

Sales and marketing playbook: Lessons learned



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It has been approximately six months since the beginning of the pandemic in the United States. My colleague Larry Heglund and I have continued our conversations with over fifty sales and marketing executives across the country.

“All journeys have secret destinations of which the traveler is unaware.”
—Martin Buber

To be sure, some of the destinations have taken these leaders to places they could not have imagined. We can be informed by their journeys regarding how they are meeting the changing needs of the market, realigning their sellers to meet those needs and addressing organizational and cultural issues that can impact their ability to keep their brand promise.

Here are the key “lessons learned” from our panel of executives to:
the Market:

- **Mix it up with customers.**
Virtual calls with customers started off strong, but then their effectiveness started to fade. Co-presenting with customers in a virtual event is now gaining traction.
- **Engage customers via third-party organizations.**
There has been some success in reaching prospective customers by sponsoring an event or activity with a trade group or group purchasing organizations.
- **Consider coalition selling.**
Co-marketing with a non-competitive provider serving the same market may generate interest to prospective customers in cases where selling to them individually does not.
- **Leave “Hansel and Gretel crumbs.”**
Prospective customers are spending much more time researching companies before contacting them. Invest in more content in the right channels, leaving “breadcrumbs” along the way to inspire them to reach out.

the Organization:

- **Watch out. Decisions can have unintended consequences.**
Those who were a bit too conservative in decision making are realizing the impact going forward. For example, there were concerns about being too conservative in decisions, such as furloughing employees or taking other actions to save cash. In some instances, those decisions have created challenges. Some furloughed employees found other jobs, which impacted the ability to ramp back up production. Where decisions were made to maintain staffing levels there seems to be less disruption.
- **Get together without getting together.**
Meetings with sellers continue but most meetings are virtual. The format and time allocation are different, being conducted in shorter time segments with time in between. Work to avoid the “meeting death march.”



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- **Put safety first.**

Teams have worked hard to implement safety procedures that minimize risk.

- **Invest in the right technology.**

It is important to invest in technologies to help identify new customers and engage effectively with current ones.

- **Retain and inspire valued employees.**

It's critical to retain good employees and differentiate ourselves as an employer-of-choice. The difficulty comes in finding a way to share our culture when we're currently all virtual.

Sellers and channel partners:

- **Consider fewer boots on the street and more inside sales.**

Increased tele-sales may go beyond the pandemic, based on early successes in engaging customers.

- **Embrace the digital age.**

Some sellers may have been reluctant to establish new methods of acquiring prospective customers but in some ways the pandemic has forced greater adoption. The result? The pandemic actually moved adoption forward several years.

- **Emphasize safety.**

There is an opportunity to support channel partners in the development of a more robust safety culture which, in turn, can help them maintain their safety and productivity.

- **Maintain regular, personal contact.**

Keeping in touch with customers, even when bad news must be delivered, is of value to the customer and organization. Fight against the "has your robo-seller called you lately?" This personal approach can also be a way to generate referrals to "other customers like you."

the Supply chain:

- **Manage to enough product, but not too much.**

There have been challenges in figuring out how to manage inventory in way that product is available, but the warehouses are not overflowing. It can result in a feast or famine with our channel partners and their inventory.

In the *Lord of the Rings* one of the heroes exclaims: "I have passed through fire and deep water, since we parted. I have forgotten much that I thought I knew and learned again much that I had forgotten."

As we pass through the fire and deep water of these challenging times, let us remember and be inspired by what has brought us here and how we can best move forward.

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