

# What is B2B Marketing Process? 5 Processes You Need to Know



How Explicit Definition of Marketing Processes Helps Scale Performance in Digital B2B Marketplaces

# 5 Marketing Processes You Need to Know

## Introduction

As someone who has been intimate with digital and marketing operations for over 10 years, I find myself talking a lot about process, workflow, data and the like. It seems familiar territory if you have worked in the information technology industry for any length of time, particularly in software, as we make a living automating process for our customers.



But, as we used to say, 'process' is a [dirty word](#) for many, even though it is shorthand for 'how we do things around here'. It is certainly not something we think a whole lot about, until a business change prompts us to recognise that we need to be more explicit about what we do and how we do it.

To be successful in a digital first marketplace, it is important to spend some time on understanding why explicit business process definition has to be second nature to marketers and in particular, which processes are significant in marketing performance.

## BPM, BPO and RPA: A Brief History

My early introduction to business process concepts at [BT](#) was driven by marketing bespoke software, based on structured development methodologies like [Information Engineering](#) and being taken through ISO9000 quality certification which focuses on and audits process.

The Business Process Management (BPM) discipline was adopted by IT professionals, following on from early [BPR](#) initiatives that resulted directly from introducing information processing software.

*Business process management (BPM) is a discipline that uses various methods to discover, model, analyze, measure, improve and optimize business processes. A business process coordinates the behavior of people, systems, information and things to produce business outcomes in support of a business strategy.*

**Gartner**

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Definition and management of the processes surrounding a company's relationship with its customers, including its automation, eventually followed manufacturing, logistics, order-to-cash and other enterprise processes to become packaged [ERP](#) systems. Customer Relationship Management ([CRM](#)) and the Marketing Automation Platform ([MAP](#)) are the best-known systems automating relationships that touch customers, or target customers. But most of marketing's touch-points don't start or end in these systems.

Now, in our AI/ robotic-obsessed era, more and more processes are being automated and optimized in the name of productivity (cost-savings) by robots. [RPA](#) is taking over the process automation world.

Sales and Marketing can not escape. Our employers and our customers are driven by Key Performance Indicators (KPIs) that obsess about reducing costs - and process efficiency means automation. Process innovation can drive growth.



### So What Does This All Have to do with Marketing?

As large parts of the [buyer's journey](#) have moved online, and engagement with vendor salespeople is left later in the buying cycle, marketing is expected to take a greater share of the responsibility for identifying engaged buyers and qualifying their readiness for sales contact.

This is a reflection of the process changes happening in the buyer landscape and the corresponding changes that B2B marketing need to make, both to read and interpret the digital body language of buyers, but also to respond in real time with content and messaging appropriate to their needs. Marketing needs to provide customers with a great experience and at the same time ensure leads which are sales ready are [getting through to Sales in a timely manner](#) with all of the appropriate information included.

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How Marketing supports these differing needs, perhaps on a global scale, with multiple languages, localised variants on [what is a sales-ready lead](#) and with differently performing engagement content and channels, is complex. To do this consistently, so that data is captured and integrated, to complete a picture that can drive the appropriate action, is complex. How to do it requires internal cross-functional agreement; documentation and consistent deployment/ training. These agreements about 'how we work' will have components that need to be automated, analysed, reported on and optimised.

This is all about the process of B2B marketing in a digital economy.

## 5 Processes for Marketing to Obsess About

So now we have established that, in order to scale marketing activities in a way that can be optimised and changed in response to market dynamics or new insights, while maintaining a consistent customer experience and brand reputation, we need clear processes.

Of course, some processes are more important than others – particularly those that touch the customer experience and drive net promoter score (NPS) performance for the company and those that significantly impact [marketing's KPIs](#). The Top 5 for B2B marketing are:

1. Lead-to-Revenue Marketing Process
2. Marketing Planning Process
3. Campaign Creation and Build
4. Attribution
5. Customer Experience Management

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## Lead-to-Revenue Marketing (L2RM)

According to [Forrester](#), companies that have implemented a managed lead-to-revenue marketing (L2RM) process are showing 30% better performance in marketing contribution to pipeline and revenue and 50% higher revenue growth.

Lead-to-revenue processes and [revenue operations](#) functions, which report funnel performance against the end-to-end sales and marketing engagement cycle have matured over recent years as companies have worked on sales and marketing collaboration, although as my [recent post](#) discusses, there is still some way to go as teams fall back into familiar silos. However, where companies have established formalized sales & [marketing operations](#) teams, governance is much better.



The fundamentals of sales and marketing alignment that lead to establishing clear definitions of who does what in the L2RM process accountability have to be supported by workflow in the systems of record (CRM, ERP) that reinforces the agreed actions, and capture data that can be reported. This is often where system usability and the time it takes for 'administration' of the process become stumbling blocks. Change can take time and project scope should be limited to make time for training and for users to become

familiar and accepting of the need for consistency.

## Marketing Planning

Marketing *planning* has always been the poor cousin of marketing *doing*! And lack of planning is often excused by pointing to the speed of change in the market and the need to stay 'agile'.

But executing marketing without both a short term plan and a long term strategy is like driving a car without either a planned destination or a map: sure, you're going to get somewhere, but how do you know when you've arrived and what did you learn that will allow you to take some shortcuts on the next trip?

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I have posted about planning [here](#) and highlighted the need for plans to be clearly associated with driving measurable outcomes. But the [process of planning](#) is just as important to get you where you want to go, and it of course starts with knowing where you are in relation to your intended destination. While it may be difficult to forecast the exact timing of a pandemic, for example, if it is a scenario that is likely and will impact your plans, then it needs to be considered along with all other environmental factors (political, social, technological etc) as well as those related to the markets we serve and any internal constraints.

For marketing, the annual planning process, which drives budget and resource allocation needs to not only encompass achievement of revenue goals, but also brand ambitions, ABM initiatives, customer retention, channel and influencer programmes and so on. The priorities will be driven by the business strategy and Sales focus, but Marketing needs to bring the voice of the customer and may need to champion investments that

span fiscal years and for which ROI is less easy to show. This is a key role for the CMO.



### Campaign Creation and Build

Campaign build should not commence before the above strategic marketing planning process has taken place. It should be supported by a clear L2RM process that identifies clearly how demand generation campaign outcomes will be managed. Non-demand campaigns will have a different set of KPIs that relate to SMART campaign objectives.

The [SiriusDecisions framework](#) is a valuable way of looking at the process of defining and creating campaigns that deliver against the marketing goals. It defines a process that identifies the needed participants, the tasks and the deliverables from each stage. For global companies seeking to roll-out international campaigns with central build and localised components (not just language) the coordination of the campaign definition, targeting and execution processes are critical to successful delivery. A [global demand centre](#) is often deployed, sometimes incorporating a project management office (PMO) to support the coordination of these activities as well as allocation of build components to internal and external centres of excellence.

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Without a clear, shared definition of what a campaign is and how it is designed, built and deployed, there can be conflict between corporate/central campaign functions and field functions, who are close to sales and the customer in-market. This can result in inefficiencies or extremes of approach – complete centralisation or decentralisation – rather than the collaboration which optimises the balance between efficiency and effectiveness.



## Attribution

I have written at length about attribution in [this post](#) and others, but not so much about how agreement and deployment of an effective attribution model is implemented. This is not something that raises its head until a company has a robust L2RM process in place (see above). Until sales and marketing are aligned around responsibilities and measurement of the end-to-end sales funnel, how it is measured in the systems that underpin the process is a moot point. Most marketing teams will accept the default settings of their CRM/ MAP vendor which are either first or last touch, depending on the system.

However, the default settings are very much open to interpretation, as they also relate to the definitions of key data entities shipped in the product: many systems have a campaign definition, which makes every tactic – such as sending one email – a ‘campaign’. Or they don’t have a campaign, but just channel types. Either way, it can be hard to attribute a ‘lead’ to a ‘campaign’ in a way that satisfies a Marketer who is trying to demonstrate how a multi-channel campaign deployment drove measurable funnel outcomes.

Another entity that needs careful consideration is the lead. When is a **contact** a **lead** – and when is it just a name and address of someone who works at a particular company? These are questions that campaign managers need to work closely with [Marketing Operations](#) on or risk being unable to track outcomes to funnel in a way that is both logical and accepted by Sales.

## Customer Experience Management

While all of the above processes are internal to the operation of marketing in today’s digital economy, they are all intended to enable our companies to provide customer with a customer experience that meets, or preferably over-delivers (‘delights’) on their experience of our brand.

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According to eConsultancy:

*Customer experience (CX) is the sum of all the experiences a customer has with a business during their entire lifetime relationship, taking in not just the key touchpoints (product awareness, social contact, the transaction itself, post purchase feedback) but also how personal and memorable these experiences are.*

Customer experience management (CEM) is a strategy used to track, oversee and organise all interactions, in order to help a business focus on the needs of its customers.

By this definition, CEM is everything our company does that touches the customer. These are the significant moments of truth, when our brand promise meets the test of actual experience.

Thinking about everything we do that touches the customer is quite a tall order. Where to start and what about those guys in customer support and professional services who have most of the interaction with our customers? The jury is still out on what most influences the customer perception of their experience and what timeframe we should be looking at – i.e. a purchase experience on an ecommerce site vs their whole experience of our company.



However, what is clear, is that we need data to work with, and to make choices about, what moments of truth are most significant. And how we measure these moments, how we build data points to capture them into our campaign execution and how campaign insights combine with insights from our NPS and ABM programmes.

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## In summary

Process is how we get stuff done - so not the job of 'others' to worry about. Now, whether we like it or not, we are all in digital marketing and how we do things determines: what data we capture; what intelligence it communicates to us; and whether we can measure successful outcomes.

Marketing needs to be able to scale operations as our business grows and this requires scalable **processes**, built on best practice, continuously optimised and delivered on foundations that enable agile execution: [SLAs](#), templates, playbooks, boilerplate, [content assets](#) and martech.

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