

# Leads Are People Too: The Necessity of Personalization in B2B Marketing and How to Incorporate More of It

BEGINNER | Strategy



**Fallon Chattaway**  
ClassPass



# Speaker Agenda

What's going on here?

Time	Agenda	Extra Info
12:35-12:40	Introduction and Experience	
12:40-12:50	The “Why?” behind the need for personalization in B2B	
12:50-1:10	How to incorporate more personalization	Examples in Pardot
1:10-1:15	Q&A	

# About me: Fallon Chattaway

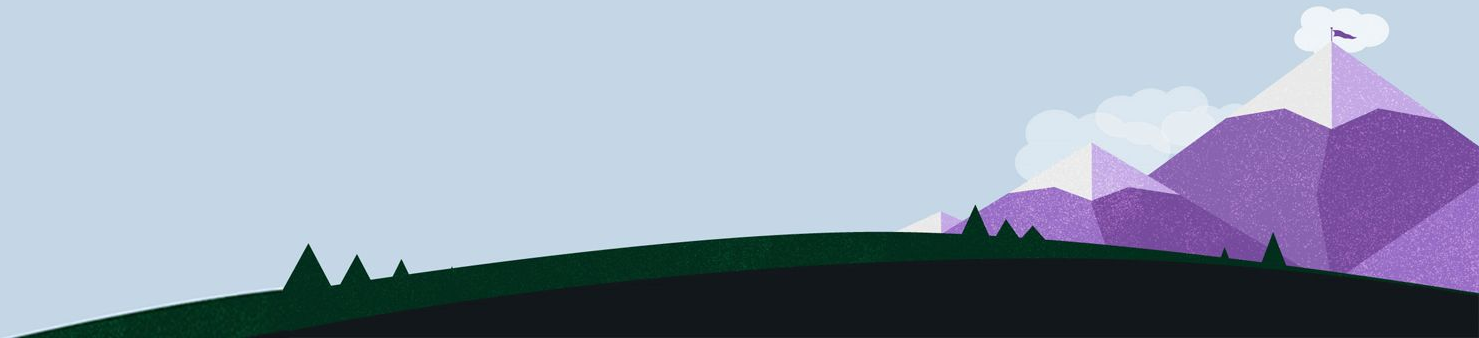


Nicholls State University



# 97%

Marketers in 2020 report a measurable lift from their personalization efforts. - Salesforce personalization report



# 75%

According to [recent findings](#) by Salesforce in its second annual [State of the Connected Consumer report](#), the answer is a resounding yes: almost 75% of business buyers expect vendors to personalize engagements to their needs.



# The Bad Date vs B2B Journey

<b>Barely notices you're there</b>	<b>1st Party Data and Progressive Profiling</b>
<b>Only talks about themselves</b>	<b>What are their specific needs</b>
<b>Tells you they're the best over and over</b>	<b>Better together - Mutual success</b>
<b>Asks you to marry them immediately</b>	<b>Well, that's just overambitious.</b>





# Leads are humans

We are not all the same... neither are buyers.

- Houston Astros = I marketed to fans
- ClassPass = I marketed to studio owners and HR professionals
- iLand = I marketed to IT professionals

Not only do we define personas for types of buyers, in general, but looking at our audience in terms of human qualities can build trust, familiarity and mutual cohesion to solving a problem together.

Sports fans and IT professionals do not have the same needs, wants or even habits. Approaching them the same way would make me a pretty bad date.

Opportunities = Company ABC, but leads... those are people.



# How do I use personalization with Pardot?

## Marketing to humans with automation and research

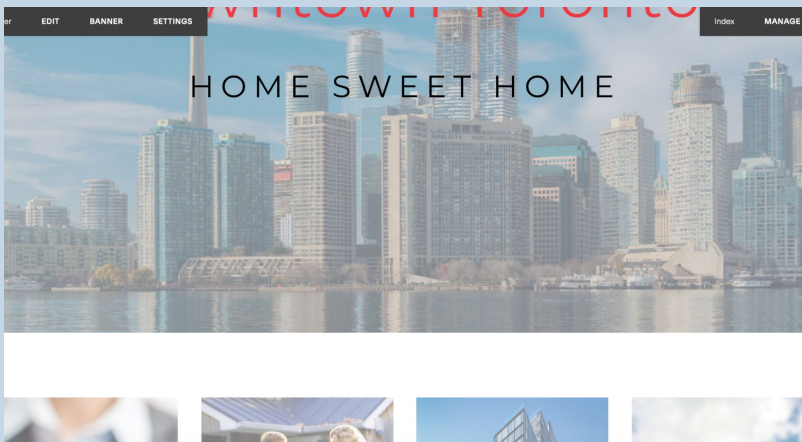
- Scoring & Grading
- Buyer Persona/Groups Defined
- Dynamic Content
- Campaign assignment and asset effectiveness
- Engagement based follow-up
- Progressive Profiling
- Journey Mapping
- Solution Based Content
- Sales call understanding and integration





# Implementing all of this stuff

## Quick wins



## Dynamic content

- You can get creative based on the data you gather. But visual representations of localized data is a quick personalization win.
- Based on geographic location, use dynamic content to show something near them that is recognizable like a well known city skyline or an industry specific landmark.
- Add to emails and landing pages. This can make a large company seem more local than the stock image of smiling randoms around a conference table.

# Implementing all of this stuff

## Quick wins

### Create File

Name

**Folder**

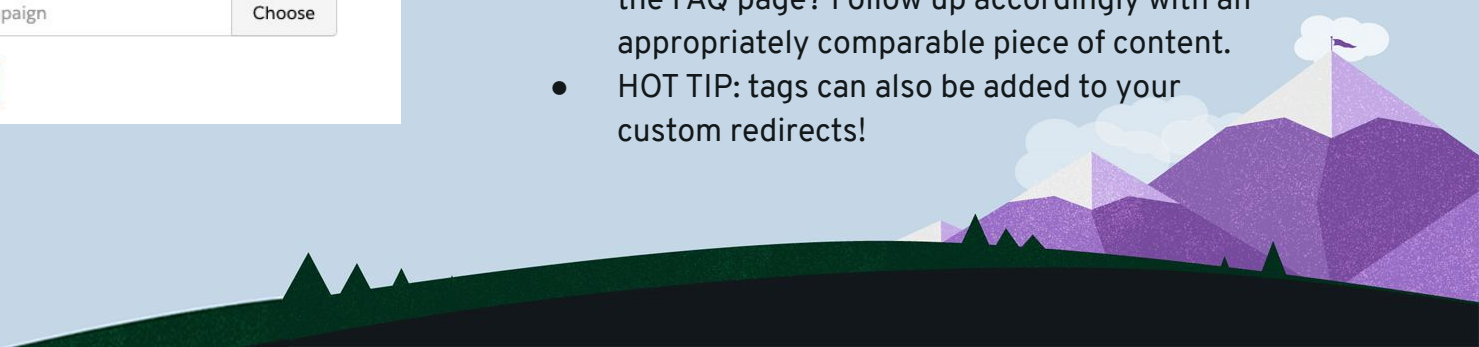
**Tags**

**Campaign**

**File**

## Engagement based follow-up

- Asset and webpage engagement will show you and trends for an individual lead.
- Use pardot tagging for assets by type that match your persona type.
- Multiple pricing tagged assets viewed? Multiple visits to the testimonials page? Or the FAQ page? Follow up accordingly with an appropriately comparable piece of content.
- HOT TIP: tags can also be added to your custom redirects!





# Campaign Management

## The secret sauce

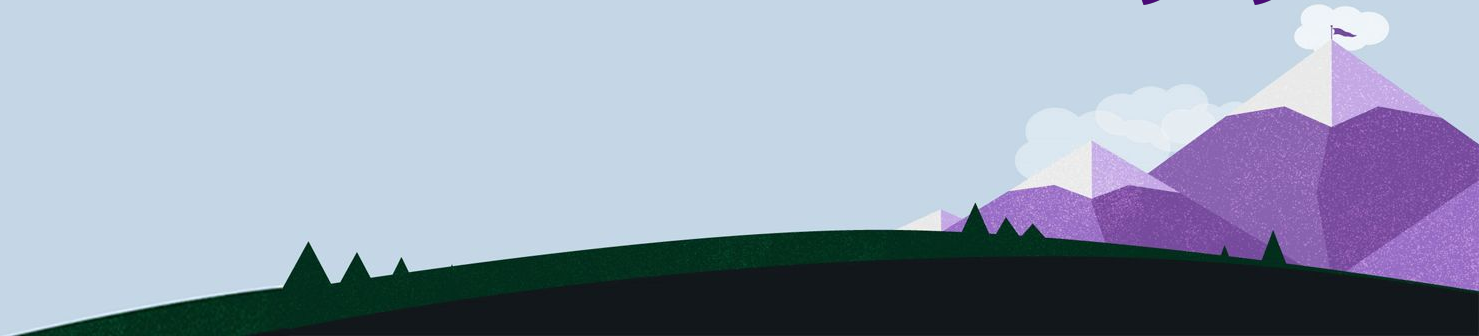
- Campaign planning and journey mapping should happen in a way that each compliments the other
  - Connected campaigns in Pardot/Salesforce is a best practice.
  - Take the time to sit with your team and define your parent-child strategy for campaigns. There's no right answer but the organization can dramatically help with reporting.
  - HOT TOP: campaign statuses are an easy way to follow a campaign member's journey. You can add more than just "Sent" and "responded" (Ex "Attended" vs "OnDemand" in a webinar campaign).
1. Work backwards from successful closed won opportunities. What did their journey look like? Not just velocity, but what assets did they engage with? Which form did they complete, what were their keyword search terms? Do this for your major campaigns first: large events, referral or content syndication, general product lead gen PPC, social media, etc.
  2. Evaluate for trends and ask sales to weigh in if there was a call or pitch.
  3. Which campaigns have the least amount of influence? Optimize those with more relevant content personalized to their journey.

“

Personal, not just personalized.

-Successful marketers

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# Progressive Profiling

## Listen to your visitors

Basic
Advanced
Values
Progressive
Dependent

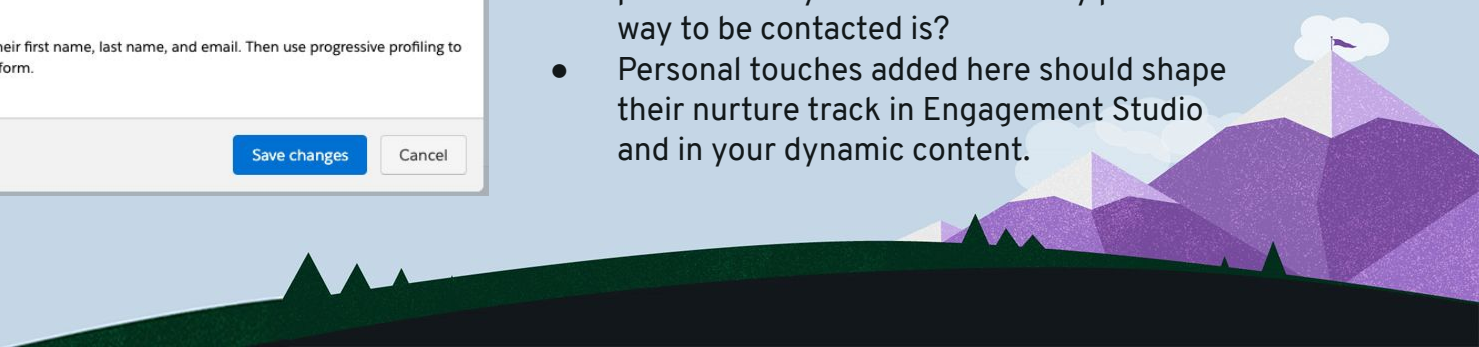
Show this field only if the prospect already has data in the following field(s):

✕

**Tip:** Use progressive profiling to collect more data over a series of multiple form submissions. By spreading out your information gathering over multiple interactions, the prospect is more likely to convert each time and you still get the data you need.

**Example:** The first time a prospect visits, only ask for their first name, last name, and email. Then use progressive profiling to ask for their company and phone number on the next form.

- Ask questions that tell you what you need to help them. Asking for personal information doesn't move people through a purchasing journey.
- What's most important to you? Picklist values with the solutions your product/service helps with. OR I haven't purchased X yet because? OR My preferred way to be contacted is?
- Personal touches added here should shape their nurture track in Engagement Studio and in your dynamic content.



“

Add fields that bring in VALUE, not just generic data.

-Marketing Ops Managers to everyone, ever

”





# Bring it all in

There's a whole wide world out there



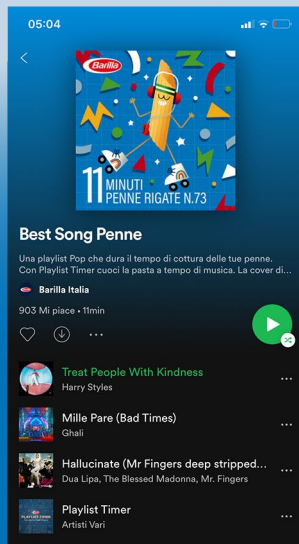
Make sure you are meeting your leads where they are. Humans are wild, truly. So meet them on social media, meet them in apps, meet them in person and on podcasts. UTM's, APIs, connected apps and good ole "asking 'em" will help you understand how you can continue the conversation in a space that is most natural for them.

That's truly personal.



# Super Secret Example

You can take it with you for free



In January of this year Barilla launched a fun campaign where they created Spotify playlists that are the exact length that it takes to boil each pasta type. Adorable and memorable. Borrow it.

Spotify demographic data shows that half of its user base is under 35 years old. Do you have a persona that is usually around that age? Create a list that is the exact length of time it takes to (insert something related to your service here). Or make it punny. AI company? Mr. Roboto, Me the Machine, and Computer Age. Agency? 9 to 5, Taking Care of Business, Manic Monday. Pair it with a blog post about listening to music + use of your product and boosting productivity = relevant and personal

# Thanks for listening!



fallonchattaway

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