



WHAT'S WORKING IN CONVERSATIONAL MARKETING

Practitioners Relying On Data To Personalize &
Power Chat Experiences

INTRODUCTION

Prospects are out of patience for impersonal, irrelevant outreach and assets. Instead, they want 1:1 highly personalized interactions in real time across multiple channels — and marketers only have 10 seconds to capture buyers' attention, according to [Nielsen research](#). To help build relationships on clients' terms and meet their desires for instant gratification, organizations are leveraging conversational marketing to immediately engage buyers at their first point of contact.

"Conversational marketing eliminates the friction in the customer experience and enables a prospect to get the information they need faster or connect easily with a human," said Brooke Bartos, Director of Marketing Operations and Analytics for [InvoiceCloud](#), an online payments solution. "Conversational marketing provides brands an ability to respond faster, in real time, when a prospect is on the site and most open to exploration."

With [Forrester research](#) indicating that 58% of demand and account-based marketers leverage conversation automation technologies and an additional 43% plan to increase or significantly increase budget for online chat, it's time to examine what's currently working — and what's not — in conversational marketing strategies.

Throughout this special report, we'll analyze the latest trends in conversational marketing, discuss the best practices and share real-world examples of successful chat strategies. Specific topics of discussion include:

- How to personalize conversations and messaging assistants to ensure prospects are receiving accurate, relevant information while staying "on-brand";
- How to ensure databases remain accurate to ensure smooth hand-offs from automation and technology to human representatives; and
- The new channels practitioners should focus their conversational marketing efforts on and best practices for connecting with buyers.



STRENGTHENING PERSONALIZATION IN AN IMPERSONAL WORLD

A major point of contention for marketers is buyers that prefer anonymity while simultaneously demanding immediate answers and complementary assets. With [Demand Gen Report research](#) revealing that the first step in most buying journeys is conducting anonymous research on potential solutions, practitioners are leveraging chat to casually meet buyers where they are — without a rapid succession of sales outreach — to drum up relevant information.

“Conversational marketing provides a proactive approach to customer communication instead of a reactive approach,” said Christina Kay, VP of Marketing for [ResellerRatings](#), an online reviews site. “Not only does this give you the chance to build rapport and trust with your potential customers, but it also gives you valuable insights into their needs and desires. This information can then be used to refine your marketing strategy and ensure that you’re targeting the right people with the right message.”

In fact, [Salesforce research](#) found that 72% of B2B customers expect a deep understanding of their needs reflected through personalized experiences, while 62% of customers expect companies to adapt their outreach based on their actions and behavior. The caveat here is that prospects and buyers don’t want robotic outreach that runs them down a list of 10 static questions. Instead, practitioners are working to provide dynamic chat experiences.

“To deliver a personalized approach, our conversational marketing platform pulls in whatever Salesforce and intent data we have, as well as a view into what the visitor is looking at on-site,” said Justina Logozzo, Director of Web Marketing for [Alation](#), a data catalog and governance tool. “With these insights, we can deliver a much more targeted and relatable chat experience, reducing friction often found in chat.”

And that friction is known all too well: [52% of customers](#) expect offers to always be personalized; yet, 66% say they’re generally treated like numbers. With that in mind, the experts stressed the importance of strong data management and database hygiene to ensure information is up to date.

Proof Point:

[Bottomline Technologies](#), a business payment automation technology, found itself providing a disparate customer experience across its website. Navigating across the different offerings was challenging, and buyers weren’t finding exactly what they were looking for. To solve that problem, Bottomline turned to a chat bot solution that helped provide more relevant information and personalized conversations. Through its efforts, the company saw:

- More than \$4.3 million in sales pipeline generated by the chat provider, with another \$8 million influenced by it; and
- 5,500 conversations over the course of a year.

“Conversational marketing provides a proactive approach to customer communication instead of a reactive approach.”

CHRISTINA KAY, RESELLERRATINGS



MANAGING DATABASES TO GENERATE MORE RELEVANT COMMUNICATION & EXECUTIVE BUY-IN

According to Logozzo, delivering personalized and relevant experiences is “simple”: All marketers have to do is use their data. Of course, just because marketers have a large data pool doesn’t mean it’s accurate — more than **70% of marketers** said one of their biggest database issues is old and outdated contact information.

“Database management is a huge piece of being successful with conversational marketing,” continued Logozzo. “You must make sure your systems are directly integrated with the chat platform: Doing this eliminates a lag in data transfer and minimizes error. My biggest recommendation to anyone looking to dive into conversation marketing is to find a platform that connects directly with your CRM and CSM.”

She continued that Alation integrated numerous tools into its chat platform, which helps the company have a much greater pull of reliable, clean data that helps immediately identify prospects.

“Our chat platform enables us to see what pages people go to, how long they are there, as well as the search topics they are most interested in,” Logozzo elaborated. “By having all of this information, we’re able to refine and A/B test chats, more accurately target visitors, as well as give our SDRs a leg up on what visitors actually want to talk about.”

Bartos agreed with Logozzo, adding that proper data hygiene enables database tools to:

- Serve up content or information relevant to the user;
- Provide a personalized “welcome back” message; and
- Reduce friction by removing requests for information that may already be known about the user.

Proof Point:

Carta, an equity management solution, was struggling to identify its website visitors, where they were coming from, why they were there and what they were looking for. The company turned to a data-powered conversational marketing platform that helped them identify their most valuable visitors, instantly start sales conversations, shape sales and marketing campaigns and uncover buying intent signals. Through its efforts, Carta:

- Increased success rate on conversations by 900% in six weeks;
- Sourced \$1.9 million in pipeline; and
- Achieved a 687% ROI.

“Database management is a huge piece of being successful with conversational marketing.”

JUSTINA LOGOZZO, ALATION



MEETING BUYERS ON THEIR CHANNEL OF CHOICE

The necessity of strong, accurate databases is doubly important when it comes to reaching buyers across multiple channels to weave together a cohesive, linear narrative. With **74% of customers** relying on several channels to start and complete a transaction, they want consistent communication that picks up right where they left off.

“Conversational marketing is enabling us to meet people where they currently are,” said Logozzo. “In a way, we’re able to continue the conversation that we began with them before they came to our website, like via an email or an organic search result. It’s helped to increase the value of other digital channels as we can move people through the funnel quicker than before.”

She continued that the two newest channels Alation added to its conversational marketing strategy are ABM and paid media. However, she advised marketers keep three things in mind when adding a new channel to chat: Audience, purpose and action.

“We need to know who we’re targeting with as many details as possible,” Logozzo explained. “We need to understand the ‘why’ for the chat, as we can better mold the experience and pathway. And lastly, knowing the action the visitor is supposed to take will help with defining the location of the chatbot (which page), the timing and the introduction made to these visitors.”

However, while **76% of customers** expect consistent interactions across departments, 54% said it generally feels like sales, service and marketing teams don't share information. To that end, "it's vitally important for marketers to test their workflows through the lens of the customer's experience," explained Bartos. "Are they able to connect to a human where they need to? Or is their tool merely a form in a slightly different format? A poor customer experience can equally damage the relationship."

Proof Point:

Commvault, a data protection and management solution, wanted to provide its customers with consistent, context-relevant messaging. To accomplish that, the company turned to a chat bot that met site visitors where they were in their research. The conversational marketing platform helped the company promote key messages and features on specific pages throughout the site to deliver consistent and relevant messages at every step and channel of the buyer's journey. Since implementing the chatbot, the company:

- Increased new business revenue generated from chat by 105%;
- Saw almost 8% more conversions than via email; and
- Increased opportunities generated from chat by 135%.

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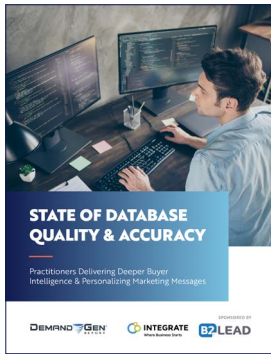
BROOKE BARTOS, ALATION



CONCLUSION

In a world that's dominated by demands for personalization, self-service and fast-moving buyer's journeys, marketers are turning to conversational marketing to better engage prospects with relevant information while providing personalized communications to guide them throughout their journey.

"Marketers are always looking for new ways to reach and engage their customers, and conversational marketing provides a unique opportunity to do so," said ResellerRating's Kay. "By its nature, conversational marketing is focused on creating value for the customer, which is something that all businesses should strive for. As more businesses begin to see the value in conversational marketing, we will see even more growth in the category."



2022 State of Database
Quality & Accuracy



2022 What's Working in
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2022 B2B Buyer
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Demand Gen Report is a targeted online publication that uncovers the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multichannel demand generation efforts.

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