



Building Predictable Pipeline During a Downturn



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SCALE

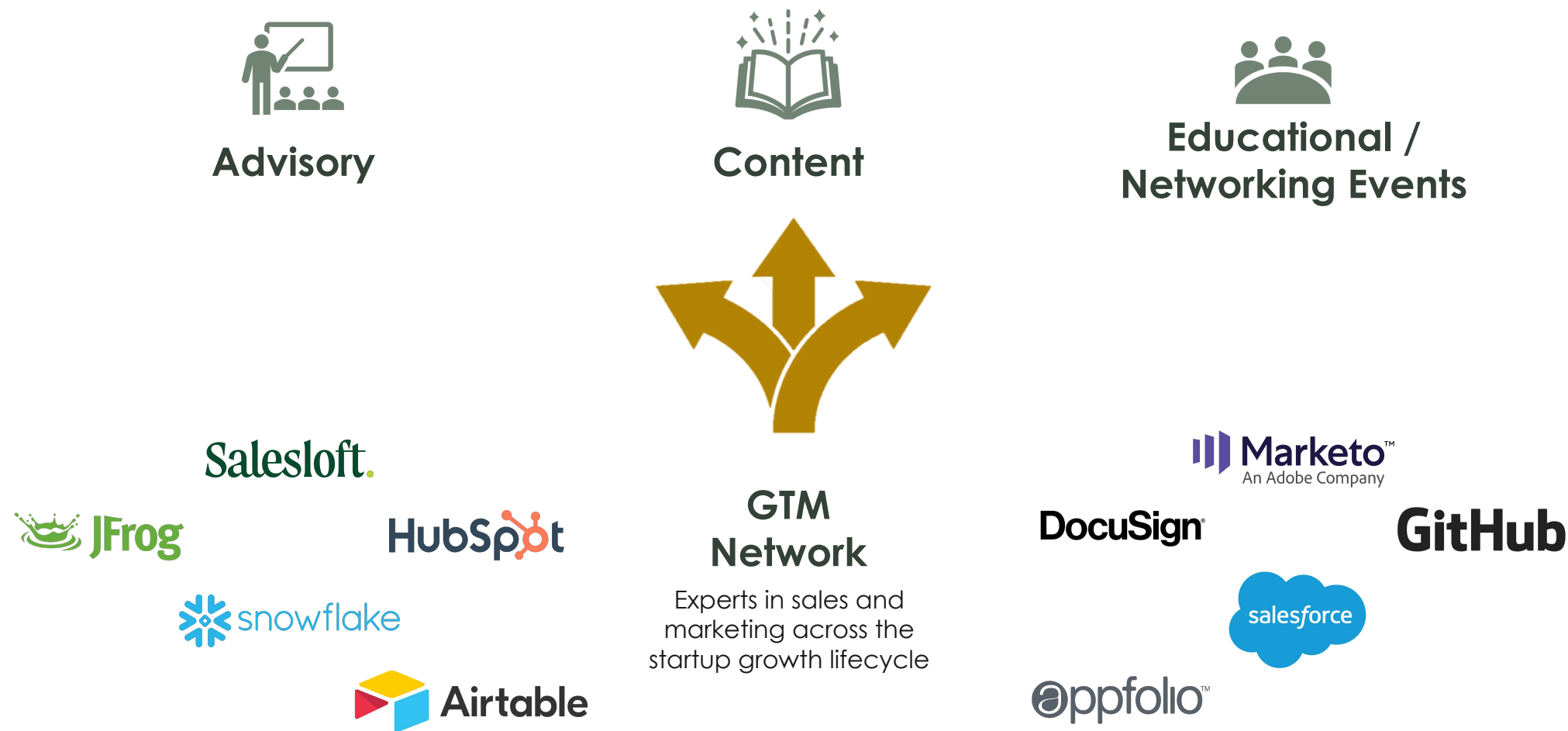
GTM Platform Introduction





**We help our portfolio build and
optimize hyper-growth GTM
machines**

The GTM platform leverages our expert network to provide a suite of offerings



Housekeeping

- If it looks like a spreadsheet....
- The deck is yours
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Five Marketing Priorities in a Downturn

1. Sales & Marketing Alignment

Sales & marketing = the same objective



Key Reasons Sales/Marketing Alignment Fails

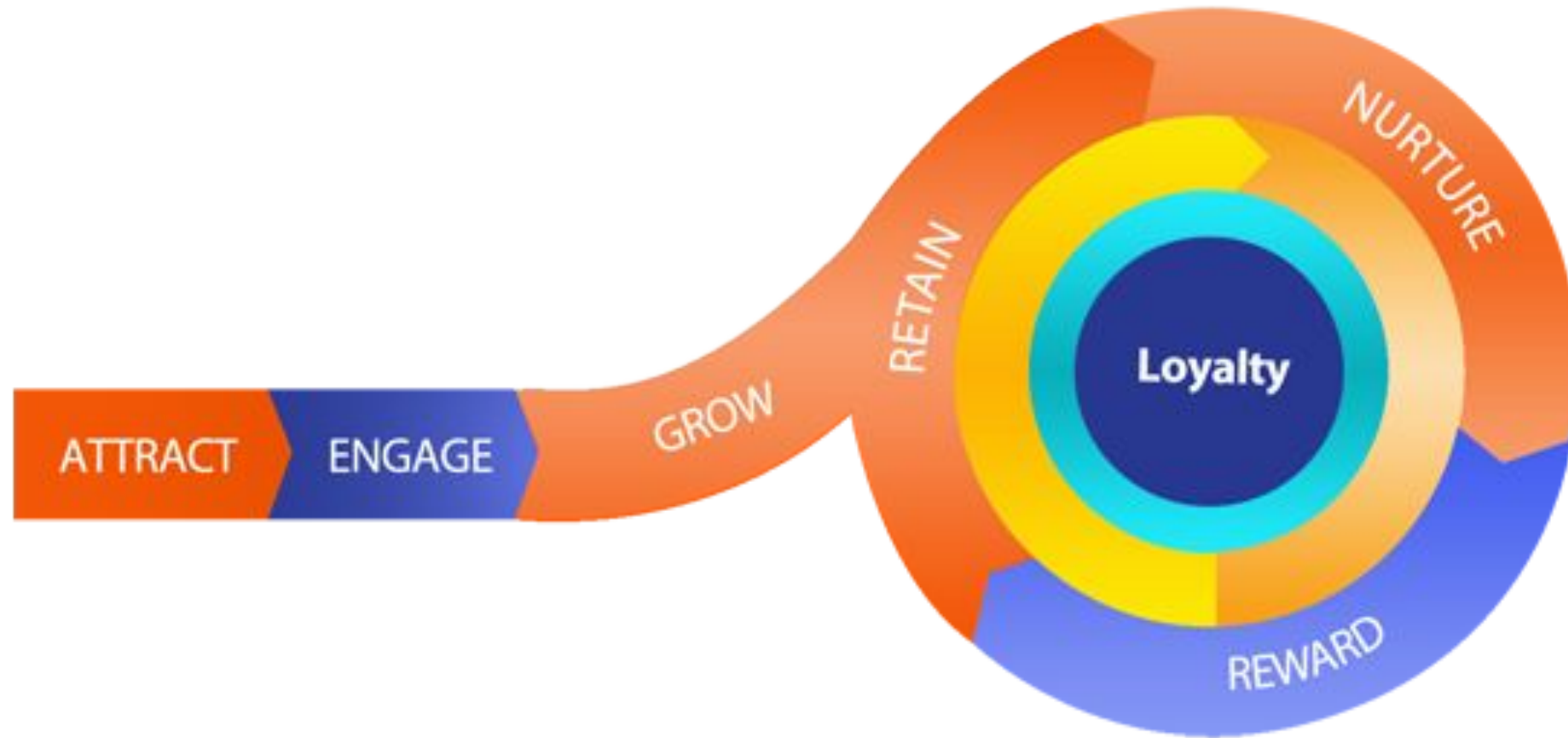
1. Lack of executive alignment & commitment
2. Lack of appetite for complexity
3. Lack of data integration
4. Lack of channel diversity & integration
5. Lack of process, automation and/or reporting

Keys to Scaling Successful Alignment

1. Outcomes first (and always)
2. Map the internal buying committee, build consensus
3. Challenge the status quo
 - 1) internal & external
 - 2) insights + reframes
4. Clear resource requirements (more than software)
5. Drive deeper coordination with sales

2. Full Customer Journey Leverage

Impact the entire customer lifecycle



What's Working

- Adoption Marketing
- PLG++
- Customer Journey Mapping
- ABX for Existing Accounts
- Advocacy Programs

3. Wartime Budget Management

Cut unsuccessful programs from last year



Organize by business function (instead of marketing channel)



A potential reporting structure

- Attract (Market Development)
- Engage (Demand Creation & Qualification)
- Grow (New Pipeline Contribution & Conversion)
- Retain (Customer Lifetime Value)

Attract (Market Development)

- Net-new inquiries
- Re-engaged inquiries
- Web traffic
- Social reach/engagement
- Content reach/engagement

Engage (Demand Creation & Qualification)

- Net-new qualified sales leads
- Re-engaged existing sales leads
- Demo and guided tour engagement
- Net-new qualified opportunities created

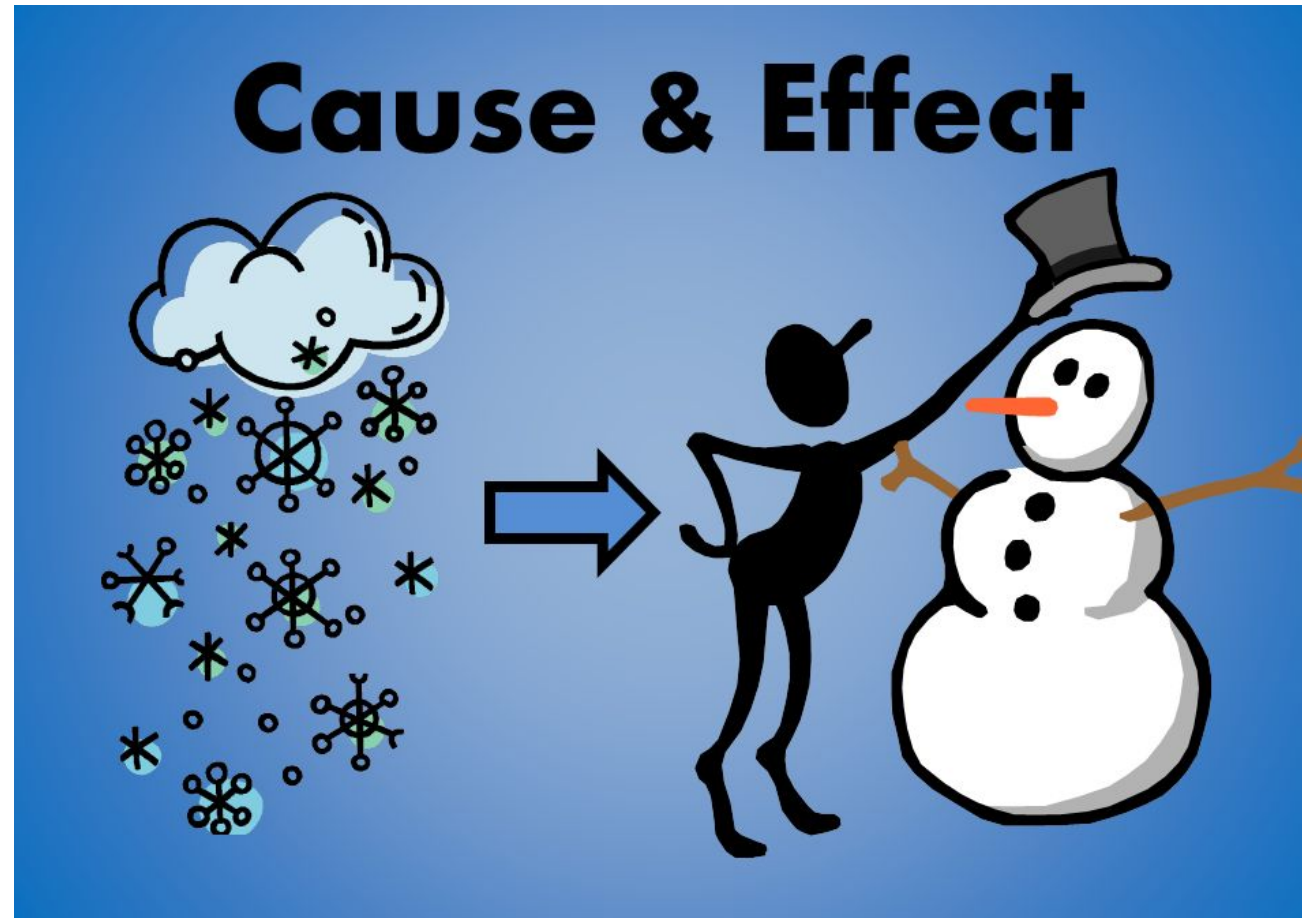
Grow (Pipeline Contribution & Conversion)

- Marketing-generated pipeline & closed deals
 - Net-new leads tracked directly through the pipeline
- Marketing-influenced pipeline & closed deals
 - Existing/previous leads tracked through the pipeline

Retain (Customer Lifetime Value)

- Customer renewals & upsells
- Customer “saves”
- Past customer win-backs

Project results (revenue, not spend)



Future expenditures contingent on success



4. Narrow Your Focus

Ideal Customer Profile

What does our ideal customer look like?

How do we think about the Ideal Customer Profile?

We think about the Ideal Customer Profile in 3 key areas:

1. Company Firmographics

Company size, annual revenue, geographic locations, and key industries are some of the criteria at the company-level that we define when developing an Ideal Customer Profile.

2. Audience Demographics

Key titles, roles, and personas are some of the criteria at the audience-level that we define when developing an Ideal Customer Profile.

3. Buying Signals

Other criteria we look at to develop an Ideal Customer Profile are:

- Explicit Intent signals like behaviors, clicks, downloads, engagements, and interactions
- Implicit Intent signals like organizational changes, key events, technologies being used, and expiring contracts

Firmographics

Demographics

Buying Signals

Ideal Customer Profile

Who is our Ideal Customer?

Firmographics (learned before discussion with prospect)			Technographics (learned via discussions with prospect)			
Geography/Key Markets	Key Industries	Size	Key Technologies	Company Maturity	IT Structure	Buying Committee
Greater Puget Sound Area	Professional Services (law, architecture, accounting, etc)	10-150	Windows Server, AWS, VMWare, Office 365, Windows workstations, LAN/WAN Networks	Follows ITIL Service desk process for tracking tickets -Incidence reporting -System upgrades -Disaster recovery	Either small in-house department (1-2 people), or fully outsourced	Decision Maker: Partner Champion: Firm Administrator
		151-500				Decision Maker: Partner Champion: Firm Administrator Technical Influencer: IT Director or IT Manager
	Government	10-150				Decision Maker: Champion: IT Director or IT Manager Financial Influencer: Treasurer/Finance Director Technical Influencer: Any lower-level IT role under the champion
		151-500				
	Nonprofit	10-150				Decision Maker: Champion: Influencer:
		151-500				
	Utilities	10-150				Decision Maker: Champion: IT Director or IT Manager Financial Influencer: Treasurer/Finance Director Technical Influencer: Any lower-level IT role under the champion
		151-500				
	Arts/Entertainment	10-150				Decision Maker: Champion: Influencer:
		151-500				
	Manufacturing/Industrial	10-150				Decision Maker: Champion: Influencer:
		151-500				

The Buying Committee

Who makes decisions?

Who influences them?

Who champions them?

How do we think about the Buying Committee

We think about the Buying Committee in 4 distinct roles, which also act as Key Target Personas:

1. Decision Makers

Decision Makers are the end-all decision makers for the purchase. (ie. They have Yes/No authority.) They fall into one of two categories:

- Business Decision Makers, who are focused primarily on how the purchase impacts business ROI and revenue.
- Technical Decision Makers, who are focused primarily on how the purchase impacts business technologies, processes and operations.

2. Executive Sponsors

Executive Sponsors are those who drive the purchase decision forward internally, acting as the primary spokesperson for your solution amongst their team and executive leadership.

3. Purchase Influencers

Purchase Influencers are people who may not have a direct role in the purchase decision, but they have influence over the outcome. They fall into one of two categories:

- Business Influencers, who are focused primarily on how the purchase impacts business ROI and revenue.
- Technical Influencers, who are focused primarily on how the purchase impacts business processes and operations.

4. User Influencers

User Influencers are the people in the organization who will use the product in their day-to-day jobs. They are directly impacted by the purchase and are focused on how the solution will help them be more efficient, effective, and productive.

Buying Committee-Persona Dynamics

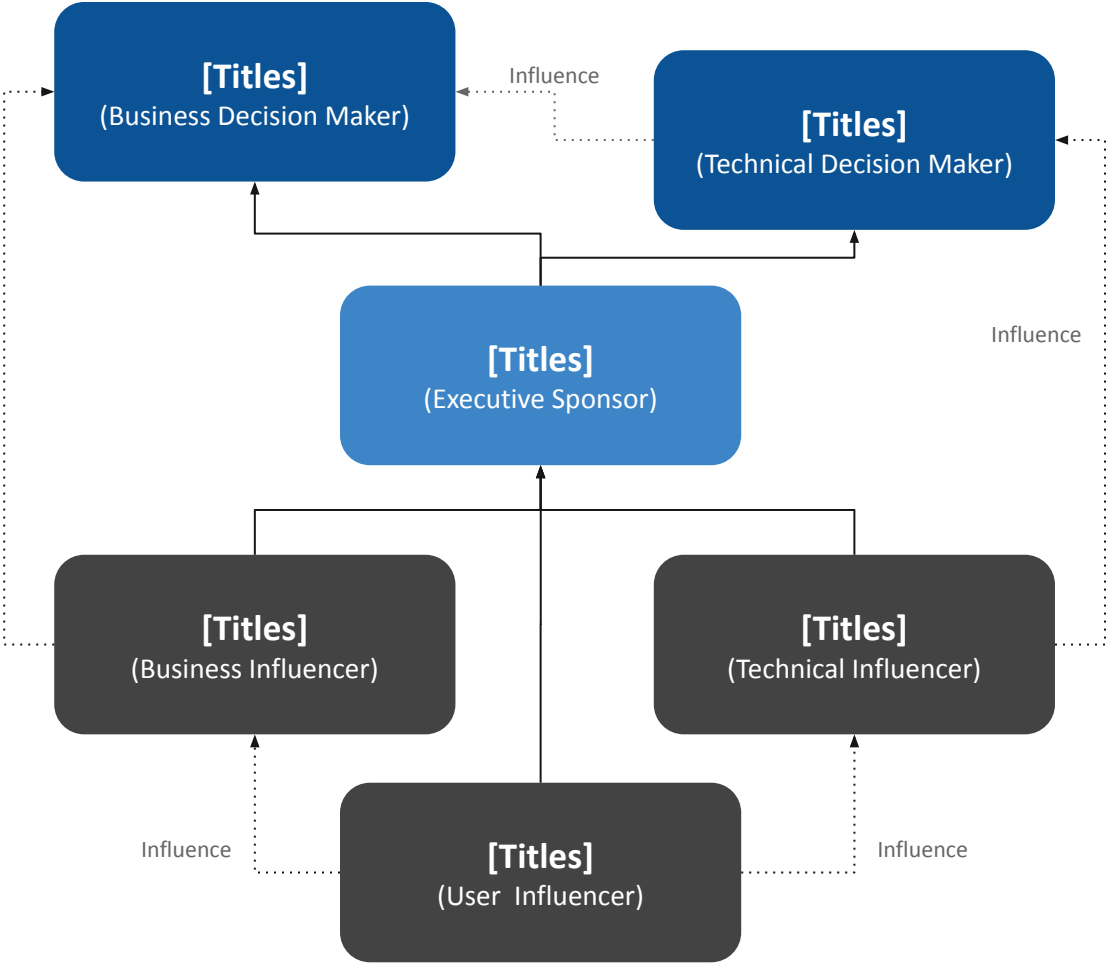
Key Target Personas of the Buying Committee

Business Decision Makers
(Power to say Yes)

Technical Decision Makers
(Power to say No)

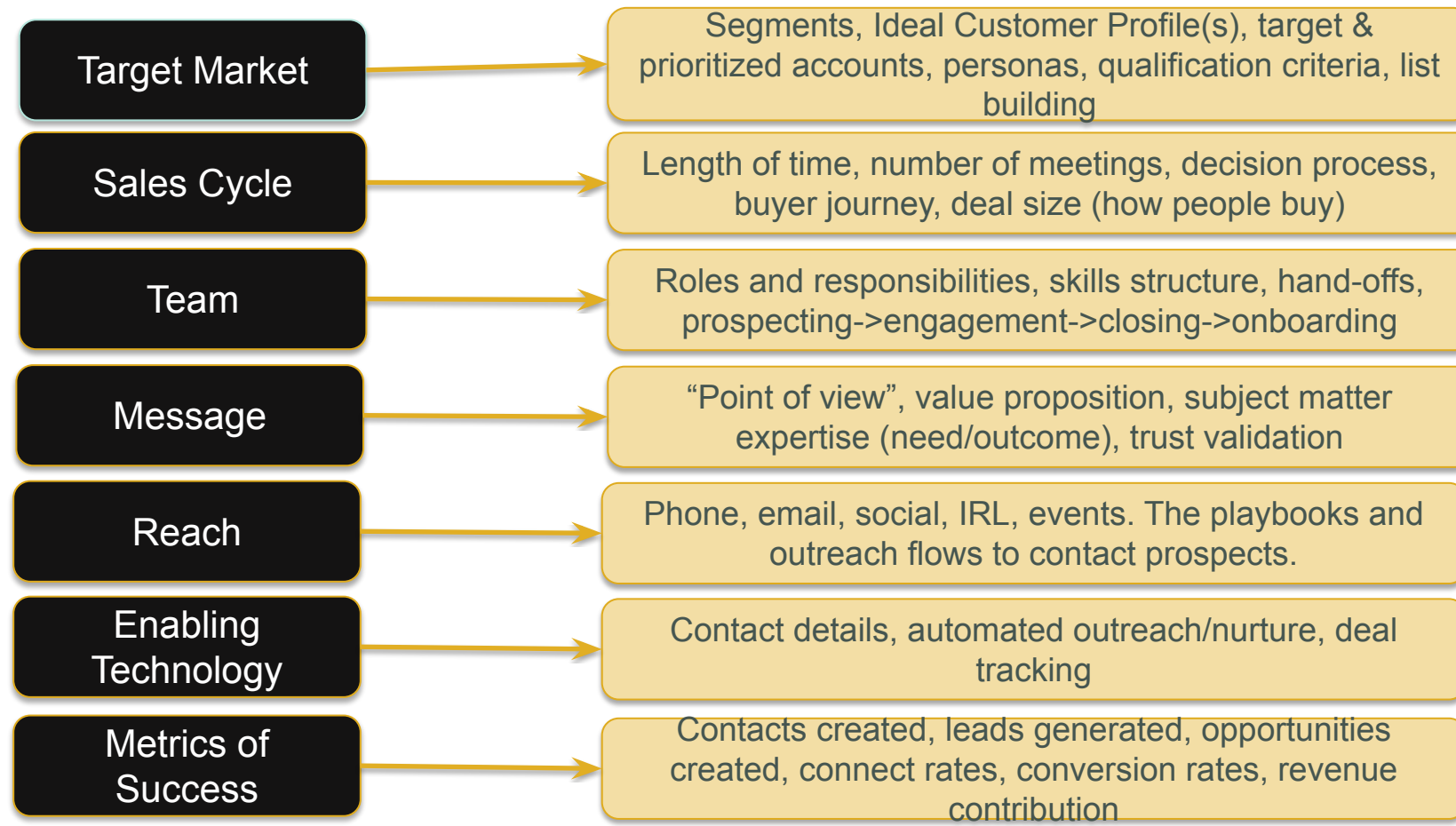
Financial Decision Makers
(Power to say No)

Business Influencers <i>(Power to influence)</i>	
Technical Influencers <i>(Power to influence)</i>	
Financial Influencers <i>(Power to influence)</i>	
Tertiary Influencers <i>(Power to influence)</i>	



5. Ruthless Review & Optimization

The Predictable Pipeline Framework



Predictable Pipeline Evolution

	Initial	Ad-Hoc	Defined	Managed	Optimized
Target Market	Lack of clearly defined target market and Ideal Customer Profile (ICP), no personas	Limited/assumption-based approach to market/customer. Limited to no qualification criteria defined	Ideal Customer Profile defined, personas defined and articulated	Known accounts, defined and agreed to qualification criteria, defined and confirmed personas	Iterative approach to target account identification, dynamic personas, qualification criteria drives targeting
Sales Cycle	No known or defined repeatable approach	Ad hoc approach & understanding of how customer buys	Understood time and decision making process, friction remains	Known and articulated buying journey, enablement focus	Selling process aligned with buying process, all known friction removed
Team	Undefined roles and responsibilities, no skills mapping/development	Major functional roles defined, high churn, low performance	Roles, responsibilities, and competency profiles defined and operational	Responsibilities and hand-offs known and operational, team is performing	Aligned team structure, career path and skill milestones
Message	No unified message and/or compelling value proposition	Confusing and disorganized message, no consistency and company-centric	Defined messaging and positioning mapped to audience, speaking to market and needs vs. feature/benefit	Content editorial calendar in place, major trust validation content in production, defined industry "point of view"	Versioned strategic messaging framework approach, content editorial calendar speaks to customer need/outcome
Reach	One-off bulk emails, direct ask outreach	"Every person for themselves" with no coordination	Sales playbook(s) in place but used for reference vs. execution	Coordinated efforts among email, phone, online, offline channels	Integrated and executed outreach "plays" across channels
Enabling Technology	Limited to no real technology in place. Basic email, phone, spreadsheets	Individual purchase decisions drive technology, low utilization, no integrated plan	Major categories purchased and in place, some coordination among teams	All current tools configured and utilized to justify expenditures	Technology aligned with process, approach in place to test new tools
Metrics of Success	Random and inconsistent measurement	Individual teams and contributors track and promote their metrics	Major categories tracked but bias towards actions vs. outcomes	Alignment around creating opportunities and revenue contribution across all activities	Full funnel measurement and accountability

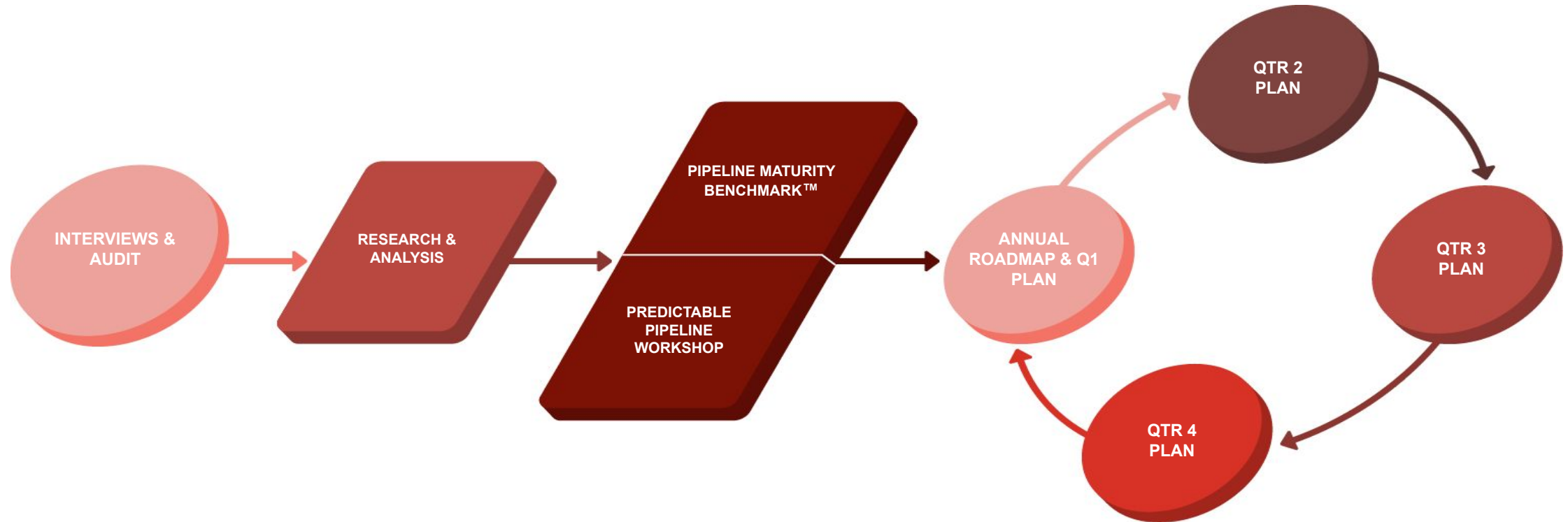


Conduct a Predictable Pipeline Review

1. Ideal Customer Profile defined and approved?
2. Target personas for all involved in buying process?
3. Messaging by audience?
4. Compelling positioning?
5. Content mapped to funnel stage?
6. Internal sales process defined?
7. Aligned metrics and incentives?



Predictable Pipeline Quarterly Review



- Objectives
- Stakeholders
- Reporting
- Documentation

- Greatest Opportunity
- Strategic Impact
- Challenges
- Initiatives

- Target Market
- Sales Cycle
- Messaging
- Tech Stack
- Metrics

- Priority Initiatives
- Goals
- Team Roles
- Activity Timeline
- Budget & Vendor Evaluation
- Tools & Training

fast 
FWD

WORKSHOP WORKBOOK

A PLAYBOOK FOR BUILDING PREDICTABLE PIPELINE

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Thank You!



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