

B2B Funnel Checklist











The Orogamis Difference

The hum of a smoothly operating machine; no distractions, no interruptions because you made the important input-decisions ahead of time. You check in for progress. The process is satisfying; even enjoyable. The rest of the time you are free to build relationships, develop brand partnerships, create thought-leadership, and curate company culture.

By working with Orogamis, you choose to focus on your North Star.

The Growth Framework from Orogamis accomplishes our mission of delivering high performance through the lens of experience because experience, arguably, is all that we are. Five concentrations brought under one roof: **Product^x**, **Brand^x**, **Funnel^x**, **Pipeline^x**, and **Customer^x**. Why? Because in an age of connectivity beyond imagination it no longer serves the whole to keep them siloed.

The concept that growth relishes in a balanced ecosystem is nothing new, but the way we, Orogamis, define, produce, measure, and refine it is. And like our own living and breathing experiences one blends into the next; there is no separation.

The Growth Framework at its nature is flexible, having the ability to adjust to industry, market conditions, internal teams, and mission-critical priorities. Whether the framework is spread over your teams or squarely in ours it is all ebb and flow, nothing compartmentalized.

We offer you our thesis: growth through the concept of experience in five concentrations deemed vital to the whole. Pragmatic execution, tended to by agile-approach.

Our promise to you, the Hero in this journey, is you will be met with world-class service, thoughtful partnership, and a house that cheers for your success.

***New company, new industry, new venture?
Start your journey with Orogamis.***



Orogamis Growth Framework

- Go-To-Market
- Market Re-entry
- Product Launch
- Growth Transformation
- B2B Growth Success

Product^x

- Jobs to be Done
- Minimum Viable Product
- User Mapping
- UI/UX Design
- Product Validation
- Product Roadmap
- Product/Brand Refresh

Brand^x

- Market Research
- Brand Specification
- Visual Identity
- Communication Guidelines
- Collateral
- Co-Branding
- Rebrand

Funnel^x

- B2B Lead-Generation
- B2C Lead-Generation
- Ecommerce Website
- Sales-Ready Website
- Channel Mix
- Content Strategy
- Campaign Creation
- Martech

Pipeline^x

- Sales Enablement
- CRM Standup
- Sequencing Creation
- Sales-Tech & Data-Integration
- Partner Success

Customer^x

- Onboarding Experience
- Touchpoint Mapping
- Sequencing Creation
- Customer Success





Introduction

The B2B customer's journey begins with an internet search. And they'll spend roughly **66% of the buying journey** discovering and consuming information without the help of your sales reps.

So how do you ensure they're moving through the B2B funnel smoothly? It requires creating a strategy that guides prospects to the end goal (aka the conversion). But to do this, you need the right content tailored for each stage of the buyer's journey.

It all begins with crafting content that builds brand awareness and interest. This is why **half the content** B2B marketers develop focuses on the top of the funnel (TOF). This isn't to say middle (MOF) and bottom-of-the-funnel (BOF) leads aren't essential. If you want to generate results (and meet company goals), then you need a comprehensive plan that incorporates the entire buyer's journey.

Need help with creating your funnel? Then this Checklist will help.

Why You Need a B2B Funnel

Selling products and services to businesses is tough, especially now. Each day, there are millions of pieces of content published.

So how do you stand out from all the noise? This is one of the challenges a strategic B2B funnel eliminates. Here's a look at some of the other reasons to use one:

- **Reduce lengthy sales cycles:** It takes an average of 8 touches to convert a lead — a funnel facilitates ongoing engagement.
- **Better position your value prop:** Learn your audience and how to best position your solution so it caters to their unique needs.
- **Measure the ROI of campaigns:** When you understand your target audience (and your goals), it's easier to track ROI.
- **Give indecisive buyers a nudge:** Develop content around the pain points of your target customers.
- **Build traffic and conversions:** Funnels drive the right traffic to your site, which improves the odds of conversion.
- **Meet the demand for personalization:** Buyers today want personalized experiences with brands — including the content they produce.
- **Align marketing and sales:** Use marketing content to generate MQLs through the funnel and into the laps of sales teams.

Now, to witness these benefits, you'll need to create a thorough B2B funnel. Here's a look at how.

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Connect with us today to learn how we can help you develop your funnel.

[Learn more](#)

Build Strong Personas

Buyer personas are common among businesses. However, few are using them properly (if at all). Be sure your customer personas are realistic, detailed, and accurate to get the best results. In other words, you need qualitative and quantitative data to drive MQLs through your B2B funnel.

□ Ideal customers

Find out who your best customers are and model your personas after them (demographic, psychographic, and firmographic data).

□ Interview questions

Create a list of questions to ask prospects, customers, and SMEs in the organization (sales, support, tech). Learn the pain points, hurdles, objections, desires, and goals of your ideal customers.

□ Analytics review

What does your data say about your customers and prospects? Use this to identify the best target audience and their behaviors.

□ Conduct interviews

Select who will conduct the interviews, surveys, or focus groups to gather qualitative data about your customers.

Map Out Conversions

What are the goals for your marketing and sales campaigns? And what are the goals of your buyers? This determines what metrics to track, how to identify success, and how to align content with the buyer's journey. It begins with mapping out the types of conversions that are big "wins" for your organization.

Primary Conversions

These are your "macro" conversions that drive prospects the closest to becoming a lead (or customer). These are what propels your company towards reaching its biggest goals. This includes actions like:

☐ Requests for sales

Leads found your content insightful and inspiring and are ready to speak to someone in sales.

☐ Requests for demo

Leads found your content helpful and would like a test drive before committing to a purchase.

☐ Phone calls to sales

Leads went through your content, but need quick answers to their questions.

☐ Emails to sales

Leads are interested in your content and product and have questions. But they prefer written communication and don't mind waiting a day or two to get the answers.

☐ The sale

Leads used your automated set up to make the purchase without intervention (i.e., signed up to subscription-based tool, downloaded a digital product, requested a service).

Secondary Conversions

These micro-conversions are just as essential to your overall strategy. It's what drives leads closer to completing a macro conversion. And it reveals data about why they are or aren't completing macro conversions. It's intent-rich engagement and includes actions like:

Blog/email subscriptions

Visitors find your content helpful and want more delivered to their inbox.

Interacting with chat tool

Visitors need help — use this to learn what questions and concerns your audience has. Then turn FAQs into blog posts or a knowledge hub.

Downloading a lead magnet

A piece of content was pretty awesome and they want more. So they choose to download the lead magnet promoted at the end (guide, eBook, checklist, etc.).

Tridiciary Conversions

These conversions pertain to first-time visitors and prospects and how they initially perceive your brand. If you don't pass the "sniff test" then you can forget about primary and secondary conversions. It also includes conversions that don't directly impact sales, but show interest, which you can track by looking at the following actions:

Social follows

A prospect following your social account is the next best thing to getting a subscriber. They enjoy your content enough to want to see every post you create.

Social shares

Sharing is caring couldn't be any more true — when someone shares content with their network, it solidifies the quality and value of your posts.

Reading your content

Visitors are consuming the content you create (track # of views for your blogs, videos, infographics, social posts, guest articles, etc.).

Website engagement

Looking at metrics like pageviews per session, bounce rate, and average time on site, speaks volumes about the relevance and value of your content.

Flesh Out

You know who your buyers are. And you know what actions you want them to perform. Now, it's time to develop content that attracts, engages, and incites conversions. To do this, focus on every stage of the buyer's journey.

Top of the Funnel

Your prospects are in the learning stage, so teach them. Do all the research for them and lay it out in a simple-to-understand format. You can do this with your blog posts and videos, which should convert visitors into leads using downloadable content. This content focuses on the why.

Lead magnet

This is a continuation, more in-depth, and/or complementary download that relates to the content it's attached to. And matches the intent of the visitor at this stage, which is research.

Talking about pain points

In your lead magnet, focus on the major pain points of your audience. If you have more than one, then create multiple versions and segment your leads.

The six stages of the B2B customer journey includes:

Awareness

Prospects know your brand, product, or service (TOF)

Interest

Prospects are looking for more information (TOF)

Consideration

Prospects connect with marketers to receive more information, i.e., via a lead magnet (MOF)

Intent

Prospects show clear interest in purchasing a solution (BOF)

Evaluation

But first, they need to decide on the best solution (BOF)

Purchase

The ultimate conversion — the sale (BOF)

Middle of the funnel

At this stage, your leads are considering your offer, but need more information. Craft content that speaks on the how (not just the why).

☐ Positioning for solution

Nurture your leads with an email campaign and content, such as solution/competitor comparisons, how-to guides for your particular product, and product/service demonstrations. The goal is to position your product or service as the solution.

☐ Social proof

Seal the deal by showing prospects how others are succeeding with your product or service (i.e., testimonials, case studies, and reviews).

Bottom of the funnel

Leads are ready to buy — make it easy for them to complete the purchase.

☐ Price sheet

Make it a no-brainer for leads to buy by creating a price list of your various products or services.

☐ Solution offerings

Create content that speaks about the relevant benefits of your solution and offerings.

☐ Free trials and demos

Offer a freebie to get them using your solution (give just enough time/features to see the value and desire more).

Plan Website Funnel

When a visitor enters your website, what should they do next? It's up to you to determine the navigational flow. This requires UX (user experience) design to guide visitors through your site. Consider every possible entry point (blog posts, home page, landing pages, product pages, etc.) and where you want them to end up.

□ Navigation

What page do you want visitors to proceed to next once landing on your home, product, or blog? Include links on the page to guide them along.

□ Landing pages

Each landing page should have a clear call to action (avoid multiple links to different pages — this will confuse and deter users from completing your CTA).

□ Thank you pages

Include thank-you pages for completing a CTA. This notifies the visitor of a successful sign-up, purchase, or download. Also, use this to guide visitors to the next stage (i.e., a product page, video/blog post, newsletter subscription, or download).

Identify the Best Channels

There are two options for generating awareness and traffic: Paid ads and organic search. Consider using a mix of the two to get the best results.

Paid

Ads continue to be an optimal way to generate traffic quickly. But monitor your budget so it doesn't surpass your limits. A/B split tests are also essential to identify what works and what doesn't. Some use paid ads as a short-term solution (i.e., product launch, promotion, sale, etc.).

□ SEM and Social Ads (Google, Facebook, LinkedIn)

There are several platforms for paid advertising, including Google, Facebook, LinkedIn, and other social networks. Use the ones your audience frequents for maximum results.

Organic

Search engine queries make up the bulk of internet traffic. So it makes sense to invest in a robust content marketing strategy. This should include a mix of:

☐ Blog posts

Regularly publishing high-quality content to your blog is key. Focus on topics your audience cares about and answering their questions in depth. Fresh, engaging, and easy-to-read content is what humans and search engines demand.

☐ Social media posts

Share the content you create on your brand profiles. Remember, YouTube is the second most popular search engine, so consider repurposing blog posts into video and uploading them there.

☐ Search engine optimization

Researching relevant, low-competition keywords to add to your content will help content rank and earn organic traffic.

Prepare to Analyze & Optimize

You'll need the right tools to analyze your website, blog, and social accounts. Use the data you gather to optimize your pages for better visibility, traffic, and conversions.

☐ Analytics build

Create analytics reports that identify ranking keywords, over or under-performing pages, and top traffic sources. Monitor your target audience to determine their conversion rates and look for potential opportunities (visits from groups you're not targeting).

☐ Optimization plan

Track targeted keywords, search for keyword opportunities, audit website (technical and on-page SEO), and refresh blog content.

Create Email Campaigns

Email lists are like the oil in a B2B funnel. It helps B2B marketers direct leads through the funnel (and beyond). Keep in mind: The buyer's journey doesn't end with the purchase.

Nurture lead

Turning warm leads into hot buyers is what email is all about. Segment your campaigns to ensure they only receive relevant tips, information, and offers from your campaign.

Customer success

Add patrons to a new email campaign that nurtures their success as newfound customers. Include tutorials, FAQs, guides, and videos so they can hit the ground running (and properly implement your product or service over the long term).

Develop a Fluid Pipeline

The B2B funnel requires a fluid pipeline to be functional. This means making the transition from marketing to sales seamless. Identify the best methods and tools to simplify the process.

Sales relationship

When leads come in from marketing, your sales team should focus just as much on relationship-building as they do selling. Not all leads are ready to buy immediately. Worst case, recycle leads back to marketing for nurturing.

Sales handoff

How will marketing leads reach the right sales reps at the right time? Manual processes are slow — consider using tools like CRMs to flag and direct leads so speed-to-lead times are optimal.

The B2B sales cycle is a tricky one. It's long — sometimes lasting four or more months. Throw in the **88% of buyers** who expect content to be personalized and relevant every step of the way.

Without a defined B2B funnel, it's challenging to meet these demands. And it all begins with understanding your target customers. This is critical with **68% of B2B buyers** preferring to perform online research on their own.

If even a fraction of your audience is in this group, you'll need content that leads them from awareness to the final decision (or risk losing them to competitors).

Need help putting it all together? At Orogamis, we have a highly successful funnel experience framework. We use this to define, fine-tune, and optimize your sales cycle.

Want to learn how we can help build your pipeline? Then reach out to our B2B funnel experts today.

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GET IN TOUCH WITH US**

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