

Your Guide to B2B Customer-Centric Marketing

How to apply insights to stand out in a sea of sameness



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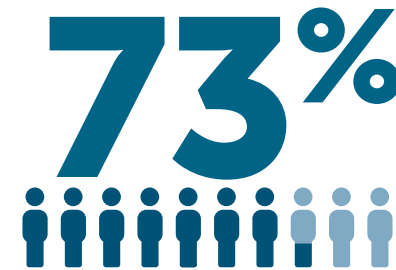
Implementation

Why Go Customer-Centric?

Customers in the B2C world have never had it so good. Over the past several years, they've grown accustomed to being served relevant, personalized messaging from their favorite brands and having round-the-clock, on-demand access to whatever they want or need in whatever stage of the buying journey they happen to be in. This has resulted in heightened expectations that are particularly pronounced among millennials, "digital natives" who have come of age in a fully digital, media-saturated world.

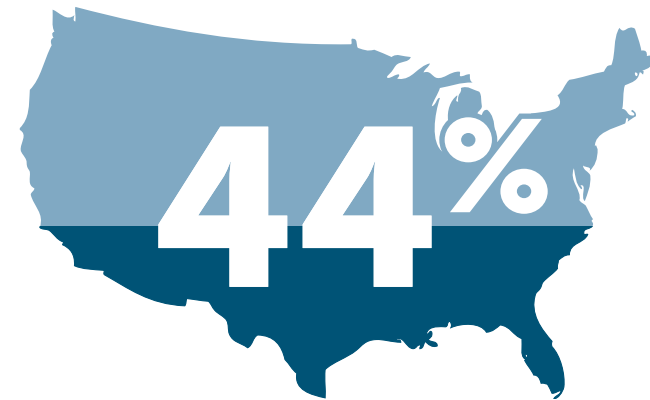
Change brings disruption, of course, but that disruption is creating opportunities for B2B companies that are willing to seize them. Specifically, B2B marketers who take steps to meet the expectations digital natives are carrying over to their experiences as B2B buyers are going to gain a competitive advantage in the marketplace.

Already, 73% of millennials in the workforce are involved in purchasing decisions for their employers, and by 2025 millennials will account for 44% of the total U.S. workforce. *The companies that deliver customer-centric messages and experiences will win out in this evolving environment.*



of millennials in the workforce are involved in purchasing decisions for their employers.

Source: Merit Research



Millennial share of U.S. workforce by 2025

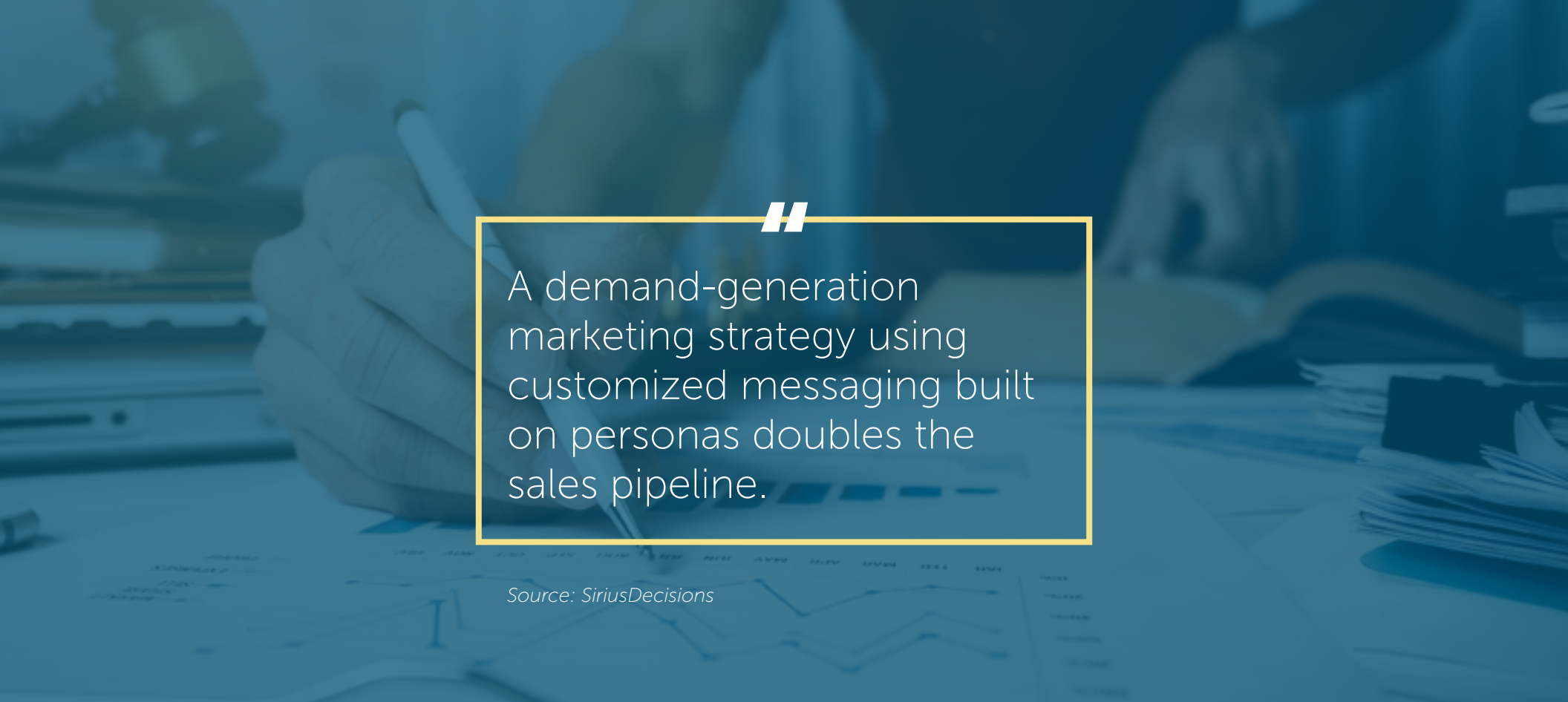
Source: Pew Research Center



As customers change, so must marketers

The bottom line is that B2B customers are changing, and B2B marketers must change along with them to remain competitive. These new B2B customers are used to being in control, to finding and consuming information in whatever manner suits them, and to choosing when and how conversations take place. They also tend to remain anonymous through longer stretches of the buying journey than their predecessors did.

For all these reasons, customer-centric marketing is critical to the future success of B2B organizations. The industry has paid lip service to this idea in the past with concepts such as solution selling, but even the best-intentioned of those efforts have a history of losing their way. Rather than staying focused on truly helping customers achieve their goals, most B2B companies quickly revert to a narrative about whatever it is they are trying to sell.



A demand-generation marketing strategy using customized messaging built on personas doubles the sales pipeline.

Source: SiriusDecisions

The payoff makes the effort worth it

Customer-centric marketing that is all about helping customers achieve their goals is the only effective strategy for B2B organizations going forward. Top-performing companies have already embraced this concept, with impressive results.

For established product-centric companies, this might seem an overwhelming proposition, something akin to turning the Titanic. To be sure, *becoming a customer-centric organization takes time and the adoption of a completely different mindset*, but the positive outcomes more than compensate for any growing pains involved.

This ebook presents practical guidelines, based on The Mx Group's extensive experience in this area, that B2B organizations can use to adopt a truly customer-centric approach and begin executing a more effective marketing program.

Essentially, it boils down to giving your customers the first priority and the last word. The way you execute on that is by creating a corporate culture that is genuinely customer-centric and learning what really matters to them.



Why Buyer Personas Are the Centerpiece of Customer-Centric Marketing

Before you can figure out how to help your customers, first you must get to know them. The best way to do that is with the right kind of buyer personas. *As important as personas are to customer-centric marketing, many organizations stumble when it comes to realizing their full potential.* This happens for many reasons, including not having buy-in for their use amongst all stakeholders in the organization. But of course personas can provide major value, including:

- The ability to create more effective marketing
- A better understanding of how your product is perceived in the marketplace
- Raw material that can be used to develop new tools and content

The cumulative power of personas enables you to transcend a basic level of understanding about your audience and push through to more meaningful insights that can activate deeper customer connections. When the proper approach to creating personas is taken, the research involved provides a window into the customer's mentality, enabling a more thorough understanding of the things that are most meaningful to them and the drivers that motivate their purchasing decisions.

This type of persona background information needs to be socialized and accepted in all areas of the business, from Marketing to Sales to the C-suite.

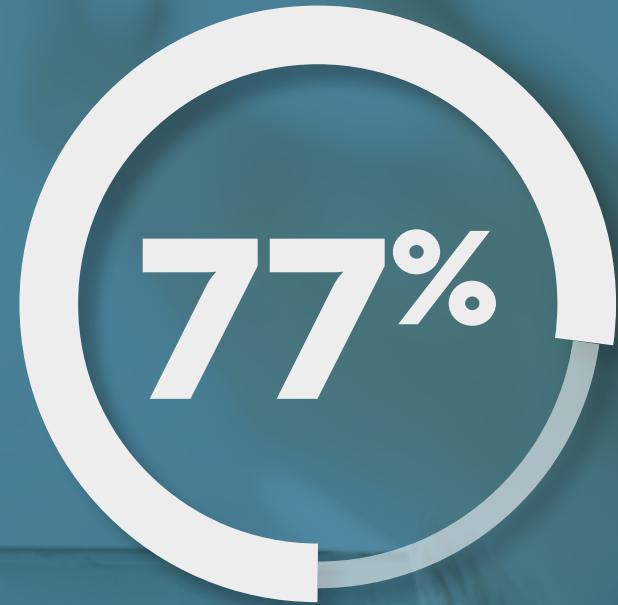


The key to a customer-centric culture

When personas are created and truly utilized, they can deliver powerful impacts across your organization by:

- Generating internal momentum for a customer-centric culture
- Fostering alignment between Sales and Marketing
- Developing a customer voice built on their own actionable insights

When it comes to generating momentum for a new customer-centric perspective organization-wide, personas are the most effective tool in a B2B company's toolbox.



of the most successful content marketers use personas, compared with **36%** of the least successful.

Source: 2018 Content Marketing Institute Benchmark Report

Thoughts From the Woman Who Wrote the Book on Buyer Personas:

Adele Revella, founder and CEO of Buyer Persona Institute, literally wrote the book on this subject. Here's what she has to say about the importance of personas.



"Your goal in gathering information to create personas is to get your buyers to tell you their stories."

When it comes to gathering meaningful, actionable insights about your customers, nothing beats the direct approach, specifically, actual conversations with them. Other methodologies, such as scripted surveys and focus groups, can provide lots of information, but they can't help you learn about what your customers really think is important. *Buyer personas enable B2B organizations to move beyond their internal biases and start down the path to understanding what is truly important to their customers.*

Your goal in gathering information to create personas is to get your customers to tell you their stories. A lot goes on as they make their way along the purchasing funnel, with needs changing as they pass through different stages. At every step of that journey, you should be providing them with the information they need to feel confident about the choices they make. To do that, you must first get to know your customers. What problems are they looking to solve? What challenges must they overcome? What's important to them? What excites them? What turns them off?

The usefulness of other methodologies in creating buyer personas is limited because their potential for meaningful input is constricted. Survey questions are formulated around issues the company thinks are important and designed to solicit responses compatible with statistical analysis. Focus groups have their own deficiencies, such as the potential for diversion toward irrelevant topics and the intrusion of group-think.

B2B organizations must adopt a new customer-centric mindset toward research into the buying process, and personas must be at its core. For those that lack the internal resources to reboot their approach, experienced third-party experts can fill the gap. The important thing is that you find a way to *elicit insights directly from customers* through a process that prompts them to share personal insights about their own buying experiences.

– Adele Revella
Founder / CEO
Buyer Persona Institute




Less than half of content marketers are actually talking with customers to understand their needs.

Source: 2019 Content Marketing Institute Benchmark Report

All About Personas



Persona-based marketing leads to

28% 
higher campaign
response rates

10%–25%
increases in marketing-
influenced revenue. 

Source: SiriusDecisions 2017 B-to-B Buying Study

Properly developed buyer personas are central to creating a customer-centric marketing strategy. Interviews with your existing customers should be the starting point to learn what your prospective customers are thinking and doing as they consider their buying options.

Done right, the buyer persona creation process helps you identify their needs, challenges and decision-making criteria. Good personas also tease out critical points of contrast between different types of customers. This knowledge and insight enable you to create content that truly resonates with their concerns and drives increased affinity, engagement and sales.

Here's how to go about it.

- 1 Do the right prep work**
- 2 Line up the right mix of interviewees**
- 3 Ask, then listen ... then listen again**
- 4 Use what you've learned to create effective personas**



1

Do the right prep work

Before you get down into the weeds of persona research, you must first settle on where to focus your efforts.

- Start by meeting with your counterparts in Sales to discuss how they determine fit. What are the key criteria they use to qualify leads — for example, company size, industry, purchase history? (At B2B organizations where Sales and Marketing are closely aligned, you might already have this information.)
- Analyze your existing database for additional insights. Your initial deep dive should be into data associated with your best customers. Based on what you find there, you can decide in which areas it makes the most sense to search for patterns—firmographics, specific behaviors or other factors your company tracks.

2

Line up the right mix of interviewees

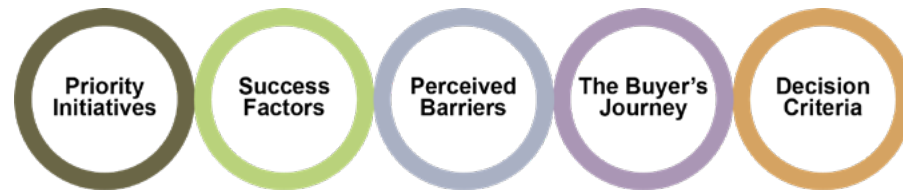
Interviews are the central building block for creating buyer personas, so choosing the right people to interview is critically important.

- Start with a market map review to get the big-picture view of the industries, sectors, company sizes and other parameters that determine where your company prospects for customers.
- Develop a plan to interview across the widest variety of segments possible in order to optimize representational reach of prospective buyers.
- If you know the job titles of the decision-makers you are targeting, try to include people with similar titles in your lineup of interview subjects. This increases the likelihood of gleaning valuable insights.
- Customers who have recently made purchases from your company are a good source of insights into what you currently do well.
- Interview prospects who considered making a purchase from your company but did not follow through. Identifying the reasons they opted out can help you determine if there is some deeper problem you need to address.
- Talk to potential customers who did not even consider your product or service, and try to find out what you could have done that would have put you on their radar.
- In general, plan on interviewing between five and 10 representatives from each of your target segments. (There are alternative approaches for those facing budget constraints; more on that later.) When you reach a point where you can accurately predict your subjects' answers, that's a good indicator you've done enough interviews.

3

Ask, then listen... then listen again

It's important to keep your interviews focused in order to maintain high levels of engagement with your subjects. A good way to do that is by asking questions based on Buyer Persona Institute's 5 Rings of Buying Insight™:



- Why do customers invest in solutions like the ones your company offers?
- What do customers want to achieve by using these solutions?
- What would make a prospect or existing customer decide not to purchase from your company?
- What does the purchasing process look like at the customer's organization, and who influences their buying decision?
- What are the most important factors involved in your customer's decision when purchasing solutions like the ones your company provides?

Conducting successful persona interviews requires a specialized skillset, so it often makes sense to outsource this to an experienced third-party provider. Getting subjects to answer these questions thoroughly will provide you with a trove of information about company hierarchy, pain points, preferred channels of communication and other important insights. Regardless of who conducts the interviews, they should be recorded and shared with all members of the team. The more frequently you listen to them, the more insights you are likely to unearth.

4

Use what you've learned to create effective personas

This is the actual persona creation step, and it begins with a thorough review of all the information gathered during the interviews. The focus here is on finding shared traits across many subjects and identifying notable patterns. Start by organizing your data into key categories:

- Differentiators—unique challenges or goals associated with individual customers and prospects
- Product connection—their pain points and feelings about your solution
- Buying insights—the various ways in which they approach the customer journey
- Segment insights—characteristics that distinguish various company types from each other

When writing personas, it's important to keep in mind that even though you are working from data, it was compiled from interviews with real people. The final product should reflect that. Use first-person language in your descriptions and an actual photo of a real person to represent each persona. It can help to assign names associated with job functions to your personas—Marketing Mel, Operations Oscar, Patty Procurement, Tonya Technical, etc.

A photograph of a white podium with three steps, set against a background of a grassy field. The steps are labeled with large black numbers: '1' on the highest step, '2' on the middle step, and '3' on the lowest step. The entire image has a dark blue overlay.

2

1

3

Matching Persona Creation
to Available Resources

The process laid out in the previous section represents the ideal approach, and personas created in this manner—and properly utilized—return the highest value. In the real world, however, the ideal approach may be out of reach for some B2B organizations due to budget and/or time constraints. Those companies can still reap some of the benefits personas provide by taking a scaled-back alternative approach.

Personas are not an all-or-nothing proposition. While the full-blown approach represents the “Gold Standard” and the greatest potential value, less intensive approaches can still provide important insights into buying-decision processes that can be used to drive improvements in sales and marketing, or at least as a first step toward a more thorough understanding in that area.



Companies that
beat their sales
goals are

2X

as likely to have
formally documented
personas.

Source: Cintell, “Understanding B2B Buyers: The 2016 Marketing Benchmark Study”

The Gold Standard

This should always be the first choice for B2B marketers dealing with complex buying cycles and large buying groups. It typically produces five or more individual personas, including those with direct purchasing authority and others who may exert significant influence on whether or not your solution is chosen. In-depth persona overviews of 3–4 pages are created based on first-person interviews, with each including:

- Core persona information
- Buyer Persona Institute's 5 Rings of Buying Insight™
- Detailed insights into the buying process and each persona's role in the final decision
- Buyers' questions at each stage of the customer journey, and the corresponding content needs they create for the marketer
- Quantitatively validated insights into preferences for content types and channels

In addition to first-person interviews, the Gold Standard approach may also involve online surveys of broader groups across each persona. These surveys complement first-person interviews by gathering more data that can clear up conflicting information from previous interviews. They can also provide quantitative firepower to reinforce insights around issues like preferred content types and the most effective communication channels.

Companies with persona-based content experience

6X

higher customer engagement when targeting cold leads.

Source: Demand Gen Report

The Silver Standard

While personas created using this approach don't dive quite as deep as Gold Standard personas, its budget requirements are more modest. Rather than probing the entire buying ecosystem, this approach focuses on the 2–4 personas with the greatest impact on the final purchase decision, as identified by your internal sales team.

Fewer interviews per persona are conducted, so the level of detail is less granular and some nuance is lost, but the process still provides valuable, actionable insights. In-depth persona overviews of 3–4 pages are created based on first-person interviews, with each including:

- Core persona information
- Buyer Persona Institute's 5 Rings of Buying Insight™
- Detailed insights into the buying process and each persona's role in the final decision
- Buyers' questions at each stage of the customer journey, and the corresponding content needs they create for the marketer
- An overview of preferred content types and channels

Companies that use personas see a

5X

higher open rate on emails

Source: Forrester

The Bronze Standard

Personas are most valuable and effective when they are created from validated insights gathered directly from your customers and prospects, even—maybe especially—those who didn't choose your solution. While nothing can replace the value of speaking directly with customers, this approach can be a first step for resource-strapped B2B organizations to gain traction for a truly customer-centered approach. Some initial insights can be generated by tapping the wealth of information that exists among internal stakeholders. Then, once you're showing results and people are on board, it can help make the case for investment in more robust buyer personas.

Set up meetings with internal members of your sales, product and support teams to gather their insights in the same categories you'd ask customers and prospects about. Look to create 2 to 4 personas focused on the most important decision-makers. Your final deliverables should be two-page persona overviews that include:

- Core persona information
- Each persona's pain points, perceptions and role in the buying-decision process
- High-level buy-cycle insights
- Segment-specific insights



65%

of companies that updated their personas within the last six months exceeded their lead and revenue goals.

Source: Cintell




The Case for Outsourcing

It's a fact of life that those who do a particular thing most often tend to become the best at it. Persona creation is no exception. *Third-party experts who build personas for a living can complete the process more efficiently,* more effectively and faster than do-it-yourselfers can. The advantages of outsourcing the persona-building process to an expert include:

- Access to time-proven skills and methodologies
- Help in determining which personas to create
- Offloading of responsibility for logistics of lining up interviews, scheduling calls, etc.
- Greater level of objectivity that is conducive to more candid responses from interview subjects
- Elimination of internal preconceived notions and confirmation bias when distilling data for insights
- Experience in creating optimized final deliverables immediately useful and actionable for Sales and Marketing



Not a Set-It-and-Forget-It Proposition



Committing to a buyer persona creation process is no small undertaking, and the inclination to breathe a sigh of relief as you approach the finish line is understandable. By all means, take a minute, congratulate yourself, and contemplate the benefits your new personas will provide to your marketing and sales teams. Then, get back to work. Not right away, of course, but it's important to keep your personas fresh, and that's a responsibility that needs to stay on your radar.

B2B customers' needs, buying behaviors and dynamics change rapidly, often driven by digital trends and technologies that are evolving just as fast. *You have to stay ahead of the curve by updating your personas to make sure they remain valid and useful over time.* How often this must be done is an open question, and the short, if unsatisfying, answer is, "It depends."



When to update your personas

B2B companies whose sales and marketing activities are concentrated in more mature industries or sectors that are less subject to rapidly changing dynamics can generally expect the lengthiest shelf life for their personas, perhaps a year or even longer.

At the other end of the spectrum, if your personas are targeted at an emerging or relatively new market that has yet to mature, updates may be required more frequently than once a year. The same holds true if you are using persona-based marketing for a product or solution that is relatively new to your organization.

Determining when a persona has reached the end of its useful life is also a subjective process. It's a decision that should be based on the feedback you're getting from team members using the personas in their respective roles.

Updating personas on the fly

No matter what your cycle is for major persona refreshes, it's a good idea to set a reminder to review them quarterly and to implement minor updates as needed.

Even better, **use digital analytics** as a real-time solution to continuously surface relevant insights, especially around:

- Buying behavior
- Priorities and needs
- Pain points
- Interaction and content preferences

Extract new persona insights from these sources:



Social Media

- Evaluate the level of your personas' engagement with content and messaging by measuring likes, shares and click-through rates.
- Utilize social listening to learn more about top interests and issues.
- Review comments to understand additional nuances about the perceptions or questions of different personas.



Search

- Conduct competitive analysis on search rankings and keywords to understand opportunities and threats.
- Analyze SEO and PPC to track the performance of keywords associated with persona attributes.
- Utilize rapid PPC testing to iterate persona-based messages and offers as industry or market trends evolve.



Website

- Track conversion paths to understand the differences by role.
- Review content consumption, time on site and bounce rates to identify persona activity patterns.
- Analyze traffic trends to identify preferences and uncover opportunities for new content or offers.



Persona Example

There are many different tacks your persona resource partner may take to ensure that the end result of your persona creation project is totally thorough and actionable. On the following page, you'll find a simplified example of a persona deliverable.

Note that this example is not provided to be used as a template, but to serve as a guide illustrating the type of information that can be gathered and created. Ultimately, your goal is to ensure that each of your buyer personas contains information and insights that are relevant to the sales and marketing teams of your particular business.





CORE PERSONA INFORMATION

PRODUCT / PERSONA CONNECTION

BUY CYCLE INSIGHTS

CONTENT NEEDS

POSSIBLE TITLES: Owner, Office Manager, General Manager, President

MEDIA HABITS:

- I don't consume information related to my business.
- We have a Facebook page for visibility for the business, but I do not use social media for work.
- If there is an immediate and specific need, I may search online for a solution.

SOURCES OF INFLUENCE:

- We talk to our partners and people in our community.
- We value relationships and trust people we know have our best interest at heart. These may include trusted vendors or other business leaders like us.
- If we're part of a trade industry, we may be a member of an association related to our trade. This can sometimes be a resource we can visit to connect with others like us.

PREFERRED COMMUNICATION TACTICS:

- A combination of email and phone is the best way to reach me.
- I value in-person meetings, but unless we're already close partners, don't drop by out of the blue; give me a call first.

PREFERRED CONTENT TYPES:

- Sometimes I like video, but other times it's difficult because I can't go through it at my own pace. Rely on video only for concepts that are difficult to explain.

HOW TO GET MY ATTENTION:

- It's hard to market to me, because I don't know what I want until I know what I want.
- Tell me how I can save money!
- Keep messages short and sweet; just tell me what I need to know.
- It has to be immediately apparent that your solution will support my business.

HOW TO EARN A SALES VISIT:

- If you can show me that it will help my business, I'll keep an open mind. Show me that you've researched our business and your solution will help a business of our size, and isn't just for the bigger guys.
- Try to build a relationship with me. We care about our community and the people in it. The more I feel you care about us and our business, the more open-minded I'll be.
- It has to be something that I'm interested in. If I'm not interested, then it's just a waste of time for both of us. Consider gauging my interest before you visit the office.

MARY MANAGER



MARY MANAGER

PRIORITY INITIATIVES

What business conditions trigger this buyer's decision to look at our solution?

- I want to be able to save money.
- I need a way to track our assets out in the field.
- We need our employees to have more accountability.

SUCCESS FACTORS

What results or outcomes does this buyer persona expect from our solution?

- I will save money on specific purchases tied to your solution.
- I won't have to have manage multiple vendors.
- I will have streamlined billing.
- I will have more visibility into employee activities.
- We will have coverage nationwide.

PERCEIVED BARRIERS

What attitudes or concerns prevent this buyer from investing? Or why wouldn't they purchase from us?

- I'm not a technical person. This seems like it will be difficult to install and manage.
- I won't use all of these fancy features, I just need the basics.
- We don't have extra money lying around, we are focused on keeping our business running, this sounds expensive.
- We tried this before, and it wasn't accurate at tracking.
- Billing is complicated.

DECISION CRITERIA

Which features of our solution does this buyer evaluate as they compare alternatives and make a decision?

- This has to be simple to use. I am not a technical person and neither are the daily users.
- This has to be cost-effective. I need to know that this is worth the cost.
- I want customer service and support to be available if I have issues or questions.

BUYER'S JOURNEY

What is this buyer's role in the decision and who else will impact the decision?

- I am leading the decision. If I am the owner, I will make the decision. If I am an administrator, I will need to get final approval from the boss, but they'll usually go with what I say as long as it doesn't cost too much.
- Mindset:
 - "I don't care if this is the new, cool thing. I need to know that it's going to benefit our business without changing it."
 - "I don't understand all the features, and we certainly won't use them all. I just need to know the basics."
 - "I don't have a problem managing things manually, so you have to show me how this will save us money."



EDUCATION PHASE

ASKING

- How can I save money?
- How can I have more visibility into where my employees are and how long they are spending at specific job sites?
- How can I make sure my employees are doing what they're supposed to be doing?

SOLUTION PHASE

- Does this allow me to track my team?
- Will this allow me to easily understand basic metrics?
- Is the interface easy to understand?
- Is it easy to get the information I need?
- Will I be able to track where my assets are?
- Will this solution save me money?
- What are online reviews saying?
- Is it practical?

VENDOR SELECTION PHASE

- Is it plug and play?
- How much does it cost?
- Will this vendor be easy to work with?
- If there are issues, will I have to work with multiple parties?
- Which vendor is cheaper?
- Do I have to sign a contract?
- How easy will it be to track?
- Is this system easy enough for my team to use?
- Will this give me decent return on my investment?
- Will my people actually use it?
- Do we fit their customer profile?
- Are we too big or too small for them?

MARY MANAGER



MARY MANAGER

CORE PERSONA
INFORMATION

PRODUCT / PERSONA
CONNECTION

BUY CYCLE
INSIGHTS

CONTENT
NEEDS

VENDOR SELECTION PHASE

Content Needs

	FOCUS / THEME	FORMAT	PURPOSE
1	Implementation guide	1-pager	Give Mary a step-by-step guide for implementation. Solution partners tend to provide information geared toward technologists, and Mary isn't tech-savvy. Give her an easy-to-follow list of steps to make her feel comfortable she can do this on her own.
2	Customer support	Contact card	Mary wants clarity on who to reach out to and for what. Give her a contact card that outlines who to contact for what potential item so there is no confusion. This should help ease her concerns of working with multiple vendors and not having the support she needs.
3	Contract / costs	Proposal guide	Help Mary understand how contracts and pricing work. Give her a clear breakdown of the setup costs, device costs, ongoing costs and a definition of the contract. The clearer you can be, the better.
4	ROI calculator	Interactive tool	Mary wants to be sure that this isn't going to be a big risk for their business. Enable sales to develop an ROI report that shows her what to expect after she installs this solution. This will also be helpful if she has to sell this solution to her boss.



Laying the Groundwork for Customer-Centric Marketing

As important as they are, personas are just one part of what it takes to create a truly customer-centric B2B organization. Giving a name and a face to a customer segment is not merely an exercise in convenience. Personas represent a massive amount of valuable, actionable insight that must be used as a catalyst for change in your organization and the way it approaches its customers. Personas are the foundation on which the fully articulated structure of a customer-obsessed corporate culture will be built.


The use of personas should trigger a radical departure in how team members think about, talk about and interact with customers. It strips "customers" of their former anonymity and substitutes "real" people. You're no longer taking about a data point, you're talking about "Larry Leader," say, and you know a lot about him. Larry is a long-term thinker and final decision-maker, someone who looks for brand names and values good customer service and support. Faced with decisions at critical junctures, team members can now ask themselves, "What would Larry think?" The answer will both guide and validate the choices they make.





Spreading the culture organization-wide

It's natural that the marketing and sales teams take the point position on the path to adopting this new culture, but the ultimate goal is to have it permeate every corner of your organization. From product development to human resources to the customer service department—and everywhere in between—all areas of your company should have access to the insights personas provide. If you commit to the widespread adoption of personas and start integrating them into the tools and processes your teams use every day, you will be well on your way toward creating a customer-obsessed company culture that reflexively puts their needs at the center of every conversation.



Companies with optimized Sales and Marketing alignment report stronger annual revenue growth than other companies and double the brand awareness growth.

Source: Aberdeen

Facilitating alignment between Marketing and Sales

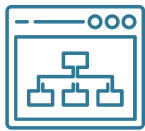
Among their many other benefits, personas also promote increased alignment between Marketing and Sales, whose team members typically have widely divergent perspectives on who buys the company's products and how purchase decisions are made. Personas help align Sales and Marketing around a common set of customer needs. Additionally, the process of persona creation cultivates early buy-in from stakeholders, not only in Sales and Marketing, but across the organization.

When the guesswork that formerly characterized interaction between marketing and sales teams is replaced by real perspectives from real customers, both teams benefit. *Marketing teams can build trust by speaking directly to customers in ways that feel personalized*, which improves their ability to generate qualified leads. The leads they pass on to Sales contain richer information, which makes it easier for the sales team to close deals because they can emphasize benefits that address customers' real concerns. That's a strong argument for Marketing to provide persona details along with the other information they include when passing leads along to Sales.

Integration, not distribution

In order to optimize the benefits of personas and their impact on company culture, you must integrate them into daily marketing and sales activities in meaningful ways.

If your personas end up in binders sitting on shelves in the marketing and sales departments, all the time and resources you've poured into their creation has been a waste. Three areas of focus for persona integration are:



Data structure

Data is (or should be) at the core of your marketing programs, driving your initiatives and decisions, and it should be segmented and tracked by persona type. Use data modeling to assign personas to the contacts in your marketing database based on title, company size, vertical, etc. Add a persona value to your sales force automation system so you can maintain this segmentation going forward. Likewise, when importing new data from events or other sources, append persona values based on your data models.



Sales process

Update all sales proposal templates with key persona insights. Provide thorough training for your sales team when rolling out personas, and incorporate persona insights into all training materials. Reconfigure all sales portals and quote generators to require a persona selection for each prospect.



Marketing process

Update all internal and external briefs to include persona insights. Put persona targeting at the core of every marketing campaign, so all involved understand who is being targeted, what they care about, and what the industry's decision-making dynamics are. The marketing team should own the persona initiative and take the lead on fostering integration and adoption, so make sure all team members are thoroughly trained on your persona types and how to use them.



Customer-Centric Marketing in Action

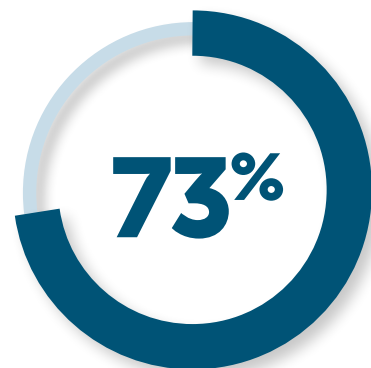
In the first half of this ebook, we talked about why customer-centric marketing is critical to the future success of B2B organizations. In a nutshell, it is the most effective strategy for helping customers achieve their goals, and that's what this is all about—giving your customers the first priority and the last word.

To pursue this strategy, you must first cultivate a deep understanding of your customers, and buyer personas are the best way to gather those insights. The persona creation process is laid out in the earlier pages, and, as noted, it takes hard work, commitment and resources to do this successfully. But the payoff is worth it, if you follow through and put those personas to work for you.



of top-performing B2B content marketers put their audience's informational needs ahead of their own sales/promotional message.

Source: 2018 CMI Benchmark Report



of B2B content marketers were planning to use personas for content marketing by the end of 2018.

Source: 2018 CMI Benchmark Report

That's what the rest of this ebook is about. Now we're going to show you how to use personas to develop the content you need to satisfy your customers' needs through every stage of the purchasing journey. Personas must play a central role in at least three areas—website, content and nurture—in order to provide a truly customer-centric experience.

Easy? No.

Worth it? Most definitely.

Doable? Yes, if you follow our examples.

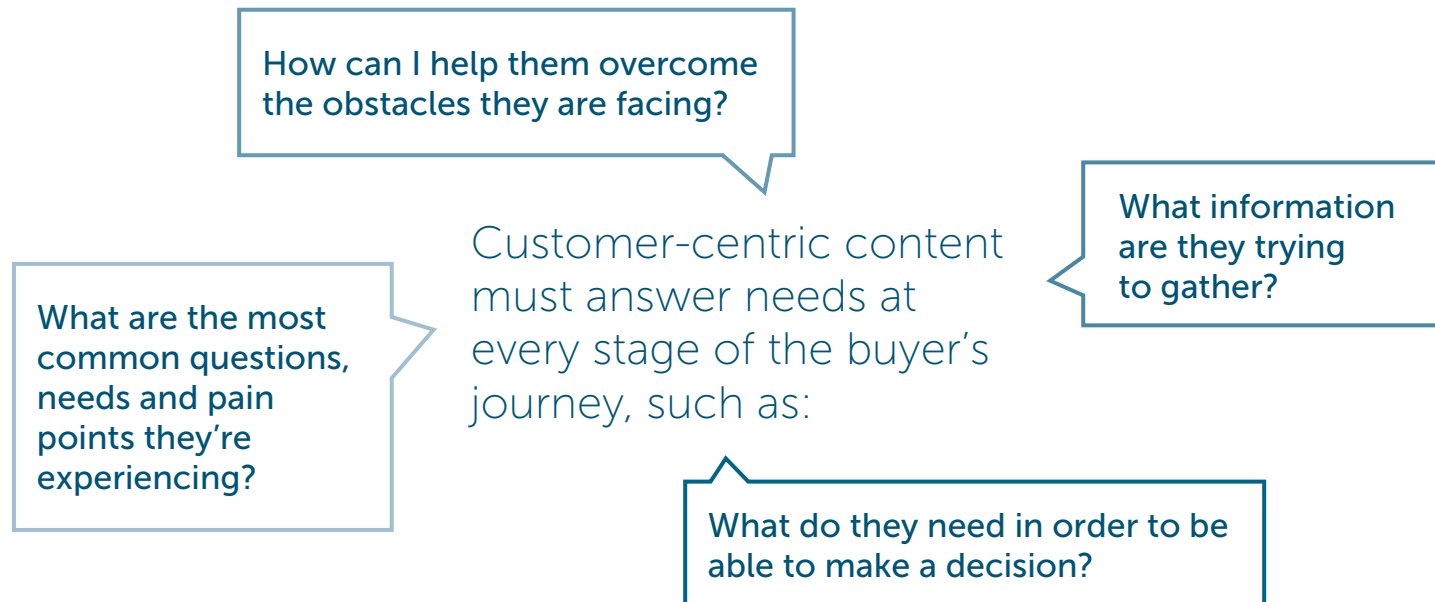
The top two challenges CMOs face in addressing changing buyer behaviors are “developing content that satisfies buyers’ needs throughout their decision-making process” and a “lack of buyer insights.”

Source: SiriusDecisions

Customer-Centric Content: Focused, Relevant & Customized

As the buyer's journey becomes increasingly digital, and buyers spend ever-longer periods of time conducting their own research before converting to qualified leads or engaging with Sales, B2B organizations must rely more heavily on marketing content to compensate for many conversations that used to take place with Sales earlier in the cycle.

There's no turning back the clock on this trend. The buyer's journey is an increasingly self-service experience, and we marketers have to acknowledge this reality. However, that doesn't mean we have to totally give up control.



Principles of Customer-Centric Content

1.

Make it about them, not about you.

The key is to approach the content creation process from the perspective of what information and experiences your buyers need—not what you think they need, but what you have learned about their needs during the persona creation process. If you don't have buyer personas, conduct voice of customer interviews and track web behaviors to gather these insights.

2.

Focus on creating value.

It may seem counterintuitive, but the best way to ensure success is by thinking *serve first, transact second*. Customer-centric content—that “serves”—goes beyond the surface. It digs deep to go beyond “marketing-speak” to answer questions, provide insights and deliver the details customers need to make a purchase decision.

In many cases, creating highly relevant content requires significant technical expertise and detail, so it's important that you leverage the subject matter experts within your organization who have the deepest understanding of your products and customers.

3.

Tailor the tactic.

It's been more than 50 years since Marshall McLuhan declared that “the medium is the message,” but those words are just as true today. When creating customer-centric content, it's important to remember that it's not just about the message. For maximum impact, you must align your tactics (delivery channels), timing and tone based on your customer preferences and insights.

Real World Application: Customer-Centric Content

Overcoming Software Purchase Concerns

A leading software supplier to automotive dealerships, VinSolutions was aware that choosing a new software program could be an exciting experience for dealers, but also a choice that was far from simple. Successful sales processes in the automotive industry depend on software, so a wrong decision can put a dealership's entire business at risk. VinSolutions also knew that when a wrong purchase decision was made, it was often the result of an ineffective approach to the purchase process or a disconnect between decision criteria and actual business needs.

Creating a truly customer-centric content approach, VinSolutions found a way to help prospective dealers overcome their challenges navigating the software buying process and move them further down the funnel toward purchase. Buyer persona research uncovered that an overriding issue is the extremely high stakes—both positive and negative—that ride on a dealership's choice of automotive software. Drilling down, dealers have concerns about the overall expense involved, specific capabilities, compatibility with operating systems, implementation time, training, data security and more. This led VinSolutions to create a custom ebook that addresses these specific issues.



Client Story



1

Let the customer decide the format:

An ebook format was chosen based on media consumption habits uncovered during persona research.

2

Address the real problem:

The roadmap-themed book addresses the key challenge of the ineffective purchase process by laying out a logical sequence of steps dealers should follow to select the appropriate software solution.

3

Put the research to work:

Persona insights were tied to helpful content that addresses pain points.

Get the most out of a live demo.

Don't sit back and relax like you're watching a movie on your couch. Make sure you make the vendor work for it:

- **Remember your core criteria.**
You spent hours researching and talking to your committee for a reason. Make sure you see the things you know you need, functionality-wise — and clearly see how they work.
- **Don't get distracted by bells and whistles.**
Many of the shiny add-ons and features can be very helpful, but don't make them the reason you choose certain software. Your core criteria should drive your decision.
- **Ask questions.**
This is the vendor's time to prove the value of their product. Ask them to explain exactly why they can or can't help you solve your most important issues.

Demo checklist

Don't let them off the hook until you have firm answers to the following:

- ✓ How easy is the setup and training process?
- ✓ Will this vendor support me after the sale?
- ✓ What are the contractual obligations?
- ✓ Is this a scalable solution that can grow with my business?
- ✓ Will the software integrate with my existing systems?
- ✓ How are system updates managed?

4



FORM A COMMITTEE



DEFINE YOUR DUTIES



SET YOUR BUDGET



EVALUATE YOUR OPTIONS



TAKE A TEST DRIVE



MAKE A DECISION

Support the full lifecycle:

The book provides value throughout the entire customer journey by answering questions, guiding actions, and helping customers build the business case to other stakeholders.

Creating a Content Action Plan

If you're ready to create a customer-centric content action plan, here are four key areas to focus on:

☐ Understand

your customer's path to purchase by mapping the buyer's journey. Leverage personas, voice of customer research and stakeholder interviews.

☐ Map Your Content

to identify strengths and gaps. You may discover that you have existing content that addresses some buyer needs, but that you have to create new content for others.

☐ Create Value

for your customers and prospects. Never lose sight of the fact that it's about them, not you. Ask yourself what the single most important thing you could help them with might be, then give it to them—even if it's not about your products or services specifically.

☐ Vary the Format

... not just the message. Understand what formats your customers and prospects value for what purpose. Match formats to different stages of the buyer's journey based on criteria such as the amount of detail needed and other relevant variables.

Buyer's Journey Worksheet

Instructions: For this exercise, let's map out the buyer's journey

1. Define your persona or database segment.
2. Think through the needs that are activating their journey.
3. Identify the questions being asked by your prospect at each stage.

Prospect: _____

Organizational needs
Problem or opportunity at organization / industry level

Functional needs
Operational requirements of the department or team

Individual needs
The persona's job-based challenges / opportunities

What questions is your prospect asking at each major stage of the journey? Be as specific and concrete as possible.

	Education	Solution	Selection

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This worksheet can help you get started mapping your content to the buyer's journey.

[DOWNLOAD](#)

Content Mapping Worksheet

Instructions: For this exercise, let's identify content needs on the buyer's journey. Identify the content you have or need to build in order to answer your prospect's questions in each stage of their journey.

	Education	Solution	Selection
Digital (We want digital)	We have: We need:	We have: We need:	We have: We need:
Interactive (We want interactive)	We have: We need:	We have: We need:	We have: We need:
Offline (We want offline)	We have: We need:	We have: We need:	We have: We need:
Sales Tools (We want sales tools)	We have: We need:	We have: We need:	We have: We need:

TheMxGroup.com | The Mx Group

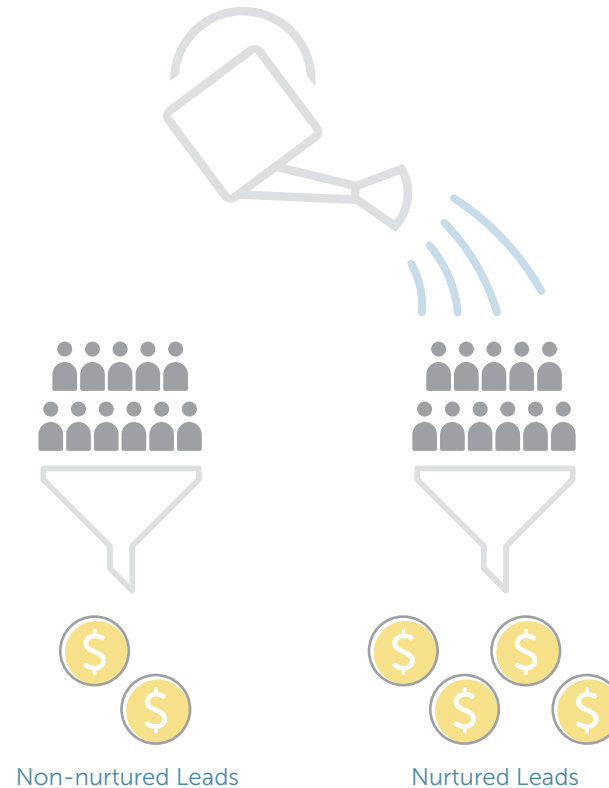
This worksheet can help you identify what content you have and what you need to build to answer prospects' questions in each stage of their buying journey.

[DOWNLOAD](#)

Customer-Centric Nurture Journeys: Prioritize, Adjust & Respond

The importance of applying what you have learned in the process of creating your buyer personas to create a customer-centric nurture strategy cannot be overstated. The goal of lead-nurturing is to really help customers along their buying journey, not just to convert leads to become “marketing qualified.” This means *you need to provide the right information and messages at the right time to help prospective buyers progress along their way.*

When you create a nurture approach that is more customer-centric vs. sales-centric, with persona-based insights in mind, your conversions from lead to marketing qualified lead, to sales accepted lead, to sales, will rise. And keep in mind that nurture is not just for buyers. You can and should be using personalized nurture strategies across the full customer lifecycle, to help with onboarding, retention, cross-selling and upselling.



Companies that excel
at lead-nurturing
generate **50%** more sales-
ready leads at a
33% lower cost.

Source: Marketo

Principles of Customer-Centric Nurture Strategies

1.

Get your setup right.

Make sure you have in place all the systems and processes you'll need to apply persona insights to your nurture tactics. That means mapping personas in your CRM to your marketing automation platform.

2.

Test and tailor.

Utilize the insights you've gained about the buyer's journey during your persona research, including choices about the pace, tone and delivery mechanisms you should use. Vary your offers and messages to align with different persona types.

3.

It's not all about email.

Review your personas with an eye toward spotting buyer types that respond more favorably to other types of content/outreach such as direct mail, interactive content, events or telemarketing.

4.

Not all your nurture content has to be new.

It's okay to use existing content where applicable. You can repurpose content with additional persona-based context, promoting key takeaways tuned to each persona's key priorities and pain points. For example, you can use one persona's top pain point as the subject line of an email, or call out a specific statistic or outcome that speaks directly to one of that persona's needs.

5.

Look at the pieces and the parts.

Combine persona insights with online behaviors (website interactions or the media sources for specific solutions, content downloads, etc.) to determine which journey streams are appropriate for each customer—product interest, needs, pain points, etc.

Real World Application: Customer-Centric Nurture Approach

Driving Leads Through Personalized Nurture

U.S. Cellular Corporation's (USCC) fleet management suite is an easy-to-use IoT solution that lets businesses connect their vehicles, routes, assets and drivers so they can see the big picture from wherever they happen to be. It can save them time and money and lead to higher customer satisfaction rates. USCC wanted to improve its nurture program to continue to feed the sales pipeline. There was an opportunity to leverage personalized content to build upon the overall structural setup of the existing program in the marketing automation platform.

The USCC marketing team devoted resources and time to creating an enhanced content marketing strategy that incorporated a thorough persona creation project. This in turn allowed them to create a nurture strategy tied to their fleet management buyer's specific challenges. The resulting nurture content has a persuasive, personal tone with messaging uncovered through buyer persona research. As a bonus, the persona research was utilized to create a valuable sales messaging guide, enabling their sales staff to turn messaging insights into sales.



Client Story

1

Address the full lifecycle:

Create content that purposely progresses to move the reader from the education phase to the solution phase of the buyer journey.



2

GPS location is just the beginning of what
vehicle tracking can show you.

Vehicle tracking is a powerful feature of fleet management that reveals what your vehicles and drivers are doing, and what they could be doing differently to help you save money.

LEARN MORE ABOUT VEHICLE TRACKING

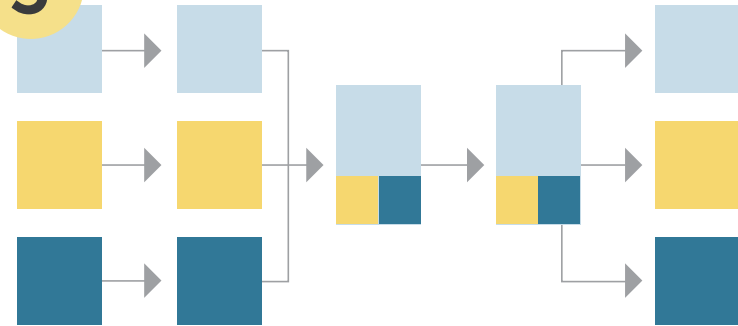
Guide the reader clearly:

Build in CTAs to move readers toward both lower-hurdle goals (such as content engagement) and higher-hurdle goals (meeting with Sales, scheduling a demo, etc.). Use more compelling action words in CTAs—"Download the white paper" rather than "White paper download," or "Create my account and get started" vs. "Create my account," for example.

Create customer-centric emails:

Build email nurture streams to include custom messaging and content offers based on persona challenges and preferences.

3



4

*Required field

* First Name

* Last Name

* E-mail

* Phone

* Company

* ZIP

☐ I am a current U.S. Cellular business customer.

☒ I would like to receive marketing communications from U.S. Cellular in the future.

HAVE A BUSINESS SOLUTIONS
EXPERT CALL ME

Learn more through forms:

Use a purposeful approach with forms to progressively capture more data on the prospect. For example, if a customer has previously filled out a form with their name and email, the next form they encounter when they access gated content does not ask for that information again. Instead, it asks for persona information to enter them into a targeted journey.

Creating a Nurture Action Plan

Here are the three key actions you need to take when creating a customer-centric nurture action plan:

☐ Prioritize

This is where we see many marketers feeling overwhelmed. Creating unique content and separate journeys for each individual persona can feel like an exponential increase in the amount and complexity of content you have to create and manage. But it doesn't have to be that complicated. Smart decisions about how to prioritize your approach can help you make the most of limited resources. Often, there will be different personas involved at different stages, especially if you are dealing with longer sales cycles and larger buying groups.

Think about which customers you need to focus on in each situation. Which persona is really the champion for a particular purchase decision? That's where you need to focus the bulk of your time and energy. Then think about key stages where you'll need to engage other personas. What are the right messages and tactics you need to apply in each of those cases? With the right strategy, data, and technology in place, you can scale a persona-based approach efficiently and cost-effectively.

☐ Adjust

This is about matching your timing, content, tone and format to persona insights. It's a mistake to start with a preconceived notion of the type of content or interaction you want to create, like a white paper, and assume you just need to tailor the message. Granted, sometimes that is the case, but it shouldn't be your default position. To truly leverage your customer insights and create a demand generation approach that puts the customer first, you must take your customers' content and interaction preferences into account, which you can learn through buyer persona research.

If your message and content are subject to change based on your target persona and that persona's stage in the customer journey, your delivery mechanisms may have to change, as well. Be careful not to limit your delivery options just to digital when dealing with this issue. *In some cases, human or non-digital interactions such as video, telemarketing or direct mail might present the best solution.*

☐ Respond

Track your prospects' online behaviors and use that information to take customer journeys to the next level—beyond persona-based and on to truly customer-centric. There is a wealth of valuable information that can be culled from website interaction metrics such as frequency, pages visited, content engagement and more.

Customer-Centric Website: Frictionless, Valuable & Conversational

Given that your website is so often the first point of contact a customer or prospect has with your business, it's self-evident that personas have a critical role to play here. Whether it's a rebuild of an existing site or a start-from-scratch endeavor, your customer-centric website must provide clear, compelling conversion paths tailored to each type of buyer. That means aligning buyers with content and experiences relevant to their needs and buying behaviors, and presenting persona-based calls to action.

A customer-centric website should also enhance your data collection activities. Personas should be assigned to contacts in your marketing automation platform based on your data model, and you should hydrate additional data over time to round out your picture of each persona. If you don't capture enough data at first, use progressive data capture to hydrate and append when persona attributes are known. An advanced website option worth considering is the use of real-time personalization to provide dynamic content and offers based on personas.

Using personas
makes websites

2–5X

more effective and easier
to use by targeted users.

Source: Hubspot

Principles of Customer-Centric Websites

1.

Make it frictionless.

A frictionless web experience is smooth and fast, making it quick and easy for customers to find what they want. It utilizes an intuitive user interface (UI) to deliver a consistent experience from page to page. Navigation should be intuitive to the user rather than focused on how you categorize your products or services internally. Likewise, it should favor language that is native to your customer over your own industry or company jargon.

Calls to action (CTAs) must deliver on their promises. When a user clicks a button or fills out a form, what happens next should be exactly what they expect; e.g., if content is promised in the CTA, it should begin downloading immediately. It's worth noting, too, that while forms have a role to play in gathering useful customer data, you might want to consider un-gating at least some of your content to create a more frictionless web experience.

2.

Make it valuable to your customers.

A customer-centric website answers their questions and responds to their needs across the full customer lifecycle. The content it delivers should replicate your users' experience in areas such as industry and applications to the greatest extent possible. Case studies and other content that clearly articulate your product's fit and impact within specific applications are great value-adds. They help customers understand that people like them buy the things you're selling to get the results they need.

Helpful product selectors, custom pricing tools, and distributor listings are other good value-adds. Immediacy can make a website even more valuable to your customers. Is there any way your site can help them try or buy your product right now? That's easy for software companies, which can offer demos, but what about complex industrial products? Options such as videos, 3D rendering and interactivity can bring many products to life. An e-commerce experience is another possibility.

3.

Make it conversational.

Communication is two-way, so don't think of your website simply as a channel for broadcasting messages to your customers. Start thinking about it as a platform to enable conversations with them. That doesn't mean you have to add a chatbot, but in some cases that might make sense. [*Research confirms that buyers are waiting longer to engage with Sales*](#), and they're using that time to do more and more research on their own.

Your website needs to be conversational so it can replace some of those conversations that are no longer taking place with Sales. But don't stop there. Think about how your website might deliver "sales at scale" by sharing content and experiences that go beyond just replicating sales conversations, and instead deliver so much value that customers actually look forward to talking with your company.

A white circular gauge with a thick border, showing 70% filled. The number 70% is displayed in the center in a large, bold, white font.

70%

of buyers prefer to have a clear understanding of their needs before talking with a sales rep.

A white circular gauge with a thick border, showing 44% filled. The number 44% is displayed in the center in a large, bold, white font.

44%

prefer to identify possible solutions before engaging with a sales rep.

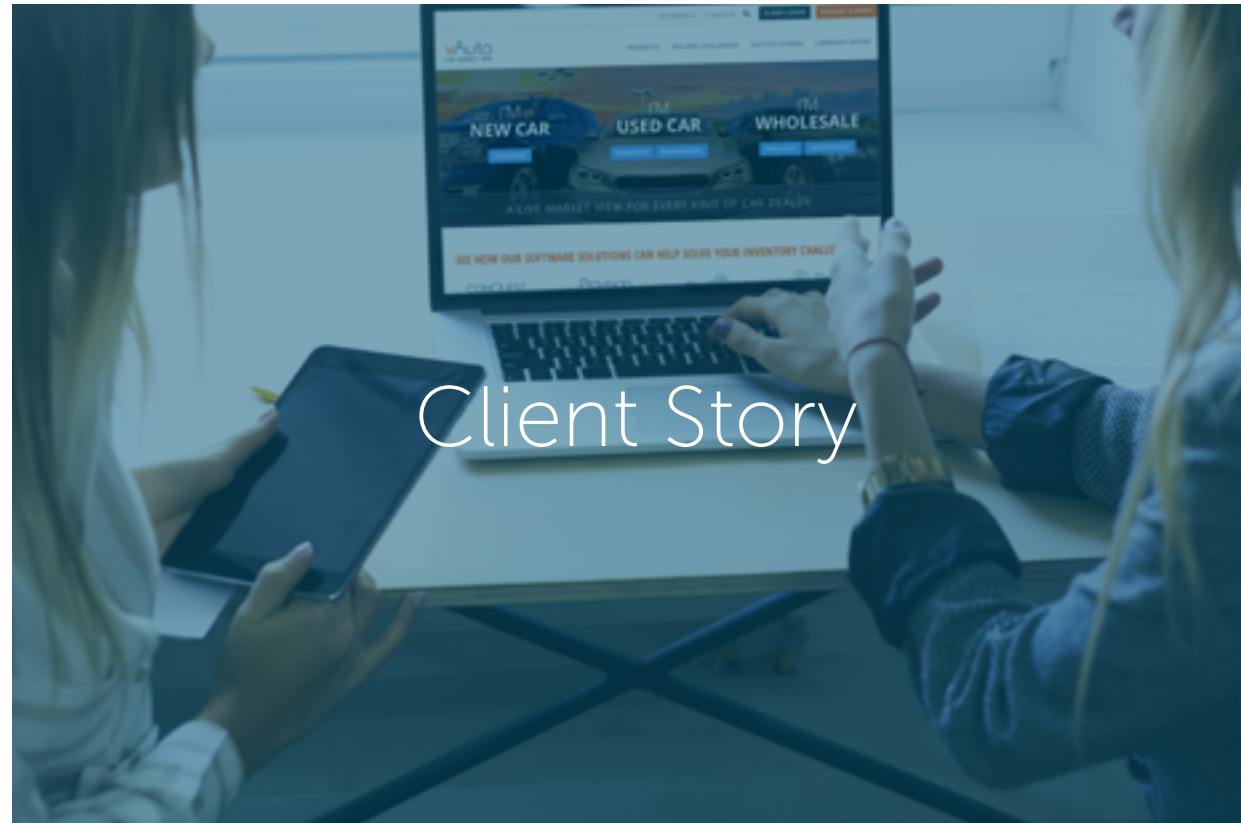
Source: CSO Insights 2018 Buyer Preferences Study

Real World Application: Customer-Centric Website

Using Personas to Revitalize Demo Requests

Like many software companies, vAuto's sales cycle relied heavily on demos of its software products for car dealers and wholesalers, and it had a strong record of closing sales after these interactions. Its website was the cornerstone for its demand gen strategy, which focused on getting prospects registered for demos. The demos drew a high volume of qualified traffic and consistently filled vAuto's sales pipeline, often resulting in conversions. But as the market matured and the company's customer base and product portfolio diversified, demo conversions started to slip.

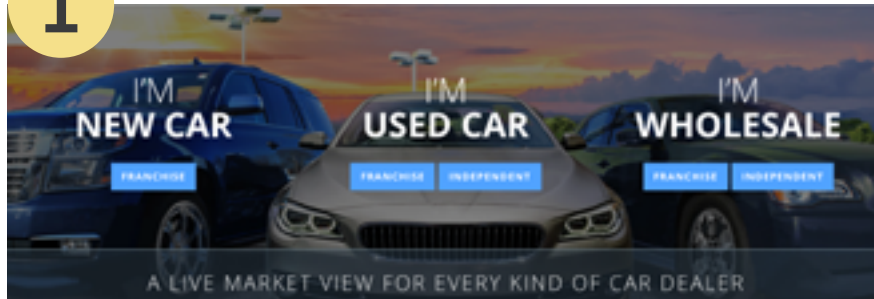
We worked with vAuto to create personas and develop compelling new entry paths for each customer type. The new website is easier to navigate and provides frictionless pathways to the experiences that are most meaningful to each persona. The home page has entry portals for each customer type that direct them to content, interactive tools, and the vAuto products most relevant to their needs. The site speaks directly to persona pain points, driving users to helpful content and interactive tools for each stage of the buyer's journey. An interactive calculator has engaged thousands of mid-funnel prospects and improved the volume and quality of leads for vAuto's wholesale vehicle sourcing software.



1

Create unique paths:

Create entry paths for each customer type that connects them with the most relevant tools and content in the most frictionless and user-friendly way possible.



2

FRANCHISE NEW > DEALER TRADES HAS THIS EVER HAPPENED TO YOU? >

You're working two deals
when the phone rings ...

It's the store a few towns over,
asking about one of your cars.



... so you quickly agree to
a trade.

It's a different color, with fewer

Tailor content:

Ensure you have content that speaks to major challenges for each persona at different stages of their buying journey.

3

Feel their pain:

Include messaging that addresses specific persona pain points.



4

Test & iterate:

Meet with your team regularly to test and optimize calls to action and landing pages to continuously update the site to maintain optimum performance.



Creating a Customer-Centric Action Plan

Creating a customer-centric website requires an action plan built around three points:

☐ Answer customer questions.

To take a customer-centric approach to your website, it's critical that you start with buyer insights. Go through the process of understanding which questions your customers are asking at each stage of their process.

With customers delaying conversations with Sales and doing more research on their own, your website has to share the information they're looking for, fulfill their research needs, and provide answers to all the questions they're asking. Our Customer-Centric Website Planning Worksheet can help you create web content and experiences that align with your customers' questions.

CUSTOMER-CENTRIC WEBSITE PLANNING

Persona Name: _____

EDUCATION PHASE	SOLUTION PHASE	SELECTION PHASE
Question: Content Need: <input type="checkbox"/> Needs Guiding Content <input type="checkbox"/> New Content Theme: Purpose: Format: <input type="checkbox"/> Blog <input type="checkbox"/> Book <input type="checkbox"/> Webinar <input type="checkbox"/> Video <input type="checkbox"/> Infographic <input type="checkbox"/> Case Study <input type="checkbox"/> Whitepaper <input type="checkbox"/> E-book <input type="checkbox"/> Podcast <input type="checkbox"/> Interactive Content <input type="checkbox"/> Other _____	Question: Content Need: <input type="checkbox"/> Needs Guiding Content <input type="checkbox"/> New Content Theme: Purpose: Format: <input type="checkbox"/> Blog <input type="checkbox"/> Book <input type="checkbox"/> Webinar <input type="checkbox"/> Video <input type="checkbox"/> Infographic <input type="checkbox"/> Case Study <input type="checkbox"/> Whitepaper <input type="checkbox"/> E-book <input type="checkbox"/> Podcast <input type="checkbox"/> Interactive Content <input type="checkbox"/> Other _____	Question: Content Need: <input type="checkbox"/> Needs Guiding Content <input type="checkbox"/> New Content Theme: Purpose: Format: <input type="checkbox"/> Blog <input type="checkbox"/> Book <input type="checkbox"/> Webinar <input type="checkbox"/> Video <input type="checkbox"/> Infographic <input type="checkbox"/> Case Study <input type="checkbox"/> Whitepaper <input type="checkbox"/> E-book <input type="checkbox"/> Podcast <input type="checkbox"/> Interactive Content <input type="checkbox"/> Other _____
Where does this live? <small>(Website, Content Management System, etc.)</small>	Where does this live? <small>(Website, Content Management System, etc.)</small>	Where does this live? <small>(Website, Content Management System, etc.)</small>
Describe personalization: <small>(Personalization rules, triggers, etc.)</small>	Describe personalization: <small>(Personalization rules, triggers, etc.)</small>	Describe personalization: <small>(Personalization rules, triggers, etc.)</small>

Customer-Centric Marketing | The Mx Group

☐ Measure the right stuff.

Adopting a customer-centric approach to your website requires a different perspective on measuring results.

Make sure you're learning the right information by knowing what to measure at each stage.



To learn which metrics to measure at each stage, download the full infographic.

DOWNLOAD

Source: SiriusDecisions

☐ Embrace continuous improvement and web conversion optimization.

Adopt an approach to web conversion optimization that leverages the persona insights you have invested so much time, energy and resources into gathering.

Continuously refine your tactics. Constantly monitor for content gaps, and address them when you find them. Make continuous improvement of your customer-centric website a top priority at all times.

Conclusion

Let's not pull any punches. Transforming an old-school B2B company into a truly customer-centric organization can be a daunting proposition. Why would anyone want to go to all that trouble?

The short answer is, because it works. Customer experience is the new battleground for B2B differentiation, and tackling a customer-centric marketing approach is a great first step. Furthermore, Marketing is the perfect owner to ensure that a customer-centric approach is being embraced company-wide.

The call-outs and figures sprinkled throughout this ebook bear statistical witness to the scope of improvements and revenue gains B2B organizations can expect to realize from becoming customer-centric. *Keep in mind, three-quarters or more of the employees already making at least some of the buying decisions at your customers' firms approach the purchasing process with much higher expectations than the previous generation had.* The same old, same old just isn't going to cut it with them.

By taking a customer-centric approach, you can stand out in a sea of sameness. Personas must be thoroughly integrated throughout your organization, and they must be updated regularly to keep pace with your changing customers and evolving technology. In fact, it's a good idea to make a plan and assign an owner for this important activity.

And, never lose sight of that fact that it's not just the messages that should be customer-centric. Make sure you understand each persona's buyer journey and take customer preferences into consideration when thinking about every activity across the full customer lifecycle, including delivery mechanism, pace, etc. Becoming customer-centric involves a wide-ranging adjustment to every aspect of your organization and how it operates.

Transforming into a customer-centric organization begins with committing to this approach and gaining organizational buy-in with team members across all divisions, including Marketing, Sales, Customer Success and Product, to move the process forward. Remember, there's no real end to this process; it's an evolution, and we urge you to stick with it!



The Mx Group

INTEGRATED B2B AGENCY

STRATEGY | CREATIVE | DIGITAL | DEMAND

The Mx Group is a B2B marketing agency that has been solving clients' complex marketing challenges for the last 30 years. We connect strategy, creative, demand generation and digital development to deliver impactful customer experiences. We are aligned around one goal: creating solutions for clients that propel businesses and buyers forward.

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