



The Exceptional Customer Experience System

A Step-by-Step Methodology Toward Sales and Marketing Collaboration to Grow Your Competitive Edge.





“Customers don’t care where marketing and sales begin and end, they want one seamless experience.”

—Study Participant

What do a \$2 billion manufacturer, \$100 million transportation company and a \$450 million distributor all have in common? They were trying to **double their growth in mature markets with competition nipping at their heels.**

It doesn't matter the market, your capabilities, or how good your product or service is - **all companies need to outperform their competition.** And you can't do it by just doing more of what you're doing today. **You need a multiplier.**

Customer experience is that multiplier. **Want to know where to start?** One great place is by supercharging your sales and marketing teams. And that begins with **the Exceptional Customer Experience System.**



INSIDE THIS TOOL

- 1 Customer Experience: Your Biggest Lever For Growth
- 2 How Can Sales and Marketing Work As One?
- 4 Sales and Marketing Collaboration: Is It Even Possible?
- 5 The Future of B2B Customer Experience
- 6 Extraordinary Customer Experience Made Simple
- 7 Level 1: Department Support
- 8 Level 2: Digitally-Transformed Partners
- 9 Level 3: Integrated for Customer Success
- 10 Growth Comes from Finding New Ways to Do Things Better

Customer Experience: Your Biggest Lever For Growth

Customers Are Leading the Charge

Across the B2B marketplace, there's been a slow-moving trend away from "boots-on-the-ground" sales and "gotta-catch-em-all" marketing toward fully-digitized relationships.

The COVID-19 pandemic turned this from a general trend into an expectation.

Now, customers expect and demand customized digital experiences throughout every interaction with a company.

It seems like a tall order, but there is a well-defined path to achieving this for your business.

Personalized experiences on a grand scale begin and end with your Sales and Marketing departments.

These two critical teams conduct research, determine strategy, and set the foundation for the entirety of your customer's journey. Yet too often they're at loggerheads, fighting over ownership, tactics, and data.

In a recent research study, the team at PATH found that the better Sales and Marketing integrate their efforts, the faster they can adapt to changing customer needs.

This integration leads to increased retention, protection against industry disruption, and operational efficiency.



The end result: revenue growth.

32% revenue growth, on average, when Sales and Marketing work as one.

How Can Sales and Marketing Work As One?

The team at PATH, a market research and management consulting firm, partnered with treetree, a B2B marketing agency, to figure out how to put an end to the age-old battle between Sales and Marketing.

Our goal was to:

- **Reveal** how sales and marketing leaders view one another
- **Define** the dynamic between Sales & Marketing
- **Understand** how they can become better partners
- **Bring clarity** to the overall organizational value this holds if they better align culturally, strategically, and philosophically

In a 4-Phase Approach that included macro trends studies, focus groups, telephonic studies, and a comprehensive digital survey, we discovered a clear method toward Sales and Marketing integration.

Our Exceptional Customer Experience System results in revenue growth and operational efficiency.

This PDF tool will help you get started on your journey to getting closer to the prize every business wants to win: predictable and reliable growth.

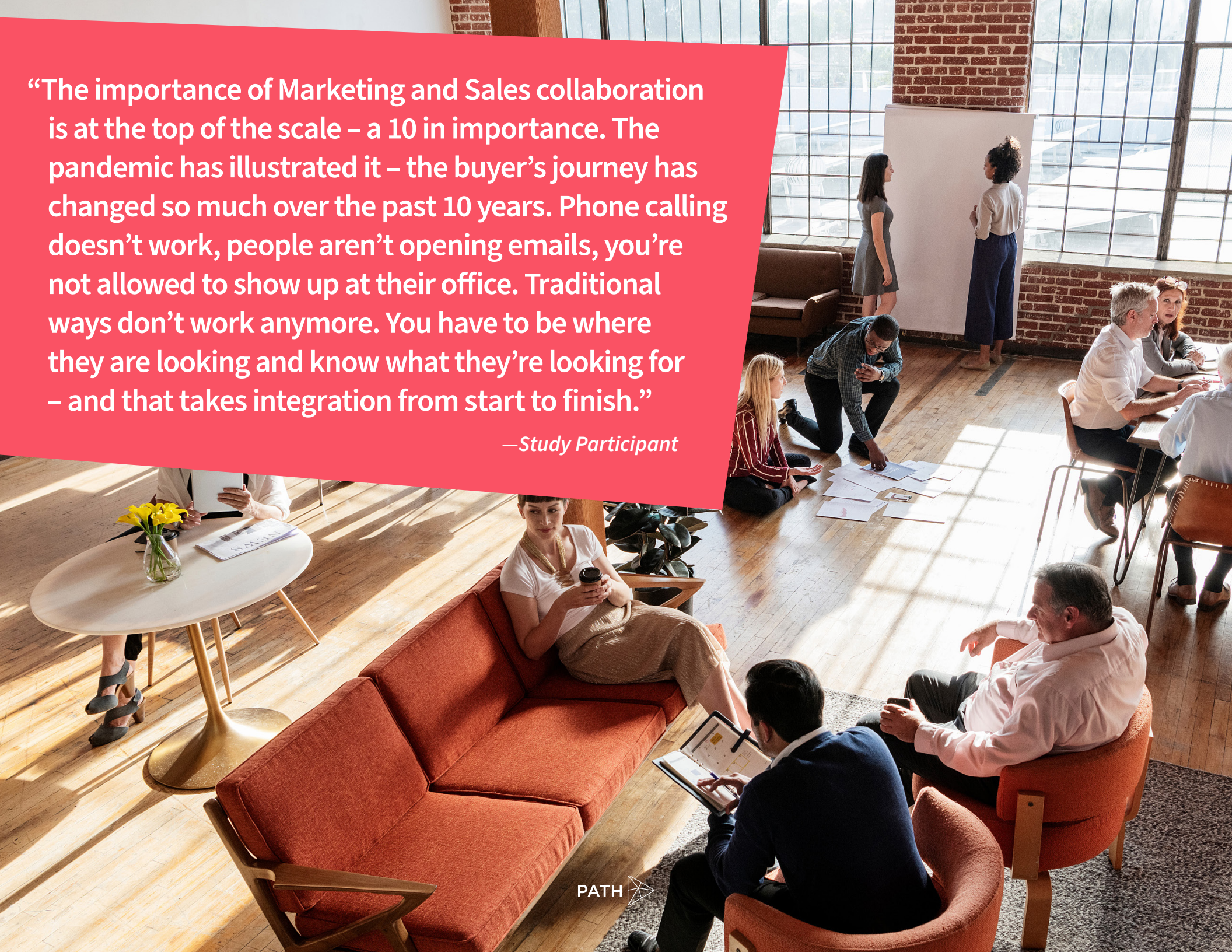


82% of all respondents in this study said that Sales & Marketing Collaboration is “Very Important.”

Your team wants to integrate—but how best to go about it?

“The importance of Marketing and Sales collaboration is at the top of the scale – a 10 in importance. The pandemic has illustrated it – the buyer’s journey has changed so much over the past 10 years. Phone calling doesn’t work, people aren’t opening emails, you’re not allowed to show up at their office. Traditional ways don’t work anymore. You have to be where they are looking and know what they’re looking for – and that takes integration from start to finish.”

—Study Participant



Sales and Marketing Collaboration: Is It Even Possible?

A Long History of Internal Struggle

For more than one hundred years, Sales and Marketing have played a game of tug of war, struggling for finite power within organizations.

We found that Marketing thinks Sales lack vision and imagination, while Sales thinks Marketing is out of touch with the ‘actual customer.’

Historically, Sales held more power as their metrics were directly tied to revenue growth, but the COVID-19 pandemic accelerated a radical shift toward data and technology, an arena Marketing traditionally ‘wins’ in.

The growing fear of becoming obsolete leads to even more internal tension between departments.

And yet—we found that when Sales and Marketing are integrated and work together it leads to:



“Collaboration is the engine for any organization to generate revenue. Without it, they don’t have a business.”

—Study Participant

Key Understanding: The strain between Sales and Marketing consistently takes focus and energy away from long-term growth.

The Future of B2B Customer Experience

Who Owns the Customer?

For decades, the fight between Sales and Marketing was focused on who owns the customer.

Who determines strategy? Who gets access to data? Who makes final decisions?

This battle over the customer slows down your growth and creates a disjointed experience for your end customer.

Ultimately, The Customer Belongs To The Customer

Our research found that customers across the B2B marketplace are demanding a shift from analog sales processes to hyper-automated, digital-first engagements.

They don't 'belong' to any specific department: customers are calling on everyone in your company to work together to serve their needs.

Customers have more power to conduct qualifying research on their own, demand top-notch service, or simply walk away from a company.

KEY INSIGHT:

Customer Experience has never been more important.

Sources:

¹ McKinsey

² JP Morgan Chase

³ McKinsey



80% of customers would be more likely to use an organization if they offer personalized experiences. ¹

92% start with an information search online. ²

62% of customers say they can finalize a vendor list based solely on digital content. ³

Extraordinary Customer Experience Made Simple

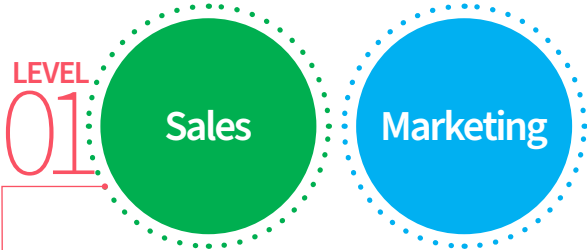
PATH's Verified Method Toward Sales and Marketing Integration

After analyzing the data, the team at PATH uncovered a method to take you from friction to full integration of your Sales and Marketing teams. It all starts with flipping the script of how we usually think about customer experience.

Customer experience isn't a linear path, guiding a customer down a prescribed road. It's a new way of thinking, an approach that uses a wide-lens view of every engagement a customer has, and sets that approach on repeat.

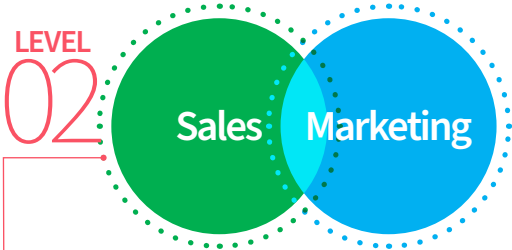
In our Exceptional Customer Experience System, Sales and Marketing move to become keenly focused on this approach, powering a cycle of revenue-driving, retention-boosting customer success to keep your company on the leading edge of your industry.

The Exceptional Customer Experience System



Level 1: Department Support

Customer experience is an outcome of collaboration and building trust, creating value with every interaction.



Level 2: Digitally Transformed Partners

The team is built on trust and good rapport, causing the customer experience to become supercharged, effectively driving greater value for the organization. Their collaborative efforts share key insights and information with other departments.



Level 3: Integrated for Customer Success

The integrated team examines their resources, focuses on delivering the very best seamless experience, and does so effortlessly. Customer experience is the main goal and KPI overall.

Level 1: Department Support

Key Focus: Building Trust

The most telling data point of our entire study was this: 100% of respondents mentioned “Lack of Trust” as the first challenge to address before the path to integration can even begin.

No long-lasting change can happen without trust.

Yet—how are we to build trust across two departments that have been in competition with each other since day one? **Data.**

The right data, paired with education, can begin to build a bridge between the leads Marketing gains to the conversions closed by Sales.

Study respondents currently in Level 1 told us:

75%

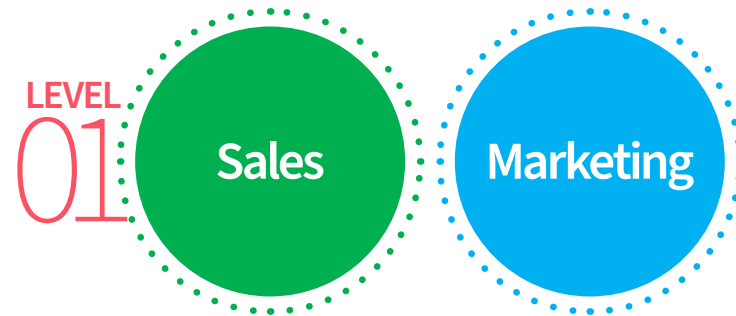
Said “Generating Revenue” as the most important reason to collaborate

43%

Felt collaboration was happening in Circle One

92%

Agreed Marketing should view Sales as an internal customer



KEY ACTION:

Prove Value In Every Interaction

- Marketing: Educates Sales about culture and function
- Sales: Gives feedback to Marketing on customer needs
- **Data Needed: Attribution reporting for the leads generated by Marketing and closed by Sales**

REFLECTION QUESTION:

Do your Sales and Marketing teams confidently rely upon each other?

- Yes, they do!
- Most of the time, but there’s still tension
- No, they don’t

Level 2: Digitally-Transformed Partners

Key Focus: Drive Consistency

With a foundation of trust firmly in place, organizations are able to transform. **Digitally, that is.**

Digital technology in Circle Two becomes the key driver of collaboration, allowing transparency, insights, and analysis to happen across departments in real-time.

This transparency makes room for Sales and Marketing to start building scalable customized interactions for customers.

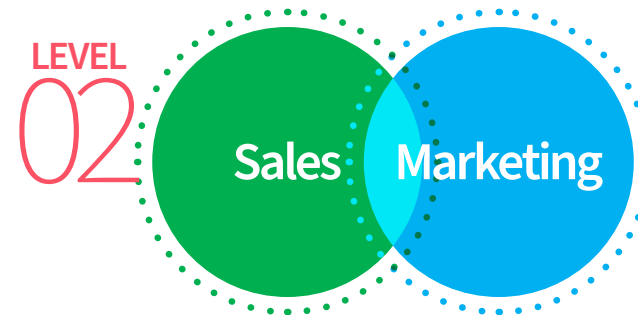
Study respondents currently in Level 2 told us:

71%

Felt collaboration was inconsistent

100%

Agreed collaboration was happening and driving value for the organization



KEY ACTION:

Build Systems to Create and Deliver Value Across the Organization

- Marketing: Market opportunity on thought leadership and segmentation
- Sales: Prioritizes customer's challenges and needs
- **Data Needed: Customized account-based tracking and reporting**

REFLECTION QUESTION:

Do your internal departments use technology to support the ability to “get things done?”

- Yes, we do! We successfully use technology to reduce redundancies and increase communication.
- We are halfway there—we have some updated technology but not everything ‘speaks’ to everything else.
- Our technology is disconnected based on department - Sales and Marketing use separate systems.

Level 3: Integrated for Customer Success

Key Focus: The Customer

In our research, we found that once an organization had built cross-department trust and drove consistency, internal goals started to shift.

“Generating Revenue” was no longer the most important goal.

They knew, based on their data, that from exceptional customer experience came exceptional revenue growth.

At this point, Marketing fully appreciated the entrepreneurial strength of Sales while Sales recognized the vision that Marketing brings to the table.

Together, they built a sustaining circle of customer acquisition, retention, and success.

Study respondents currently in Level 3 told us:

85%

Felt collaboration was comprehensive across the whole customer experience

58%

Identified “Shared Focus on Customer Outcomes” as key to collaboration

LEVEL
03

Customer
Experience

KEY ACTION:

Integrate To Provide A Seamless Experience

- Marketing and Sales: Transparency and partnership across the customer experience
- Leadership: One leader driving integration across both departments
- **Data Needed: Balanced scorecards based on revenue, brand value, opportunity, and customer retention**

REFLECTION QUESTION:

Is the focus on the customer first and foremost?

- Yes, it is! Customer experience is number one.
- We do our best, but we still get caught up in KPIs and revenue targets.
- We are solely focused on revenue and sales goals.

Growth Comes from Finding New Ways to Do Things Better

At PATH, we're your partners on the journey toward unparalleled customer experience.

Our focus is to connect experiences to strategy through the power of data.

Great research can build bridges between your customers, your teams, and your leadership to create positive and lasting relationships.

We're here to help you adapt with confidence to the changing needs of your customers and employees with useful insights and strategies.

If you're ready to build your Exceptional Customer Experience System, we're ready to work with you.

How would you like to get in touch?



Call

Give us a call, let's connect and discuss! We'll get back to you within a business day.



Email

Contact us via email to learn more about PATH's Exceptional Customer Experience System

PATH is a data-driven, market-research management consulting firm that helps companies make the best growth decisions by focusing on the most important element of business: People. We use data to understand what is really going on in the market and make confident decisions for the growth of your business. We envision a world where human connections are the key driver for a business's success.

The Exceptional Customer Experience - Model Overview

		1: Department Support	2: Digitally-Transformed Partners	3: Integrated for Customer Success
Key to Driving Collaboration	0. Limited Interaction	<ul style="list-style-type: none"> Build Trust – prove value in every interaction 	<ul style="list-style-type: none"> Drive Consistency – build systems to create and deliver value across the organization 	<ul style="list-style-type: none"> Focus on the Customer – integrate to provide a valuable and seamless experience
Marketing & Sales Relationship		<ul style="list-style-type: none"> Marketing – Event-driven agency focused on Sales Support Sales – Marketing’s internal customer 	<ul style="list-style-type: none"> Sales & Marketing – <ul style="list-style-type: none"> Collaborative Key account insights and thought leadership Information is shared with other departments 	<ul style="list-style-type: none"> Technology-driven alignment, transparency and partnership across the customer experience True cross functional approach
Goal Alignment		<ul style="list-style-type: none"> At an individual level – <ul style="list-style-type: none"> Marketing - Education about culture and function Sales - Feedback from sales team about customer needs 	<ul style="list-style-type: none"> At a customer level – <ul style="list-style-type: none"> Marketing – Market opportunity thought leadership and segmentation Sales – Prioritization of customer challenges and needs 	<ul style="list-style-type: none"> At a leadership level – One leader driving and prioritizing integration for both departments
Data, Analytics & Insights		<ul style="list-style-type: none"> Attribution Reporting - leads generated by marketing and closed by sales 	<ul style="list-style-type: none"> Highly Customized - Revenue and customer engagement in the <i>right</i> segments/markets, with a digital focus 	<ul style="list-style-type: none"> Balanced scorecard focused on revenue, total brand value, new market/product opportunity and customer satisfaction/retention