

Gartner Research

Improve Deal Quality by Orchestrating Sales and Marketing Efforts

Elizabeth Jones

21 August 2023

Gartner®

Improve Deal Quality by Orchestrating Sales and Marketing Efforts

Published 21 August 2023 - ID G00775239 - 14 min read

By Analyst(s): Elizabeth Jones

Even for complex decisions, B2B buyers prefer minimal interactions with sellers but struggle to build confidence in their purchasing decisions. Product marketers and marketing teams must partner with sales to engage buyers through orchestrated human and digital interactions to improve deal quality.

Overview

Key Findings

- Sales activities and digital marketing efforts often conflict with the buying journey. This results in buyers potentially missing value or relevance in the information received from sales or marketing, decreasing seller effectiveness and revenue opportunities.
- Buyers prefer to engage with suppliers digitally, but often find that digital is lacking the information they need, and sellers frequently provide inconsistent and equally unhelpful information. This decreases the customer's confidence in the information, stalls deals, and results in smaller deal sizes or lost revenue.

Recommendations

Product marketers focused on driving marketing impact and commercial success across both sales and marketing functions must:

- Align digital interactions and sales activities with the customer buying journey by analyzing buying groups, mapping out the key tasks of buying stakeholders, and matching them to the sales process.
- Create confidence-boosting and immersive digital experiences by creating a buying journey map that outlines the buying jobs, questions and information needs of each buyer persona. This can then be used to create digital content and experiences, such as custom landing pages, digital sales rooms, or buyer enablement content that specifically help customers make progress in their buying journey.

Strategic Planning Assumption

By 2026, B2B organizations that unify commercial strategies and leverage multithreaded commercial engagements will realize revenue growth that outperforms their competition by 50%.

Introduction

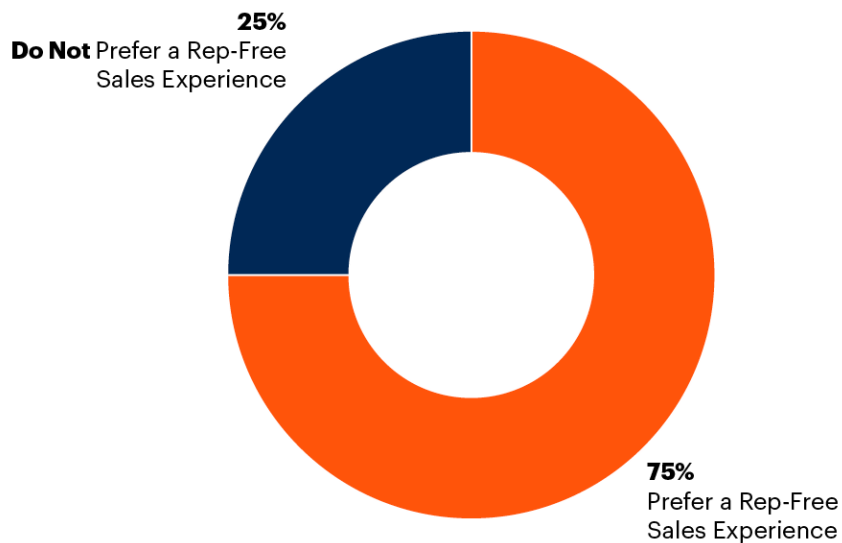
When B2B buyers encounter consistent information from the supplier website and sales reps, they are 2.89 times more likely to complete a high-quality deal, but over half (58%) of buyers agree that the information on the supplier's website conflicts with the seller or subject matter expert. ¹

Gartner defines a high-quality deal (HQD) as a situation where customers strongly feel they are achieving the value they expected when they made a technology purchase. They either: (1) did not compromise their ambitions for the project that the purchase was associated with, or (2) purchased what they consider to be a premium solution from a technology service provider.

These contradictions in the information likely lead to the customer becoming overwhelmed, and they will likely avoid speaking with a sales rep who may only confuse them further. In the data, we see that 75% of B2B buyers prefer a rep-free experience ² (Figure 1), meaning that buyers are likely trying to control as much of their purchasing experience as possible before engaging with a sales rep.

Figure 1: Customers Prefer a Rep-Free Experience**Customers Prefer a Rep-Free Experience**

Percentage of Respondents



n = 771; B2B buyers

Source: 2022 Gartner B2B Buyer Survey

Note: Percentage calculated based on number of B2B buyers who selected, "somewhat agree," "agree" or "strongly agree" in response to the statement "I prefer a rep-free sales experience."

775239_C

Gartner

So there is an urgent need for sales and marketing teams to break down their organizational silos, and fully align. Marketing outreach and sales engagement models must coordinate their efforts and work seamlessly together in a blended, orchestrated engagement model.

Definitions Related to Orchestrated Customer Engagement

Orchestrated customer engagement consists of three fundamental strategies:

- **Situational awareness** — Every buying situation is unique, but with patterns that repeat across organizations. Commercial teams must work to understand the customer's perspective.
- **Multithreaded engagement** — Coordinate and execute touchpoints to engage customers based on situational awareness. These multithreaded engagements allow suppliers to orchestrate timing, channels and messaging through multiple individuals within the buying team, thereby expediting consensus on a commercial decision.




- **Commercial convergence** – Aligns strategies, functions and KPIs of commercial stakeholders to enable situational awareness and multithreaded engagement while accelerating revenue generation and reducing cost and complexity.

This means that the buyer can choose to engage with a supplier, without force, through both digital and human engagement models, in order to provide a consistent experience for the buyer, which requires customer situational awareness, multithreaded engagement and commercial convergence (Figure 2).

Figure 2: Examples of Orchestrated Buying Engagements

Orchestrated Buying Engagements

Examples

| Components of an Orchestrated Commercial Practice | Examples of How Orchestrated Buying Engagements Provide a Consistent Customer Experience | |
|---|---|---|
| | Examples of Human Engagements | Examples of Digital Engagements |
|  Customer Situational Awareness | Pre-sales rep connects customer to relevant information/tools based on where the customer is in their buying journey. | Marketing sends out an email marketing campaign aligned to where the customer is in their buying journey. |
|  Multithreaded Engagement | Sales rep and customer success manager coordinate on an implementation strategy and discuss with customer. | Implementation guide and other materials needed to finalize a purchase decision are added by sales, customer success and marketing into a digital sales room. |
|  Commercial Convergence | Sales and marketing align their functions around a common understanding of the customer buying journey. | Custom webpage is generated by marketing based on the location in the buying journey and visibility provided to sales in order to serve the customer based on their specific context. |

Source: Gartner
775239_C

Gartner.

This will require product marketers to partner with sales enablement and other marketing teams to enable both buyers and sellers in ways that will help buyers complete a high-quality deal.

Analysis

Align Digital Sales Channels and Sales Activities With the Buying Journey

Digital sales channels and sales activities must align with the customer buying journey. This means that product marketers must go beyond only developing buyer personas. Technology marketers must align the customer buying journey with sales activities in order to make the customer buying journey more actionable for sales. This means that product marketers must:

- Determine the common buying tasks/jobs of a typical buying group (see Focus on Buying Jobs Rather Than the Chaos of Buying Journeys).
- Map out the key tasks, questions and information needs of each buying stakeholder (see Tool: Buyer Persona and Job-Based Buying Journey Template).

These jobs and needs should then be aligned with the sales process and their corresponding activities. Product marketers should work with sales enablement to outline actions and best practices that sellers should take with the given information, such as:

- Content that should be made available to sellers
- Actions for sellers to take and own
- Methods (including digital interactions) for verifying the customer is making progress or has completed a buying job

Product marketing can assist sales enablement by providing the right resources, including content, buyer enablement tools, and data that can help inform the seller as to where the customer is in their buying journey so they can take the appropriate action. This can all be provided to the seller in a sales playbook and/or integrated with various sales and marketing technologies so the information is woven into the seller workflow (Figure 3).

Figure 3: Illustration of a Sales Process and Buyer Journey-Aligned Digital Sales Playbook

Sales Process and Buyer Journey-Aligned Digital Sales Playbook

Illustration

Buying Journey

| Problem Identification | Solution Exploration | Requirements Building | Vendor Selection | Purchase |
|------------------------|----------------------|-----------------------|--------------------|--------------------|
| Validation | Validation | Validation | Validation | Validation |
| Consensus Creation | Consensus Creation | Consensus Creation | Consensus Creation | Consensus Creation |

Sales Process

| | | | | | | |
|-----------|-------|---------------------|------------|----------|-----------|-------|
| Awareness | Learn | Business Brief/Demo | Evaluation | Proposal | Negotiate | Close |
|-----------|-------|---------------------|------------|----------|-----------|-------|

Digital Sales Playbook

| Prospect Needs | Resources | Seller Actions | Exit Verifiers |
|--|---|--|--|
| Key Needs <ul style="list-style-type: none"> Case studies Risks/benefits/ROI | Learn <ul style="list-style-type: none"> E-learning Competitor battlecard | Tasks <ul style="list-style-type: none"> Investigate the customer's tech environment, issues and goals Discuss relevant case studies/use case | The Prospect <ul style="list-style-type: none"> Confirms interest, timeline and challenges Explored other solutions |
| Key Questions <ul style="list-style-type: none"> How else can we tackle the problem? Do we have the resources for this? | Present <ul style="list-style-type: none"> Presentation deck Customized buyer enablement tool | Sales Methodology <ul style="list-style-type: none"> Learn the customer's vision of the ideal solution Determine business value | The Seller <ul style="list-style-type: none"> First meeting completed |
| Information Challenges <ul style="list-style-type: none"> Cost of inaction Comparison to peers | Share in Digital Sales Room (DSR) <ul style="list-style-type: none"> Customized buyer enablement tool Shortened presentation deck with audio/video voiceover | Internal Stakeholders <ul style="list-style-type: none"> Account executive (AE) Sales engineer (SE) | |
| Key Stakeholders <ul style="list-style-type: none"> Developer(s) Business owner | | | |

Source: Gartner
775239_C

Gartner

Technology can augment sales playbooks. For example, technology can be used to alert sales as to when key steps or jobs are incomplete so sellers can proactively guide buying teams on tasks they should be doing to accelerate their progress toward an effective decision. Identify opportunities for technology to enable buying jobs/tasks based on the evolving buying dynamics of your markets (for more information, please see the Market Guide for Revenue Enablement Platforms).

Create Confidence-Boosting and Immersive Digital Experiences

Buyers are becoming more accustomed to digitally engaging with suppliers. This goes beyond e-commerce and expands into areas such as digital sales rooms (DSRs), providing custom landing pages for individual customers or accounts, and leveraging buyer enablement tools.

Digital Sales Rooms

In a buying environment where a clear preference exists for a rep-free experience, and where only 20% of the buyer's time is spent meeting with suppliers (meaning that they're spending 80% of their time not directly engaged with sellers), ² it's important to engage with buyers in an asynchronous fashion. DSRs provide that opportunity.

DSRs are a collaborative space for sellers and buyers that can be used to help build consensus among the buying group. DSRs provide a space for various buying and selling activities, such as collaboration, virtual meetings, digital commerce and bidirectional content sharing between the revenue-facing functions and the buying group.

Organizations can create their own DSRs, leverage existing technologies or a revenue enablement platform that provides DSR capabilities (see the Market Guide for Revenue Enablement Platforms). Using DSRs can deliver a better-orchestrated buying experience; however, steps should be taken to ensure the DSR provides a consistent customer experience between digital and human interactions (Table 1).

Table 1: Creating a Digital Sales Room That Customers Want to Use

| <i>Expectations of the Buyer in an Orchestrated Buying Engagement</i> ↓ | <i>Requirements for a Best-in-Class Digital Sales Room (DSR)</i> ↓ |
|--|---|
| Ease: <i>"I want to get the information I need without spending hours of my time searching the web or in multiple meetings talking to a seller."</i> | Consolidated Buyer Enablement: Create and store all relevant buyer enablement resources in a single, digitally accessible location to minimize customer effort searching for information on both the supplier site and across the web. |
| Relevance: <i>"I want information specific to my needs and challenges when I need it."</i> | Adaptive Digital Experience: Analyze the customer's online activity and seller interactions in order to update DSR content in a way that will align with where the customer is in their buying journey. |
| Seamlessness: <i>"I want consistency between the information the seller shares and what is available on the supplier's website before and after my purchase."</i> | One-to-Many Communication: Upload curated sales team communications and materials that all buying group stakeholders can access in their DSR, empowering customers to review the materials on their own and easily share them with colleagues as needed. |
| | |

Source: Adapted from Express Scripts

Custom Landing Pages

Product marketing should determine the best ways to share customer engagement and next-best-action insights with sales to increase seller effectiveness. Creating custom landing pages as part of an account-based marketing (ABM) program (see Account-Based Marketing Program Template) is just one way that marketing can provide more information about buyer situation awareness to sales teams (Figure 4). Specifically, marketing can take the following steps to create a custom landing page aligned with what the account needs at various points in their buying journey:

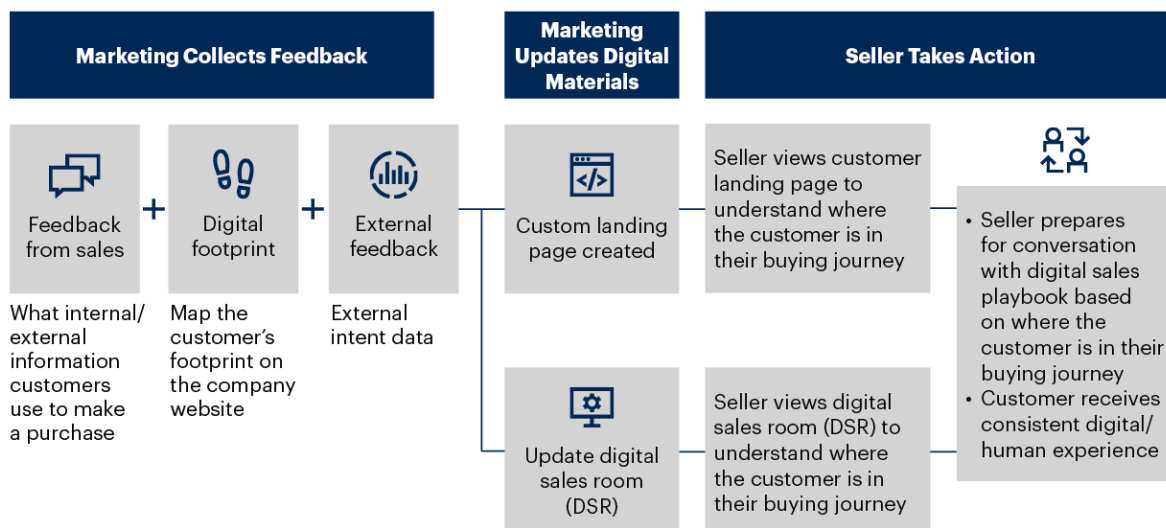
- Create a feedback loop with the sales organization to determine the type of information customers use to help them make a purchase.

- Create buyer-journey-aligned content and tools that can be leveraged in both digital and human channels.
- Track the customer's footprint on the company's website/homepage.
- Analyze external, third-party intent data.
- Use context clues from the above information to determine where the customer is in their buying journey. For companies using product-led growth (PLG) principles, such as free trials or freemium offers that entice users within accounts, tracking and operationalizing resulting product usage/engagement data will also be helpful to sales (see How Marketing and Sales Work in Product-Led Growth).
- Leverage this information to update digital channels, such as creating a highly personalized landing page for the customer based on the behavioral data that marketing has collected, or even to update the DSR.

These customized, digital journeys can then be referenced by sales so the buyer receives a consistent experience across digital and human channels, including in-person events if needed (Figure 4).

Figure 4: Example of How Marketing Can Help Provide Consistency in Human and Digital Channels

How Marketing Can Help Provide Consistency in Human and Digital Channels Example



Source: Gartner
775239_C

Buyer Enablement Tools

Buyers consistently struggle in two areas: validation and consensus creation. Buyers still validating their purchase can find themselves in a holding pattern around topics such as whether they feel they are doing the right research, solving for the right problem, or even working on a project worth prioritizing right now. Buyers also aren't making decisions alone, but in buying groups. Building consensus among the buyer group, especially when there are both business buyers and technology buyers involved, can be difficult. Each individual buyer has different concerns they need addressed before approving a purchase. Buyers often find it difficult to fully build consensus with the entire buying group around a purchasing decision.

Once these buyers have arrived at a decision, it's worth noting that buyers who complete their purchase through digital channels often regret their purchase.³ This could be a result of buyers not only experiencing difficulty understanding the product or a potential mismatch with the expected outcomes, but also difficulty resolving internal buying team conflicts that continue postpurchase. Creating tools that specifically help increase customer confidence, and are available through both human and digital channels, can provide a more effective digital experience and increase the likelihood of closing a higher-quality deal with less regret. Two of the most impactful tactics used to accomplish this are buyer enablement and change enablement content and tools.

Buyer enablement tools can help buyers make progress on common challenges they encounter during their buying journey by increasing their confidence in the information provided to them. Buyer enablement is different from common marketing materials (such as product brochures and white papers) in that it serves the specific purpose of providing prescriptive advice (helps the buyer know what to do and how to do it) or practical support (helps the buyer complete discrete, job-related activities).

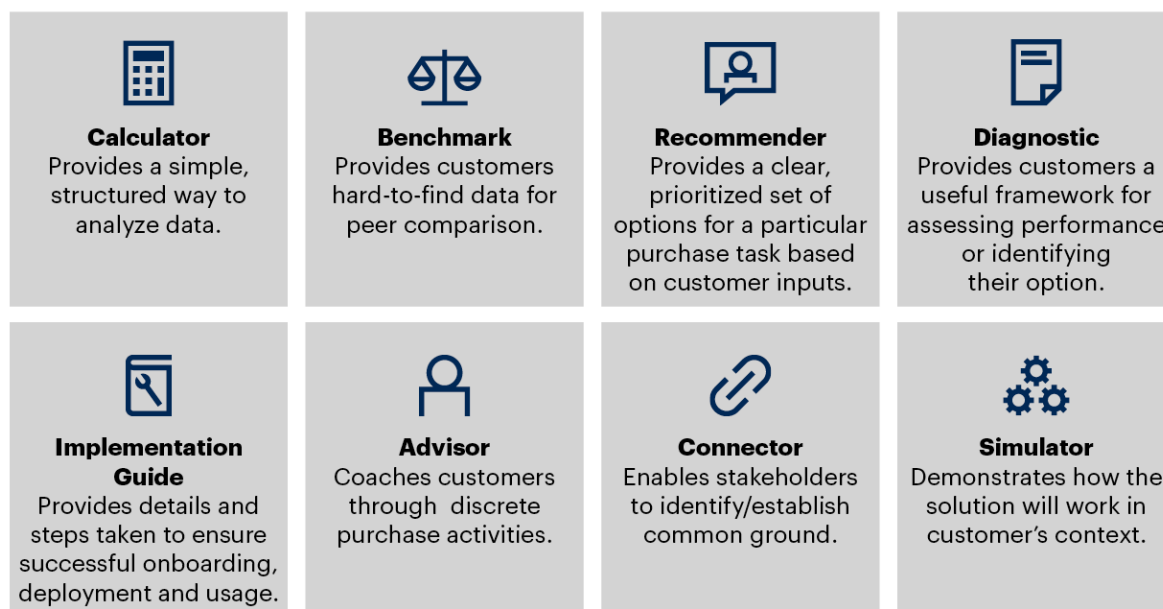
Buyer enablement tools should be constructed to assist the customer with their most difficult buying tasks and help to increase the customer's confidence in information (such as helping to determine the right questions to ask, the information that matters most, and the consistent patterns in the information encountered during the purchase). Strategically placing tools (on the custom landing page or in the DSR) at the appropriate time in the customer journey and calling the buyer's attention to their presence can encourage desirable and productive buying behavior.

Buyer enablement should tell customers what to buy and how to buy by helping them to complete discrete buying-job-related activities. In order to create highly effective buyer enablement content, product marketers should:

1. Identify the buying job that you will support the customer in completing based on your understanding of the most challenging buying jobs that your customers struggle with (see Tool: Buyer Persona and Job-Based Buying Journey Template).
2. Determine customer-specific needs in completing that job. Look for the questions that they typically ask and the tasks that buying group stakeholders must do to complete that buying job.
3. Assess the best-fit form factor for delivering the content (see Figure 5). Think through the channels that your customers typically use to conduct buying research and the medium that will help you best communicate your enablement content.

Figure 5: Common Forms of Buyer Enablement Tools

Common Forms of Buyer Enablement Tools



Source: Gartner
775239_C

Gartner

Using buyer enablement tools shifts the focus from a supplier-centric view to a customer-centric view, where content is being developed to support the completion of complicated buying tasks.

Summary

Product marketers should partner with sales enablement and other marketing teams to create orchestrated buying engagement experiences in order to meet the customer in their specific moment of need. Align buyer preferences into an orchestrated engagement that can be used in both digital and human interactions. This approach ensures consistency in the buying process and provides a valuable and relevant customer experience for the buyer. The creation of a buying journey map and aligning sales activities to that buying journey will give sellers the confidence they need to execute on customer-centric best practices. Creating DSRs, custom landing pages, and buyer enablement tools can help to augment efforts of sellers, and will have the added benefit of increasing customer confidence.

Evidence

Redefine Commercial Strategies With Orchestrated Customer Engagement: A Gartner Trend Insight Report

¹ **2021 Gartner B2B Buyer Survey:** This survey was administered in November and December 2021 and includes data from 725 B2B buyers from the U.S., Canada, the U.K., Australia, India, Singapore, Germany, and Sweden. Respondents were required to be employed full-time at an organization with total revenue of at least \$250 million and have participated in a significant B2B purchase decision. A significant purchase decision was defined as a decision that required deliberation with at least one other person and the evaluation of more than one potential supplier or vendor. Respondents were instructed to answer questions based on their experience with this recent purchase and a specific supplier they considered. Respondents evaluated the quality of the purchase decision and provided insights into various stages of their recent purchase decision.

² The **2022 Gartner B2B Buyer Survey** was administered from November through December 2022 and includes data from 771 B2B buyers from the U.S., Canada, the U.K. and Australia. Respondents who qualified for this survey had to be employed full time at an organization with total revenue of at least \$250 million or the equivalent and had participated in a significant B2B purchase decision. A “significant B2B purchase decision” is defined here as a decision that required deliberation with at least one other person and the evaluation of more than one potential supplier or vendor. Respondents were instructed to answer questions based on their experience with this recent purchase and with the supplier that was used to complete the purchase. Respondents evaluated the quality of the purchase decision and provided insights into various stages of their recent purchase decision. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and

³ **2023 Gartner End-User Buying Behavior Survey:** This survey seeks to understand the behavior of B2B buyers on how they approach decisions to renew or expand technology subscription agreements. The survey was conducted online from February through March 2023 among 1,503 respondents from organizations with annual revenue of at least \$50 million or equivalent from Western Europe (41%), North America (33%) and Asia/Pacific (25%). Industries surveyed include education providers, energy, financial services, government, health payer, healthcare, technology, telecom, insurance, manufacturing, natural resources, retail, transportation and utilities. Qualified respondents are involved in vendor evaluation/selection or review of at least one of the following products or services (subscription agreement) within the past two years: software as a service, platform as a service, infrastructure as a service, network as a service, hardware as a service, managed IT services or business process as a service. Also, respondents have been personally involved in a renewal and/or expansion decision at their organization in the past two years. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Recommended by the Author

Some documents may not be available as part of your current Gartner subscription.

Tool: Buyer Persona and Job-Based Buying Journey Template

Improve Sales and Marketing Alignment by Mapping Buyer Personas to Buying Situations

Focus on Buying Jobs Rather Than the Chaos of Buying Journeys

Innovation Insight for Digital Sales Rooms to Support Virtual Selling and Customer Experience

Market Guide for Revenue Enablement Platforms

Revenue Enablement Is a Maturity Evolution

How Marketing and Sales Work in Product-Led Growth

Account-Based Marketing Program Template

© 2024 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)." Gartner research may not be used as input into or for the training or development of generative artificial intelligence, machine learning, algorithms, software, or related technologies.

Table 1: Creating a Digital Sales Room That Customers Want to Use

| <i>Expectations of the Buyer in an Orchestrated Buying Engagement</i> ↓ | <i>Requirements for a Best-in-Class Digital Sales Room (DSR)</i> ↓ |
|--|---|
| Ease: <i>"I want to get the information I need without spending hours of my time searching the web or in multiple meetings talking to a seller."</i> | Consolidated Buyer Enablement: Create and store all relevant buyer enablement resources in a single, digitally accessible location to minimize customer effort searching for information on both the supplier site and across the web. |
| Relevance: <i>"I want information specific to my needs and challenges when I need it."</i> | Adaptive Digital Experience: Analyze the customer's online activity and seller interactions in order to update DSR content in a way that will align with where the customer is in their buying journey. |
| Seamlessness: <i>"I want consistency between the information the seller shares and what is available on the supplier's website before and after my purchase."</i> | One-to-Many Communication: Upload curated sales team communications and materials that all buying group stakeholders can access in their DSR, empowering customers to review the materials on their own and easily share them with colleagues as needed. |

Source: Adapted from Express Scripts

Actionable, objective insight

Position your organization for success. Explore these additional complimentary resources and tools for tech marketing leaders:

Webinar



Gartner Predictions for 2024: How Generative AI Will Reshape Tech Marketing

Learn how to prepare for and capitalize on opportunities from GenAI.

[Watch Now](#)

Research



Capitalize on GenAI to Improve Content Marketing

Explore how to scale and improve your content marketing operations.

[Download Now](#)

Infographic



How can tech marketers drive growth efficiently through uncertainty?

Find out how to drive business growth through optimized investments.

[Download Now](#)

Webinar



The Gartner 2023 Tech Marketing Benchmarks: Optimize Your Marketing Budget & Mix

Learn how to optimize your marketing strategies during turbulent times.

[Watch Now](#)

Already a client?

Get access to even more resources in your client portal. [Log In](#)

Connect With Us

Get actionable, objective insight that drives smarter decisions and stronger performance on your mission-critical priorities. Contact us to become a client:

U.S.: 1 844 466 7915

International: +44 (0) 3330 603 501

[Become a Client](#)

**Learn more about Gartner for Tech
Marketing Leaders**

gartner.com/en/industries/high-tech

Stay connected to the latest insights



Attend a Gartner conference

[View Conference](#)