

DEMAND GENERATION USERS GUIDE

Step-by-step instructions to build your demand generation strategy.

By Jay Hidalgo

I've been in the marketing and sales world for nearly 25 years, and have worked with hundreds of marketers. No matter their backgrounds (e.g. enterprise vs. startup, B2B vs. B2C, etc.), marketers most often ask me, "Why isn't my demand generation more effective?" In my experience, the simple answer is "focus on your buyer." In fact, most marketers will eventually admit,

- They don't know their buyer well enough;
- They don't understand the buying process well enough;
- They don't have a content framework for communicating with the buyer.

But here's the thing: Most of the companies I interact with know they need to improve in these areas. What they don't know is *how* to do it.

Whether you're a novice marketer who doesn't know where to start, or a seasoned marketer looking for an edge to boost effectiveness, these practical tips should be of help. The entire process is organized into three distinct sub-processes: (a) develop a buyer persona, (b) define the buying process and (c) develop a content framework.

DEVELOP A BUYER PERSONA (i.e. know your buyer)

GATHER MARKETING AND SALES TOGETHER.

This will be a working session or workshop where equal representation from both marketing and sales is present. If marketing seeks to develop the personas alone, the result will be skewed. Having both groups with their unique view of the customer gives a more holistic view.

DETERMINE BUYING GROUPS.

Through dialogue, brainstorming and whiteboarding, determine the buying groups for your products and services. These are target groups that decide or influence the buying decision. Try to stay away from titles (e.g. VP or manager) and focus more on functions such as technical *buyer, user, designer*, etc.

DEFINE INFORMATION CATEGORIES.

Once you determine the buying groups, define which categories of information are important to know with regard to the group's buying behavior. Sample information categories might be personal background, daily activities, role in the company, challenges, preferred sources for industry news, etc. At this stage, you're only defining those categories but not filling in the answers.

CREATE A MATRIX.

Put together a matrix of the buying groups and information categories, with buying groups across the x-axis and the information categories down the y-axis.

FILL IN THE MATRIX.

Use a bullet-point list to determine the three to five descriptors for each buying group's information category. For example, if the buying group is *facility management*, and the information category is *daily activity*, you might list:

- Monitor operational efficiency
- Manage staff
- Manage vendor relationships
- Create and maintain budget

VALIDATE.

After completing the matrix, validate it with customers and other staff. This can be done via phone call or small group presentation. If it's available, use secondary research to validate results.

DEFINE THE BUYING PROCESS

GATHER MARKETING AND SALES. WHITEBOARD AN INITIAL BUYING PROCESS DRAFT.

This second working session is separate from the one to develop the buyer persona. Through conversation, create an initial buying process map—a simple flow chart that identifies the specific decisions or steps the buyer goes through.

Start by asking, “What triggers a buyer to start looking for our solution?” Once you determine that, then ask, “What does the buyer do/think next?” Keep asking follow-on questions until you’ve plotted out the steps the buyer take through post-purchase.

For some groups, working backwards is more effective. For example, start with the statement, “They bought ‘x’ from our company.” Then ask, “What did they do just before buying?” (e.g. Before making a purchase, they justified their decision. So, justification becomes the step before purchase.) Keep working backwards in this fashion until you define the trigger step that starts the process.

SUPPORT/REVISE YOUR MAP WITH RESEARCH.

It’s important to verify the buying process with objective research. Methods such as in-depth interviews and focus groups work well to determine the buyer mindset through the buying cycle. These should be conducted among prospects and customers. If you have the resources to use an outside research firm, make sure it understands the concepts of buyer insight for demand generation.

CONFIRM.

After revising the draft based on research, confirm the results by asking internal stakeholders (e.g. sales, business development, product marketing) and customers to review and validate it. This can be done via phone call or small group presentation.

Depending on the size of your organization, completing the entire process will take approximately one to three months—a considerable investment of time. Is it worth it? A resounding “Yes!” Too often marketers implement demand generation tactics without strategic support. They spend time and money executing programs they “hope” or “think” will work. I always counsel to “plan the work then work the plan.”



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Can your marketing plan focus on both lead and demand generation? Find out: <http://bit.ly/LeadDemand>

DEVELOP A CONTENT FRAMEWORK

GATHER MARKETING AND SALES. CREATE A MATRIX.

This will be yet another working session. Build a matrix using the buyer personas and buying process map. List buying process stages across the x-axis and buyer personas down the y-axis.

FILL IN THE MATRIX.

As you did with the buyer personas, use bullet points to list the answers to questions for each persona in each stage:

- What questions is the buyer asking at this stage?
- What answers should we provide to those questions?
- What is the best medium for delivering the answers?
- What behavior do we want our answers to elicit?

VALIDATE.

After completing the matrix, validate it with customers and other staff. This can be done via phone call or small group presentation. If possible, use available secondary research to validate as well.