzle. Study your first-party data, identify the signals, and extrapolate what content and programs resonate with your buyers. Determine what your buyers are reading on social media or other events that you host or are a part of. Predictive analytics and intent-based vendors can help you use different types of signals to identify companies that are in-market and showing interest in your solution.

The second puzzle piece is qualitative—customer interviews and form responses. Getting on the phone and speaking with customers is invaluable. It allows you to validate assumptions and ask direct questions. Working with target and current customers to advise you on the best ways to engage with a market segment can help you break through barriers, build authenticity and trust, and earn positive word of mouth in online communities.



Ed Breault

CMO, Malbek

Tap Into Your Best Voice of Truth

Speaking directly to customers and prospects is the best source of truth for understanding how they think about their problems. They are the best marketers and voice of the market, and my founders and I will never stop talking to them. They're the ground zero of product and message market fit.

We also rely on aggregators of the voice of customers, like analysts and influencers, as well as the market research we do with prospects and customers. However, speaking directly to customers provides a truth that can't be faked in market research.



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Start Broad, Then Work to Specific Problems

While large companies have the resources to engage research firms and consulting companies to assist, bootstrapped startups can accomplish quite a bit, even with limited resources. Startups and smaller companies can still test the waters in an agile, quick, and dirty way by creating small surveys and connecting with, talking to, and polling people on social media.

When you do customer discovery and learn about their buying journey and pain points, you want to understand

the broader picture and then work your way down to the specific problem you solve. This research will help you understand the pain points more deeply and the places where you can assist. When your understanding of their journey and content strategy starts off too narrow, you'll probably miss out on some of the buyers' important decisions they make early in their journey. Also, your messaging may not resonate with the entire buying committee.



Justin Steinman

CMO, Definitive Healthcare

Turn Sales and Marketing Into Customer Experts

To be successful, you can't go after everybody. You have to choose certain accounts wisely and do your homework, it's not like you spend an hour on this. In reality, for one key account, you're probably spending a week or more scouring everything you can find online to learn about their problems—annual reports, their website, the Wall Street Journal, industry sites like STAT Health Tech, AXIOS Health, and other industry reports and then mapping your solutions to their challenges. Then you can use LinkedIn to find the right people to speak with.

The only way you learn is to get your sales and marketing team members out there. They need to learn

and become experts on your customer's challenges. So when they come back in, they'll be able to tell us what we need to be talking about.

Trade shows can inform a product marketing manager's (PMM) content strategy. I like to hire PMMs with deep industry and job experiences similar to my target customers—people who can have a productive discussion with target customers. Their job is to listen and learn about the top challenges their customers are facing and then create webinars, ebooks, and blogs on those topics. These discussions also inform which search engine terms to buy, content to put on the website, and what speaking engagements we should line up for our Chief Product Officer on those topics.

Make friends. Figure out which trade shows your target customers attend and deliver presentations at, and send in your sales and marketing representatives. During downtime, they need to find the right people to talk to, build rapport, listen, and learn about their customer's challenges and problems. These fantastic insights inform the hand-to-hand combat that our people need to succeed.

Customer advisory panels can provide instant and free feedback. I can ask questions like, "Am I describing your problem correctly?"

How can teams continue to build on their initial customer research?



Anastasia Pavlova

Founder and CMO, Bold GTM

Conduct Ongoing Buyer Interviews and Primary Research

Companies typically conduct extensive product research when they start, but they often don't go back and continue to deepen their understanding of the buyer. By regularly conducting buyer interviews and primary research, you will better understand the market and competitive situation and how it changes over time. In addition, you'll learn what questions and objections internal and external stakeholders will have along their journey, which will enable you to deliver the right content at the right time.



Ed Breault

CMO, Malbek

Buyer Conversations Are A Rich Source of Insights

As buyers go from passive research to wanting to speak to a representative, we start the listening process to understand their problems. We use conversational intelligence and sentiment analysis when our sellers have conversations, and we use generative AI technologies to find commonalities in what they say. In addition, we carefully analyze their RFIs, RFPs, and notes from QBRs to understand how they talk about their problem and make progress driving towards value. We utilize customer advisory boards to help us with early-stage ideation and prioritize our innovations.

What challenges or obstacles do teams commonly experience in their customer research efforts?



Justin Steinman
CMO, Definitive Healthcare

Getting Help From Prospects

It's extremely difficult to get prospects to help you. If you want insights from prospects, I've found that I've been most successful in hiring a third-party market research firm to speak with prospects on your behalf.



Kyle Lacy
CMO, Jellyfish

Getting Marketers to Do Primary Research

The biggest problem is that most marketers don't do primary research. Instead, they have writers rewriting analyst decks and reports. Or they put together white papers filled with product features and maybe a customer quote. Smart marketers are often afraid of talking to customers.

How should teams leverage customer insights to improve the buying experience?



Justin Steinman

CMO, Definitive Healthcare

Customize the Value Proposition to the Industry and Company

We work extremely hard to understand our target customer's business. We customize our value proposition at the industry level and then focus it on the company level. For example, we have a sophisticated solution for analyzing your marketing investment in BioPharm that allows you to optimize your global marketing spending based on near-real-time results and changing market conditions. This is a pretty specific value for a biopharma company, but we take it one step further. By understanding where a specific company is succeeding and failing in particular markets, we customize our message to show them how we can help them maintain a leadership position in markets they're doing well in or succeed in markets where they're behind.



Kyle Lacy

CMO, Jellyfish

Convert Research Into Valuable Content

To create an amazing buying experience, you need to make it interesting, valuable, and accessible. People should feel like they would have gladly paid for the experience. First, don't present findings that people have seen before. Start by doing primary research. Ask your customers five to ten questions about a specific scenario, and share what you learn. Creating a poll on LinkedIn or Twitter or creating a form and sending it to your customers can provide unique and interesting insights. Second, don't put your content behind a form. When the content is valuable and interesting, prospects will want to engage with you if you're doing it right.



Brian Gladstein

CMO, Tufin

Work With Research Agencies To Help You Understand The Buyer's Journey

Research agencies can help you map and understand the journey. Their research can help you better understand who buys your product, how they buy it, and the stages they go through to make that purchase. Agencies find, vet, and interview people who have gone through the buying process over the last year. In addition, they can evaluate your space and product along with a set of competitors' products and provide a detailed report that defines the different stages of a typical buyer's journey and what buyers are trying to accomplish at each stage.



Chapter 3

Competition



Understand your competition to improve your customers' buying experience

The Goal:

Set yourself apart from your competition

How To Achieve This:

- Understand your competitor. Ask buyers and customers how your competition sells, what vendors say about themselves, and what they say about you. Find out what they like and dislike about your competitors' messaging.
- Understand the use cases where each of your competitors performs well. Survey buyers to determine their top use cases and which vendors they rely on by use case.
- Refine your content strategy. Talk to customers about the content and issues they would like to learn about.
- Differentiate by creating value beyond the product
- Focus on your own value proposition rather than talking negatively about your competitors



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How does understanding the competition support high-impact buying experiences?



Justin Steinman

CMO, Definitive Healthcare

Dig Into Quantitative Research

I favor qualitative feedback, but quantitative research can prove extremely convincing. I wanted to demonstrate that we're the most recommended data set for each of the top use cases for the data we sell. We worked with a research firm to blindly survey 150 customers to determine their top use cases and which data vendor they rely on. Because we ranked first or second for each of the top ten use cases, we used this data to prove our value.



Ed Breault

CMO, Malbek

Understand and Pivot Against Competitor Messaging

The longer you can remain valuable in the buyer's journey, the better and more differentiated you can make your buying experience. However, you must understand how your competition sells and what they say about you.

Refine Product Strategy and Content

We used our newly found use case insights to refine our product strategy for the top use cases that the research identified. It allowed us to ask, "What more can we learn about that use case? What kind of content can we create? What kind of metrics can we use? How can we differentiate ourselves in this area?"



Kyle Lacy
CMO, Jellyfish

Differentiate By Creating Value Beyond the Product

Once you determine the outcome narrative, you can figure out the supporting narratives that support the outcome narrative. This allows you to tell a story different from your competitors and even pulls in the human element that helps you connect with the customer on a more personal level. You want to take a deeper dive into understanding the customer, what they do, and what they deal with outside of what you view as their challenges as they relate to your product.

By creating value beyond the outcome of the software's functionality, your software won't be perceived as a commodity which causes you to lose on pricing. Instead, you'll build a bigger relationship with your customers, giving you more pricing and branding opportunities.



Ed Breault
CMO, Malbek

Go on the Offense

Some sellers set traps and have buying processes that talk negatively about other vendors. Deciding to go on offense in many ways sets your company's personality. I think it's best to focus on the outcomes for your customers. Be as helpful as early in the process as possible and, along the way, meet their needs and answer their questions.



Chapter 4

Content Creation and Messaging



Improve your content creation and messaging by engaging with your audience

The Goal:

Create content and messaging materials that provide real value to your buyers along each and every step of the buyer journey.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How To Achieve This:

- Engage with buyers and nurture relationships to determine relevant, compelling, and valuable topics.
- Utilize customer advisory boards to help ideate.
- Get your customers to tell your story via use cases, customer reviews, industry forums, and peer-to-peer recommendations.
- Test different ideas in forums, online communities, and social media polls. See what resonates with your audience.
- Don't create uninspired content. Your buyers know the difference.
- If a piece of content works, ask your buyers what they like about it.
- Get to know your key target personas, and put extra effort into the content that speaks to them.
- Engage with all different types of target customers involved in the buying process. Don't overlook any key personas.

What must your content marketing program possess to support high-impact buying experiences?



Anastasia Pavlova

Founder and CMO, Bold GTM

Builds Relationships Over Time

To stay top of mind and to be a trusted choice, companies need to build relationships with prospective buyers over time with content that is relevant, compelling, and useful. Creating trust and authenticity requires you to provide genuine value and help customers in a meaningful way. It needs to come from a deep understanding of their issues, provide useful and unexpected insights that pertain to where they are in their journey, and it needs to be delivered in an authentic and fun way.



Kyle Lacy

CMO, Jellyfish

Provides Real Value

To create an amazing buying experience, you need to make it interesting, valuable, and accessible. People should feel like they would have gladly paid for the experience. When the content is valuable and interesting, prospects will want to engage with you if you're doing it right.

How do you ensure that your content speaks to your buyers?



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Building the Right Frame

Strong, impactful, and relevant messaging requires having the right frame. Build the frame by understanding the customer needs, doing market research, and understanding the competition and competitive landscape.



Ed Breault

CMO, Malbek

Listening to Buyer Conversations

As buyers go from passive research to wanting to speak to a representative, we start the listening process to understand their problems. We use conversational intelligence and sentiment analysis when our sellers have conversations, and we use generative AI technologies to find commonalities in what they say. In addition, we carefully analyze their RFIs, RFPs, and notes from QBRs to understand how they talk about their problem and make progress driving towards value. We utilize customer advisory boards to help us with early-stage ideation and prioritize our innovations.



Justin Steinman

CMO, Definitive Healthcare

Mining Research For Content Opportunities

I favor qualitative feedback, but quantitative research can prove extremely convincing. I wanted to demonstrate that we're the most recommended data set for each of the top use cases for the data we sell. We worked with a research firm to blindly survey 150 customers to determine their top use cases and which data vendor they rely on. Because we ranked first or second for each of the top ten use cases, we used this

data to prove our value. But more than just creating proof for the website, we used our newly found use case insights to refine our product strategy for the top use cases that the research identified. It allowed us to ask, "What more can we learn about that use case? What kind of content can we create? What kind of metrics can we use? How can we differentiate ourselves in this area?"



Kyle Lacy

CMO, Jellyfish

Putting Effort Into Content That Speaks to Your Champion

Find a thought leadership topic that maps to your product and your champion's aspiration. Let's say you're a CMO at a growth stage company that has already figured out product market fit for your technical product. At this stage, marketing must fully understand the different use cases and outcomes. Then, you want to step back and think about your champion and what they're trying to achieve. Ask yourself, "What are the common themes throughout the use cases?"

For us, our champions are VPs of Engineering or CTOs. So we chose a thought leadership topic about how to help them become the best engineering leader possible or how to help an engineering leader become a business leader.

At Lessonly, we had a "Better Work" framework. We had six product pillars on the product side and how you use each to create great learning and training. On

the operational side, our framework focused on using the six pillars to become a better leader. So, we wrote a book on "Do Better Work." We gave the book to all our customers. It helped us build a deeper connection with our customers because we were helping them beyond just being another software vendor. We talked about leadership development, nonviolent communication, empathy in the workplace, and having a piece of software to help them with learning and development. At Jellyfish, we have the same thing. The value framework focuses on helping engineers build great teams, but also applies to how they use our product daily.

People appreciate your effort. A well-designed survey will always create interesting insights, even if the data doesn't match expectations or it's less surprising than you would have liked. You can always find a way to spin what you learn and weave it into your narrative.

You'll create powerful content when you put real effort into it. When your content is based on a survey and

includes customer and thought leader insights, people sense the amount of time and energy you put into it. They want to know it isn't just another Demand Gen piece.

People sense how much effort you put into the piece of content. Most Demand Gen content needs to be more inspired. The biggest problem is that most marketers don't do primary research. Instead, they have writers rewriting analyst decks and reports. Or they put together white papers filled with product features and maybe a customer quote.

I'm a huge advocate of continuous rapid improvement and experimentation. If a piece of content works, keep working to improve it. It's even okay to share something before it's ready. You must be proactive when building a category or if the market is heating up with competition. You can't wait for stuff to happen. If content doesn't work, move forward and try something new. Keep experimenting.

How can you work with buyers to improve content and messaging?



Brian Gladstein
CMO, Tufin

Nurture Relationships With Buyers

Customers are your best, fastest, and least expensive resource for creating highly useful, relevant, and authentic content. When you have warm relationships with customers, they happily share their tools and experiences. We often ask customers if they have an internal tool or template they find particularly useful. Their tools can be anonymized to build great content that prospective customers will likely find equally valuable. The benefit is twofold—your customer feels good about their contribution, and you know the tool is real. It's not just something that a marketer makes up.



Kyle Lacy
CMO, Jellyfish

Include Buyers in Content Ideation and Creation

Smart marketers are often afraid of talking to customers. Not only does it make sense to include customers in coming up with content ideas and creating a piece of content, you could even have them review it before you publish.

To create an amazing buying experience, you need to make it interesting, valuable, and accessible. People should feel like they would have gladly paid for the

experience. First, don't present findings that people have seen before. Start by doing primary research. Ask your customers five to ten questions about a specific scenario, and share what you learn. Creating a poll on LinkedIn or Twitter or creating a form and sending it to your customers can provide unique and interesting insights. Second, don't put your content behind a form. When the content is valuable and interesting, prospects will want to engage with you if you're doing it right.



Ed Breault
CMO, Malbek

Speak Directly to Buyers

Speaking directly to customers and prospects is the best source of truth for understanding how they think about their problems. They are the best marketers and voice of the market, and my founders and I will never stop talking to them. They're the ground zero of product and message market fit.

Enrich your content marketing strategy and its implementation with what you learn from your customers. Our content speaks the same way our customers speak. We take our customer's language from the interactions in our funnel to create a complete editorial calendar with content that maps to their pain signals and is infused with discoverable keywords that we want to rank for.



Justin Steinman
CMO, Definitive Healthcare

Connect With Buyers via Tradeshows and Webinars

Trade shows can inform a product marketing manager's (PMM) content strategy. I like to hire PMMs with deep industry and job experiences similar to my target customers – people who can have a productive discussion with target customers. Their job is to listen and learn about the top challenges their customers are facing and then create webinars, ebooks, and blogs on those topics. These discussions also inform which search engine terms to buy, content to put on the website, and what speaking engagements we should line up for our Chief Product Officer on those topics.

How-to webinars are very effective at generating leads because you provide real value to a prospect in return for their time.

Definitive Healthcare sells to people who want to sell into healthcare. Our value prop is that healthcare is complex, and we can help you understand, compete and win in the healthcare market. So, we create webinars on how to use data to identify the right hospital executives. And, of course, the answer is to buy Definitive Healthcare.

Even if prospects don't intend to buy your product, prospects will engage in the webinar chat because they're trying to get free advice and ideas from your expert. Their questions and the prospective customer's comments provide invaluable insights into a prospective customer's concerns and challenges.

What strategies do you recommend to create the right content for each step of the buyer journey?



Brian Gladstein
CMO, Tufin

Prioritize Personas and Test Different Concepts

When you create content and buyer experiences, be strategic. Don't take the map of the buyer's journey and attempt to create content for every persona at every point on the map. Many steps and personas are lower priority—especially at different stages. Instead, be selective. Put the 80/20 rule to work and choose a few pieces to create where you have a clear picture of what needs to be accomplished and can make an impact. When you use these pieces in programs for specific buyers and move them from one stage of the selling process to the next, the impact will be high and measurable.



Anastasia Pavlova
Founder and CMO, Bold GTM

Consider Every Member of the Buying Committee

When engaging different types of target customers involved in the decision process it's important to consider their interests and the content they care about. For example, you need to approach executives differently than end users. Executives appreciate high-touch experiences, where they interact with similar-level colleagues, focus on high-level strategic issues, and discuss the impact of the solution on the company and its ROI.



Justin Steinman
CMO, Definitive Healthcare

Consider Multiple Buyer Groups

When targeting large enterprises with an outbound campaign, you need content to address particular concerns of multiple buyer groups that are likely spread across the organization in multiple different functions and divisions. You may need to target as many as twenty-five people.



Kyle Lacy
CMO, Jellyfish

Create a Content Framework That Drives Value

Create a framework for your content to create a great experience and get your customers to tell your story. There are two sides to a framework for a B2B software company. There's the technical side that addresses the reasons for the software, and then there's the operational side that shows how it helps customers in their day-to-day.

To develop a strong framework theme, focus on the outcomes your product delivers at different times. For example, for a CMO in the early stages of determining the framework, you're worried about the annual renewal for your first or second cohort of customers, so your outcomes for these customers may be different than

the outcomes longer-term customers might experience. In other words, the outcome narratives you talk about will differ depending on where your customer is in their journey. From there, think about the bigger narrative: "What's the problem we solve? What's the reason we exist as a company?" Great companies have figured this out from the very beginning.

And once you determine the outcome narrative, you can figure out the supporting narratives that support the outcome narrative. This allows you to tell a story different from your competitors and even pulls in the human element that helps you connect with the customer on a more personal level. You want to take a deeper dive into understanding the customer, what they

do, and what they deal with outside of what you view as their challenges as they relate to your product.

Coming up with the right framework requires thinking outside the box. To develop the right thought leadership concept, we asked, "How do we help the VP of Engineering in their day-to-day, but also help their teams go from good to great?" Some concepts won't fit.

To create an amazing buying experience, you need to make it interesting, valuable, and accessible. People should feel like they would have gladly paid for the experience. First, don't present findings that people have seen before. Start by doing primary research. Ask your customers five to ten questions about a specific

scenario, and share what you learn. Creating a poll on LinkedIn or Twitter or creating a form and sending it to your customers can provide unique and interesting insights. Second, don't put your content behind a form. When the content is valuable and interesting, prospects will want to engage with you if you're doing it right.

When you have the right framework, it serves as a foundation to say that we're delivering a product that delivers a bigger outcome. At this stage, you'll have many outcomes, a bunch of one-pagers, and a couple of case studies you've built to support the outcomes. And at this stage, you should take even more time to develop a deeper understanding of the customer.

Once you have a strong framework theme, you will find great ways to build on it. For example, we developed certification tracks around engineering leadership. Find ways to invest in your customers so that you're upskilling them and leveling up your customer base beyond being an admin or user of your product.

By creating value beyond the outcome of the software's functionality, your software won't be perceived as a commodity, which causes you to lose on pricing. Instead, you'll build a bigger relationship with your customers, giving you more pricing and branding opportunities.

What tools and technology improve the reach or impact of content in the buyer's journey?



Brian Gladstein

CMO, Tufin

User Communities and Social Media For Testing Concepts

Once you have your buyer's journey mapped and your data collected, you start the creative process of determining the best ways to answer those questions and satisfy your buyer's needs. And finally, using resources like mailing lists, user communities, or targeted social media, quickly test a few different concepts to see what pulls the best. When you're confident you've found something that's working, roll it out.



Anastasia Pavlova

Founder and CMO, Bold GTM

Knowing What Content To Create

Data analysis is an extremely important piece of the puzzle. Study your first-party data, identify the signals, and extrapolate what content and programs resonate with your buyers. Determine what your buyers are reading on social media or other events that you host or are a part of. Predictive analytics and intent-based vendors can help you use different types of signals to identify companies that are in-market and showing interest in your solution.



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Content Generated by AI

CMOs can start embracing AI by generating more content tailored for different personas at different buying cycle stages. AI isn't perfect, it's not replacing humans yet, but it can accelerate the process. Other good starting places to incorporate AI include refining your brand's voice, generating social media content, and creating new, more personalized ongoing interactions of outreach content for different stages of the buying cycle.

How do you gauge the effectiveness of content and messaging at each point in the buyer's journey?



Kyle Lacy
CMO, Jellyfish

Set Expectations

Before publishing a piece of content, you should set an expectation for the outcome with your team. That way, when you have a retro with the team, you know whether it worked.



Brian Gladstein
CMO, Tufin

Measure Content Effectiveness

In addition to measuring the performance of individual content pieces, you can compare the relative performance of pieces with similar goals. Another great way to test which content works the best is to put it out to the sales team and see which pieces they use and find valuable in starting conversations. Finally, testing content by channel can also lead to interesting insights about where your audience hangs out.

The goal is to move the buyer forward in their journey and to your next piece of content. Content shouldn't just occupy a point in the buyer's journey. Instead, create a piece that fully addresses your buyer's main concerns and motivates them to progress to the next phase. Using lead scoring or tracking opportunities, you can track how a high-impact piece moves a buyer from one selling stage to the next, which should correspond to their buying stage.



Chapter 5

Creating Demand



Engage with your customers to create demand for your product or service

The Goal:

Be top of mind so that when customers are ready to buy, they immediately turn to you.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How To Achieve This:

- Make it easy for buyers to connect with you and learn about your brand. Ask them how they discovered you and what compelled them to want to contact you.
- Create compelling, insightful, research-based content that gives your customers real value.
- Connect with potential buyers in the channels where they aggregate. Ask buyers what communities they are a part of, what conferences they attend, what online forums they visit, and which review sites they read.
- Listen to your buyers. Show them that you understand their problems.
- Differentiate your brand from your competition. Talk to your customers about the competing vendors that they have used. Find out what they like about other vendors and what they don't like about you.
- Get your customers to sing your praises. Buyers trust their peers more than anyone else. Help your customers to share their use cases, write positive reviews, and engage with you on social media.

How do you create demand for your product or service?



Anastasia Pavlova

Founder and CMO, Bold GTM

Make Buyers Aware They Have a Problem

You create demand by making buyers aware that they have a problem. Be visible, create great content, and connect with potential buyers in the channels where they aggregate. If your product and content are good, you'll make a connection with the buyer and will be top of mind when they're ready to buy.



Ed Breault

CMO, Malbek

Elevating The Issue's Priority

When prospects read your heavy piece of research that helps them understand their problem or that article that helps them think about their problem differently, and why the pain of the status quo is greater than the pain of change, you help them elevate the issue's priority. They will recognize the problem-solving value generated by your brand, and you'll be on their short list of options to consider.



Justin Steinman

CMO, Definitive Healthcare

Adjust Efforts Accordingly For Inbound vs. Outbound

Inbound customers know they have a problem that they want to solve. They know it's raining and they don't want to get wet, so they are already shopping for an umbrella. These sales cycles are typically much shorter, involve fewer people, and require less content.

Outbound marketing must show customers that it's raining and getting wet sucks and that you need an umbrella. And then, as a last step, your marketing must show that your company has the best umbrella. You

need to sensitize them to the problem, cause them to want to solve it, and convince them that you have the best solution. Outbound marketing designed to create demand requires a longer, potentially more expensive, and usually more complex, multi-step buying process. For example, when targeting large enterprises with an outbound campaign, you need content to address particular concerns of multiple buyer groups that are likely spread across the organization in multiple different functions and divisions. You may need to target as many as 25 people.

While creating demand, how do you differentiate your offering from competitors that address the same pain points?



Anastasia Pavlova

Founder and CMO, Bold GTM

Differentiate With Value

Your solution must be differentiated from the competition and provide significant value to your customers.



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Start By Creating Awareness

Startups with new solutions must focus on creating awareness because most customers may not even know they have a problem and that there's a way to solve it. Once you create awareness, you can start educating customers about why you're different.



Chapter 6

Buying Journey



Engage with buyers to improve the buying journey

The Goal:

Remain valuable throughout every step of the buyer's journey.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How To Achieve This:

- Be part of the journey as early as possible. Ask your buyers where they initially learned about you. Make sure you have a strong presence there.
- Meet buyers where they're at in the buying process. Ask your buyers about their considerations and concerns. Don't try to follow a "typical" buyer's journey. Customize your approach for each buyer.
- Differentiate yourself from your competition at each stage of the buying journey. Understand how your competition engages at each stage so that you can set yourself apart.
- Understand your buyers in a personal way. Get to know them as people- their interests and personalities. Understand their fears, challenges, concerns, and questions.
- Acknowledge that the journey varies for each buyer. Every buyer is different and should be treated uniquely.

Once you have an accurate and complete map of the buyer's journey, how do you use it to create high-impact buying experiences?



Brian Gladstein

CMO, Tufin

Informs The Creative Process

Once you have your buyer's journey mapped and your data collected, you start the creative process of determining the best ways to answer those questions and satisfy your buyer's needs. And finally, using resources like mailing lists, user communities, or targeted social media, quickly test a few different concepts to see what pulls the best. When you're confident you've found something that's working, roll it out.



Anastasia Pavlova

Founder and CMO, Bold GTM

Ensures That Buyer's Needs Are Met As the Journey Evolves

The way buyers buy today has changed considerably from 10 years ago. Buyers are either in the market for your solution or not. If they are, they will often go to their peers for recommendations first before engaging with a salesperson.



Ed Breault

CMO, Malbek

Identify and Provide Value at Each Stage

B2B enterprises with similar firmographics and revenues often have similar B2B buying cycle patterns from industry to industry and company to company. While not the same, there are common buying processes that you can use to begin the mapping process. For example, with high-consideration purchases, a whole group of folks makes the decision.

I use an industrial concept to think about the buyer and revenue journeys. I call it the “Marketing Factory Floor.” Imagine new buyers as the “raw materials” that enter a factory. We then work to move the raw materials from stage to stage in our factory until they become customers. For each stage in the factory, we think about

the activities that need to occur. We then add value to the “raw materials” by satisfying their goals, completing all the activities, and educating and inspiring them to move into the next stage in the revenue journey, where the factory continues making them into customers.

Our goal is to be part of their journey as early as possible. You want to meet buyers where they’re at in their buying process and have them say, “Wow! They get me.” Rely on market intelligence and intent data sources to get in early and provide the information buyers seek.

The longer you can remain valuable in the buyer’s journey, the better and more differentiated you can make your buying experience. However, you must

understand how your competition sells and what they say about you. Some sellers set traps and have buying processes that talk negatively about other vendors. Deciding to go on offense in many ways sets your company’s personality. I think it’s best to focus on the outcomes for your customers. Be as helpful as early in the process as possible and, along the way, meet their needs and answer their questions.

When your buyers see you have a process to get them to value realization and that you’re in it for the long haul, that’s the magic you need to have in the buying and selling process.



Brian Gladstein

CMO, Tufin

Think About Individual Buyers, Rather Than Companies

When CMOs are measured on their ability to open pipeline, understanding your buyer's journey and what prospects need at every stage are critical. By understanding where they are in their journey and what step they'd like to take next, your material will be much more effective at moving them through the funnel. When most marketers think about the buying journey, they think about the company, not understanding the buyer. You need to put on the buyer's shoes and walk a mile. You need to get inside their heads and understand what they go through to find a solution to their problem. You need to understand how they make decisions and

their fears, challenges, concerns, and questions to understand their journey fully.

The stages of a buyer's journey are mostly fixed from year to year. However, if your ecosystem changes or a new competitor hits the market, it can cause a disruption. For example, if all the products in your space require a few weeks to set up and configure, and then someone launches a new product that gets users going in hours, that can have a big impact on the way you sell and the content needed to support that sales process. Sometimes this disrupts the entire buyer's journey, but often the stages remain the same even through changes like this.

The goal is to move the buyer forward in their journey and to your next piece of content. Content shouldn't just occupy a point in the buyer's journey. Instead, create a piece that fully addresses your buyer's main concerns and motivates them to progress to the next phase. Using lead scoring or tracking opportunities, you can track how a high-impact piece moves a buyer from one selling stage to the next, which should correspond to their buying stage.



Kyle Lacy

CMO, Jellyfish

Work to Understand the Customer in a More Personal Way

Winners in the market take the next step to understand the full scope of a customer and their buyer's journey beyond just the product. They work to understand the customer in a much broader, deeper, and more personal way. For example, I'm a CMO, and I buy software. I just signed a contract for attribution software. When a company speaks to me beyond the software they are selling and instead recognizes me as a CMO and father, that is the type of stuff that builds communities and movements.



Ed Breault

CMO, Malbek

The Zero Moment of Truth

Ideally, you want to meet them where they are before they reach the "Zero Moment of Truth." Zero Moment of Truth (ZMOT) is the point before they purchase and have been introduced to your brand. They're at the point when they're researching and deciding if you're a good option.

What should marketers consider when thinking about various types of journeys and personas?



Anastasia Pavlova

Founder and CMO, Bold GTM

Acknowledge the Journey Varies For Each Buyer

It's very important to map your entire buyer journey—before and after the sale. Don't assume that the journey is linear and that every person goes through the journey the same way.

When engaging different types of target customers involved in the decision process, it's important to consider their interests and the content they care about. For example, you need to approach executives differently than end users. Executives appreciate high-touch experiences, where they interact with similar-level colleagues, focus on high-level strategic issues, and discuss the impact of the solution on the company and its ROI.



Justin Steinman

CMO, Definitive Healthcare

Understand Differences Between Inbound vs. Outbound Customers

Buying journeys have always existed. What has changed is the concept of thinking about customers as being in the market for your product or service versus people that need to be motivated to want to buy.

Inbound customers know they have a problem that they want to solve. They know it's raining and they don't want to get wet, so they are already shopping for an umbrella. These sales cycles are typically much shorter, involve fewer people, and require less content.

Outbound marketing must show customers that it's raining and getting wet sucks and that you need an

umbrella. And then, as a last step, your marketing must show that your company has the best umbrella. You need to sensitize them to the problem, cause them to want to solve it, and convince them that you have the best solution. Outbound marketing designed to create demand requires a longer, potentially more expensive, and usually more complex multi-step buying process. For example, when targeting large enterprises with an outbound campaign, you need content to address particular concerns of multiple buyer groups that are likely spread across the organization in multiple different functions and divisions. You may need to target as many as twenty-five people.



Kyle Lacy
CMO, Jellyfish

Understand Differences Between Prospect, Customer, and Revenue Journeys

Create a mutual journey—the buyer’s journey and your revenue journey must be correlated at some level. Your map will reflect how your buyer goes through their process, but sellers must also map out the stages and how they will ultimately create revenue. For example, sellers need to map the key activities in each stage, the time dimension of how customers move through stages, and the goals of each stage.

I separate the prospect journey from the customer journey because they are very different motions. I spend 60% of my time on the prospect journey and 40% on the customer journey. However, there’s overlap. When I listen to a Gong call with a prospect and then a Gong call with a customer, they usually have similar pain points or outcomes.

After a prospect decides to buy, the buyer’s journey continues. When we’re sure customers are happy and we recognize their growth potential, we use an account-based model to expand the focus on renewals and subscription business expansion. This might mean looping them back into earlier stages of the marketing journey.

Customer Journey focuses on how you surprise and delight your customers during the implementation and usage of the product. Marketing plays an important role in the customer journey. You must figure out how to support the customer success team and communicate the company’s culture meaningfully. In addition, you need to upsell and cross-sell, which is usually a different motion than what the customer went through as a prospect.



Chapter 7

Buying Committees



Engage with your buyers in buying committees

The Goal:

Successfully sell your product or service to a buying committee.

How To Achieve This:

- Build relationships with the people on the committee and understand their process. Ask them about their needs and concerns, the committee's objections, how the decision will be made. Work to assist and guide them in the process.
- Navigate the various relationships in the committee with sensitivity and understanding.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How should teams adjust their typical approach to buying experiences when it comes to buying committees?



Anastasia Pavlova
Founder and CMO, Bold GTM

Study the Intersecting Relationships, Needs, and Objections of the Committee

If you're selling into enterprises, you will encounter large buying committees, which is quite different than selling into SMBs where you may have a single buyer making a decision. You will need to build relationships, meet individual needs and overcome objections of all the executive and functional decision-makers, as well as ensure that you're meeting the needs of the entire committee.



Ed Breault
CMO, Malbek

Focus On the Committee Rather Than An Individual

By understanding the needs of the entire buying committee, you start to understand how the buying process will happen and what you need to provide. There are people above the powerline (people who view what you're selling as an investment and have either decision-making power or buying committee influence) and people below the powerline (those with no power to buy, shield decision makers, and may be influential, but can sometimes favor the competition or see you as competition).

There's a scout who researches possible solutions. An economic buyer is experiencing the pain and looking for funding. There are ratifiers and influencers in the deal as well. There are administrative, strategic, and operational needs and concerns with cyber and reputational risk. And then there's procurement. Each individual may have different tiers of problems and concerns.



Chapter 8

Optimize and Measure

Optimize and Measure throughout the journey to successfully engage your buyers

The Goal:

To consistently create the best buying experience even as the market and customers change.

How To Achieve This:

- Study the data, look for evolving trends, and choose areas to optimize.
- Identify specific parts of the journey that you'd like to improve. Survey and interview buyers to understand their needs in those specific parts of the journey.
- Work with buyers to refine and develop new buyer experience ideas to test.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

What should CMOs consider when thinking about optimization and measurement?



Brian Gladstein
CMO, Tufin

Measure the Ability to Open Pipeline

When CMOs are measured on their ability to open pipeline, understanding your buyer's journey and what prospects need at every stage are critical.



Justin Steinman
CMO, Definitive Healthcare

Know Your Metrics

The most important piece of advice I can offer a CMO is to know your metrics cold. You need to view your job as a custodian of the company's money and deliver the ROI for that investment. When you know your metrics, you buy yourself the freedom to focus on things like the buyer's journey and buyer experiences.



Reuben Braham
B2B Enterprise Marketing Executive and Consultant

Be Selective About What You Measure

For small companies with limited resources, be very selective and focus on three or four main metrics, create a baseline, and build up what you measure over time. It's a process to figure out how you scale up measurements. You can also set targets to create a certain number of case studies and get product reviews or testimonials.



Ed Breault

CMO, Malbek

Create an Architecture of Revenue

Don't miss the quantitative dimensions of all this. You must deliver the best buying experience, ensure the business is sustainable, and create enterprise value for your board, stakeholders, and investors. To do this, you need a well-defined architecture of revenue. To have a healthy business, you've got to be metered and have KPIs of health and growth in place. For every stage, you need unit economic dimensions for value creation, conversion rate dimensions for quality, and the associated time dimensions. Understanding your customer acquisition cost (CAC) and having a healthy payback period is also very important. The CMO's job is math and science, but also human and creative, and that's why I like being a CMO.



Anastasia Pavlova

Founder and CMO, Bold GTM

Measure Results Over Time, Focus on the Bottom Line

Companies need to do data analysis and qualitative customer research regularly to better understand how their assumptions change over time and learn what new signals are emerging. By understanding how things are changing and carefully measuring results, you can see which efforts are translating into a pipeline that converts to revenue.

While it's fine to start with early-stage metrics like the number of content downloads and how many people attended your event or listened to your podcast, you ultimately need to measure the impact of your programs on the revenue and bottom line.

What measurements do you particularly like to focus on and optimize?



Kyle Lacy
CMO, Jellyfish

Focus on and Optimize For Revenue

Companies live and die by revenue. For Marketing to have a seat at the table, you need to know if something generated pipeline and revenue. You need to understand all of the metrics that have to do with content and your website. We have many measurement tools, including attribution modeling, to determine whether a digital experience drove deal flow, pipeline, and revenue. I don't know why we don't talk about it more.

Our job as a marketing team is to optimize for revenue. Marketing teams at high-growth companies may focus on net revenue, whereas other companies that have already achieved a certain revenue level may focus on customer revenue. Every company is different, and every experience is different.



Justin Steinman
CMO, Definitive Healthcare

Know Revenue Generated Per Marketing Spend

CFOs want to know the revenue generated for each dollar that marketing spends. So when a CFO asks, Are you on track this month? You need to be able to know what is happening in each of your segments, market, and sales channels. You need to know how many free trials, the conversion rates of demos, and how much pipeline each strategy creates. You need to understand how you get to the lowest cost per lead. In short, you need to quantify everything because they aren't interested in the fluffy stuff.



Anastasia Pavlova

Founder and CMO, Bold GTM

Know Pipeline By Channel

You need to understand which channels are driving pipeline that converts to revenue at the highest velocity, with the highest conversion rate, and at the highest contact value.



Ed Breault

CMO, Malbek

Focus on Retention

Our most important metric is net revenue retention. It's 120% for us, which means we never lose customers. What's our secret? It's our customer experience organization. When you have a great product and a team in place that helps your customers achieve value, it kicks off another buying experience. And that's the best way to differentiate—through great service.



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Keep Satisfaction, Retention, Third-Party Validation, and Social Proof Top of Mind

Measuring customer satisfaction over time, from purchase through post-sale, helps you have a basis for comparison. This helps you identify problems and guides your improvement efforts. Net Promoter Score helps you to understand loyalty and provides a picture of who will serve as an ambassador vs. acting as a detractor. If your NPS is positive, you're on the right track, and you can continually work to improve it. You must build mechanisms to learn and address issues if you're not on the right track.

Optimal customer retention should be over 95%, but if you're below 90%, you have an issue requiring a

plan that will likely have many components. This plan includes providing relevant content, conversing with customers, and creating customer advisory forums to help lower attrition.

Analyst validation and recommendations are also useful measurements. Getting initial customers to post social proof on social media and create case studies is very important for startups. Without a large base of customers, you will have to rely more on word of mouth on social media, initial reviews, and social media sentiment analysis. Amplifying the first reviews and initial positive word-of-mouth mentions can effectively start the process.



Chapter 9

Building Relationships With Customers

Build Warm Relationships With Buyers

The Goal:

Create a warm customer base that is thrilled with your product, appreciates hearing from you, and wants to help you when you reach out for help.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How To Achieve This:

- First and foremost, ensure your customers' success. They will see you as a partner rather than a vendor trying to sell them a product or service.
- Speak directly to customers and prospects. They are the best source of truth for understanding how they think about their problems.
- Designate someone in the company to have ongoing relationships with your customers.
- Approach them with sincerity.
- Improve the customer experience: reduce and streamline communications and provide real value.
- If you aren't successfully connecting with customers initially, try working with a third-party market research firm to speak with prospects on your behalf. Once you have interesting insights to share, prospective customers will be more interested in speaking with you.

How do better customer relationships translate into higher-impact buying experiences?



Brian Gladstein

CMO, Tufin

Make Everything Easier

By investing in creating a warm customer base, you will have a pool of people expecting to hear from you when you need help. For example, let's say you're doing a webcast in three months and need a customer to be on it. Finding a guest is easy if you have 200 people expecting to hear from you. If you don't invest in these relationships, everything is harder.



Ed Breault

CMO, Malbek

Provide the Best Source of Truth

Speaking directly to customers and prospects is the best source of truth for understanding how they think about their problems. They are the best marketers and voice of the market, and my founders and I will never stop talking to them. They're the ground zero of product and message market fit.



Anastasia Pavlova

Founder and CMO, Bold GTM

Improving Customer Experience

At Marketo, I worked with a team to map out our SMB customer journey for the first 12 months after the sale. It was a cross-functional effort involving many teams who touched the customer. The goal was to improve the customer experience, reduce and streamline communications, and provide real value. In addition, we worked to figure out which communications were appropriate to automate and where we needed to deliver a high-touch, personalized experience. If groups of customers had challenges adopting a solution or needed specific information, it was easier to deliver that content at scale.



Kyle Lacy

CMO, Jellyfish

Create Value Beyond Your Product

Once you have a strong framework theme, you will find great ways to build on it. For example, we developed certification tracks around engineering leadership. Find ways to invest in your customers so that you're upskilling them and leveling up your customer base beyond being an admin or user of your product.

By creating value beyond the outcome of the software's functionality, your software won't be perceived as a commodity which causes you to lose on pricing. Instead, you'll build a bigger relationship with your customers, giving you more pricing and branding opportunities.

What are the most effective strategies for creating warmer relationships with customers?



Brian Gladstein
CMO, Tufin

Put Someone in Charge, Make It Worth Their Time

To create warm relationships with your customers, designate someone in the company to have ongoing relationships with these people. The person can be from Sales, Customer Success, or Customer Marketing.

Customers need to feel like they're getting something out of the relationship, so that when you contact them, they open your email, take your calls, and participate. Investing in warm customer relationships can include offering access to your company's product management team and thought leaders. You can offer a support community, education opportunities, and a relationship with a specific customer success manager.

Companies that do this well typically have high-functioning Customer Success organizations. A couple of companies that do this well are MailChimp and Hubspot. MailChimp had such a great customer nurture program that people felt like they knew MailChimp, whether or not they had a relationship with them. Hubspot does this well. Whether I was using Hubspot or not, I knew my account manager. They would call, they would be friendly, and they would have interesting resources for me. They gave me content and tips whether I was a customer or not. They worked hard at the relationship. Companies do well when they have a strong strategy around customer success.



Ed Breault
CMO, Malbek

Position Yourself as a Partner, Manage Expectations

As valuable as prospective and current customer conversations are, sometimes even your best customers can be difficult to talk to if you don't match their expectations and fail to make them the heroes they hoped to be. To avoid this, manage expectations, have a strong customer success function, and ensure that your people are subject matter experts who can be prescriptive in their advice. When you ensure your buyer's success, they will see you as a partner rather than a vendor.



Justin Steinman

CMO, Definitive Healthcare

Get Sales and Marketing Engaging With Customers, Utilize Third-Party Market Research Firms

The only way you learn is to get your sales and marketing team members out there. They need to learn and become experts on your customer's challenges, so when they come back in, they'll be able to tell us what we need to be talking about.

Make friends. Figure out which trade shows your target customers attend and deliver presentations at and send in your sales and marketing representatives. During downtime, they need to find the right people to talk to, build rapport, listen, and learn about their customer's challenges and problems. These fantastic insights inform the hand-to-hand combat that our people need to succeed.

Trade shows can inform a product marketing manager's (PMM) content strategy. I like to hire PMMs with deep industry and job experiences similar to my target customers—people who can have a productive discussion with target customers. Their job is to listen and learn

about the top challenges their customers are facing and then create webinars, ebooks, and blogs on those topics. These discussions also inform which search engine terms to buy, content to put on the website, and what speaking engagements we should line up for our chief product officer on those topics.

It's extremely difficult to get prospects to help you. If you want insights from prospects, I've found that I've been most successful in hiring a third-party market research firm to speak with prospects on your behalf.

I favor qualitative feedback, but quantitative research can prove extremely convincing. I wanted to demonstrate that we're the most recommended data set for each of the top use cases for the data we sell. We worked with a research firm to blindly survey 150 customers to determine their top use cases and which data vendor they rely on. Because we ranked first or second for each of the top ten use cases, we used this data to prove our value. But more than just creating proof for the website, we used our newly found use case insights to refine our

product strategy for the top use cases that the research identified. It allowed us to ask, What more can we learn about that use case? What kind of content can we create? What kind of metrics can we use? How can we differentiate ourselves in this area?

We work extremely hard to understand our target customer's business. We customize our value proposition at the industry level and then focus it on the company level. For example, we have a sophisticated solution for analyzing your marketing investment in BioPharm that allows you to optimize your global marketing spending based on near-real-time results and changing market conditions. This is a pretty specific value for a biopharma company, but we take it one step further. By understanding where a specific company is succeeding and failing in particular markets, we customize our message to show them how we can help them maintain a leadership position in markets they're doing well in or succeed in markets where they're behind.



Chapter 10

Encouraging Customer Advocacy

Encourage Customer Advocacy

The Goal:

Turn your customers into advocates.

How To Achieve This:

- When your customers succeed, they'll naturally write positive reviews about your product and share their experiences with their peers.
- Build a product that delivers on a pain point and do an excellent job with your narrative. Your customers will become your best salespeople and storytellers.
- Encourage customers to share their positive experiences and stories about the product at events, dinners, and review site.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How do you encourage customers to become advocates?



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Great Experiences Generate Loyalty

You know your buying experience works when prospects quickly turn into customers. You know you've created an excellent buying experience when they exhibit loyalty, advocate for you, grow in value, and increase your average lifecycle value by helping you bring in new business.



Kyle Lacy

CMO, Jellyfish

Excellent Narratives Turn Customers Into Salespeople and Storytellers

If you build a product that delivers on a pain point and do an excellent job with your narrative, your customers will become your best salespeople and storytellers. Focus on encouraging customers to share their positive experiences and stories about the product at events, dinners, and review sites like G2 and facilitating the introduction between prospects and customers.

Create a framework for your content to create a great experience and get your customers to tell your story.

There are two sides to a framework for a B2B software company. There's the technical side that addresses the reasons for the software, and then there's the operational side that shows how it helps customers in their day-to-day.

For off-site prospect experience, it's about ensuring you have the best product and facilitating community discussions encouraging your customers to tell your story in the market.



Ed Breault
CMO, Malbek

Customer Success Yields Customer Advocacy

When customers succeed, you turn their potential energy into kinetic energy. Based on their relationship with you, they'll give you strong NPS scores and share their great experience on social media and word of mouth or provide a customer-substantiated testimonial on G2 or TrustRadius. That's the best thing any seller can get.

Customer advocacy can vary based on personalities, company politics, and industries. For example, certain industries like financial services and life sciences can be more conservative when advocating for vendors. And sometimes, in highly regulated industries, they can't advocate for you, even if they want to. But in the end, a customer's willingness to advocate for you all comes down to the personal relationships you can form.



Anastasia Pavlova
Founder and CMO, Bold GTM

Excellent Post-Sale Buying Experiences Create Customer Advocates

High-impact buyer experiences aren't just important before the purchase, they're important after the purchase as well—starting with the onboarding experience—because they grow customer value and facilitate expansion sales and renewals. And if buying experiences are excellent throughout the customer lifecycle, customers become advocates for the company.



Chapter 11

Customer Advisory Boards

Encourage Customer Advocacy

The Goal:

Form customer advisory boards that help you better understand and connect with buyers and customers.



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.

How To Achieve This:

- Ask customer advisory boards about their pain points.
- Ask them for feedback on your ideas.
- Ask questions like, “Am I describing your problem correctly?”
- Working with customer advisors can help you break through barriers, build authenticity and trust, and earn positive word of mouth in online communities.
- Include people who deeply understand your market and look forward to participating with colleagues of similar stature.
- Your customer advisory forum should have a mix of prospective and current customers.
- Formally run them or combine a formal experience with a lot of entertainment and education so that there are networking opportunities and opportunities for them to learn from their peers.
- Encourage participants to share openly
- Don’t just do this once. Create a Customer Advisory Forum program that someone in your organization owns. Your customers will appreciate your investment in them, and your customers will invest in you.
- Hold the customer advisory board meetings over Zoom or in person, depending on who the customers are.

How can customer advisory boards contribute to successful buying experiences?



Anastasia Pavlova

Founder and CMO, Bold GTM

Breaking Through Barriers, Building Authenticity

Working with target and current customers to advise you on the best ways to engage with a market segment is especially valuable. For example, targeting CISOs can be challenging because they're averse to traditional marketing tactics. Working with customer advisors can help you break through barriers, build authenticity and trust, and earn positive word of mouth in online communities.



Justin Steinman

CMO, Definitive Healthcare

Providing Instant Feedback

I have had a ton of success with customer advisory boards. When people use your software, it's in their best interest to tell you what you're doing wrong and what they need. Customer advisory panels can provide instant and free feedback. I can ask questions like, "Am I describing your problem correctly?"



Ed Breault

CMO, Malbek

Ideation and Prioritization

We utilize customer advisory boards to help us with early-stage ideation and prioritize our innovations.

What criteria should teams use in selecting customers to join their advisory board?



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

A Mix of Prospective and Current Customers

Your customer advisory forum should have a mix of prospective and current customers. This provides you, and your customers, with richer perspectives. Hosting a customer forum that your customer advocates lead is a great way to engage with prospective customers. When prospects talk about their pain points and current customers talk about how they solved those same problems, the conversation is interesting and validating.



Anastasia Pavlova

Founder and CMO, Bold GTM

Customers Who Understand Your Market

Building customer advisory boards is extremely beneficial for companies. When you create these boards, you want to include people who deeply understand your market and who are looking forward to participating with colleagues who are of similar stature. For example, you wouldn't want to mix enterprise and SMB executives.

It's good practice to work with existing customers to advise your team. These relationships can evolve into customer advisory boards.

How can teams get the most from a customer advisory board and effectively translate their feedback into company action?



Anastasia Pavlova

Founder and CMO, Bold GTM

Create an Setting For Open Sharing

You can run them in a formal way, or you can combine a formal experience with a lot of entertainment and education so that there are networking opportunities and opportunities for them to learn from their peers. You want a forum where they can openly share challenges and help you shape your company's trajectory and vision.



Reuben Braham

B2B Enterprise Marketing Executive and Consultant

Invest in Them as Formal, Ongoing Programs

Customer Advisory Forums should be an integral part of your ongoing process to prepare better buying experiences and help you validate product developments and enhancements. As valuable as these customer forums are, you would think companies would have a formal program, but most don't. They do a one-off, a roundtable, or a dinner, but they don't have a full process. By creating a whole Customer Advisory Forum program that someone in your organization owns, your customers will appreciate your investment in them, and your customers will invest in you.



Justin Steinman

CMO, Definitive Healthcare

Find the Right Format For Your Advisory Board

These advisory boards can meet over Zoom, or better, you can have the groups meet in person and make a weekend getaway out of it. Before joining Definitive Healthcare, I worked at multiple Fortune 10 companies, where we hosted customer advisor boards for very senior-level executives from our largest customers, many of whom made multi-million-dollar purchases from us. For these customers, we could justify having in-person advisory board meetings in luxurious places.

In contrast, at Definitive Healthcare, our contract size tends to be smaller, and we tend to sell one level below the C-suite, so we have had quite a bit of success having Zoom meetings with lower-level executives, because everyone can spare 45 minutes for an interesting conversation.

Expert Bios



David Rogelberg

Publisher and
CEO of Mighty Guides, Inc.



David Rogelberg is a two-time Inc. 500 CEO passionate about B2B marketing, demand generation, and innovative publishing models. At 28, he became the youngest publisher in Simon & Schuster history. His Internet Starter Kit, the first complete software product to ship to help Mac users get on the Internet, sold over 850,000 copies. He founded Studio B, one of the first content marketing agencies. He is now the founder and publisher of Mighty Guides, specializing in publishing sponsored thought leader content.



Anastasia Pavlova

Founder and CMO, Bold GTM



Anastasia Pavlova, Founder and CMO of Bold GTM, provides go-to-market, revenue marketing, and customer expansion consulting services for growth companies. With 20 years of experience in B2B SaaS, Cybersecurity, Ecommerce, and B2C, she held executive roles at Adobe Marketo, OneLogin, and Uberflip. Anastasia is passionate about storytelling and leveraging technology and data to design personalized customer experiences.



Kyle Lacy

CMO, Jellyfish



Hey, I'm Kyle. I've spent the last 17 years building, scaling, failing, and winning in high-growth software. I'm currently serving the Jellyfish team as their CMO, and before joining the Jellyfish 'bloom', I had the pleasure of building a company called Lessonly. We employed over 230 people and changed the lives of many more after our acquisition. I've also been fortunate to lead teams at Seismic, OpenView, Salesforce, and ExactTarget.



Justin Steinman

CMO, Definitive Healthcare



Justin Steinman is the Chief Marketing Officer at Definitive Healthcare, a leading provider of healthcare data and analytics. In this role, Justin is responsible for the strategy, development, and execution of all aspects of marketing for the company, including product marketing, demand generation, corporate marketing, public relations, and corporate communications. For Definitive Healthcare's recent IPO on Nasdaq, Justin led all marketing-related activities, including a complete brand evolution, and produced an IPO roadshow video.

Expert Bios



Brian Gladstein

CMO, Tufin



Brian Gladstein is the CMO of Tufin, based in Boston, MA. He is a growth-stage marketing leader, with 20 years of experience in cybersecurity and data-driven marketing strategy from former leadership roles at A-LIGN, Cmd Security, Carbon Black, and RSA Security, among others. Brian is a startup advisor and two-time entrepreneur with degrees from MIT and Stanford.



Ed Breault

CMO, Malbek



Ed, a serial CMO, is a SaaS B2B marketing leader with a focus on growth, brand development, and account-based strategies. As Malbek's CMO, he aims to empower Legal, Finance, Procurement, and Sales to harness AI-driven CLM for digital contract innovation, driving awareness, demand, customer success, and revenue.



Reuben Braham

B2B Enterprise Marketing Executive and Consultant



Reuben is an experienced results driven Marketing executive. As VP Marketing he's helped companies develop powerful brand identities, drive strategic demand generation and growth initiatives, create partner ecosystems and build customer loyalty in the B2B enterprise space. Reuben has set off recently on a mission to launch his own startup that will help revolutionize marketing with the help of AI. He also provides Virtual CMO consultancy to both startups and enterprises.