

# CRIF / Inventia Digital Remote Selling

---

**Nancy Maluso**  
**VP Principal Analyst**

29 September 2021 at 10AM Eastern US

BOLD  
AT  
WORK



Nancy Maluso

VP & Principal Analyst

Forrester B2B Sales  
Executive Services

## Agenda:

- Forrester Overview of Market Trends
- Best Practices in Digital Selling

4

**key trends  
impacting  
B2B2C sales**



# 1

Socio-economic shifts mean a more diverse, digital first, and values-driven B2B2C buyer community.



# 1

## Generational shift

Digital-first

Diverse

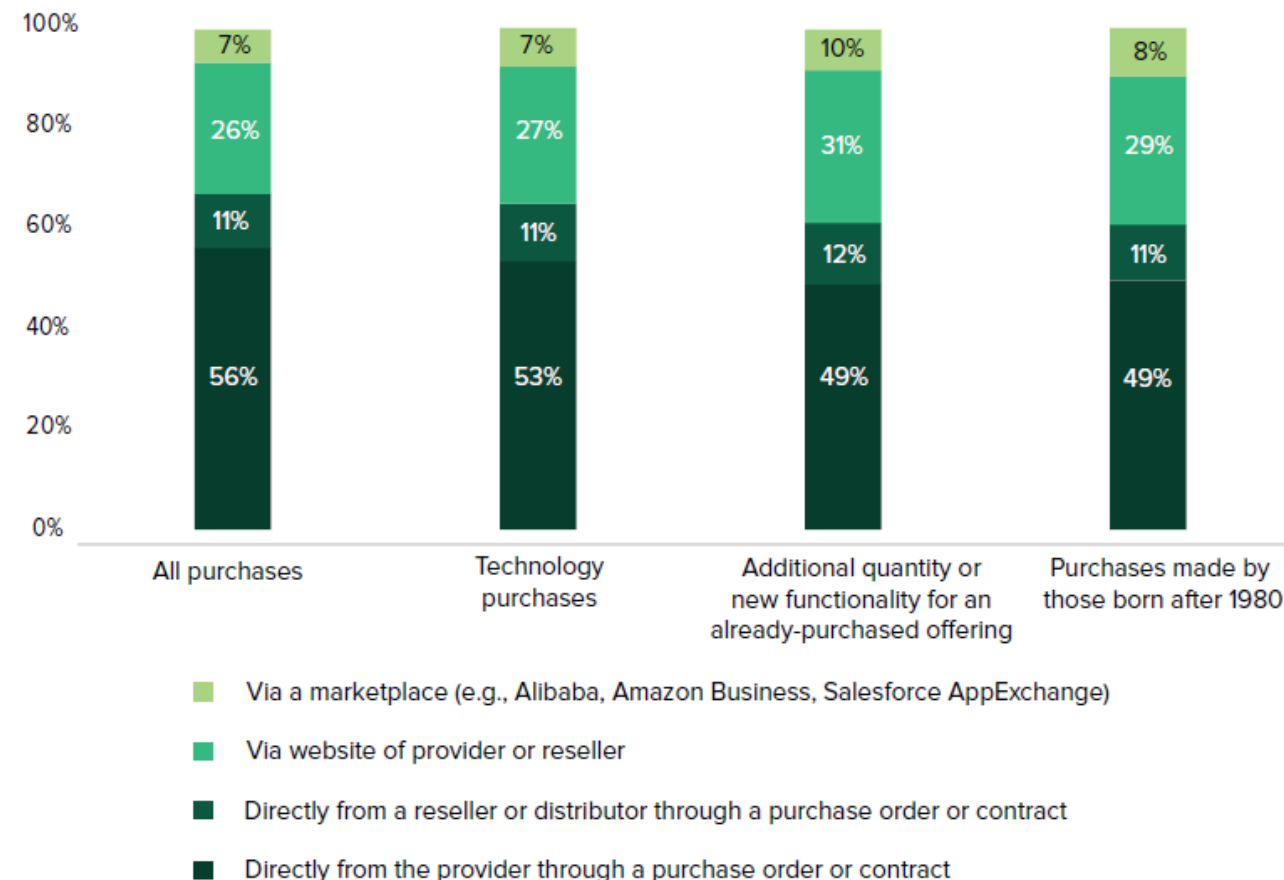
Purpose-driven

Try before Buy

Increase demand for **self-service** and eCommerce (rep-assisted eCommerce now 42% of B2B Purchase)

**Value peers** more than providers

Purchase Channel Factors



Note: Values may not add up to 100% due to rounding



# 2

---

Work from anywhere for employees, customers, and suppliers.

According to Future Forum Research survey of 4,700 knowledge workers, only 12% want to return to full-time office work



# 3

---

## Shift in business drivers and selection criteria

### Top three drivers of B2B purchases:

- No. 1** Improve efficiency and effectiveness
- No. 2** Grow revenue
- No. 3** Improve customer experience

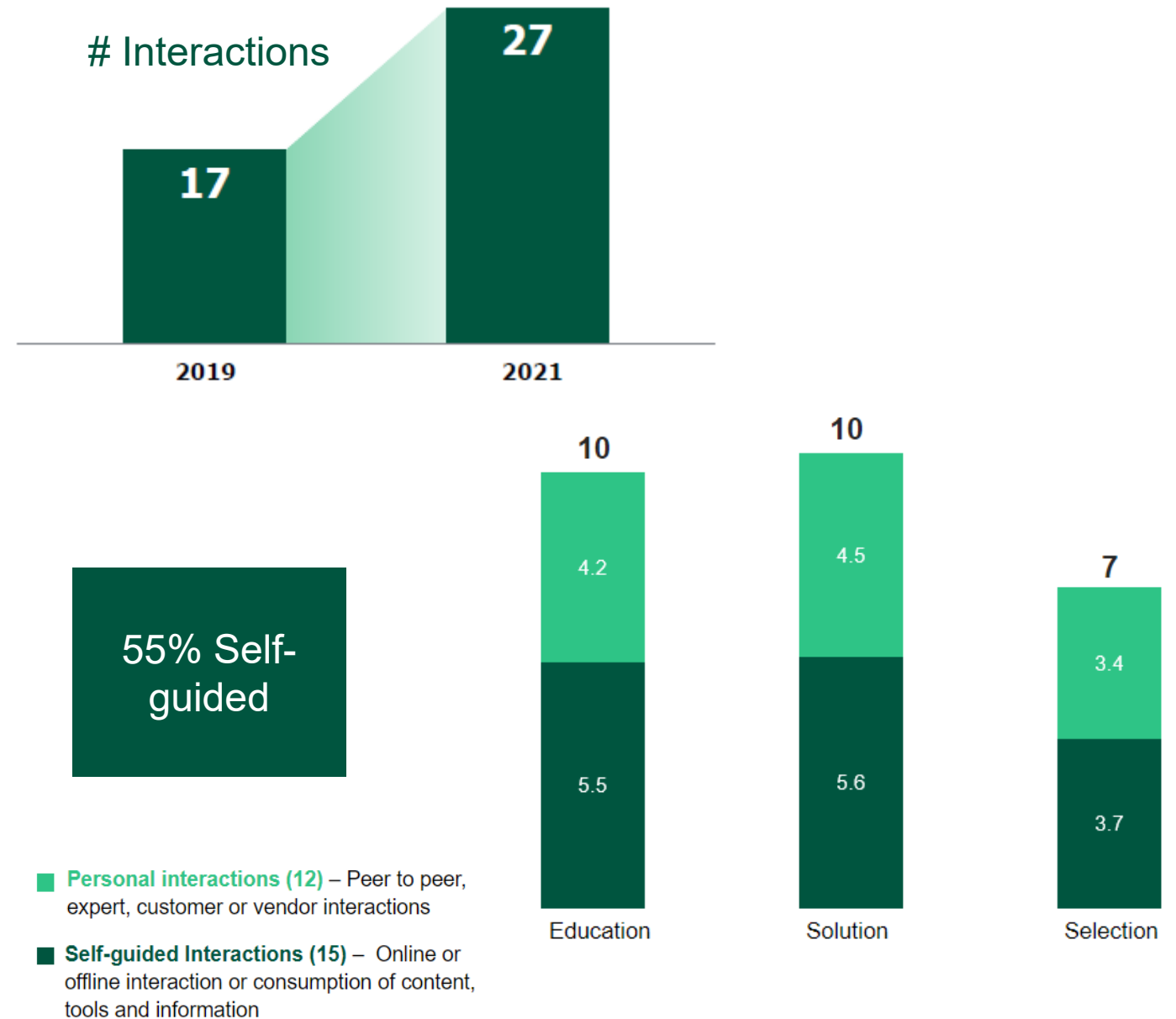
---

### Top three criteria for selecting vendor:

- No. 1** Providers customization of the offer to meet our specific needs
- No. 2** Competence the provider demonstrated through purchase process
- No. 3** Previous experience with the provider

# 4

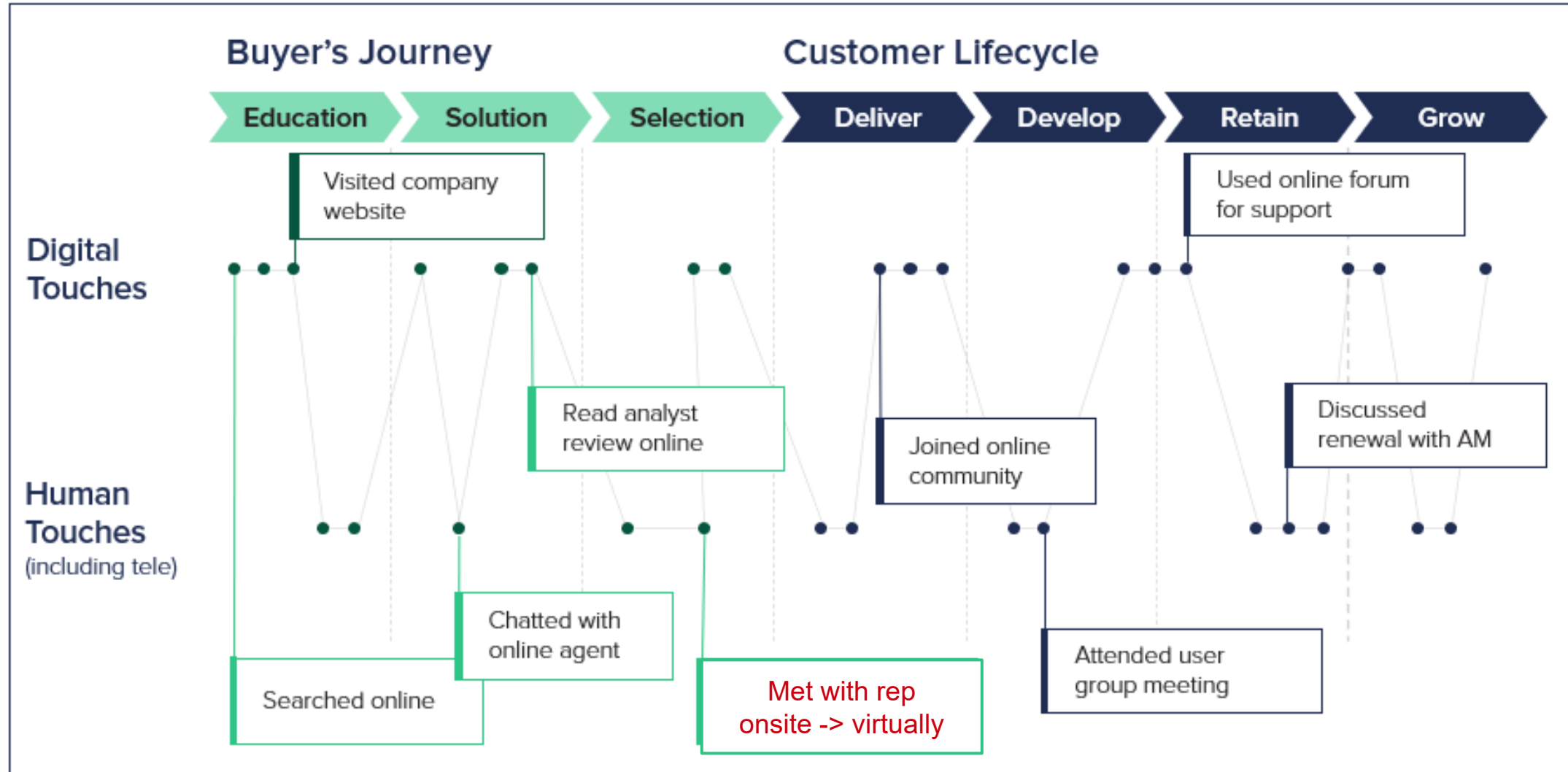
The total number of interactions during the purchase process has increased dramatically





# Buyer / Customer Journeys

Forrester Buyer Insights Studies reveal that the B2B buyers journey contains an average of 27 touches of which 16 are self-guided.



# Digital Selling

Pertaining to, noting or making use of computers and computerized technologies like the internet.

---

All self-guided and a majority of personal (human) interactions are digital except those that are face to face

Virtual interactions are the specific human interactions that use digital technologies to create real-time but geographically distanced connections: such as facetime; phone calls; web conferences; etc.

Customer-facing resources must collectively:

Build Influence and Credibility

Create a Seamless Conversation

Engage Interactively

Build and Maintain Trusted Relationship

# Effective Digital/ Virtual Engagement

---

## PREPARE

### **Prep your space:**

- Turn off distractions (notifications, ringers, glare from the window, background noise)
- Check your background, and your image

### **Prepare for engagement:**

- Review past notes and engagement; look at digital footprint
- Know the client: their job, company and industry, relevant personal items
- Adjust agendas to be brief and focused
  - Add context and desired outcomes – validate timing

### **Plan for personalization & interactivity:**

- Adjust digital content to be precise and personalized- plan for when, where and how to engage
- Whiteboard, brainstorm. vs. canned materials
- Interactive tools: hand raising, chat, emoticons, polling, etc..
- Use chat windows to take notes for example in a 1:1 session

# Effective Digital Engagement

---

## ENGAGE

### **Interaction:**

- Speak more slowly, pause more often
- Look for engagement, attention – pull into discussion
- Cue on the reactions “you look pensive”; “Joe, that seemed to resonate with you....”
- Listen and watch – attempt to hear disinterest, discomfort, boredom and disagreement from tone and pace

### **Add Value:**

- Identify their knowledge needs and fill them
- Identify their personal, professional and organizational needs and map conversation to those needs
- Enable client to edit documents in real time

### **Close:**

- Recap key points and decisions or agreements reached
- Define next steps with assignment and due date

# Effective Digital Engagement

---

## FOLLOW UP

### Send notes to all attendees:

- Recap key points and decisions or agreements reached
- Have client download finalized materials
- Include materials discussed or post-materials required. Summarize what is being shared in the notes and draw attention to key pages of interest
- Define next steps with assignment and due date

### Calendar next steps and follow up:

- If no next steps planned, then identify when to reach out to nurture relationship and with what material

# To Create a Digital Selling Organization

1. Define buyer knowledge needs across every stage of their buyer and customer lifecycle
2. Define the best information sources for each knowledge need
3. Create the knowledge artifacts required
4. Educate customer facing resources on when and how to leverage
5. Provide tools that enable a seamless experience for customer and seller alike

# Pitfalls to Avoid in Becoming a Digital Selling Organization

Divide between sales and marketing

Short vs. long term approach to interaction

Tracking the entire conversation

Using assets to sell vs. bring value



# Thank You.

---

**Nancy Maluso**

VP Principal Analyst