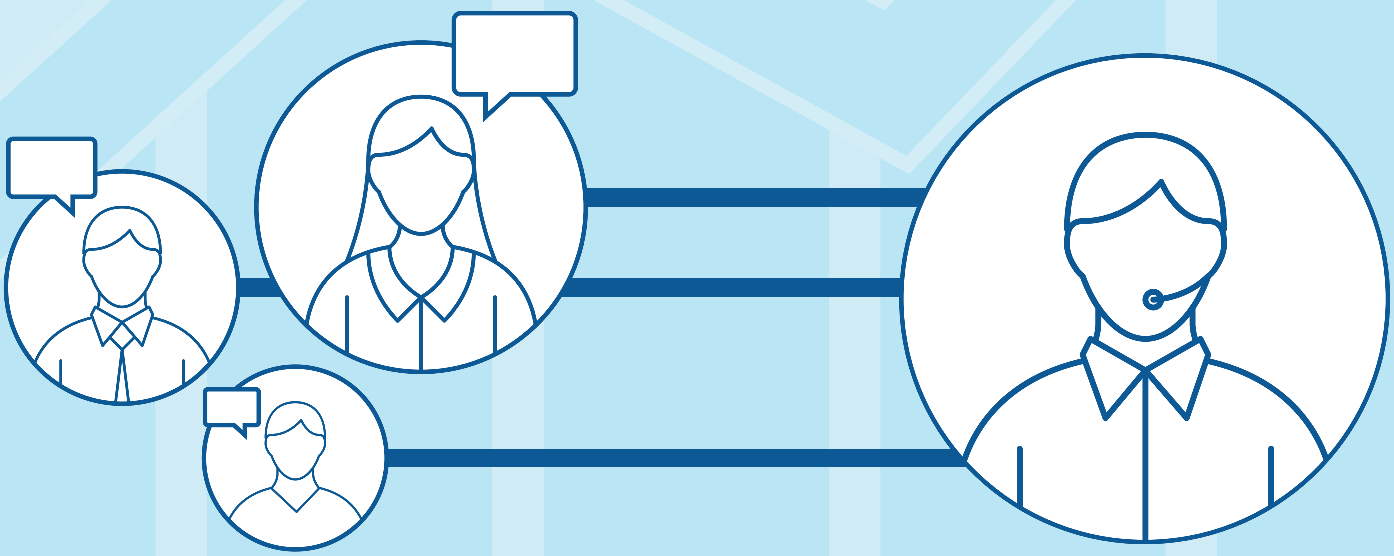
How B2B Companies Can Use Customer Feedback to Get Ahead



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Introduction

Okay, we all know abstractly that understanding customer behavior is important for B2B companies, but what about the nitty-gritty details?

What exactly can you do to grow your audience, delight customers, and boost sales?

To uncover what truly works, we asked some of the B2B companies we admire to share specific examples of how they've used tactics at every stage of the sales funnel to succeed.

The businesses we surveyed market to a range of industries, and are of varying sizes, but all have one thing in common: They've found effective ways to use customer feedback, analytics, and user experience testing to boost their bottom lines.

So, what did we discover? All sorts of things: some expected, and some a surprise even to us. This eBook covers key learnings about and best practices for the three stages of the B2B sales funnel—audience building, lead nurturing and conversion, and post-conversion follow-up.

Stage one: audience building

The first stage of the B2B sales funnel is audience building. Preparing prospective customers to engage with your brand and product, strong audience building is integral for kick-starting your leads toward conversion. If you strategize well early on, you can maximize customer experience and grow a strong B2B funnel in the long run.

Now, let's dive in. How exactly can you better build awareness and attract leads?

Five key tactics for building awareness

When it comes to the first stage of the funnel, many of the B2B companies we talked to said the same thing: This point in the process often involves tactics like content creation that initially seem difficult to test, yet there are actually a number of powerful optimization opportunities available.

In particular, our respondents highlighted these five important learnings from their experiences using UX, analytics, and CRO to improve their audience building efforts:

1. The $1 million fix: make sure customers are getting the right message

THE PROBLEM

All of your awareness-building efforts are an exercise in futility if visitors see your offerings and don't get the right brand message.

That point may seem obvious, yet too often businesses rush off and attempt complex audience building tactics without first getting the fundamentals right. Before doing anything else, make sure that your core value proposition is clear.

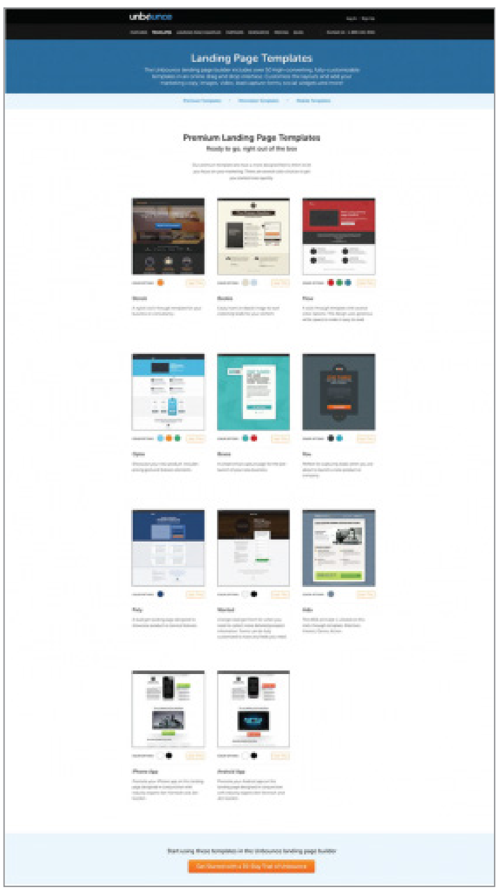
Easy to say, of course, but how do you actually test your messaging?

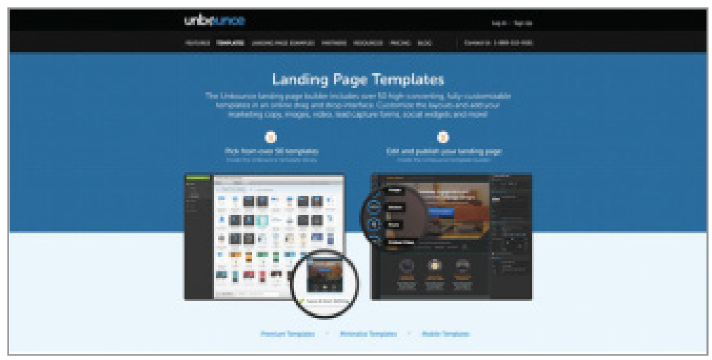
THE SOLUTION

Unbounce, a company that specializes in high-converting landing pages, thought they'd created a great offering which showcased a few templates built into their product. Just to make sure, once this demo webpage was live, they added a survey widget to see what people thought of the templates, and the results led to a major revelation.

Almost all the customer feedback was about issues that were irrelevant to the content (prices for individual templates, how to download, etc.); it turns out **people were completely missing the fundamental fact that the offerings shown were included in the core Unbounce product.**

The company quickly reworked the page to clearly explain where the templates lived and how could they could be used (you can see the before and after below).





The first version (left) showed a lot of templates, but didn't explain that they were a part of the product. The second version (right) showed customers exactly where they could find their templates.

The impact was huge: conversion rates jumped by 43%, and the company saw an estimated $1 million boost in annual revenue. All this came from doing the most basic of things: asking consumers directly what message they were getting from a key page.

2. Swim, don't drown: use the consumer insights you already have

THE PROBLEM

We sometimes forget that customer insights are everywhere. Most businesses have access to a wealth of information—website visitor traffic numbers, email open rates, ad click-through rates, etc.—that are all essentially customer feedback data points.

Often the problem isn't a lack of customer insights, it's too many. How do you make sense of all of it?

THE SOLUTION

There's an old folk saying that sharks will die if they don't keep moving. While it isn't really true, the idea is a useful one when it comes to data.

BrightEdge, an SEO and content marketing management platform, has found that the best way to build a large, high-quality B2B audience is to **regularly collect information and then immediately use each set of fresh insights.**

The company constantly monitors its SEO rankings, experiments with 5-10 ads at a time, runs A/B tests to determine navigation flow, and tracks a host of metrics. The key, though, is not simply that all this data is collected, but that it is used.

> *It's not enough to just collect data. You have to use what you learn.*

Based on new consumer insights, BrightEdge adjusts its tactics every week and tracks the impact of these changes via dashboards in its own platform. The undertaking is continual, and the results are measurable—meaning that company makes the most of its valuable data rather than drowning in it.

3. Art and science: follow your instincts with content, then verify

THE PROBLEM

Some inbound content tactics—such as a constantly updating company blog—are hard to test thoroughly all the time. Yes, you can do periodic usability studies and solicit feedback, but trying to think about customer behavior while meeting constant publishing deadlines can feel overwhelming.

What can you do?

THE SOLUTION

An important thing to remember is that it's okay to mix art and science when it comes to content creation. In other words, quality pieces are the result of both unmeasurable **creativity and a solid, data-based understanding** of your audience.

KISSmetrics, a web analytics solution, does its best to combine creativity and knowledge when it comes to its company blog, which drives most of its web traffic. The company produces a high volume of pieces on a consistent schedule, with each one going through multiple revisions internally to get polished by employees who have both a good understanding of the topics and the audience.

> *Don't be afraid to combine creativity with data.*

From there, KISSmetrics monitors traffic and subjective feedback to see which posts resonate and where customers have questions. The following posts take these learnings into account and the process starts again: a cycle of creativity built on a foundation of internal insights (revisions) and external learnings (traffic metrics, comments, etc.).

4. The enemy of my enemy: target your competition, then test

THE PROBLEM

Ever wish there was an already-existing audience out there that was interested in your product/service category and open to engaging? There is: the people who are looking at your competitors.

This audience is especially valuable for businesses with similar products, or that are competing in a category with a few major established players. So, how do you reach it?

THE SOLUTION

Often, the best way to reach your competitors' audience is to directly go after it.

Formstack, an online form building application, did exactly this by creating a set of landing pages that **compare their tool against certain competitors.** These pages allow the company to address prospect questions and highlight why they are the best solution for certain users (you can see an example below).

Formstack's comparison page directly spells out the advantages to its competitors' audiences.

However, the company doesn't stop there. It continually A/B tests these comparison pages to determine which content elements are most effective for converting customers. This simple and effective tactic—creating comparison pages and then adapting them based on customer feedback—brings in a steady stream of high-quality, engaged leads.

5. Don't be shy: ask your audience what they want, over and over

THE PROBLEM

So you've done lots of things to better understand your customers—you've checked your messaging, started regularly learning from your metrics, tested your content by creating/iterating, even learned by targeting your competitors' audiences—yet you've still got plenty of questions. What should you do?

THE SOLUTION

The one-word solution to this problem is remarkably simple: Ask.

Often in the first stage of the sales funnel (building awareness and engaging visitors), B2B companies struggle to understand the wants and needs of their audience.

Moz, the inbound marketing and SEO platform, shows that it doesn't have to be this way. The company is constantly looking for ways to **directly ask what people want and what they're not getting.** Some of their tactics include:

- The company created this survey to help improve its blog. Visitors are asked to describe their reading habits, what topics they enjoy, and what they'd like to see more/less of.

- This page allows blog readers to submit their own answers to the prompt, "I'd like to read a blog post about..."
- This Q&A section lets the community ask for expert advice and also results in an annual industry survey, which provides a picture of the market.

Jump in and get started

Ultimately, none of these efforts are all that complicated, but they are highly effective. That, of course, is the whole point. When it comes to building a valuable B2B audience using customer insights, there are a host of powerful, simple tactics available... you just have to use them.

Ask your audience questions, use the data you already have, and test your content instincts—you may be surprised at what you learn!

Now that we've examined how some B2B companies we admire use customer insights to build an audience, we're going to look at how they also use customer feedback, analytics, and user experience testing to increase conversions.

Stage two: lead nurturing and conversion

Getting people to visit your digital offerings is hugely important, but it's not necessarily the key to increasing revenue. To truly boost the bottom line, you must find ways to entice those potential customers to do something—they need to click, to sign up, to buy, to convert.

So, what can you do to encourage visitors to take action?

Five key tactics for boosting conversions

Some of the companies we talked to told us they use complex, in-depth methods to wring every last click out of their audiences. Others said they take a broader approach, relying on qualitative feedback and/or overarching philosophies to guide their efforts. The common thread is that all have found ways to incorporate customer insights into their conversion strategies.

Here are five of those very different UX, analytics, and CRO tactics companies are using to encourage more action-taking:

1. The beauty of benchmarks: test with clear metrics and goals in mind

THE PROBLEM

Want know if your site content could be converting better? A/B test your pages.

This may seem like the obvious approach, but getting it right isn't so simple. Just testing blindly won't do much for your conversions—you'll end up with a bunch of numbers, but no real context for what they mean. What you need are test results that help you understand what's happening. How can you get those?

THE SOLUTION

Formstack, whom we saw directly going after their competitors' audience above, also A/B tests with tenacity, constantly looking at various elements—from headline copy and images to entire landing pages—to see what can convert better.

The key is that this testing takes place with clear metrics in mind. The company has established its own benchmark numbers for landing pages, so it can easily see how successful new elements are (or are not).

Plus, there is a single conversion goal: A higher traffic-to-trial rate.

This combination of a **specific desired outcome** (more trials) and a **way of judging improvements** (performance above known benchmarks) is the foundation for the company's conversion success. Without those elements the user testing would be data, not insights.

Formstack A/B tests with purpose, not guesswork.

2. Spice things up: make big conversion gains with experimentation

THE PROBLEM

Okay, you've been making lots of little tweaks to your offerings, resulting in small conversion gains, but now you want to experiment with some broader changes. How can you easily test new messaging to clearly see what resonates with your audience?

THE SOLUTION

As we mentioned earlier, BrightEdge, an SEO and content marketing management platform, runs a fairly large set of 5-10 digital ads at a time. This constant experimentation gives the company clear insights into the effectiveness of new language and offers.

This secret to success, again, is monitoring metrics. Each ad is tracked against the median group performance, and is eliminated if it falls below the base level. In essence, customer feedback is coming via clicks, and the messaging gets stronger and stronger over time as the weakest performers are eliminated.

This strategy, using ad performance to judge how messaging resonates, is effective because it gives BrightEdge **a low-pressure environment to experiment in.** If something sticks, it carries over into other ads, the website, social media messaging, and more. If it flops, that's okay, since the time and cost investment was minimal.

A key thing to note is that BrightEdge doesn't simply test the ads. It also tracks every point of entry, monitors navigation flow, and runs A/B tests to optimize pages for higher engagement. The reason for all this is that the conversion process is a set of steps, not a single element.

3. Mind your "p"s: personalize and be persistent

THE PROBLEM

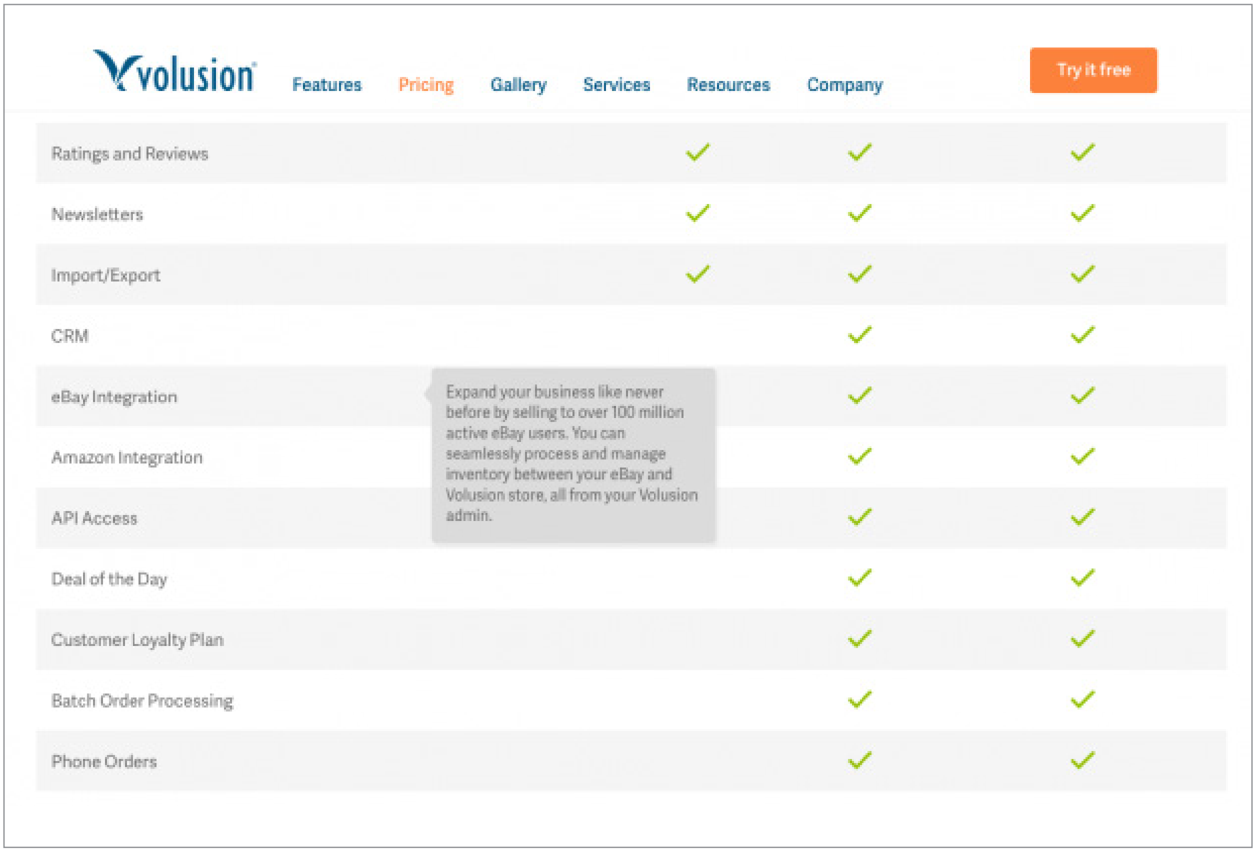
You're comfortable with your broad messaging but feel that you could be better connecting with specific visitors. How can you move past a one-size-fits-all approach and make conversion gains with audience segments?

THE SOLUTION

Volusion, an e-commerce platform, starts by getting the core messaging right. Their proposition is simple ("try our product free for two weeks with no risk"), and the calls to action are consistent.

However, on top of this common experience are layered elements targeted to specific groups. The company serves dynamic site content based on which pages visitors engage with and then consistently tests this messaging. Next comes the persistence. If a potential customer fails to convert, they are retargeted on an ad network, which allows for further messaging experimentation.

Ultimately, Volusion's conversion funnel relies both an effective shared experience and tailored elements for success. Plus, of course, plenty of follow-up.



Volusion's dynamic site content creates a personalized experience for customers.

4. Sweet emotion: understand why people engage

THE PROBLEM

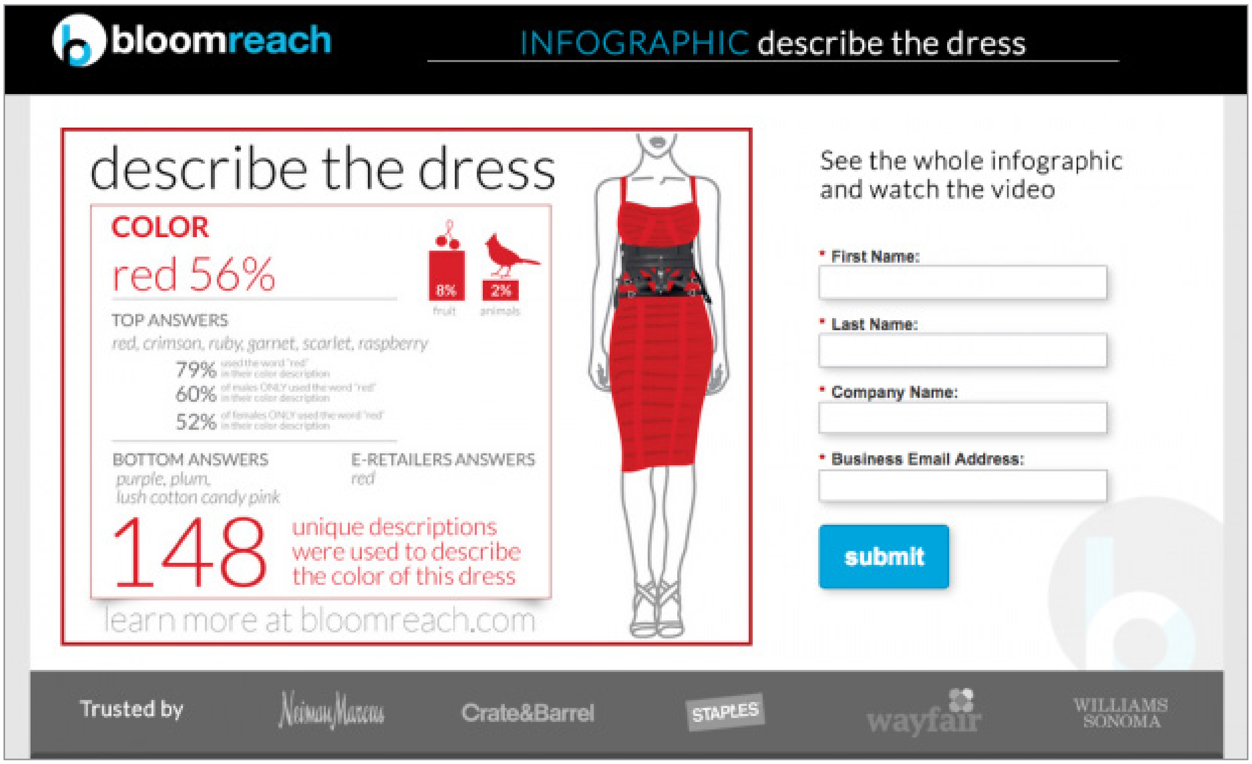
You've seen some trends with your conversions but aren't sure what to make of it all; certain content types are driving action and certain types are not. How can you figure out what's going on and capitalize on what's working?

THE SOLUTION

Often, a steady stream of consumer insights will drive small improvements. However, sometimes a single important learning is enough to shift direction entirely. That's what happened to BloomReach, a content discovery platform.

By monitoring what was driving engagement and what was not, the company came to a major realization: Its B2B audience was sick of long text content.

This led to shift in content creation, away from whitepapers and toward quizzes, ROI calculators, interactive content timelines, infographics, and more.



BloomReach learned that their audience wanted more short, graphic content, and fewer whitepapers.

Basically, a single insight (our audience wants to have some fun) provided a unifying idea for developing sales funnel elements.

Of course, that particular idea isn't applicable to all companies—some audiences want to be informed rather than entertained, and some prefer text to visual content. What's important is that you're constantly thinking about your potential customers' motivations, and then testing those theories.
If you're not sure what those motivations are, you can always simply ask via a survey or a user test. You may be surprised at what your audience says!

5. Use the force: gather feedback when you can

THE PROBLEM

Sometimes you just don't have the time to dig through your analytics to find conversion issues. Or perhaps you know something is wrong, but you don't have the bandwidth or the budget to do any more testing at the moment. What can you do?

THE SOLUTION

Two separate companies we talked to had the same suggestion: If you're not sure why people are reacting to your messaging in certain ways, use existing interactions to find out the answer.

Optimizely, an optimization platform, does this at in-person events and during webinars. Another B2B company we spoke with said they simply ask their sales force to gather feedback when talking with potential clients.

The process doesn't have to be formal; it can be a few casual questions at the end of an already-scheduled interaction. **The key is that you take the time to do it.**

As for what to ask, the best approach is usually to be direct. Some generic options are:

- How did you first learn about us, and what inspired you to come to our event/reach out/join our mailing list/etc.?
- What did you think of our offer? Would something else have been more enticing?
- What would stop you from purchasing our product/signing up for the free trial/etc.?
- What could we be doing better?

Don’t wait

The five lead nurturing and conversion methods described above are, of course, not mutually exclusive. Big conversion gains tend to come from a mix of different tactics, including monitoring, experimentation, and persistence.

What’s important is to not hold off because you don’t think you have the time or budget. You can make significant strides in engagement by simply asking a few questions and running a few tests. Don’t wait.

Now that we’ve talked about audience building and lead nurturing and conversion stages, it’s time to address optimizing your offerings post-conversion!

Stage three: post-conversion

Sometimes we marketers spend so much time focused on getting potential customers to convert that we neglect to focus on what happens next.

Of course, conversions are wonderful. Everyone wants their audience to take action—that's the point of most B2B marketing efforts!—but what's important to remember is that these initial action moments are not where the sales cycle ends.

What happens post-conversion matters deeply for three reasons:

1. Many initial actions, such as signing-up for a free trial or taking a product demo, still need to be followed by an actual sale. **Just because the customer is in the sales team's hands doesn't mean the marketer's job is done!**
2. Continued customer satisfaction is essential for companies that depend on a recurring payment/purchase model.
3. Customers who buy one product from a business are very likely to buy another.

In other words, focusing on engagement after a first action can lead to many valuable future actions. And by improving customer experience, you can positively impact the final phase, post-conversion engagement.

Three key tactics for improving retention and engagement

In general, the marketers we talked to said they don't do anything too different to engage customers after a conversion. The core tactics—asking for feedback, monitoring metrics, testing offerings—tend to be the same as in other parts of the sales cycle. The key is that the companies who succeed say they invest the same amount of time and effort in engaging post-conversion as they do in pre-conversion.

So, what specific tactics do these top B2B companies recommend employing post-conversion? Here are three lessons respondents highlighted for us:

1. Tailor swiftly: immediately customize your follow-up offerings to the audience

For Crazy Egg, a heat map tool provider, getting visitors to sign up for a 30- or 90-day free trial is viewed as merely the beginning of the engagement process.

Crazy Egg puts every potential customer on an **email drip sequence** as soon as they choose a plan, with each engagement flow further customized based on the actions taken (i.e., has this person created a snapshot of their site, viewed the results, etc.). They also send contextual emails to individuals showcasing the value of running particular reports.

The point of these emails isn't to engage for the sake of engaging; it's to clearly showcase the value of the product and lead the person down a structured path from initial trial sign-up to sale. Given that goal, the metrics on these email efforts—open rates, click-through rates, etc.—are closely watched so the company can adjust exactly as needed.

Crazy Egg also makes extensive use of **surveys** to find out what potential customers like/dislike about its product and its marketing efforts. Again, the key is that these queries are targeted to specific segments. For instance, in a blog post earlier this year, the company gave this example of potential follow-up questions for different types of customers:

E-Commerce	What prevented you from completing your purchase?
SaaS	Why did you not sign up after your trial?
Media	What topics should we write about next?

Follow-up questions can uncover why customers converted (or didn't), what you can do to help them succeed, and what they are interested in learning about.

2. The s-team: enable your customers' success

BrightEdge, SEO and content marketing platform, has a single core value: customer success. In practical terms, this means it makes every effort to ensure that its clients are both pleased with its product after purchase and are using it to full effect.

To achieve a high level of satisfaction, the company provides **set-up support and ongoing technical/consulting resources**, as well as an **extensive training program** that includes a certification program. All of these efforts are showcased using a range of content, including case studies, videos, customer stories, and research papers.

A training program helps customers become experts.

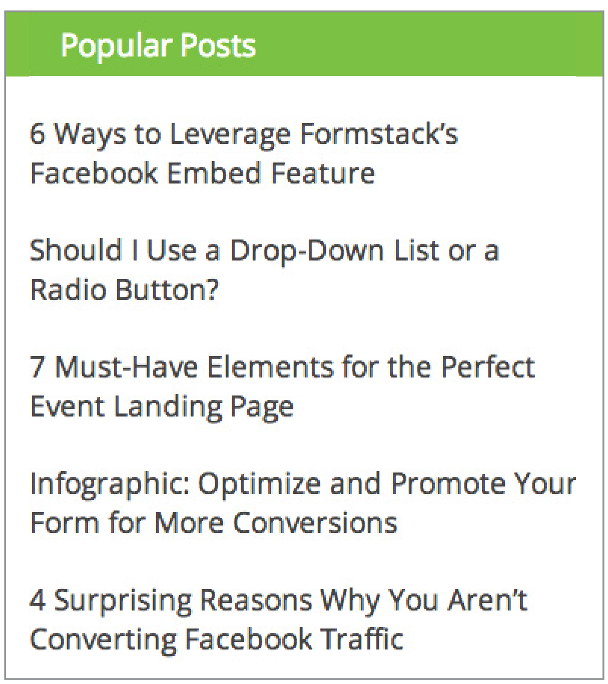
The key to success is that post-conversion engagement is structured and optimized. **A dedicated Customer Success Team** is responsible for the efforts and undertakes regular reviews of all assets/processes to see what's working (and what isn't). The offerings are then continually tweaked and augmented so that customers get the follow-up materials they truly need.

3. It's simple: be useful

Formstack, aforementioned online form-building application, deeply appreciates the value of post-conversion engagement. As the company put it to us:

"Customers who engage with us tend to have a longer relationship with Formstack. If we can get clients involved with our marketing efforts early in their lifetime, they are more likely to stick with us longer and be advocates for our brand."

So how do you build this sort of highly-valuable brand relationship with customers post-conversion? In essence, it comes down to this: Be useful.
To be truly useful to its customers, Formstack starts by sending bi-weekly emails highlighting hot posts on its blog. The key is that these topics tend to be specific to the product, covering challenges many users are grappling with.



The blog can be a key tool for helping users learn how to use the product effectively.

The company also hosts quarterly webinars on various digital marketing topics, such as landing page optimization and content marketing through forms. Again, the goal is to provide truly fresh, useful, content.

Insights on what's working with these efforts come in part from qualitative metrics—email click-through rates, blog post views, etc.—-and in part from qualitative feedback via the webinars and other events. The emails and webinars are then adjusted to better meet the needs of customers.

Of course, "be useful" isn't a groundbreaking idea—but that's the point. The best B2B post-conversion customer experience tactics (as well as audience building and action-encouraging tactics) work not because they are complicated, but because they are simple.

Conclusion

There is no one size fits all answer to creating the perfect B2B sales funnel, but through learning from other companies' B2B best practices and iterating to find what works for your own, you can be well on your way to reaping the benefits of an optimized customer experience.

Most marketers already have access to the core tools they need for success—metrics suites, testing platforms, survey tools—the vitally important thing is to use them regularly, and effectively. Through testing and understanding customer behavior, and by continually asking for customer feedback, you can prevent stale user experiences, boost conversions, grow customers' relationship with your brand, and directly increase your company's bottom line.

Bonus: Interested in more ways to optimize your B2B funnel? Check out 5 B2B Website Experiences You Will Wish You Were User Testing!

About UserTesting

UserTesting is the fastest and most advanced user experience research platform on the market. The company gives marketers, product managers, and UX designers on-demand access to people in their target audience who deliver audio, video, and written feedback on websites, mobile apps, prototypes, and even physical products and locations.

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