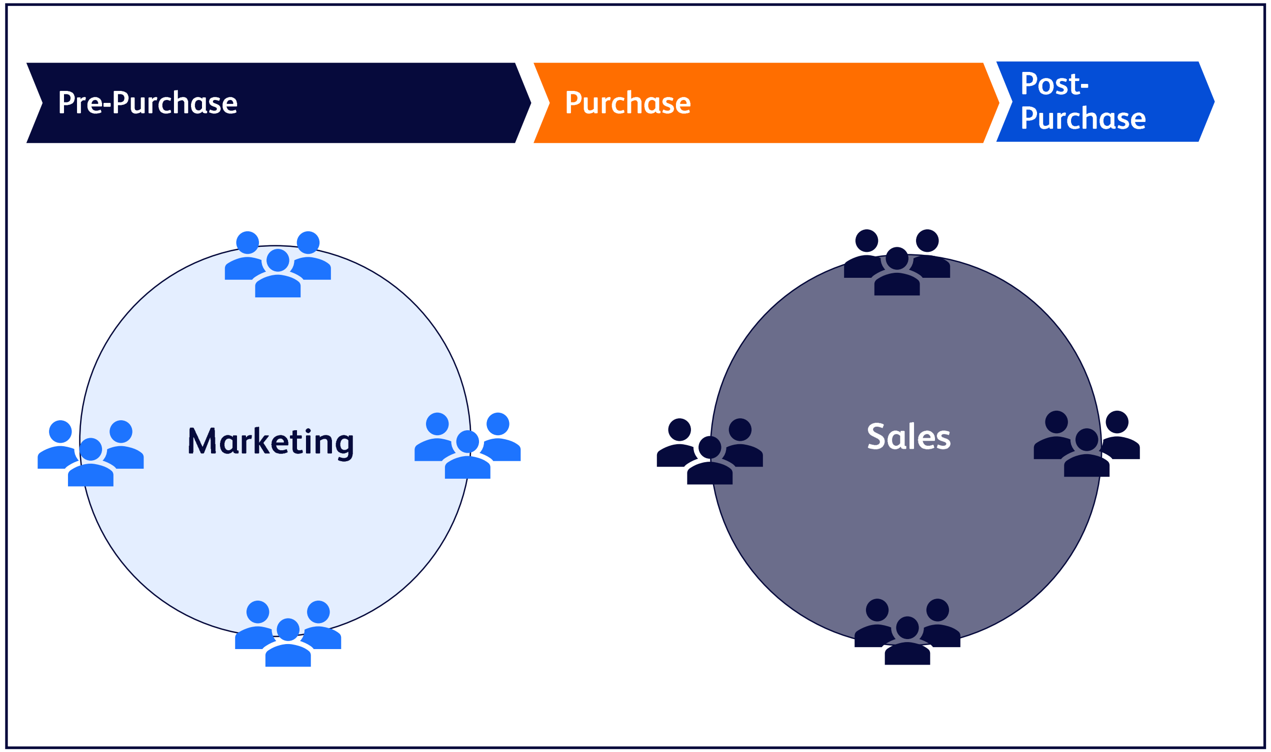
Omnichannel Commercial Choreography

Unclear coordination between sales & marketing functions results in lost opportunities

Gaps in current coordination efforts



No standard understanding of roles across lead management process and handoff

Teams have different customer targets and understanding of the buying journey

Low quality leads handed over from marketing to sales due to misaligned qualification criteria

Lack of well established feedback loop and reporting process in terms of marketing and sales activities and outcomes

Global Standard

Key Terms | Best-Practices | Benefits

Source: Global Standards, CDA

Marketing and sales focus more on revenue generating activities through commercial choreography

Sales and Marketing benefits across north star journey

Phases: Pre-Purchase | Purchase | Post-Purchase

Customer Journey: Awareness | Research | Personalization | Rep interaction | Decision to buy | Self service | Data-driven Support

Benefits

Pre-Purchase	Purchase	Post-Purchase
Optimized agile campaign process enabling faster time-to-market (M) (S)	Personalized quotes based on persona and market insights (S)	Feedback loop informing what resonates most with customers (S)
Actionable insights consistently generated from test & learn process (M) (S)		
Increased qualified leads actively generated through campaigns (M) (S)	Lower touch sales process supported by eCommerce and order tracking (S)	Expansion opportunities generated through automated BD products communications to customers (M) (S)
Feedback loop informing what resonates most with customers (M) (S)		

Global Standard

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Omnichannel customer experience

Key Terms | Best-Practices | Benefits

M Marketing S Sales

Successful omnichannel commercial choreography depends on a few key "get rights" across the combined marketing and sales process

Marketing and Sale Process

Strategy		Pre-Purchase			Purchase			Post-Purchase
Visitors			Leads	MQL	SAL	SQL	Won	
Campaign Plan	Customer Targeting	Customer Outreach	Capture	Nurture	Nurture and Accept	Qualify and Sell	Measurement and Feedback	Ongoing Outreach

Illustrative journey

Campaign Plan	M S	Align on strategic objectives of campaign and build out campaign strategy and plan
Customer Targeting	M S	Define target market and customer segmentation (e.g., new or existing customers)
Customer Outreach	M S	Begin test and learn campaign execution with combined marketing and sales strategy
Capture	M	Coordinated lead scoring model to qualify leads by marketing
Nurture	M S	Marketing to hand-over leads to sales, sales to provide feedback on quality of leads to marketing
Nurture and Accept	S	Sales accepts leads and continues to provide feedback and customer insights to marketing
Qualify and Sell	S	Sales provides personalized interactions to leads to further nurture and close deal
Measurement and Feedback	M S	Ongoing feedback between sales and marketing on progress of campaign to feed into and learn campaign
Ongoing Outreach	M S	Ongoing customer insights shared as input for future campaign strategy

What do stakeholders need to do

	What do stakeholders need to do
Campaign Plan	*Campaign strategy supports sales business objectives (e.g., demand capture & demand generation)*
Customer Targeting	*Aligned definition of target customer and key buyer personas and journeys*
Customer Outreach, Capture, Nurture	*Sales timely informed of campaign progress and results*
Nurture and Accept	*Regular feedback mechanisms to share learnings*
Qualify and Sell	*Standard application and coordination of lead scoring and handover*
Measurement and Feedback, Ongoing Outreach	*Regular feedback mechanisms to share learnings*

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Key Terms | Best-Practices | Benefits

M Marketing
S Sales

Select sessions are equired to coordinate marketing and sales teams

1. Cross-Functional Coordination Set Up			2. Measurement and Optimization	
1A	1B	1C	2A	2B
Assess	**Design and Build**	**Enable and Optimize**	**Measure**	**Testing**
Assessment of "where we are" and gaps in current lead management process	**Design "where we want to go"** i.e., future state lead scoring model with key definitions and outline of responsibilities across teams	**Plan "how to get there"** and build roadmap to align on key activities, trainings to implement new approach	**Define what "good looks like"** for metrics being tracked by marketing and sales teams	**Align and discuss experimentation plan** and how to optimize "test and learn" campaign

How-to-Guide

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Omnichannel customer experience

Step-by-Step

Resources

Video Tutorial

Source: MedBank Use Case

The Assess session requires the team to undergo a current state assessment of lead handover approach

1A Assess

Session Objectives and Inputs

Objective:

Capture insights on the current state

- Define lead scoring model shortcomings
- Align on marketing and sales handoff period
- Delineate the role/responsibility of field versus inside sales

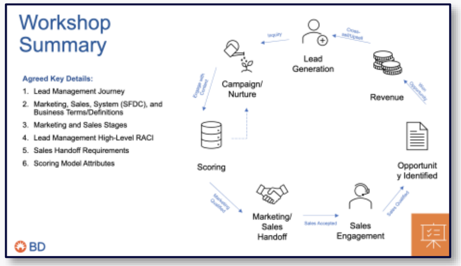
Input:

- Workshop templates to capture session information
- Review U.S. Region Demand Center Standards & Commercial Choreography Standards

Attendees

- Product Owner (lead)
- OOT
- Inside Sales representatives
- Field Sales representatives

Resources



Current State Workshop Deck

Demand Center

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Omnichannel customer experience

Step-by-Step | Resources | Video Tutorial

The Design and Build session has the team design the future state lead management process and clearly outline roles and responsibilities

1B Design and Build

Session Objectives and Inputs

Objective:

- Reviewed Lead Scoring Model relevant to use case
- Establish lead routing definition for sales
- Steps of future state sales modelling mapped to team alignment
  - Marketing responsibilities
  - Inside sales responsibilities
  - Field sales responsibilities

Input:

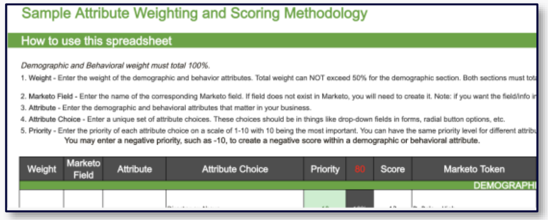
- Sample lead scoring model
- Template to define clear team responsibilities (e.g., deal size, marketing and sales handover)
- Template to map sales lead routing

Attendees

- Product Owner (lead)
- OOT
- Inside Sales representatives
- Field Sales representatives

Resources

Workshop template



Lead Scoring Model

Source: MedBank Use Case

The Enable and Optimize session focuses on defining a roadmap to get to the future state lead management process

1C Enable and Optimize

Session Objectives and Inputs

Objective:

Roadmap created to align on:

– Lead Management Model iteration and reporting
– Sales enablement playbook for marketing
– NBA creation in SFDC and or Marketo

Input:

– Jira prepared for planning sales work
– Sample email flows for Marketo and SFDC

Attendees

– Product Owner (lead)
– OOT
– Inside Sales representatives
– Field Sales representatives

Resources

Sales and Lead Management Session Deck

Defining the Team | Ways of Working

The Measure session discusses the measurement framework and defines what constitutes a "good metric"

2A Measure

Session Objectives and Inputs

Objective:

Capture the value of metric-based decision making e.g.,

- What makes a good metric (MQL, SAL), versus a bad metric?
- Qualitative versus quantitative metrics
- Vanity versus actionable metrics
- Leading versus lagging metrics
- Correlation versus causation

Run an exercise to discuss how team would categorize current dashboard

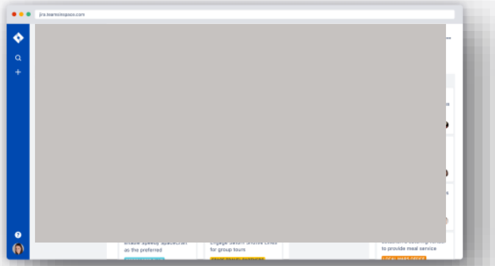
Input:

- Metric examples for discussion

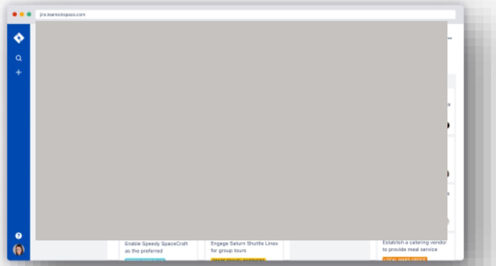
Attendees

- Product Owner (lead)
- OOT
- Inside Sales representatives
- Field Sales representatives

Resources



TBC



TBC

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The Testing session focuses on campaign experimentation and aligning the team on tactics of running test and learn sprints

2B Testing

Session Objectives and Inputs

Objective:

Establish how testing will be integrated into future campaign models:

– Segmentation

– Cohort Analysis

– A/B and Multivariate Testing

Show examples of past experiments and outcome gained

Run exercise to analyze mock results and make recommendations

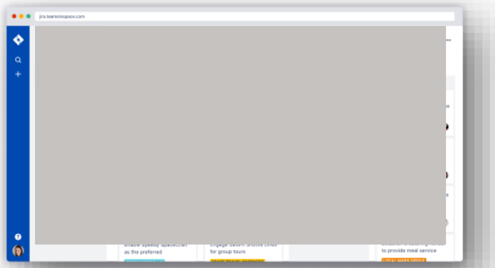
Input:

- Examples of past experiments for team discussion
- Experimentation template to help define new experiments

Attendees

- Product Owner (lead)
- OOT
- Inside Sales representatives
- Field Sales representatives

Resources



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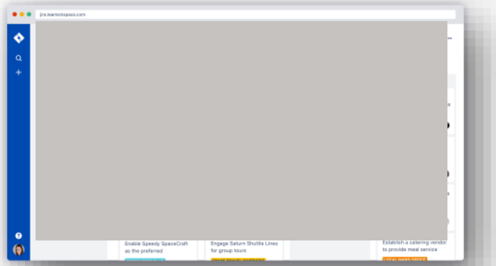

TBC

How-to-Guide

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Step-by-Step

Resources

Video Tutorial

Source: MedBank Use Case

Cross-functional teams coordinate across the customer journey to enable commercial choreography

Marketing → Sales → Customer Service

Responsible Team	Marketing	Inside Sales	Field Sales	Customer Service Team
Description	– Cross-functional orchestration team responsible for marketing strategy and executing marketing activities (e.g., campaign planning and set up, optimization, reporting) – Collaborates and hands over quality leads to Inside Sales teams to move lead through funnel	– Executes account specific targeting campaigns developed in collaboration with marketing teams – Responsible for engaging field sales depending on complexity of account (e.g., multi-site account)	– Executes account specific targeting of complex account types, in collaboration with inside sales teams – Conducts periodic on-site touchpoints with accounts to uncover and monitor issues that need resolution and hand-off to relevant function to resolve	– Service function responsible for ongoing customer care, including proactive issue management and issue resolution

Core OOT → *Extended OOT*

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Key Terms | Best-Practices | Benefits

Source: BD Team Descriptions

1. Sales team are split by inside and field sales – roles and responsibilities are delineated for both teams

Critical responsibilities are clearly defined (1/2)

Defining the Team
Ways of Working

	Strategy: Campaign Plan	Pre-Purchase: Customer Targeting	Pre-Purchase: Customer Outreach	Pre-Purchase: Capture	Pre-Purchase: Nurture
OOT	**AR** **Responsible** for campaign plan e.g., defining plan, budget , objectives aligning with Product Owner on strategic objectives	**AR** **Accountable and Responsible** for defining market based on strategic objectives (e.g., new or existing customers, target buyer personas) and sizing the opportunity	**AR** **Accountable and** Responsible Outreach to target customers based on initial campaign experimentation	**AR** **Accountable and Responsible** for ongoing outreach to target customer to nurture them to marketing qualification	**AR** **Accountable and Responsible for co-owning scoring threshold** and criteria for marketing qualification
Inside Sales	**CI** **Consulted** for campaign plan definition e.g., spend, budget allocation, informed about initial campaign plan and strategy	**AC** **Accountable and Consulted** to define target market e.g., target account lists, high value customer segments based on sales history, known potential customers	**I** **Informed** about results of initial test and learn experiments	**CI** **Consulted** to define attributes for high quality marketing qualified leads **Informed** about results of ongoing test and learn experiments	**RC** **Responsible for co-owning scoring model** and criteria for marketing qualification **Consulted** to define attributes that go into model to ensure high quality leads
Field Sales	**CI** **Consulted** on overall campaign plan e.g., spend, budget allocation etc.	**C** **Consulted** on target target definition to refine e.g., target account prioritization, buyer personas based on sales expertise	**I** **Informed** about initial results of test and learn execution	**I** **Informed** about initial results of test and learn execution	**I** **Informed** about initial results of test and learn execution
Customer Support	**NA**	**NA**	**NA**	**NA**	**NA**

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Omnichannel customer experience

Key Terms | Best-Practices | Benefits

Source: MedBank Use Case, MMS Inside Sales

1. Sales team are split by inside and field sales – roles and responsibilities are delineated for both teams

Critical responsibilities are clearly defined (2/2)

	Purchase			Post-Purchase
	Nurture and Accept	Qualify and Sell	Measurement and Feedback	Ongoing Outreach
OOT	AR **Responsible** for further nurturing leads depending on inquiry status **Accountable** for refining lead scoring model if high volume of unqualified leads	AC **Consulted** about target accounts in pipeline **Accountable** for further nurturing based on inquiry status	RACI **Measure and provide feedback** on omnichannel campaign performance	I **Informed** about post-purchase satisfaction and customer experience
Inside Sales	AR **Responsible** for determining status of lead – whether it is ready for qualification or needs nurturing **Accountable** to inform marketing teams about status	AR **Accountable and Responsible** for 1-1 contact with potential leads, personalization of messaging to move leads through to won opportunity **Accountable** to engage Field Sales reps when account type is more complex (e.g., multi-site, tiered discount is required)	RACI **Measure and provide feedback** on omnichannel campaign performance	AI **Accountable** for post-purchase follow up with customers **Informed** about post-purchase satisfaction and customer experience
Field Sales	I **Informed** about results of initial results of test and learn execution	AR **Accountable and Responsible** for 1-1 contact with potential leads on-site , personalization of messaging to move leads through to won opportunity	RACI **Measure and provide feedback** on omnichannel campaign performance	AI **Accountable** for post-purchase follow up with customers **Informed** about post-purchase satisfaction and customer experience
Customer Support	I **Informed** about any roadblocks that might cause customer churn during rep interaction	CI **Consulted** to share customer success stories to sales to highlight value of product to inform sales pitch **Informed** about any roadblocks that might cause customer churn during rep interaction	AR **Accountable and Responsible** for ensuring continuity of product and service quality by proactive issue identification, fast response, troubleshooting and issue resolution	AR **Accountable and Responsible** for ensuring continuity of product and service quality by proactive issue identification, fast response and troubleshooting and issue resolution

Global Standard

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Omnichannel customer experience

Key Terms | Best-Practices | Benefits

Source: MedBank Use Case, MMS Inside Sales

1. Sales team are split by inside and field sales – roles and responsibilities are delineated for both teams

2.2. Agile Ways of Working for the MedBank Use Case

What did we know?

- Team had limited knowledge and expertise in agile ways of working
- BU did not have a Scrum Master or Agile Coach to help onboard the team
- Marketing and sales functions had limited collaboration
- Hand-over process and criteria between marketing to sales was not clearly defined
- Sales teams did not feel the need to engage with marketing due to high volume of low-quality leads

What did we do?

- Ran agile training workshop with the OOT
- Embedded agile ways of working through running ceremonies and onboarding team to Jira
- Ran sessions between OOT and Sales teams to understand gaps in current hand over process, and establish RACI of roles and responsibilities between teams
- Conducted workshops in collaboration with the OOT and sales team to assess gaps in lead management process and design future state process and criteria for handover

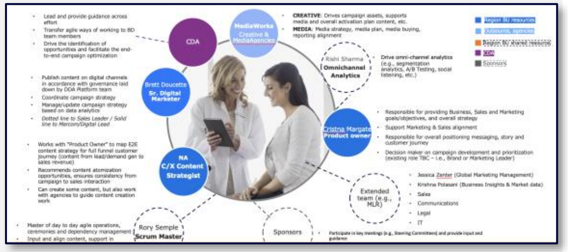
What was the outcome?

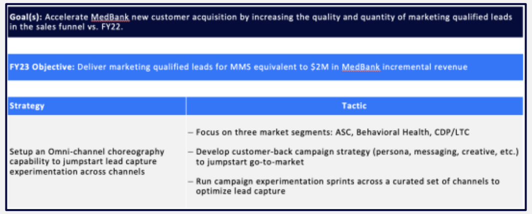
- OOT onboarded to agile ways of working over a 4-month period
- Clear roles and responsibilities defined across customer journey for responsible teams (i.e., OOT, inside sales, field sales)
- Early engagement of sales teams to collaborate and define criteria for lead management process and handover between teams to increase likelihood of quality leads to be accepted by sales

Source: MedBank Use Case

MedBank OOT onboarded to agile ways of working through coaching, and achieved efficiencies in planning and executing ASC campaign

What did we do?





Set up OOT for MedBank

- Assigned roles and responsibilities to team members
- Coached team members through both agile setup and core ceremonies
- Facilitated the usage of agile tools to maintain accurate project tracking and hygiene

Define data-backed persona to drive campaign strategy

- Gathered data from existing reports, conducting research (marketing and attitudinal segmentation) to define four personas
- Identified target messaging based on persona pain points and preferences

Defined campaign plan to keep line of sight to business objectives

- Developed business case to identify path to $2MN with strategic goals of campaign in mind using the campaign planning tool

Used "test and learn" approach to define experiments for Sprints

- Defined test and learn experiments to drive improvement in funnel conversion
- Setup the OOT to drive towards success with persona-based experimentation for the campaign

Use Case

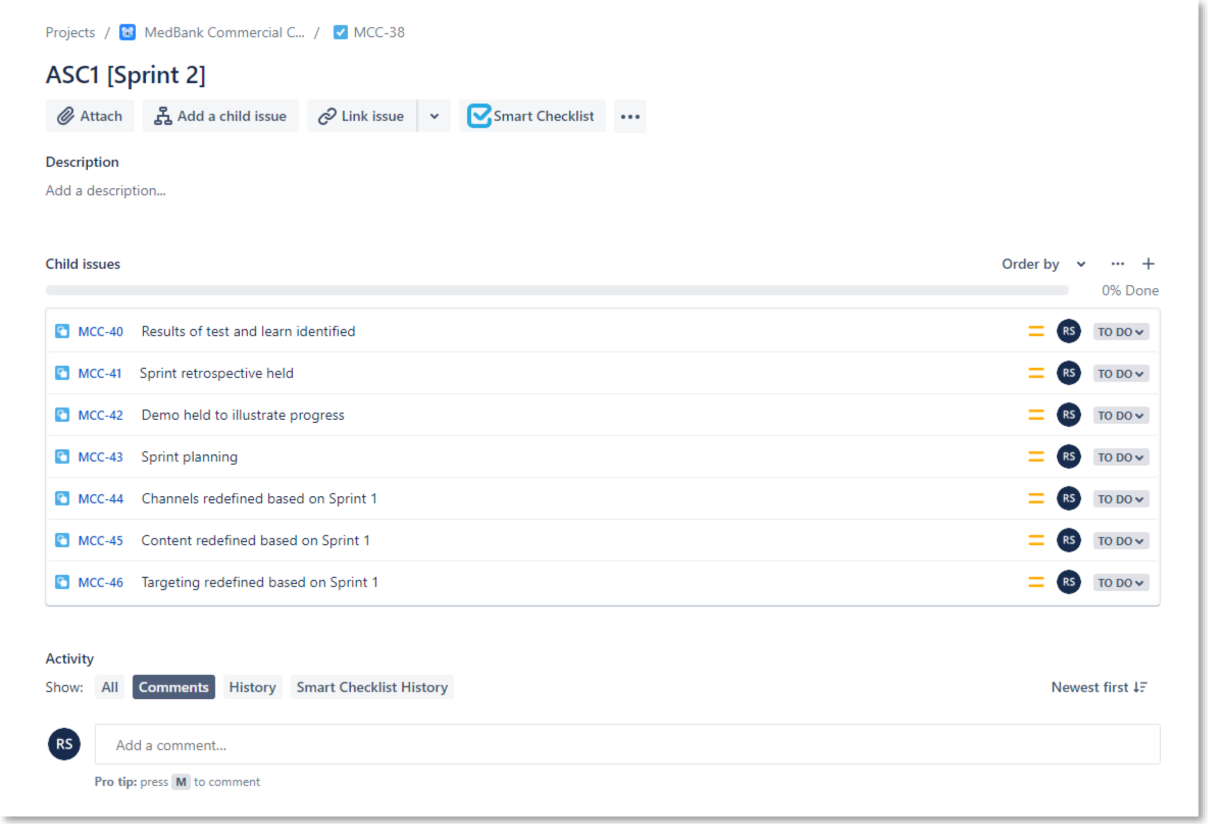
Case Study

Key Learnings

Source: MedBank Use Case

MedBank OOT utilized project management tool to set up a product backlog, and keep track of key activities during sprints

What did we do?



- Used Jira Project Management as an artifact to plan both product and sprint backlogs
- Assigned tasks, track completion and organize the OOT around core business objectives

Outcome:

- OOT built capability to define and prioritize key tasks for the sprint
- Cross-functional team members were aligned on priorities and aware of dependencies increasing operational efficiency and speed of output

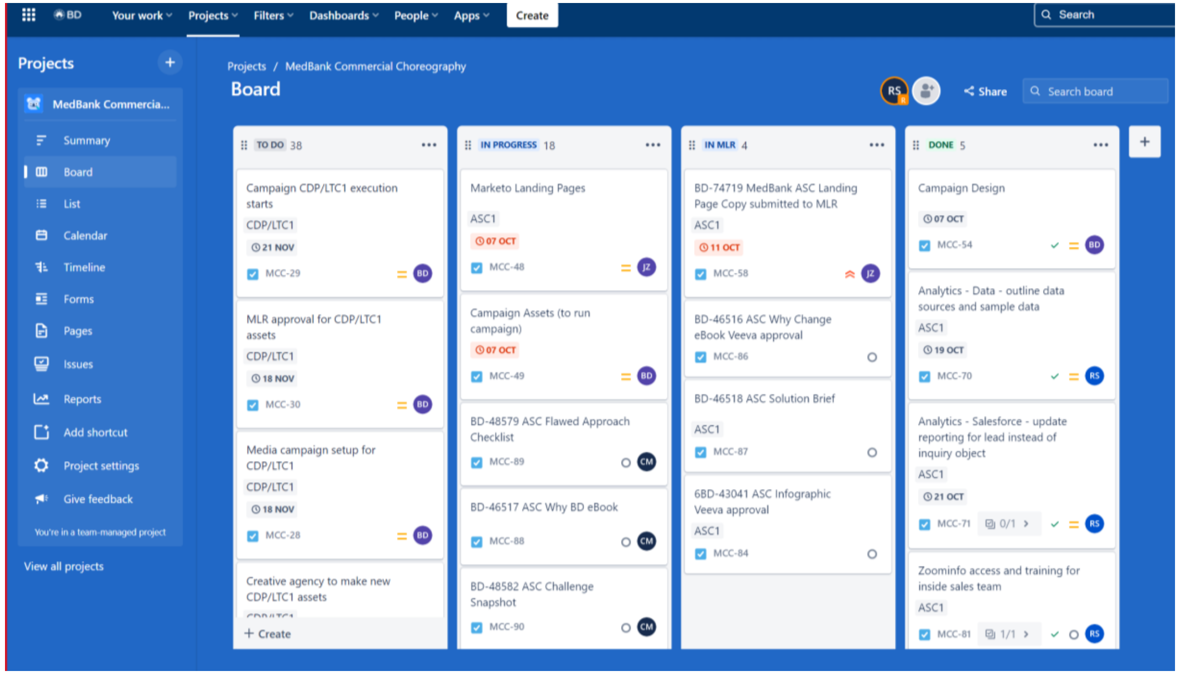
Use Case

Case Study

Key Learnings

MedBank OOT conducted agile ceremonies to track cadence of campaign

What did we do?



– Ran DSUs with the OOT daily to track activities, and any barriers to campaign execution

– Conducted sprint review and retros to align on what worked well and what is required as input for subsequent sprints

– Coached on sprint planning for OOT to define work

Outcome:

– Increase in collaboration and transparency across working team

Use Case

Case Study

Key Learnings

OOT aligned on clear roles and responsibilities between marketing, field sales and inside sales functions to ensure smooth transition of lead management

What did we do?

	Campaign Plan	Target Group	Communicate	Capture	Nurture	Nurture & Qualify	Qualify & Sell	Measurement and Feedback
	objectives, process, timing, resources, hand-over criteria, metrics, reporting,...	*SFDC, 3rd Party, Manually selected by Sales, On-line, ...*	*Email Online Ads Social Events SEO/SEA*	*Email open/click Web site visits Landing Pages Events*	*Raise interest to the point at which 1:1 contact is needed / appropriate*	*Marketing Qualification Contact Customer and nurture to the point where a sales contact is appropriate*	*Sales Qualification Prospecting BDWoS*	*Content effectivness*
Marketing	AR	AR	AR			AR	I	RACI
Field Sales	CI	ACI	I			I	AR	RACI
Inside sales	CI	ACI	I		AR		AR	RACI

Use Case

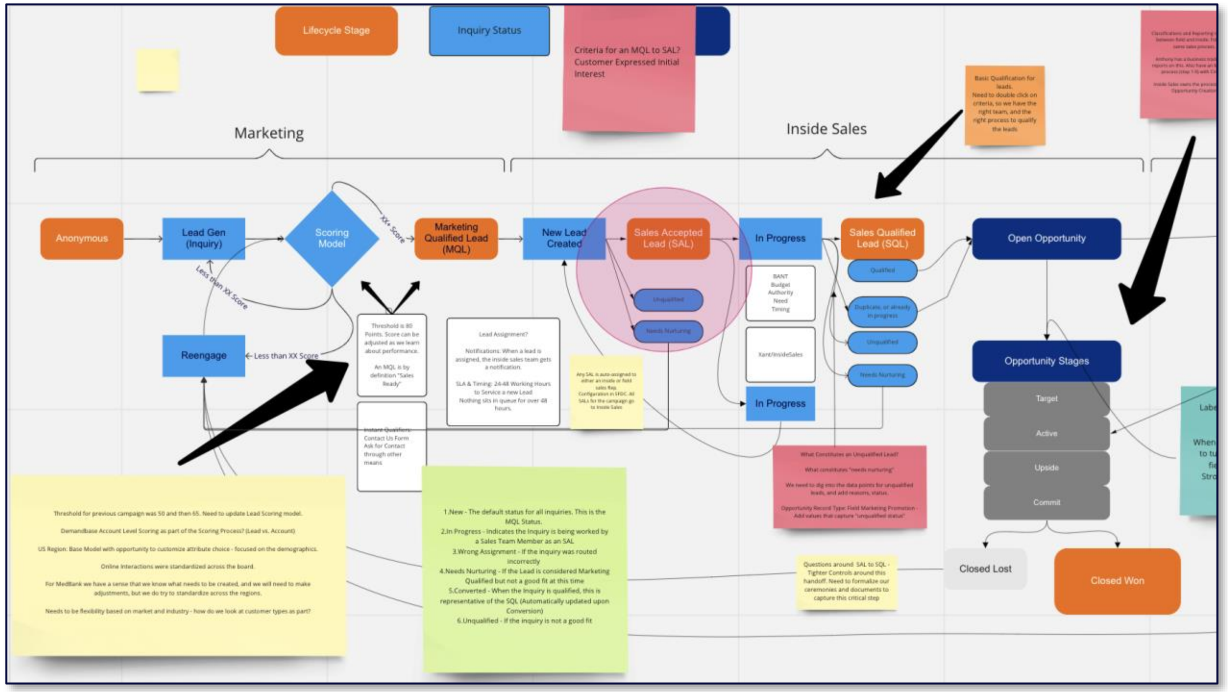
Case Study

Key Learnings

Source: MedBank Use Case

Conducted workshops to design and build lead management process and definitions for handover for the MedBank use case.

What did we do?



- Conducted workshops in collaboration with the OOT and sales team to assess gaps in lead management process and design future state process and criteria for handover
- Aligned on definition for each stage of lead management process and assigned responsibilities and feedback loop

Outcome:

- Increase in coordination between OOT and sales team
- Alignment on ownership of lead across lifecycle

Source: MedBank Use Case

Best practices for coordinating sales and marketing teams

Build out Inside Sales team proficiency

- Insides Sales team have product and market specific expertise relevant to your campaign. They are remote teams that have the ability to quickly pick up leads and move through engagement funnel
- Ensure you align on roles and responsibilities between their function and field sales for timely lead hand over

Include Sales teams at the start of campaign planning process

- Engage sales when defining campaign strategy, align on target segmentation and target messaging. Hold lead management sessions to define led scoring model collaboratively based on segments, messaging channel strategy etc.

Use Case

Case Study

Key Learnings

Source: MedBank Use Case