

On-Demand CRM

And The **New** Marketing Model[™]

Integrating On-Demand CRM
Into Your Company's
B2B Marketing Program

How Marketing, Sales,
and Product Management Professionals
Use On-Demand CRM Systems for Effective,
Measurable **Lead Generation** and
Lead Development in their
B2B Marketing Programs

SELECTED TOPICS FROM
THE CRM FIELD MARKETING (CRM-FM[™])
ONLINE TRAINING AND CERTIFICATION SYSTEM

CRM[™] FIELD MARKETING



**On-Demand CRM and
The New Marketing Model**

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Author: Eric Gagnon
(eric@businessmarketinginstitute.com)

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CRM Field Marketing™

This eBook features content excerpted from the CRM Field Marketing (CRM-FM™) system, developed by the Business Marketing Institute (BMI), a training, certification, and professional development company serving the business-to-business marketing field.

The CRM Field Marketing system provides marketing, sales and product management professionals in business-to-business marketing with the training and certification in the processes required to effectively plan, develop, and execute successful business-to-business lead generation and lead development marketing programs using on-demand CRM systems.

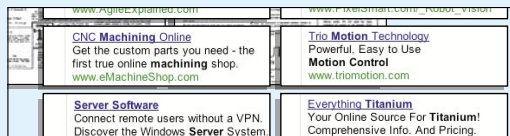
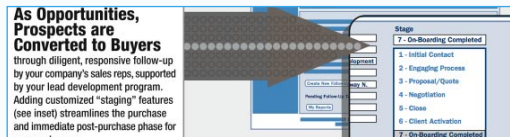
Developed especially for marketing professionals in companies using on-demand CRM systems, the CRM-FM system focuses on the practical skills of business-to-business marketing execution necessary to utilize on-demand CRM for implementing marketing programs that generate sales leads and new business in today's highly competitive global markets.

The CRM-FM system contains courseware content adopted and utilized by the Business Marketing Association (BMA), the largest trade association for B2B marketing professionals, established in 1922.

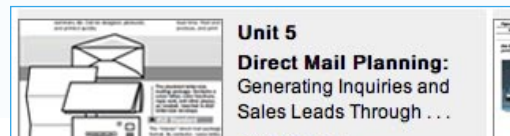
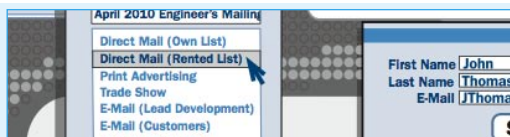
For more information on the CRM Field Marketing system and BMI training and certification, [click here](#) to see CRM-FM system content, or visit our Web site:

www.businessmarketinginstitute.com

Contents (click any section title below to link to that section)



The Status Quo	The New Marketing Model™
Treating marketing execution as a "black box"	Knowing how a thing is done, even if you're one doing it
Outsourcing competence	Owning the skills of effective marketing ex
Marketing operates as a "gifted unit"	Marketing aligned with sales



Utilizing On-Demand CRM for Effective B2B Marketing

On-demand CRM is the catalyst for major changes in B2B marketing programs **2**

On-Demand CRM and Effective Lead Development

Marketing programs no longer end after leads are generated **7**

Benefits of On-Demand CRM to the Marketing Process

Transparency and better measurement in the sales process is only the beginning **9**

The New Marketing Model: Marketing Realigned with Sales

Better marketing in on-demand CRM **19**

Integrating On-Demand CRM and Your Marketing Program

Key CRM functions, and their integration with your B2B marketing program **30**

The Business Marketing Institute

Content overview of the CRM Field Marketing (CRM-FM™) system **39**

2 On-Demand CRM and The New Marketing Model: Utilizing On-Demand CRM for Effective B2B Lead Generation and Lead Development

Because potential buyers have almost unlimited access to information on products and features, conventional marketing methods are less effective

There are big changes happening in business-to-business markets today:

- **The Internet gives everyone in your market access to nearly unlimited information** on products, their features, and—especially important, product feedback from current owners and users of your company’s products, and products just like yours;
- **This means buyers in business markets are paying less attention to conventional business marketing**, like print ads in trade publications, and spending more time using Google and the Internet to research the products they need to solve the problems they have

As a result of these changes, conventional, tired B2B marketing methods used in ads, mailings, and other marketing activities that cling to the “old” ways of just a few years ago aren’t generating the level of response they used to.

That’s because every one of your prospects—your potential customers—are now just a few clicks away from accessing the factual detail on products like yours, and those of your competition, as they begin their pre-purchase assessment process.

And because these potential buyers have access to so much more objective product information, they are also tuning out the hype they

**Net users—
your potential
prospects—now
research products
of interest, and
make their own
decisions on the
products they think
deserve a closer
look.**

**You will never
know whether or
not they selected
your product**

see in much of the marketing copy in the conventional marketing produced by companies themselves. Instead, they rely on factual product descriptions, feature comparisons, spec sheets, and impressions they receive from customer product feedback comments on the Internet.

These buyers—your potential customers—are using the Internet and search sites like Google to search for products to meet their application or solve their business problem. And they're doing it whether you know it or not.

As Josh Stailey of **The Pursuit Group**, a sales and CRM consulting firm, writes:

“The Web is turning the business-to-business selling process upside down: Buyers find and short-list suppliers based on their Web presence even before making contact. The decision has been made before you are even aware . . . and you'll never know that you failed to make the cut.”

On-Demand CRM: Bringing New Efficiency and Measurability to Sales and Marketing

At the same time your potential buyers use the Internet to find products like yours, the Internet gives you new ways to reach them in your marketing program, on-demand CRM systems, offered by companies like Oracle (Siebel), SAP, Salesforce.com, and Microsoft (Dynamics CRM) have ignited a revolution occurring in the CRM software field that is changing the sales process, by improving the interaction between a company's sales team and their prospects.

Their ease of entry and low cost make on-demand CRM systems easy for sales professionals to implement in their companies to dramatically streamline

On-demand CRM exposes gaps and inefficiencies in company marketing programs

and improve the interactions between the company's sales team and their leads, prospects, opportunities, customers, and partners.

In addition to improving the efficiency and productivity of a company's sales process, one of the major advantages of on-demand CRM is that it introduces a high level of measurability into the sales cycle. On-demand CRM systems make it easy for sales executives and management to become more highly aware of many important aspects of their sales processes. They can measure the time—and even the average number of interactions—required for prospects to become customers, the actual and potential dollar volume of opportunities and new sales in the pipeline, and the overall productivity of their sales team's efforts to convert each of these opportunities to customers.

Once sales teams use on-demand CRM, the insight they gain by measuring every activity related to their sales cycle soon extends to the beginning of the sales process—to marketing. Just as it simplifies measurement of sales contacts and opportunities, on-demand CRM makes it just as easy to measure the return of every marketing activity in a company, defined as a **campaign** in a CRM system. Marketing professionals in many companies must take steps not only to make their marketing programs more measurable, but they must often improve them, by increasing their power to generate sales leads, the first vital element in any sales process.

It's Not Business as Usual in Business Marketing Anymore

Marketing professionals in B2B companies must adapt to these major changes, as companies integrate on-demand CRM into their selling processes and reap the benefits of better, more efficient interaction and

On-Demand CRM: A Tool for Improving Productivity, Efficiency, and Measurability in Sales and Marketing

On-demand CRM systems dramatically improve the efficiency of communications and follow-through with prospects interested in buying your company's products. They are easy-to-use, well-engineered systems for enabling, scheduling, and documenting those communications. Most important, on-demand CRM provides a structured system for keeping this process of communication with prospects on a productive course, to help move these prospects closer to becoming buyers of your company's products. As open, Web-based systems, many on-demand CRM systems also promote transparency in the sales process by making it easy for your company's senior staff, sales, and marketing executives to track, measure, and assess the progress and status of every prospect in your company's sales cycle.

On-demand CRM is part of the "software as a service" revolution (SaaS), a major new trend in the IT field. On-demand software applications use the Internet as their delivery platform for access by users, instead of using expensive proprietary software applications installed on a company's in-house computers. This new SaaS model means companies pay only for the number of users who access the system, with virtually no additional upgrade or technical support required by a company's IT staff, and far less expense than the high cost of paying annual software licensing fees for installed, in-house applications.

As flexible, open systems, many on-demand CRM systems can be modified and configured to meet a company's own special business requirements. One on-demand CRM system, Salesforce.com, can be extended by adding hundreds of third-party applications via an online applications exchange.

On-demand CRM enhances the productivity of all the relationships between a company and its customers, partners, and prospects. The Business Marketing Institute CRM Field Marketing (CRM-FM™) training and certification system focuses exclusively on the critical areas where on-demand CRM can be utilized in a company's marketing program, where marketing professionals in companies whose sales teams use on-demand CRM systems can improve their marketing programs, utilizing the advantages of on-demand CRM to improve the power of their own marketing programs to generate sales response—sales leads and new business opportunities—to *increase their company's sales.*

The new methods you can now use to generate sales response in on-demand CRM—Google AdWords, landing pages, and information premiums—are highly measurable

increased measurability, and as your potential buyers change the ways they find and evaluate products like yours.

Companies and sales teams using a CRM system can now closely scrutinize and measure every one of the marketing activities in your marketing plan for leads generated, and each of these activities can now be linked to new business closed at the end of the long sales cycles experienced in many companies operating in B2B markets today.

Better measurement raises expectations for better marketing programs that generate better sales response. Any marketing activity tracked as a campaign in an on-demand CRM system that doesn't generate measurable sales leads at the front end, or a sufficient return at the back end, is now revealed as a marketing effort that should not be repeated.

This means running fewer, expensive, “image building” print ad programs that can't be measured for leads generated and their contribution to top-line sales. It also means developing on-demand CRM campaigns designed from the ground up to generate positive ROI. And generating ROI on marketing programs means generating **sales response**—sales leads.

The good news is the need for increased measurability in marketing coincides with the fact that the new online marketing media you can now use to reach your potential prospects—and get them to reach your company—happens to be highly measurable. Clicks on Google AdWords keyword search text ads, downloads from landing pages for information premiums, and links to targeted URLs in your company's print advertising can all be accurately and efficiently tracked and measured within on-demand CRM systems.

In on-demand CRM, lead development programs build the case for your company in the prospect's mind as the best solution to the business problem or issue faced by the prospect

Marketing deliverables utilized in on-demand CRM campaigns must be clear and compelling enough to generate response from potential prospects that can be measured in the CRM system, through use of **clear presentation** that motivates readers to take the action you want them to take: Calling your company to request more information, clicking on your Google AdWords text ad, downloading a spec sheet or white paper from your company's Web site, or calling a rep or distributor. On-demand CRM campaigns designed *from the ground up* using this process of clear presentation to generate powerful sales response will return enough sales leads to make their measurement worthwhile in on-demand CRM.

Lead Development: The Marketing Program that Begins After Leads are Generated

With on-demand CRM integration, marketing doesn't stop at generating leads anymore, either. **Lead development**, the "marketing program after the marketing program," is a new and critical required execution element for marketing professionals in companies using on-demand CRM systems.

Where on-demand CRM systems are integrated to company sales and marketing programs, marketing professionals need to know how to plan, develop, execute, and measure specialized, targeted lead development programs in their companies to help position the sales rep on the account as a trusted advisor to their prospect, and their company's product as the prospect's best choice to solve their business problem.

Lead development is a specialized type of marketing program that includes e-mail transmissions, specialized editorial content, and conventional, targeted

**Fewer than 20%
of companies have
developed useful
measurements of
their marketing
programs**

marketing activities (on-demand CRM campaigns) that work during the entire length of the company's sales cycle to support your company's sales team by building the case for your company in the prospect's mind as the best solution to the business problem or issue faced by the prospect.

Lead development closes the circle on measurability in on-demand CRM, helping marketing professionals and company management measure the return on every marketing activity from the time the lead was entered into their CRM leads database to the day the first order was placed by the prospect.

The New Marketing Model™

These changes call for a new approach to B2B marketing—an approach that makes every marketing activity accountable for its contribution to sales and business growth, by integrating the power of on-demand CRM systems to your company's marketing program.

This new approach, the BMI New Marketing Model, aligns marketing to sales and redefines the role of marketing professionals in companies using on-demand CRM. As a marketing professional, this positive transformation raises your profile and value to your company.

This eBook describes the major features, benefits, and applications of on-demand CRM in the business-to-business marketing process, and the important changes that must be made to adapt company marketing programs to this new environment.

The content featured in this eBook has been excerpted from the BMI CRM Field Marketing (CRM-FM™) system, a Web-based training and

**Better measurement
using on-demand
CRM raises
expectations in other
areas, especially
company marketing
programs**

certification program for B2B marketing, product, and sales professionals utilizing on-demand CRM in their marketing programs.

(For more information on the CRM-FM system, click here, or link to www.businessmarketinginstitute.com.)

Major Benefits of On-Demand CRM to the Business-to-Business Sales and Marketing Process

By streamlining the process of lead management and communications for sales teams, and by making the sales process—how a sales lead becomes a customer—measurable and more transparent to more people in your company, on-demand CRM brings new benefits to the way companies market and sell their products. These benefits cause important changes in a company's sales team and its selling process and, most important, provide the catalyst for important changes to company marketing programs.

Efficient New Processes Expose Old Inefficiencies

On-demand CRM helps companies formalize their sales processes, by enabling a company's sales reps to document their contacts with their prospects, as well as documenting their contacts with key influencers in the buying decision at these companies.

With each prospect contact, sales reps use on-demand CRM to log information on the opportunity: Key questions or issues raised by the prospect addressed (or open issues still needing to be addressed) by the sales rep, questions

Discovering each prospect's individual business problem, and clearly, persuasively describing how this problem is solved by your product, is the basis of effective lead development for marketing professionals using on-demand CRM systems

related to product features or applications and, most important, a record of these interactions that chart a path toward outlining the business, technical, or application problem described by the prospect that can be solved by your company's product, *and addressed by your marketing process in your company's CRM system.*

Over time, the efficiency and transparency of this interaction process in your company's on-demand CRM system uncovers important gaps where the sales team can do a better job of addressing their prospects' product questions and business issues and, most important, points out improvements that can be made in showing how your company's product solves each prospect's problem or business issue, which is usually the most effective way to sell products in business-to-business markets.

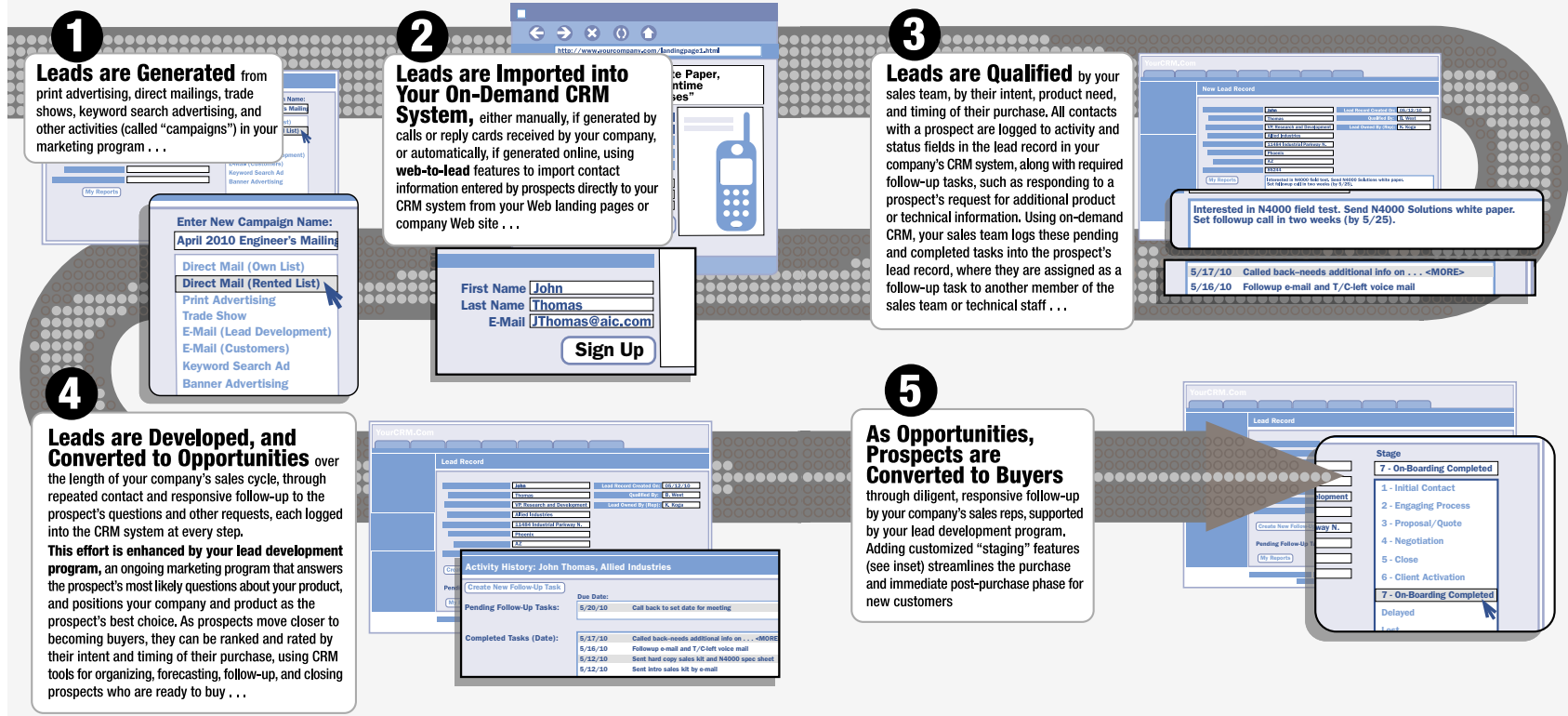
Since any issue related to how the benefits and problems solved by your product are communicated to prospects is a marketing-related issue, these gaps in execution and communication reveal improvements that must be made to a company's **lead development process**. As a marketing professional, you must make the changes required to improve your lead development program, or develop one if your marketing program hasn't been extended to this critical sales support process in on-demand CRM.

Better Measurement is Contagious

Measurement of the sales process one of the most important and useful aspects of CRM systems. As your company's sales team uses your company's on-demand CRM system to log and document their phone, e-mail, and in-person contacts with their prospects, as these prospects become opportunities for your

Figure 1-1

On-Demand CRM and Your Company's Sales Process



company as they move closer to their buying decisions, and as prospects become customers, on-demand CRM systems enable your sales executives and their team to more easily quantify the many aspects of your company's sales process: More accurate forecasts of prospective "pipeline" revenue, accurate calculations of the duration of your company's average sales cycle, ready assessments of an individual sales rep's productivity and efficiency based on important performance indicators, with detailed measurement of how often contacts are made with prospects by your sales team in your company's sales process.

In companies using on-demand CRM, marketing's role doesn't end with generating leads

As sales executives and their teams gain the power to measure their progress using your company's CRM system, this power creates a greater awareness of the importance and benefit of measurement in the sales process. This new awareness sparks an interest in measuring other activities connected to sales, most notably to marketing, the activity directly linked to a company's sales and business growth.

Once they are accustomed to using their company's CRM system to receive accurate, up-to-date measurement of their company's sales effort, the company's sales and senior executives often ask why the contribution of the expenses tied to the company's marketing program and, more important, the volume of response it generated (i.e., sales leads), can't be accurately tracked, measured, and improved, just as their sales team is already using on-demand CRM to measure and improve its own performance.

Often, the Problem Isn't Lack of Measurement, It's Poor Sales Response

As a marketing professional, you can increase your ability to measure the performance of your marketing program by efficiently capturing contact information for a lead from every marketing activity into your CRM system.

Most important, however, you can improve the return on your marketing program by re-engineering your marketing program to generate stronger sales response, and implementing a lead development program that supports your company's sales team in their efforts to move these leads through their sales process, and to convert as many of these prospects to buyers as

**Clear presentation
in all marketing
activities is the
basis for building
strong sales lead
generation in
on-demand CRM
campaigns**

possible. These are two of the most important ways you can utilize on-demand CRM systems to improve your marketing program.

Measurement is the first step toward improving a marketing program, but many companies either don't currently measure their marketing programs, or they're not satisfied with the measurements they're using: According to the CMO Council's 2004 survey of CMOs (chief marketing officers) at major technology companies, over 80% of these CMOs surveyed "expressed dissatisfaction with their ability to benchmark their marketing programs' business impact and value."

Lack of measurement is one obvious and important cause of this problem, but there is something more: If the deliverables you are using in your marketing program aren't presenting your product's benefits clearly and compellingly, they will not generate enough response to make measurement viable. Print advertising, direct mail programs, trade show appearances, Web promotions, and any other marketing activity that doesn't present your product's problem-solving benefits clearly and persuasively to readers and viewers well enough to motivate them to take the next step closer to becoming a prospect—contacting your company, linking to your Web site, etc.—won't generate sufficiently measurable sales response in the first place.

Sales response, defined as sales leads generated by a marketing activity traceable back to that marketing activity, is the most concrete and clearly measurable result of your marketing program. In other words, if you're ads aren't generating leads, your problem isn't measurability: Your problem is your ads aren't working.

Strong lead development programs mean higher prospect-to-sales conversion rates and shorter sales cycles

No soft measurement attribute of any business-to-business marketing program, such as “brand awareness,” “recall,” or “brand equity,” is as important, or as accurately measurable in an on-demand CRM system, as sales response.

Boosting the effectiveness and selling power of the key elements of your marketing program—direct mail, print advertising, trade shows, online marketing, and other marketing activities—is the first step to achieving measurable sales response in your marketing program. This is accomplished by practicing the techniques of **clear presentation** to *eliminate any doubt* that your ad, mailing or other marketing deliverable could have presented and sold your product in a more compelling way.

Because these techniques are so important to achieving the goal of improving sales response in lead generation and lead development programs in on-demand CRM systems, it is critical for you as a marketing professional to learn and master the process of improving sales response by improving the selling power of marketing deliverables used across your marketing program.

After a Lead is Generated, It Must Be Developed, With the Help of Marketing Professionals

Your company’s on-demand CRM system dramatically streamlines the process of your sales team’s follow-up and e-mail contact with their prospects. In companies using it as their first-ever implementation of a CRM system, CRM systems replace a sales rep’s ad hoc, manual system or other haphazard, inefficient sales contact methods with a productive, Web-based interface that makes sales professionals immediately more productive, and is optimized for

Lead development programs work to support your company's sales reps as "trusted advisors" to their prospects.

This is critical, because the prospect's perception and trust in the sales professional assigned to their account plays the greatest influence in their final purchase decision

easy, efficient, follow-up contact with prospects. For companies selling high-dollar products or services in complex team-selling situations, on-demand CRM makes it easy to pull together selling teams, get those teams communicating with each other quickly, sharing ideas and resources, and working together efficiently to address these major account selling opportunities.

This increased power and efficiency brought to communication between sales reps and their prospects in the sales cycle creates a need for business-to-business marketing professionals to develop better, more formalized **lead development programs** to support this critical interaction between your sales team and their prospects over the entire term of the sales cycle.

Lead development is the next stage after lead generation: Lead development is the process, developed and managed largely by you as a marketing professional, of executing the programs and developing the deliverables necessary to support your company's sales team in your joint effort to convince prospects (qualified by sales from leads generated in your marketing program) to buy from your company, and not from your competitor, based on **your company's unique ability or other unique attribute showing how your company can solve the prospect's problem or business issue.** Another useful definition of lead development, written by lead generation expert Brian Carroll, author of the book *Lead Generation for the Complex Sale*, is: "A lead nurturing [development] program is not a single marketing campaign. Instead, it is a series of steps and communication tactics whose defined objectives are to develop and build a relationship with the potential customer—out of which will come conversations that convert to sales."

70% of B2B customers determine their final brand perception and product preference based on their relationship with the company's sales rep, according to a 2004 study by The Aberdeen Group

Benefits of lead development programs: Lead development programs begin with the “marketing database” in an on-demand CRM system, containing the profile information (such as revenue, number of employees, etc.) for leads, prospects, opportunities, and customers. Integrating this critical prospect information into on-demand CRM is the first step toward improving sales efficiency in lead development. According to B2B marketing expert Brian Carroll, companies who develop a marketing database can improve their success in lead development by as much as 50%.

Lead development programs work, over the length of your company's sales cycle, to provide the prospect with the ongoing information and communication that fills in the critical information gaps on your product, its application to the prospect's business, and its solution to the prospect's business problem. Over time, a lead development program builds your company's reputation with your prospect, making your company their best choice when they make their final buying decision. According to Carroll, “when you pay special attention to understanding a customer's needs and wants during the courting and buying process, it is insightfully obvious to prospects how they will be treated later. Lead nurturing sets the tone for how your prospect can expect to be dealt with going forward to conclude that ‘this is the kind of company I want to do business with.’”

The consequences of operating *without* an evolved and formalized lead development program mean living with a highly inefficient, costly marketing program, where only a small share of generated leads are actually developed into customers by your company's sales team. Growing numbers of marketing professionals at companies in business-to-business markets worldwide now realize their responsibilities don't stop once the lead is generated in their

The New Marketing Model: Marketing Realigned with Sales

The Status Quo	The New Marketing Model™
Treating marketing execution as a “black box”	Knowing how a thing is done, even if you’re not the one doing it
Outsourcing competence	Owning the skills of effective marketing execution
Marketing operates as a “gifted unit”	Marketing aligned with sales
Handing generated leads off to sales (“throw the leads over the wall”)	Partnering with sales by executing lead development programs
“Marketingspeak”	Plain words sell products
Reciting features and benefits	Solving the prospect’s business problem or issue
Using consumer-oriented “creative” marketing approaches to build “brand awareness”	Using “Show What You Know” to establish thought leadership and unique positioning
Ignoring or avoiding measurability	Developing inherently measurable programs that can be tracked and measured

marketing program: They must work with their sales teams to develop those leads into buyers, with the help of powerful tools like on-demand CRM systems.

With On-Demand CRM, a Streamlined Process Becomes a Faster Process, Raising Expectations for Better Marketing Execution

As your company’s sales team integrates an on-demand CRM system to their selling process, and as they become more efficient in their lead follow-up, and as the transparency of their sales process is revealed by the CRM system through

According a 2004 survey of 800 C-level and marketing executives by the CMO Council, only 7% of executives believed their sales and marketing staffs were working together as partners to generate measurable ROI from their sales leads

better tracking and measurement, these positive developments raise expectations on marketing: For a more consistent, steadily rising flow of quality leads, the creation of a formalized lead development process requiring marketing's execution and support, and for better, closer, overall support for the company's sales process from marketing. Streamlined processes introduced by using on-demand CRM breed greater expectations, and for marketing professionals, better **marketing execution** is often the most important change that is needed from marketing to meet the new challenges introduced by sales teams using on-demand CRM systems.

The “Sales/Marketing Disconnect”

A critical issue often exposed by companies introducing on-demand CRM systems to their sales teams is the “sales/marketing disconnect,” occurring when the objectives and operation of a company's marketing program do not meet the needs and objectives of the company's sales team. Companies have a sales/marketing disconnect wherever the company's marketing program isn't generating sales response in the form of quality sales leads for their company's sales team, and where company marketing activities have not been developed so they can be tracked and measured for their return on investment throughout the sales cycle.

A sales/marketing disconnect is dramatically highlighted when sales teams using on-demand CRM systems are able to track, follow up, and close their sales opportunities with unprecedented speed and efficiency, yet they observe their marketing departments continuing to run expensive, image-building ads that

According to a 2004 study by The Aberdeen Group, sales professionals spend 40 to 60 hours each month reworking company marketing materials to make them more effective for their selling purposes

don't motivate readers to contact the company, and can't be objectively measured to assess their contribution to the company's sales and top-line revenues.

CEOs, CFOs, and sales executives in these companies can check reports and "dashboards" in an on-demand CRM system to see up-to-the-minute reports of leads contacted, prospect status, and the dollar amount of potential and impending sales in the company's pipeline, yet they can't see the same kind of usable information from their marketing departments. Often, they only hear the vague results of "reader awareness" surveys, anecdotal information, or other subjective information they can't reliably connect to their sales process.

The sales/marketing disconnect is a widespread problem throughout the business-to-business marketing field:

- **Marketing management's minimal impact:** According to a 2008 study published in the Journal of Marketing, a survey of 167 large companies, covered over a five-year period, concluded that Chief Marketing Officers (CMOs) at these companies had zero impact on the company's sales growth and profitability;
- **Lack of measurable return on marketing expense:** The CMO Council, in a 2004 survey of 800 senior C-level and marketing executives, reports that just 7% of these executives believed their sales and marketing staffs were working together as partners to generate measurable ROI from their sales leads;
- **Marketing not relevant to sales:** According to a 2004 study by the Aberdeen Group, salespeople spent 40 to 60 hours themselves each month re-creating or reworking their company's marketing materials to make them more effective for their selling purposes

**Breakdowns in
marketing execution
happen when
companies outsource
competence in their
marketing functions**

In companies plagued by sales/marketing disconnects, usually the improvement that needs to be made is on the marketing side of the disconnect: Through clearer, more persuasive marketing programs that generate measurable sales response, through better, faster marketing execution, and by creating lead development programs to carry the company's marketing program beyond the lead generation process, marketing professionals can close the sales/marketing disconnect and meet their primary responsibility: To increase their company's sales.

The New Marketing Model™

The Business Marketing Institute (BMI) defines this drive for improved sales response and accountability in the business-to-business marketing field as the New Marketing Model™ (NMM), further defined as:

Using the techniques and principles of clear presentation and effective marketing execution to generate measurable sales response in every marketing activity, and supporting your sales team over the life of your company's sales cycle by helping prospects understand how your product solves their problem or business issue.

The New Marketing Model sweeps away many of the faulty assumptions and inefficient practices of business-to-business marketing and incorporates effective processes and new technology to align the company's marketing function more closely with sales, in order to help every business-to-business marketing

Better knowledge of marketing tradecraft helps marketing professionals do a better job of managing and executing marketing projects managed as campaigns in on-demand CRM systems

professional achieve the goal of generating the sales response that increases sales for their company.

On-Demand CRM and the New Marketing Model: Core Principles

1. Knowledge of the Tradecraft of Marketing Execution

Learning how a thing is done, even if you're not the one doing it: Poor marketing execution is often the leading cause of failure in business-to-business marketing programs, and is often caused by marketing and sales support professionals who treat the process of marketing execution of the advertising, direct mail, online search, and other marketing projects in their program as a “black box.” A mysterious process to be handled by others and kept at arm’s length. Treating the critical process of marketing execution as a black box leads to breakdowns in effective execution of a marketing project, due to the marketing manager’s lack of knowledge of the steps necessary to perform that project.

A marketing manager who knows the tradecraft of marketing—the essential procedures and skills required to execute every marketing project—develops respect for the process, leading to an appreciation for the amount of time that must be devoted to each step required to complete it. Knowledge of the critical elements of a marketing program, and respect for the process on the part of every marketing professional, means more marketing projects are completed on schedule, without degrading to last-minute rush projects due to a marketing manager’s lack of knowledge of the process. This is just as true for projects that are delegated to third parties, such as ad agencies or consultants, as it is for projects executed by marketing professionals

**Knowledge of
effective, competent
marketing execution
establishes your
value to your
company as a
business marketing
professional**

themselves: Building knowledge of tradecraft, leading to respect for the process of marketing execution, means better coordination in the management of the day-to-day execution of every marketing project, and helps foster better working relationships with the members of your marketing team.

The project management and scheduling features available in many on-demand CRM systems promote better marketing execution in the New Marketing Model by providing an open forum for communication, collaboration, and scheduling of all of the critical marketing projects comprising your marketing plan. With on-demand CRM, individual project tasks can be outlined and assigned to members of your marketing team, and your team can view and complete their open tasks, or collaborate as needed to solve problems that inevitably arise during the execution of marketing projects. Once you gain knowledge of the critical processes of marketing execution by building your marketing tradecraft, and developing an understanding of the time and effort each process requires in the execution of your plan, you can use your company's CRM system to schedule these projects, monitor their progress, and make adjustments to their elements and timing, as needed.

2. Owning the Skills of Effective Marketing Execution

As companies have downsized through outsourcing, they sometimes outsource the core expertise that is critical to their operation, eliminating this expertise inside their companies. This is especially true in the business-to-business marketing field, as many companies have outsourced too much of the essential knowledge required to effectively market their products to third-party advertising agencies, marketing consultants, and other outside service providers. Superior business-to-business marketing programs require strong managers inside the company who know how to sell their products, know what positioning and copy

**Sales support is
your most important
job responsibility
as a B2B marketing
professional**

approaches work most effectively in their marketing programs, take charge of the critical role in setting their company's positioning and marketing strategy, and can perform the many hands-on tasks required to execute their marketing plan: Writing a sales copy outline, sketching out a rough, initial idea for a competent ad or expedient marketing deliverable, or otherwise specifying and executing the marketing project required to meet the lead generation or lead development objectives of their marketing plan.

For marketing professionals, this means no one else should care more about your company's marketing program more than you. Knowledge of the tradecraft of marketing builds competence with repeated execution, and this competence should never be outsourced to your ad agency, marketing consultant, or anyone else outside of your company. Effective training in business-to-business marketing builds your knowledge of the tradecraft required for you to develop, manage, and execute marketing programs that generate sales response, and establishes your value to your company by *bringing this competence inside your company*, where it belongs.

As a marketing professional, developing your skills in using on-demand CRM, and using it as a tool for faster and better execution of your lead generation and lead development programs, adds to the share of skills you own, master, and put to work for your company.

3. Marketing Aligned with Sales

Sales support—planning, developing, and executing lead-generating marketing programs that generate sales leads and opportunities for your company's sales team—is the most important function of the business-to-business marketing

Sales teams using on-demand CRM systems can easily spot inefficient areas in their marketing programs

process. In B2B marketing, your job as a marketing professional has three key parts:

- **First, and most important, to support your company's sales team** by generating sales response—inquiries and leads—from your marketing program;
- **Second, to work with your sales team, running a lead development program to convert these leads to buyers over your sales cycle**, using various marketing tools and media to communicate to these prospects how your company's expertise makes your company the best partner to the prospect, and effectively communicating how your product solves the prospect's problem;
- **Additionally, to run ahead of your marketing program to seek new markets and business development opportunities** for your company, through new product launches, new market tests, and joint business ventures, all supported by additional marketing programs, executed by you and your marketing team

Marketing departments in companies experiencing sales/marketing disconnects often view their goals as being separate from the goal of their sales team: Disconnected marketing staffs take too much of a “big picture” view of their roles, chasing overly-strategic objectives that often can't be connected to the critical mission of increasing sales for their companies. For example, running expensive, image-oriented advertising campaigns to “build brand awareness” pursues an objective that can't be accurately tracked or measured by known sales or financial benchmarks, and is often measured using soft, unreliable methods, such as surveys of trade publication readers or, worse yet, focus groups. In these companies, marketing thinks of itself as a kind of “gifted unit” that should not be

Almost half of all prospects in B2B markets may take a year or more to make their final purchase decision

held accountable to the same goals and benchmarks as other operating areas of the company.

Ineffective business-to-business marketing methods are exposed when sales teams begin using on-demand CRM systems in their selling process. Suddenly, all sales leads are visible in the CRM database, where they can be counted and tracked, along with each contact made and activity performed by the sales team to move the lead further along in the sales cycle. With a system that makes it far easier and far more efficient for each member of the sales team to manage and maximize contact with their prospects on a daily basis, communication becomes more substantive as open issues with the prospect, identified and monitored in the CRM system, are answered and addressed immediately and more responsively, using this more efficient method.

As these prospects become customers, and as sales can be tracked, using on-demand CRM, all the way back to the lead source, company executives begin to question the expense of the marketing programs that aren't showing up in their CRM system as having generated many of those leads. This prompts companies to drop these non-performing marketing activities, and to replace these expensive, unaccountable marketing projects with effective marketing activities that generate sales response, re-aligning marketing to sales.

4. Partnering with Sales by Executing Effective Lead Development Programs

Smart marketing professionals who run effective marketing programs that generate solid sales response realize their job doesn't end when these leads are passed along to their sales teams. In business-to-business marketing, buying decisions are often long deliberations, because products sold in these markets are

The length of the average sales cycle in B2B markets ranges from 30 days to two years, according to a 2005 study by Sirius Decisions, a research firm

expensive, complex, and may substantially impact business operations. For these reasons, the process of making sales, by converting leads generated from an ad, mailing, trade show or other activity that is part of your marketing plan, into buyers of your product, requires a long-term **lead development** effort.

According to a recent study, conducted by Reed Business Information, of 40,000 prospects who responded to ads and press releases for products in the manufacturing field, six months after inquiring, just 23% of these prospects actually purchased the product they inquired on, 25% bought the advertised product within seven to 12 months later, and 47% purchased the product a year or more later.

While the previous survey shows that the majority of business-to-business purchases occur well beyond six months, according to lead generation and development expert Brian Carroll, author of *Lead Generation for the Complex Sale*, most sales reps fail to follow up on longer-term leads. The primary cause, according to Carroll, is that sales reps focus instead on closing their most immediate and rewarding short-term selling opportunities to meet their next sales quota.

Given these circumstances, there is clearly a need for marketing professionals to work with their sales teams to develop lead development programs, with ongoing marketing communications efforts directed toward both active and inactive prospects in the company's CRM leads database. Lead development programs utilize e-mail, phone, and in-person communications between sales reps and their prospects, as well as conventional marketing media (such as direct mail and editorial and promotional e-mail) targeted to prospects, to continue the process of answering the prospect's questions about your company's product,

The lead development process is also a process of establishing trust and credibility between your sales rep and their prospect

making the case for your product as the best solution to the prospect's business, technical, or applications problem. During the many months of the sales cycle, an effective lead development program helps to communicate your company's reputation and unique expertise. Over time, as your sales rep earns their prospect's trust with the help of your lead development program, the prospect decides that your company and its product are their best choice, and places their first order.

Every activity in your marketing program devoted to lead development can be integrated, tracked, and measured using a CRM system. For example, standard e-mail message templates, to provide sales reps with effective notes, letters, reports, presentations, and other communications with prospects, can be stored in the document libraries available in most CRM systems and made available to your sales team. E-mail features integrated with some on-demand CRM systems, and available from third-party vendors for others, allow you to send bulk e-mail and autoresponder-based e-mail messages to hundreds of prospects, and their response can be tracked and measured using your company's on-demand CRM system. You can also use on-demand CRM to plan, execute, and coordinate followup on other, "offline" marketing activities targeted toward current and longer-term prospects, such as mailings for new product or special price offers, advertising campaigns, and appearances by your company at upcoming trade shows.

5. Using Clear Presentation in Lead Generation and Lead Development

Prospects in business-to-business markets assess products and approach their buying process differently than buyers in consumer markets. B2B marketing speaks to audiences in business, technical, or other

Information deliverables (such as white papers, case studies, applications briefs) help establish your company as an expert in your marketplace

specialized vertical markets. These potential buyers are interested in price, features, and, most of all, information on how they can put a product to work to solve a problem in their business, their operation, or their technical process. By contrast, consumer marketing aims to incite an emotional response in a consumer, or uses other soft approaches to establish a brand image in the mind of the consumer, which is a kind of weak memory that hopes to influence consumers to buy the next time they are in the store.

Most important—and especially during the lead development process—a prospect in a B2B market wants to know how using your product solves the business problem or issue they face. Producing effective marketing programs that generate solid sales response on the “front end” (lead generation) of your marketing program, and carries through to the critical lead development stage of your program requires **clear presentation**, an important process in the New Marketing Model.

Clear presentation means using clear, simple, direct language to communicate the known sales benefits of your company’s product, using benefits seen as compelling by your potential prospects in all marketing deliverables—advertising, direct mail, e-mail, the Internet, or any other marketing tool or medium, and using bold presentation and layout techniques to make your sales message as obvious as possible to the largest number of readers and viewers in your market.

Nowhere is the use of clear presentation more important than in new online advertising media, such as e-mail, your company’s Web site, and Google AdWords keyword search text ad programs. Prospects in business-to-business markets have trained themselves to disbelieve the standard marketing

**Times may change,
but people, and their
motivations, don't:
Sales appeals using
clear presentation
are the most
effective way to
generate sales
response in B2B
marketing programs**

Effective Sales Appeals are Timeless—75 year-old copy approaches used in today's online media

Times May Change, But People—and Their Motivations—Don't: Top Google AdWords copywriters of today study and recycle copy appeals invented by John Caples and other copywriting masters of the 1930s

HOW TO WIN FRIENDS AND INFLUENCE PEOPLE
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hype and brochure copy they see in advertising everywhere around them, and go online to seek clear answers to their questions, and to assess and compare product features from numerous vendors to carefully research each product's application to their need. When prospects read your company's marketing deliverables, they want hard facts, features, answers to their immediate questions about your product, and problem-solving "reasons to buy."

Editorial information deliverables (white papers, case studies, etc.) help to establish your company as a thought leader and expert in your market, ahead of your competition

The best sales copy appeals to the timeless human motivations that drive every one of your potential prospects in their business roles—such as the need to increase revenues, to be more productive or efficient, or to save money. These sales copy techniques were perfected decades ago by John Caples, Claude Hopkins, Rosser Reeves, and the other early innovators in advertising and direct mail, and it's a known fact that many of the top copywriters producing Google AdWords keyword advertising programs today study and emulate the techniques of these old masters (see Figure 1-3).

6. Using “Show What You Know” to Establish Thought Leadership and Unique Positioning for Your Company and Its Product

Every company possesses unique knowledge in its business and manufacturing processes, the special knowledge and expertise held by its executive and technical staff, and other insights into how the company's products help customers solve their problem, that it can utilize to help sell its products to new potential buyers.

“Show what you know” uses marketing deliverables like white papers, reports, case studies, and other informative editorial formats to package and present this information, both as premiums used in ads, mailings, and other lead generation activities, and during the lead development process, where it is especially valuable in helping your sales team answer the important questions asked by their prospects about your products and their problem-solving applications, and to uniquely position your company as the prospect's best choice in their purchase decision.

Using an on-demand CRM system, you can utilize white papers, case studies, reports and other critical “show what you know” deliverables in “spot”

On-demand CRM campaigns are tracked by entering new leads, importing leads online using “web-to-lead” features, or by changing the status of existing lead records in the CRM lead database

e-mail contacts between your sales team and their prospects, in ongoing e-mail messaging programs for lead development, as premiums used in Google Adwords keyword search text advertising, and as standalone deliverables in the document library of your company’s CRM system.

Functional Areas Where Marketing is Integrated With On-Demand CRM Systems

As a marketing professional integrating your marketing program with an on-demand CRM system, it is important to learn the features and functions shared by most CRM systems that are most relevant to helping you improve the productivity, speed, and measurability of your marketing program.

Here are the major functions of on-demand CRM that are most useful to your marketing program:

- 1.) **Tracking and measuring sales response** from marketing programs (CRM campaigns);
- 2.) **Manual and online lead capture** (including web-to-lead);
- 3.) **Online storage and distribution** of sales support marketing deliverables (on-demand CRM document libraries);
- 4.) **Executing, tracking, and measuring lead development programs** (bulk e-mail systems and on-demand CRM reports);
- 5.) **Produce, execute, measure, and assess keyword search advertising** (on-demand CRM and Google AdWords);
- 6.) **Plan, schedule, and monitor** the progress of execution of marketing

programs (on-demand CRM activity planner)

**Use “web-to-lead”
to capture contact
information online
from prospects in
Google AdWords and
other Internet-based
on-demand CRM
campaigns**

1.) Tracking and Measuring Sales Response from Marketing Programs (On-Demand CRM Campaigns)

Any marketing project or activity can be created, managed, tracked, and measured, by entering it as a **campaign**, the term used in most on-demand CRM systems. Once entered into your company’s on-demand CRM system, a campaign, such as an advertising or direct mail program, trade show appearance, or online marketing project, can be tracked and measured: By importing a mailing list of potential prospects (if available) into the CRM system, attaching this list to a specific campaign (such as a direct mail project) and then tracking prospects on this list who respond to the campaign, or by manually logging leads captured from prospects who call your company, provide their business cards or contact information at a trade show, or mail in reply cards from your mailings. Leads can also be imported automatically from your online marketing promotions, through “web-to-lead” features available in some on-demand CRM systems (see Figure 1-4).

Information on marketing activities entered as campaigns in on-demand CRM systems is usually accessible (read-only) to all CRM users in your company’s sales, marketing and senior management teams. By openly documenting response to every marketing activity as a campaign in your company’s on-demand CRM system, you keep all everyone in the loop on all of the activities in your marketing plan and, most important, you take the first step to instilling the value of measurability into every marketing activity in your plan: If you can track a campaign, you can measure it, and if you can measure it, you can determine its

On-Demand CRM and Your Company's Marketing Program: Key Functional Areas for Integrating Your Marketing Program with On-Demand CRM Systems

contribution to sales, or change the campaign to improve its sales response, as needed.

2.) Manual and Online Lead Capture (On-Demand CRM Web-to-Lead)

Contact information obtained from potential prospects who respond to your print ads, mailings, Web promotions and keyword search advertising, and from trade show attendees who provide their contact information at your company's trade show booth, or contact information on interested potential prospects obtained from any other source in your marketing program, is entered into your company's on-demand CRM system as a lead record.

While leads generated by “offline” marketing methods—print advertising, direct mail, trade shows, or other marketing activities occurring “off the Net”—are manually entered into your CRM system by your company's sales support staff or sales reps, by using “web-to-lead” features, available from some on-demand CRM vendors. Here, lead information is captured and imported automatically into the CRM database from any prospect who provides you with their contact information from any online Web or e-mail promotion, or online keyword search advertising program, such as Google AdWords.

Web-to-lead generates HTML code which you (or your IT staff) can place within the body text of the Web “landing pages” you're using to gather information from prospects who provide their contact information to your company in response to online promotional offers on your company's Web site, Google AdWords text ads, or e-mail promotions in your marketing program. Web-to-lead generates both the forms for the fields you're asking the user to

Web-to-lead and other methods of capturing and importing lead information to CRM systems are essential for compiling mailing lists, and for tracking and measuring response from on-demand CRM marketing campaigns

enter (first/last name, e-mail address, etc.) and, optionally, tracking codes to track response to specific promotions, landing page formats, or any other variable you need to test or track in your marketing program.

Web-to-lead is a very important part of many of your marketing programs because it is a powerful tool for creating mailing lists, which are essential for all direct mail projects and mass e-mail transmissions. Mailing lists generated from lists of leads entered into your CRM system also play a major role in your ongoing lead development program, as you will be constantly generating lists of prospects from your CRM system's database, selected by specific criteria (purchasing role, product interest, etc.) to be utilized in e-mail transmissions and print mailings for your lead development activities.

3.) Online Storage and Distribution of Sales Support Marketing Deliverables (Document Library)

The document library, a feature available in most on-demand CRM systems, allows you to create an online library of sales and marketing materials which can be accessed by your sales team, as needed. Examples of these materials include product sales brochures and flyers, spec sheets, white papers, PowerPoint presentations, and sample sales letter templates for e-mail responses, and common selling scenarios. The document library streamlines the distribution and storage of these important marketing deliverables, by providing your sales team with ready access to the needed marketing and sales support materials, when they're needed by your sales reps to communicate with their prospects: for example, E-mail cover notes to accompany other materials or promotions sent in

The document library of your company's on-demand CRM system provides ready access to a wide array of "field marketing deliverables" useful to your company's sales team as they interact with their prospects

"spot" communications by sales reps with their prospects, e-mail templates for responses to common product questions, and .PDFs of product brochures, sales flyers, and Q & A sheets.

The document library is also an important final destination for the many expedient "field marketing deliverables" you develop for your company's sales team. These are basic, easy-to-produce product and promotion flyers, sales sheets, and other expedient materials often produced on a rush basis to exploit selling opportunities, or even created to address a product question or issue for a single prospect. Over time, the document library becomes an invaluable communications resource for your sales and marketing team, as more materials are developed, added, and retained for future access and use.

4.) Executing, Tracking, and Measuring Lead Development Programs (Bulk E-Mailers and On-Demand CRM Reports)

After a potentially interested individual has provided you their contact information in response to seeing your ad in a trade publication, receiving a mailing piece, visiting your booth at a trade show, or responding to any other marketing activity in the lead generation stage of your marketing program, this individual becomes a lead, who, after being qualified by your sales team, then becomes a prospect in your lead development process, the next stage of your marketing program in an on-demand CRM system.

During the lead development stage, your company's sales reps are already communicating with their prospects by phone and e-mail, and these prospects have also usually agreed to receive additional e-mail communications from your company, in the form of e-mail newsletters, updates, etc. While other, "offline"

Lead development programs typically use varied methods for sending e-mail transmissions, depending on level of contact, prospect interest, and type of editorial content presented

types of marketing activities and media used for lead generation (mailings and trade show promotions, for example) are also used in lead development, e-mail messaging programs form a substantial part of many lead development programs.

E-mail messaging programs executed in on-demand CRM systems consist of bulk mailings of larger numbers of messages (such as a monthly e-mail newsletter to prospects) and automated e-mail processes using autoresponders and “marketing automation” features to send e-mail messages targeted to a prospect’s interest, based on their product, application, or other preferences. Bulk e-mail and autoresponder capabilities are integrated as part of some on-demand CRM systems, and are available as third-party add-ons with other on-demand CRM vendors.

Using e-mail response tracking features, you can track access to sent e-mails and Web pages linkable from your e-mail message transmissions, and you can capture this tracking information for analysis and display in on-demand CRM report formats in many of these systems.

5.) Produce, Execute, Measure, and Assess Keyword Search Advertising (On-Demand CRM and Google AdWords)

Using Google AdWords and your company’s on-demand CRM system, you can utilize online keyword search text advertising in your lead generation program to draw response from interested potential prospects searching for products or services like those sold by your company.

In business-to-business marketing applications, free “information-based premiums,” such as white papers, case studies, reports, etc. are

Information deliverables, such as white papers, case studies, or applications briefs, make excellent free premiums for use in Google AdWords keyword search programs

often used in Google AdWords keyword search advertising to motivate potential prospects to provide their contact information to your company.

These potential prospects who request contact from one of your company's sales reps, and agree to receive additional information and announcements from your company, are then imported into your CRM system database, and into your lead development program, which works alongside your sales team, and helps to inform, educate, and influence prospects during your company's sales cycle.

Accesses to landing pages used to promote and capture lead information in Google AdWords programs can be tracked and measured over the length of your company's sales cycle using Google Analytics features (to track landing page conversion rates from AdWords text ads in Google), and web-to-lead features (available in some on-demand CRM systems) to generate Web forms for landing pages to capture and import lead contact information to the CRM database, and to track and report access to specific landing pages.

6.) Plan, Schedule, and Monitor Progress of Execution of Marketing Programs (CRM Project Management)

Many on-demand CRM systems also feature versatile project management and scheduling tools to help you plan and coordinate the execution of your marketing projects. Using these tools, you can schedule activities on a daily, weekly, or monthly basis, communicate these plans to other members of your marketing and sales team, assign tasks to other team members or third-party contractors, and monitor the status of these assigned tasks.

It All Starts With a Lead

Sales teams need sales leads to begin the selling process. As marketing professionals, we know these leads don't materialize inside of your company's on-demand CRM system. They must be generated by advertising programs, direct mail, trade shows, etc. and all of the important activities in your marketing program—lead generation.

The first step in putting the New Marketing Model to work using an on-demand CRM system is to employ the process of Real Marketing in the lead generation stage. This includes using clear presentation in your marketing programs and deliverables that communicate the essential benefits of your product to your potential prospects, backed up with strong, effective marketing execution in every aspect of your marketing program.

Clear presentation *eliminates the doubt* that your marketing effort could have more effectively sold your product, and effective **marketing execution** helps you move on every opportunity to sell your company's products.

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