The Digital Transformation of B2B Selling

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Dynamics CRM MVP
Certified Sales Professional
About Rick McCutcheon

• Dynamics 365 CE/CRM MVP, CSP - Certified Sales Professional
• Past Vice Chair CPSA Sales Certification Group
• Leading strategist, speaker and writer on CRM and Social Selling
• Facilitates Sales Process and CRM Best Practices Educational Events for leading Corporations and Associations including
  • Microsoft Corporation
  • CRMUG, ExtremeCRM
  • CRM Evolution
  • Regional Innovation Centers
    • Innovation Factory
    • Spark Centre
    • Haltech
    • NWOC
The Full Contact Selling Methodology is about the Digital Transformation of B2B Sales. Enabling B2B Companies to build a multi-channel engagement program designed to better influence, manage and communicate with your *business ecosystem*. This is achieved by creating the integration of people, process, CRM and related social technologies.
“Ecosystem” conveys the idea that all the pieces of an economy come together in particular places, and that their strength and interactions determine prosperity and economic growth. Think of it as your garden, where you need fertile soil, seeds, and other ingredients to make things grow.

Rosabeth Moss Kanter
Professor Harvard Business School
Planning for CRM Success!

Your Business Ecosystem

- Customers
- Prospects
- Channel Partners
- Supply Chain
- Contractors
- Vendors
- Influencers
Digital Transformation

Stakeholders

• C Level Management
  • CEO, CIO, CMO, CFO
• Sales & Marketing
• Customer Service
• Field Service
• Professional Service
• Supply Chain & Operations
• Product/Category Management
• Human Resources
• Information Technology
Digital Transformation Stakeholders

Sales Teams:
- Generating revenues
- Customer retention
- Territory coverage
- Channel management
- Competitive threats
- Report generation
- Hiring, training and managing people
- Satisfying the CEO
Conventional B2B Sales Process

• Profiled as a Sales person
• Rely on personal network
• Buy Prospect list
• Cold calling, VM & spamming
• Get to the Decision Maker
• Understand requirements
• Find a budget
• Present product/solution
• Close the deal
• Find next target
Conventional B2B Sales Engagement

- Sorry to interrupt but
- Hello my name is (blank)
- You don’t know me or my company
- I don’t know if you need anything
- Are you the decision maker
- Do you have a budget
- Can I set up a meeting
- Can I send you a brochure
- Hello are you still there?
Social B2B Sales Process

- Understanding and grow their business ecosystem
- Connect with influencers
- Profiled as an expert
- Understand who is buying
- Work on referrals and warm intros
- Educates the customer & prospect
- Builds relationships
- Closes the business
- Next prospect finds you!
The Buying Process has Changed

- 57% of the buying journey is done BEFORE a sales rep is involved.
- 7 people are now involved in the average B2B buying decision.
- 75% of B2B buyers now use social media to research vendors.
- 90% of decision makers say they never respond to cold outreach.
- 74% of buyers choose the rep that was FIRST to add value and insight.

Source: LinkedIn Sales Solutions
The B2B Buying Process – The Digital Researcher

- 2012:
  - 29% 35-44
  - 27% 18-34
  - 26% 45-54
  - 18% 55+

- 2014:
  - 22% 35-44
  - 46% 18-34
  - 19% 45-54
  - 13% 55+
“B2B buyers have been conditioned to expect the same personalized treatment that they get while shopping on Amazon. They want to be approached with relevant offers at the right moments, not when it’s convenient for a sales rep. They have little to no patience for ill-timed, generic pitches.”

Justin Shriber VP of Marketing LinkedIn Sales and Marketing Solutions
The B2B Buying Process – The Digital Buyer
The B2B Buying Process – Part One – Initial Requirements

- Requirement LOB
- Requirement Management
- Requirement C Level Exec
- Requirement IT
- Requirement 3rd Party

Steps:
- Internal Discussion
- Assign Researcher
- Web Search
The B2B Buying Process – Part Two – Information Gathering
The B2B Buying Process – Part Four – Making the Purchase

Engage Vendors

- Vendor
- Dealer
- Consultant

RFP

Select

Purchase
EXHIBIT 1 | Digital Matters—Even for Offline Purchases

Did you make your purchase online or offline? Was your purchase decision significantly influenced by digital research?

Share of respondents (%)

- **Industrial machinery**
  - Offline purchase: 100%
  - Online purchase: 58%
  - Digitally influenced: 58%

- **Industrial supplies**
  - Offline purchase: 69%
  - Online purchase: 88%
  - Digitally influenced: 88%

- **Packing and shipping**
  - Offline purchase: 42%
  - Online purchase: 54%
  - Digitally influenced: 54%

On average, two-thirds of purchases were significantly influenced by digital research.

Source: BCG research.
FCS Social Selling Process

Campaigns

SEO

PPC

Google Bus.

Bing Places for Business

Location

Referrals

Location

Referrals
FCS Social Selling Process

- **Campaigns**
- **SEO**
- **PPC**

**Website**
- Company Page
- Webinar
- Downloads

**YouTube**
- Company Page
- Video
- Testimonials

**Facebook for Business**
- Company Page
- Posts

**Twitter**
- Pages
- Posts

**Products**
- Blog
- Video
- Testimonials

**Video**
- Offers/PPC
- Likes
FCS Social Buying Process

[Diagram showing the various touchpoints and interactions involved in the social buying process, including LinkedIn, Website, YouTube, Facebook for Business, Twitter, Google Business, Bing Places for Business, LinkedIn Company Page, Video, Testimonials, Webinars, Downloads, Company Page, Products, Blog, Groups, Company Page, Facebook for Business Company Page, Offers/PPC, Posts, Video Likes, Event, Phone, Chat, Email, Text, Web Form, and Lead.]
The Digital Transformation of Sales

- Email Marketing
- Web Intelligence
- Lead Scoring
- Campaign Automation
- SMS Messaging
- Reporting
- Form Capture
- Surveys
- Landing Pages
- Social Discovery
- Event Management
- Training & Support
FCS Lead Qualification Process

- Assign to Sales
- Opportunity Triage
  - Yes Interest
  - No Response
  - No Thanks
- Future Project
- Current Project
- Schedule FU Contact (IA)
- Assign Marketing Campaign
- Select Sales Process

- Leads
- Contact
- Accounts
- Social Research
  - Call
  - Email
- EM 1
  - VM 1
- EM 2
  - VM 2
  - Social
  - VM 3
- EM 4
  - VM 4
FCS Opportunity Process

Opportunity

Select Process
- RFP
  - Qualify
  - Develop
  - Proposal
- Direct
  - Qualify
  - Develop
  - Proposal
- Partner
  - Qualify
  - Develop
  - Proposal/RFP
- Ongoing Transactional Business
  - Qualify
  - Develop
  - Proposal

Close
- ND
  - Schedule FU Contact (IA)
  - Change Opp to 10% Probability
- Yes
  - Opportunity Closed Won
  - E-signature Complete
  - Purchase Order
- No
  - Opportunity Closed Lost
  - Assign Competitor
  - 30 Day Follow Up

Account Management
- Opp Closed Won

Schedule FU
- Change Opp to 10% Probability

Opportunity Closed Lost
- Assign Competitor

30 Day Follow Up
- Assign Competitor
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- Form Capture
- Surveys
- Landing Pages
- Social Discovery
- Event Management
- Training & Support
LinkedIn Sales Navigator

Noah Gold

LinkedIn Member Profile

Noah Gold
VP of IT at SolarFlash
Yuma, Arizona Area
Solar Power

Current positions
VP of IT at SolarFlash

Education
Arizona State University - Yuma School of Business Management

How You're Connected + TeamLink™

You

Sarah Tran
Account Admin at EZPay
Ask Sarah about Noah

Both at Arizona State University
Rick McCutcheon
Dynamics 365 CRM MVP and Sales Process Expert
Full Contact Selling • George Brown College
Toronto, Canada Area • 500+ connections

I have been involved with the CRM industry for over 20 years as a Senior Executive, Reseller, Board Member, Educator, Consultant and Professional Speaker. I am a Dynamics 365 CRM MVP (Most Valuable Profession... See more