

## Measuring the B-to-B Customer Journey with Bryan Semple

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*Kerry O'Shea Gorgone:* Welcome to Marketing Smarts, a podcast brought to you by MarketingProfs. I'm your host Kerry O'Shea Gorgone. Thanks for listening.

I really appreciate you joining me week after week and I would appreciate if you reached out to me on Twitter to say hello. Drop me a line on Twitter @[KerryGorgone](#).

Today on Marketing Smarts I'll talk with Bryan Semple, Chief Marketing Officer of [SmartBear Software](#) and author of the book *Digital CMOs Guide to Marketing Measurement: Think Like a Submariner for Operational Success*. He has worked in sales and marketing leadership positions across a range of companies and sales models. His past experience includes Cybase, Dell, NetApp, and FairMarket.

Bryan has taken his early work as an Operations Officer on a fast attack submarine and applied it to his business experience to provide a unique view into the world of marketing operations. He's also an instructor in an upcoming [MarketingProfs University course](#) on measuring the customer journey. I'm happy to have Bryan with us today.

Bryan, thanks so much for talking with me.

*Bryan Semple:* Thanks so much for having me on your podcast.

*Kerry:* You bet. It's nice to meet a fellow Cape Cod fan.

*Bryan:* We love it out there.

*Kerry:* The first thing I wanted to talk about was your book, [Digital CMOs Guide to Marketing Measurement: Think Like a Submariner for Operational Success](#).

You have kind of an eclectic background for a CMO, so first let's talk about that. Then dive into how that turned into your first book.

*Bryan:* I graduated from the Naval Academy in the last five years of the Cold War and I spent the first five years on a submarine fleet in the Atlantic Ocean. I transitioned out of the Navy and went back to business school and I started working in high tech out in the Valley doing a bunch of enterprise sales, so heavy lifting enterprise selling. I gradually transitioned into marketing in the Boston area for some SaaS companies, mainly doing product marketing.

Then about six years ago I took on my first CMO job, this time in a high volume, high velocity, download and go software company. The model was absolutely fascinating because marketing went from a product marketing focus, high touch, heavy into messaging, heavy into working enterprise sales cycles, to almost an operational model of thousands of visitors a day, downloads a day, traffic, making sure stuff gets processed through the system right, getting to the sales team correctly. On the basis of all that, and my sales experience, operations experience, marketing experience, I'm like "this stuff is really complicated," and I wrote the book *CMO Guide*.

*Kerry:* Because it's actually surprisingly similar to how you run a naval submarine.

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**Bryan:** A lot of the concepts are. If you look at anybody that has been in the Navy (and probably a lot of the other armed services) you spend a lot of time measuring. Especially if you look at a ship going through the water, you end up measuring a lot of things to make sure that ship is going through the water correctly, or in the case for a boat for a submarine.

You measure all kinds of very low level metrics. You want to catch problems before they start to happen. If you have a pump somewhere and that pump is starting to overheat, you want to know it's overheating because if that pump overheats it causes something else, which could cause something else, which could cause something else.

A lot of these high velocity marketing models are the same way. If for some reason your traffic drops off you want to know as soon as it drops off to figure out why it dropped off so you can go fix it. If suddenly leads stop getting routed to the sales team correctly, you want to know that quickly before the sales team wakes up a week later and says, "Where are all my leads?"

What I've discovered is measuring all of these little points of data is just like how we do it on the boat. I apply the same concepts to marketing in terms of lots of measurements to figure out what is happening and then very frequently review those and make process steps and changes to drive the business forward on the basis of those measurements.

**Kerry:** It's very detailed. What's interesting is I read a lot of marketing books and commonly the criticism is "you didn't delve deep enough" or "this is just an overview" or "where's the how to, this is just the why," and your book is like an instruction manual.

**Bryan:** It took about a year to write it and it is almost an instruction guide. It's funny, I look back at some of the stuff I wrote and at the time I thought, "Wow, I just learned how to do this, I better go write it up," and now to me I look back and it's kind of basic. One of the Amazon reviews I just had was someone said it's a good intermediate guide to how all these pieces fit together.

One of the things that I've found as I've gone off to talk with other CMOs and other VPs of marketing is that unless you have an operational view of the world, I've worked for some CMOs in the past that just aren't able to dive into the details of how does PPC work, how do you evaluate a PPC program, tell me about SEO, why are these numbers up and down. One of the things from my time in the Navy and on the boat was you knew how everything in the boat worked so you could go and ask the hard questions of people. It's the same thing as a modern CMO. Unless you can go down and have discussions about what's going on with digital advertising and understand what people are presenting you in terms of the data it's very hard to add value and it's very hard to make sure that the money and everything is being spent correctly.

I actually think that CMOs, VPs of marketing, anybody in marketing, needs to have an understanding of the minute details of how the business does operate if you're going to be effective and drive things correctly. The model, especially in these high velocity models, is very complicated and you have to be a master of all the details.

**Kerry:** Let's talk more about that. How much detail is realistic? How much detail can you have at hand at any given time? How much do you have on hand about your business right now?

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**Bryan:** A lot. Part of that is the reporting models that we use.

**Kerry:** We're talking about at SmartBear now?

**Bryan:** Yes. Some people may find it odd how we do reporting. First of all, the marketing team is divided up that everyone is in a particular role in the process of delivering leads to the sales team. Someone is responsible for advertising, someone is responsible for email marketing.

They actually report each week into a Google Docs spreadsheet, of all things, on the results they had the week prior. I can very easily go in and scan and understand exactly what happened across the entire business simply by looking at the numbers that got reported last week. When you look at that week over week it's very easy to pick up the trends, and also when you roll it up on a monthly basis, a quarterly basis, etcetera.

By doing the process that way, because I have the people that are responsible for the numbers, because they're the ones that are actually reporting on the numbers, there is a certain amount of authenticity. They own that number, they report it. So you don't get in a room where someone says that's not the right number. It is the right number because Mary who is responsible for email marketing reported on it.

We actually have a lot of information at our fingertips because of the way that we do reporting. It takes us about an hour and a half on a Monday morning starting at 10:00 to quickly review all of the data from the week before and pick up hot spots and pick up other issues that may have happened.

We have four business groups here. Because of that reporting when the marketing team goes off and the marketing leaders meet with their respective business groups they know exactly what happened the week before, they know all the data, and they can explain exactly what's going on.

**Kerry:** So an hour and a half to go through this data. Do you do that together as a group or does everyone delve through it and then bring just the things that they're concerned about that they noticed?

**Bryan:** We go through it as a group, but it's four groups. What happens is it's sort of a rolling meeting where we start with the first team and then we roll to the second team. Some people have to report into all four teams because they're a shared service across the different groups. People definitely show up with observations, so it's not a question of coming on there and reading "this is the number from last week." Everybody can read. The question is tell us what happened, tell us what changed, and tell us what you're concerned about.

**Kerry:** It reminded me of when I read the book *The Last Hurrah*. I don't know if you remember that, about an old Boston mayor's last run for office. They used to have to review the voting as it came in at the polls. Him and his right hand man were the only ones who noticed very early that things weren't going his way. Spoiler alert for anybody that hasn't read the book.

How early do you think you can pick up on something that is going to become a big problem down the road? Basically, how closely do you need to pay attention to the smaller things?

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**Bryan:** We actually do daily numbers. I'm actually sitting here in this conference room and I have eight screens across the way behind my desk and they have a bunch of daily metrics up right now, in addition to real time traffic metrics. We look at numbers daily and when it comes to traffic we actually look at traffic on an hourly basis and we compare it to the same amount of traffic the week before.

Just yesterday one of the market managers was all fired up because he noticed that something had gone wrong in his download process, because he looks at his download process every day, and he was on the phone with the operations teams figuring out why. In some cases we look at data every day because you can't go a week. We're feeding an inside sales team, so we can't wait a week to say something broke last week.

The daily and the weekly tend to give you validation that everything is working correctly. It's going to quickly spot if you have traffic jumping up or down and what's going on, if suddenly your form conversions change, did something happen on the site. The weekly is almost a way just to validate that everything is operating correctly. For anyone that has Salesforce or something similar to that, or Marketo, or HubSpot, and they're using GoToMeeting and WebX, and they're sending out emails, there are a lot of moving parts in the system.

**Kerry:** What things specifically are you looking at when you do that? I've heard you talk about marketing metrics and how people are sometimes looking at the wrong ones. Which ones are the right ones to monitor that closely that often?

**Bryan:** The close often ones are to make sure that things aren't broken. Where you get the longer trends is when you do the month over month comparisons, this month to last month, this month to the month the year before, and then when you get the quarter to quarter that's where you spot the longer trends of where your business is suffering or things are changing to catch.

On a week over week basis traffic generally doesn't change that much, your form conversion rates generally don't change that much, the click through rates on your emails generally shouldn't change that much (though they will depending on what you have sent out), your number of 404 errors on your site, etcetera. What you see is week over week things generally don't change that much, and if they do you need to understand why they changed and what you did.

You're almost looking for the absence of change and when you do see a dramatic change you should understand exactly what happened there.

**Kerry:** That has to be a real bad day for your email marketing person if they send one out and it's doesn't work out the way they were hoping because then everybody can see it as they go by.

**Bryan:** We're 100% transparent and everybody has access to the data because it's a shared sheet and we review it, so we're a very low ego organization. We do tend to mock people that don't do well each week but it's all in good fun.

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**Kerry:** Fun for you, maybe not for the person who is having a bad week. So your first book was very focused on the operational aspects, but it sounds to me like it could roll very nicely into perhaps a second book.

**Bryan:** The first book was written with very much go attract traffic, traffic comes to your site, you convert the traffic, put it in the database, email nurture it, send it to the sales guys, watch to see what your win rate is. It was very much the lead flow process from an internal perspective. I think where we've been dramatically trying to revamp how we operate over the last year now is that view of the world is very much an operations internal view of the world, it's not really a customer journey view of the world. If you think about it, the customer journey is all that matters from a process standpoint.

I'm sure everyone has their own customer journey mapping, you can go search online for what is a customer journey and how to create a customer journey, sometimes it's called the buyer's journey. Essentially what we've done is we're now trying to map our measurement process to map to the actual customer journey. That's actually the topic of the [MarketingProfs University course](#) I'm doing, how to measure the customer journey and how is it different.

What you find is if you start to look at things from a customer journey standpoint the different things like email marketing, social, pay-per-click, remarketing, whatever you're doing, those tend to be tactics to move people along the journey as opposed to specific tactics tied to a part of the journey. You may find that you use social very late in the customer journey, or you may find you use it early, or you could use it all different kinds of places. But those are just tactics. What you really want to do is measure where someone is in that journey and how effective you are at moving them from one stage to the next.

**Kerry:** One of the things that you talked about that makes so much sense is how we have this idealized sort of process in our head of how sales are supposed to go and the reality is they don't go that way at all. They're more like those *Family Circus* cartoons where the kid used to wander all over the neighborhood before he went where he was supposed to go.

Knowing that there is this potential chunk of the customer journey that you're not going to be able to attribute properly, how do you optimize your marketing when it's not possible and some of these little aspects are kind of unknowable?

**Bryan:** The mistake is everybody assumes they are knowable. I'm sure folks out there have worked for CEOs and CMOs that want to know what piece of content did someone download that made them buy, and the answer is they didn't, it's a sum of everything. Yes, they grabbed that content, but it's 20 to 30 other pieces of content that someone has downloaded or 30 other interactions that someone has had. To try to go to that level of attribution just gives you a false sense of what's happening.

What we try to do is first measure where people are in the customer journey, and we use scoring to do that. We use lead and contact scoring in our system to determine where someone sits in the journey. Then the next thing we do is try to measure how effective we are at moving them from one step of the journey to another step of the journey in terms of increasing their score.

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When you look at it that way it becomes a much simpler problem to solve.

If you say this group of people are in the research phase where they're trying to research a solution to their problem, and you drop an email to them and you get a certain click through rate, if you do that enough you'll get very comfortable on what a good email is to people that are in the research phase in terms of what click through rates are. We started to get some of these segments where they're getting up to 10% click through rates pretty consistently because they're so focused in on that particular phase. Do they click and eventually buy? We're not really interested in that. We're interested in did this tactic help move them to the next stage.

You can look at the same thing with remarketing. If you set up online remarketing for people that just come to your site and then bounce off and don't really know your brand you get comfortable with of these people that don't really engage with us can we put an offer in front of them that makes them come back and engage with the brand and what do those percentages look like.

If you measure these tactics in light of and with an understanding of how they contribute to the journey you get used to seeing that depending upon where you apply the tactic and where in the journey it gets applied, you start to get very familiar with the particular response rate you should get for that tactic.

*Kerry:* What about the times when a prospect has stepped out of whatever you want to call it – the funnel, the journey, the whatever – and then been brought back in by some piece of content that somebody else saw and mentioned? I think the example you typically use is going to a tradeshow or something and they get brought back in. Can you talk about how we can work with this nonlinear model?

*Bryan:* We actually don't, we just avoid it.

*Kerry:* That's great.

*Bryan:* It makes it a lot easier. In that case what you'll see is you go to a tradeshow and you get a certain response rate from your tradeshow in terms of A, B, C, number of people talked to, people at the booth. We don't just go to tradeshow and swipe, we try to engage and evaluate people. You can sit there on the basis of that tradeshow and say in aggregate this was a good or bad tradeshow based on the number of people we were able to engage with successfully at the show. We do that all the time.

All that's reasonable to expect for that particular person is when they actually go and become a customer would be to go back and credit all of the marketing activities they did with that sale as an influenced opportunity. That's about the extent of what we do.

For that tradeshow eventually we'll go back and say, "Did any of the people who came to the tradeshow ever show up on an opportunity?" If they did, we're happy. If they didn't, that's not really so great. We had good response rate, but no opps created, this person never even resulted in an opportunity. That's about the extent we look at, which is probably more the "art" part.

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We are very comfortable with a certain amount of just not knowing stuff. We're okay with that because we get comfortable that at least the tactics we're doing are working and we're comfortable enough that in aggregate we see deals getting closed.

*Kerry:* So knowing that marketing is at least in part an art frees you to pursue the part you know is working and just place faith in the rest.

*Bryan:* Yes. One of the things I write about in my book is to measure what you can, not what you want. What everybody wants to measure is that incredibly nonlinear process. I'm sure some people are smart enough to figure that out, but there is also a cost as you try to go measure everything. We try to strike a balance between measuring the things we can, seeing if that's a good enough proxy for what we want to measure, and then just understanding that there's still a little bit of an art to all of this.

*Kerry:* Based on where you started, which is in the military, and where you've been since then, which is all of these different roles at all different kinds of organizations big and small, B-to-C and B-to-B, how would you now build the right marketing team?

*Bryan:* That's an interesting question. One of the reasons why I came to SmartBear was to actually go and build a larger marketing team with multiple products and multiple market motions into multiple markets. I think we're doing a pretty good job here of building what I think is the right team structure.

We have four groups, each of them have unique sales teams. Each of those groups is led by someone I call a market manager who is responsible for all of the demand generation. Their partner is a product marketing manager who is responsible for understanding the customer journey and also understanding all of the positioning, branding, competitive analysis, sales training and sales enablement.

We've tended to hire post-MBA type folks to be the PMMs, although not always. The market managers tend to be people that come up from the digital marketing ranks but are really strong in two or three of those areas, so maybe they used to be a really solid email marketer or pay-per-click person. Because those are the two people that have to sit with the sales team each week, support them and drive the revenue, we align the rest of the marketing team up to go support them.

Those four teams are kind of the head honchos in the organization and they are everybody's customer. If you're the email marketing person you answer to them. Maybe not in a reporting fashion, but certainly in a weekly "this is what I did for you last week" fashion. That seems to work and it allows us to produce a lot. It means there is very little management hierarchy, people can just go make decisions. We push budgets down to the market managers, we push decision making down to them. We're able to make decisions very quickly. They can make decisions quickly and they feel accountable and responsible, and they move forward.

I think that model seems to be working and we're going to keep scaling it out here.



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**Kerry:** I think they feel accountable because their results are put up on eight different screens in the hallway. You think?

**Bryan:** Oh yeah. Everybody knows. They also get some competition going between them. Sometimes the competition isn't healthy, like one group was trying to go beat the other group out in terms of number of webinar registrations they could get. I asked, "How many people did you send this invite to?" Oh, 100,000. "I see what's going on here."

**Kerry:** That's old fashioned sales funnel stuff, just send it to more people and if you get the same percentage from more people it's more leads.

**Bryan:** Exactly.

**Kerry:** You've said yourself that leads without conversion don't actually mean anything. How do you push them to chase the right rabbit?

**Bryan:** We do everything based on scoring, so ultimately leads don't go to the sales team but rather people that are scored up to the right place in the customer journey. You sit with the sales team and you all agree on how to score different activities, because the sales guys don't want to spend their time on stuff that doesn't matter. Once you have that established it's fairly easy to not go off and chase stuff that doesn't matter because everybody agrees on what they want to get past the sales team. By involving the sales team in the scoring discussions everybody is on the same page in terms of what matters and what does not matter.

In addition to that, we also track all of the disposition of once we hand somebody to the sales team how much of it is bad data, how much of it creates an opportunity, how much of it is existing customer, etcetera. We use that data to help us calibrate whether we're chasing the right stuff or not.

In addition, we never do any type of pay-per-lead programs because we've never found those to work at all. Everything they do is self-generated and everything we do is heavily driven towards doing organic versus paid advertising. Paid advertising is a very small share of the overall marketing budget and overall time that we spend.

**Kerry:** Really? Organic reach on social is pretty low these days, so for somebody whose business is heavily reliant on social does that change the game for them or should they work harder at using blogging or other tactics that can bring them more organic traffic?

**Bryan:** I think you have to use everything. Everything in terms of blogging, writing content, you have to have a rock star SEO/content person on your team.

Social has been interesting for us because we've kind of moved it around. We used to have a dedicated social person. Now the social person is the same as the content marketing person, because they use mostly social for distribution. We also monitor social.

I think you have to have everything going to make it work. That's what we have going here. The latest thing that came up the other day was are we spending enough time monitoring a bunch of the third party communities where people are talking about our products, the answer was



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probably not so now we have to go figure out how to get someone to cover that or stretch someone to go do it. I think you have all pieces running, you can't rely on any one particular tactic.

*Kerry:* Jay Baer just came out with a book, I think it launched today actually, [Huq Your Haters](#). One of the things he talks about is forums and how you should be paying attention to the forums and companies aren't.

*Bryan:* Oh my gosh, yes. It's interesting, and I think everyone will find this in their own travels. You spend more time looking at the user forums to go get information about a product than you do at the company's website. In fact, the company's website is almost just not that interesting.

I'm looking to upgrade my old used boat to a slightly larger old used boat. First off, the company website doesn't have any information on some of the stuff. Second, all the types of questions that I want answered, really detailed questions like "does this work with that" or "what size engine do you need for something like this," the company never even produced the content on that but the content has been produced out in all of these forums. You find yourself spending most of your time on forums because that's where the content has been generated that can help you make the purchase decision or not.

We're seeing that also. By the time someone comes to our site they're either ready to engage and try our software or they're not going to. The top of the funnel almost doesn't belong to the companies anymore, it's somewhere else out there.

*Kerry:* It's almost not even a funnel anymore. I don't think anybody else has come up with whatever the next thing is going to be, but most people say the sales funnel doesn't really work anymore, it's just kind of a mess.

*Bryan:* It is. There clearly are some stages that someone goes through. It's interesting. We still do conversion metrics, so I have metrics of traffic, how much of the traffic converts to leads, of the leads in a given week how many of those turn into opportunities. But those are just ratios, there's not causation between those. Just because you get leads doesn't mean you get opportunities. You may be getting opportunities in a given week, but those may be from leads from six weeks ago.

What's interesting is if you do measure the ratios they tend to hold, although they are not necessarily causated, it's potentially just correlation. I think that's the important thing to remember.

For anybody whose CFO says, "We need a marketing plan, you need this number of leads and this is what your cost per lead is," it's just like please stop, that's not the way you do stuff, it just isn't. Those predicted ratios almost never hold. It's back to what we said at the beginning, which is it's a good way to do an indication of how things are flowing. If our ratios from the sales funnel start to change it's not good or bad, it's more why are they changing, let's see if we can go figure it out.

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**Kerry:** We've reached the point of the program where we talk about anything but marketing. Because you've moved 18 times, I'm going to ask you how has moving frequently helped you to become a more agile marketer?

**Bryan:** I'll tell you what popped into my mind. We're a global organization; we have engineering all over the world, sales teams all over the world. Having lived all over the country and traveled a lot, even every part of the U.S. is different than other parts. You're down in Florida, I'm up in the northeast, very different parts of the country.

One of the things that I've resisted when you do global marketing has been the "it's different over here" scenario, or "you don't understand, things are different." There are differences and there are differences whatever region you're in of the world, even within the United States there are differences. What's important is to try to understand what you can accomplish globally and what has to be accomplished locally and apply the right processes and the right management structures in place to go do what has to be done locally versus what has to be done globally.

I think lots of organizations get that wrong. I think a lot of the so called marketing consulting firms get that wrong where they have these global demand centers and local demand centers, you package stuff up and send it over to these places. So much of marketing can be done right now that you have to really apply the local resources where and when you need them, because every place in the world is different, and at the same time you can reach a lot of the world from a central location.

**Kerry:** That's really profound, Bryan. I'm glad I asked you.

**Bryan:** I'm glad there's a deep thought in this for the broadcast.

**Kerry:** Where can people learn more about you, more about SmartBear, how can they sign up for your course, where can they get your book – everything?

**Bryan:** At SmartBear we sell software to software developers, testers, and operations folks, so I don't know if it's the MarketingProfs audience, but certainly you can come to [SmartBear.com](http://SmartBear.com) and learn more about our products.

If you want to learn more about me, probably the best place is at my blog [StoryMetrix.com](http://StoryMetrix.com). There's also links to my book there and my book is up on [Amazon](http://Amazon). I also have a Twitter handle @vk\_bryan.

Then of course my [MarketingProfs University class](http://MarketingProfs University class) is coming up in April and that is on measuring the customer journey. I'll also be speaking at Marketo Marketing Nation in May on a topic of 15 things not to tell your CMO.

**Kerry:** Like "all of these metrics you're looking at are wrong."

**Bryan:** That's a good one. "We're doing this for awareness" is another one of my favorite ones. How did we do on that? Well, we did it for awareness. Which is code for we didn't measure it and we don't know why we did it.

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I have to come up with all 15. I submitted three or four topics and this is the one they picked, so I have to come up with 15, but I'll get to 15.

*Kerry:* You should invite people to come into your office every day and give you bad news and see which 15 make you feel the worst. That would be my advice.

Bryan, thanks so much for talking with me.

*Bryan:* Thanks so much for having me on your podcast.

*Kerry:* For more information check out [SmartBear.com](http://SmartBear.com) and look up at Bryan's blog at [StoryMetrix.com](http://StoryMetrix.com). You can also follow Bryan on Twitter @[vk\\_bryan](https://twitter.com/vk_bryan).

Thanks for listening here to the very end. This has been the Marketing Smarts podcast, brought to you by MarketingProfs. I'm your host Kerry O'Shea Gorgone. Talk with you next week.