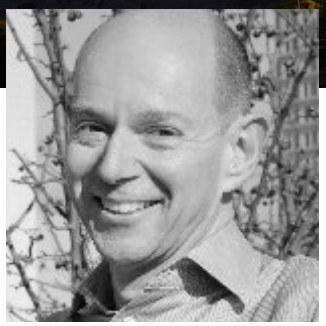
№ 01

The Marketing Practice

Tackling the tough questions in B2B

There are some conundrums in business-to-business marketing that never seem to be solved. We asked our team to dig into the problems one by one and share advice on how to overcome them.



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Why hasn't B2B harnessed AI's full potential?

Artificial intelligence is a game-changer, right? It makes processes quicker, less resource-intensive, more accurate – and uses what it learns to improve over time. Our B2C marketing cousins are using it, but we've not seen successful, widespread application in B2B. (If you've seen evidence to the contrary, I'd love to hear about it.)

Here's my take on why B2B finds it hard to fully exploit AI. One issue is data. In B2C, target markets can be vast, with hundreds of thousands of data points. B2B firms don't have that kind of mass market; we're often targeting high-value offerings at a handful of prospects. It's hard to aggregate data for analysis if you don't have much of it. Another stumbling block is scepticism. If you're a salesperson or a marketer who's used to relying on your own skill to identify prospects and design campaigns, you might be suspicious of handing some responsibility to an algorithm.

If you can scramble over those data and scepticism hurdles, and integrate the power of AI into your campaigns, the rewards will justify the effort.

Don't run before you can walk

My first piece of advice, if you're dipping a toe in the B2B-AI water, is start small. A pilot lets you test effectiveness and iron out any kinks without disrupting your existing marketing campaigns. We ran a pilot with Citrix to test the use of their Edison AI system within an integrated

outreach campaign. Target accounts were fed into the system, which used intent data and propensity modelling to prioritise them against individual sales plays. We designed assets to support each sales play and trained the outreach callers to use the Edison information to prioritise their calling and improve the relevance of their messaging. We chose a single proposition and target audience, and ran the programme alongside a control group. The pilot delivered outstanding results and gave us the evidence we needed to roll the process out more broadly. It also showed us what needed fine-tuning.

Three tips for outbound campaigns with AI

I've got three recommendations for any B2B marketer wanting to harness AI in an integrated outreach campaign. The first is to consider the human factor when designing your process. We realised new sales plays were being added too often in our pilot. The callers were getting confused because the priority accounts were changing too often.

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The second is to remember the campaign is a balancing act between technology and expertise. A powerful targeting tool is worthless if you don't have the right marketing and sales people to progress the opportunities which are unearthed. We used outbound callers who were trained on this specific campaign and had experience managing complex conversations with senior stakeholders.

The final recommendation is, even when you're running the pilot, make sure the AI system can be integrated with your other campaigning tools. If you're not ring-fencing the accounts, your team will need to be able to see which accounts are being targeted to avoid campaign crossover. And it's vital that the leads are recorded in your CRM to demonstrate marketing attribution to pipeline.

Implementing AI effectively takes reorganisation of structures and processes, but those who get it right will, I believe, enjoy a competitive advantage in the world of B2B.

Find out how Citrix converted 27% of MQLs to closed deals and halved their sales cycle

View the asset