

HOW TO BUILD B2B CLIENT JOURNEYS THAT DRIVE CONVERSIONS



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Synopsis:

- The importance and benefits of client journeys
- Best practices for developing accurate client journeys
- 3-step playbook to building client journeys that drive conversions



WHAT IS A CLIENT JOURNEY?

A client journey refers to the complete process a client undergoes while interacting with a business. It encompasses all touchpoints and experiences, from the initial awareness stage to post-purchase interactions, influencing their overall satisfaction and loyalty. The B2B client journey typically involves stages such as awareness, consideration, decision-making, purchase, and advocacy.

The B2B landscape continues to [undergo dramatic transformation](#), marked by significant changes in the buying cycle that reshape the way businesses operate. Notably, buyers have evolved into a more independent and discerning force, demanding higher levels of quality, value, and personalized experiences.

In the past years, buyer committees have grown in size and importance, as organizations recognize the necessity of diverse perspectives in the decision-making process when acquiring a solution. The buying cycles have also extended in duration, reflecting the deliberative approach buying committees now undertake to ensure the Return on Investment (ROI) of their purchased solution.

This buyer evolution has necessitated organizations to pivot and prioritize client journeys by placing client experience (CX) at the forefront of their approach. Indeed, Zendesk's [CX Trends 2023 report](#) shows that 81% of surveyed leaders see CX and support as growing priorities over the next year and 71% of leaders plan to revamp their client journeys.

In order to deliver the client journey that is expected of the modern B2B buyer, [tech and client data are critical](#). Indeed, those that manage to optimize these elements will have a significant advantage over their competitors as, in the above Zendesk report, 67% of surveyed leaders reported a prevalence of disorganized, reactive efforts to use client data—a trend that is compounded by organizational silos that prevent that information from being shared efficiently. In addition, 72% of business leaders continue to move forward with personalization plans that are wildly at odds with the actual needs and desires of their prospects.

THE IMPORTANCE OF CLIENT AGENCY

With this in mind, it is important to remember that organizations cannot prescribe client journeys to their buyers, as they buy on their timing, and use channels that they feel comfortable using while moving freely from phase to phase, both forward and backward.

Therefore, the most important aspect of optimizing client journeys is to build seamless, consistent experiences with the right content, and make sure that users can easily engage across all channels and devices. A satisfactory client journey, which caters to the differing needs of your audience members, is what will enable a predictable sales pipeline for your organization.

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The importance of client journeys

Building effective client journeys is crucial for successful [demand generation](#) given the need to map the entirety of the ideal path a lead takes from initial awareness to becoming a satisfied client. Understanding these journeys, therefore, allows businesses to identify pain points, personalize interactions, and provide [relevant content](#) at each stage. This leads to enhanced engagement, trust, and conversion rates. By aligning marketing efforts with client needs and preferences, organizations can optimize their demand strategies, foster long-term relationships, and ultimately drive [revenue growth](#).

Additionally, the importance of first investing in and building an attractive client experience cannot be overstated when it comes to securing the attention of your target audience. In today's competitive landscape, clients have numerous options at their disposal, making it important for companies to stand out and differentiate themselves from their competitors. While having a quality product or service is essential for client retention, it is the initial experience that must attract clients and lay the foundation for a lasting relationship.

Creating positive first impressions and a memorable personalized experience is an essential differentiator in competitive markets, providing a valuable competitive edge that prompts leads to choose a brand over competitors. Moreover, delightful experiences foster client retention, drive repeat purchases, and cultivate brand advocates, leading to sustained business growth.

In fact, according to [2021 research by Forrester](#), organizations that demonstrate how client satisfaction is associated with growth, margin, and profitability are more likely to report client experience success and are 29% more likely to secure more CX budgets.



[Discover the value of client relationships within the B2B sales funnel and the role it plays in generating leads](#) →



4 benefits of successful client journeys

Building client journeys successfully can yield numerous benefits for B2B organizations.

Here are the top four advantages:



#1 Enhanced client experience

Developing effective client journeys is key to enhancing client experience in various ways. A well-crafted client journey requires an understanding of client needs, expectations, and pain points, enabling personalized interactions at every touchpoint. This tailored approach fosters trust and loyalty, as prospects and clients feel valued and understood. Building trust is essential, as highlighted by a [2022 report by Sinch](#) which reported 87% of clients actively avoid buying from brands they do not trust.

Additionally, a streamlined journey minimizes friction, ensuring smooth transitions between stages, from initial contact to post-purchase support. This is particularly important in the current B2B landscape, where buyers move quickly between channels and expect their journey to adapt to their preferences. This is reflected by the aforementioned [2023 Zendesk CX Trends report](#), which showed that 73% of consumers value the ability to start on one channel and pick up on another without starting over.

Efficient communication and prompt problem-solving create positive impressions and strengthen the client relationship. By consistently delivering a seamless and satisfying experience, businesses can generate positive word-of-mouth, attract new clients, and foster long-term partnerships, resulting in an [enhanced client experience](#) that drives growth and success.



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#2 Improved client retention and brand perception

Successful client journeys can greatly improve client retention by establishing a strong foundation of trust and satisfaction. When clients have a seamless and positive experience from the initial contact stage to the final delivery of products or services, they feel valued and appreciated. This, in turn, leads to higher levels of loyalty and reduces the likelihood of seeking alternative providers.

Therefore, clients who have their needs consistently met and receive exceptional support throughout their journey are far more likely to become brand advocates and promote the business through word-of-mouth. Such positive, reliable experiences, foster long-term relationships, and ultimately boost client retention rates.



#3 Higher conversion rates and ROI

Well-structured client journeys aligned to client needs, preferences, and pain points also help to identify bottlenecks and optimize processes, resulting in more efficient interactions, reduced client drop-offs, higher conversion rates, and increased revenue. In fact, [2023 research from Zippia](#) found that 64% of clients consider CX to be more important than price when making a purchase and that improved CX can increase company revenue by 10-15%.

Moreover, a streamlined client journey minimizes friction and obstacles in the buying process, making it easier for clients to make informed decisions. This enhanced user experience further boosts conversion rates and reduces the likelihood of clients abandoning the sales funnel—as evidenced by [2022 Emplifi research](#) which reported that 49% of clients indicated poor CX as the main factor for leaving a brand they had been loyal to in the past 12 months.



#4 Data-driven decision making and optimal resource allocation

Successful client journeys are key to unlocking data-driven decision making and optimizing resource allocation. Accurate strategies allow businesses to collect valuable data at every touchpoint. This data can be leveraged to glean actionable insights into client behavior and trends, informing decision making as a result. In fact, according to the [2022 How Data is Driving Next-Generation Client Experiences report by Precisely](#), more than 19 in every 20 CX leaders have invested or plan to invest in data integration, data integrity, or data enrichment technologies.

By analyzing behavioral information, organizations can identify opportunities to improve client experiences and tailor services accordingly. Additionally, data-driven decision making enables effective resource allocation, ensuring that time, effort, and finances are directed where they will make the most significant impact.

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4 best practices for building client journeys

Crafting seamless client journeys requires a combination of data, strategy, and innovation. In this section, we explore essential **best practices to deliver exceptional experiences that result in lasting client relationships:**



#1 In-depth buyer persona development

A thorough understanding of target audiences and accurate buyer personas are crucial to crafting a smooth and effective client journey that meets prospects where they are and addresses their needs and pain points efficiently. In fact, according to a [2022 Hubspot Infographic](#), marketing personas help make websites 2-5 times more effective and easier to use by users.

More detailed advice can be found in [our definitive buyer persona guide](#), but the **foundation of creating an accurate buyer persona includes the following steps:**

- **Conduct research:** Gather data through surveys, interviews, and buyer group research to understand your audience's preferences and behaviors
- **Identify patterns:** Analyze the collected data to identify common demographics, interests, and challenges in your target audience
- **Create persona profiles:** Develop fictional representations of your typical clients, including their goals, pain points, and preferred communication channels
- **Validate with real data:** Test and validate the personas using actual client behavior, [survey feedback](#) and social listening.
- **Inform marketing strategies:** Tailor your marketing efforts to address the specific needs and preferences of each persona



When following the above steps, keep these 5 best practices in mind:

- **Keep personas updated:** Continuously gather data and insights to keep your personas relevant and up-to-date. Client preferences and behaviors can change rapidly, so regularly review and adjust your personas accordingly.
- **Reject stereotypes:** Be mindful of biases and avoid creating personas based on stereotypes. Use real data and insights to form accurate representations of your audience.
- **Involve cross-functional teams:** Collaborate with various departments, such as marketing, sales, client support, and product development, to ensure all teams understand and align with your buyer personas. This collective understanding will lead to more cohesive strategies and client experiences.
- **Prioritize high-value personas:** While it is important to address the needs of all your personas, focusing on those with the highest potential value to your business can be beneficial. Tailor your efforts towards converting and retaining these high-value segments to manage workflows.
- **Measure and iterate:** Regularly measure the effectiveness of your marketing efforts targeted at each persona. Analyze the results and iterate your strategies based on the insights gained. This data-driven approach will help you refine your buyer personas and optimize your marketing campaigns over time.



#2 Utilizing data and analytics

Data and analytics are integral elements in crafting an effective client journey. Both provide valuable insights into client preferences, behaviors, and pain points.

When creating a client journey, potential sources of quantitative data could include analytics from CRMs, data analytics platforms, client purchase history, and sales data. Qualitative data sources might involve in-depth interviews, focus groups, surveys, client feedback in the form of open-ended comments, social media conversations, and direct observations of client interactions and behaviors throughout their journey (usually by the sales team).

When utilizing data, keep the following best practices in mind:

- **Define clear objectives:** Outline specific goals for data and analytics usage in client journey development, such as improving satisfaction or boosting sales.
- **Collect relevant data:** Gather data from sources like CRM systems, social media, and client feedback, ensuring accuracy for informed decision-making.
- **Segmentation and personalization:** Divide your client base into segments based on demographics, behavior, and preferences to create personalized journeys.

- **Integrate data sources:** Combine data from different sources to form comprehensive client profiles and understand their cross-channel journeys.
- **Predictive analytics for insights:** Utilize predictive analytics to anticipate client behavior, preferences, and pain points, enabling proactive engagement.
- **Real-time monitoring:** Implement real-time analytics to track client interactions, facilitating prompt responses and adjustments.
- **A/B testing for optimization:** Test different strategies, messages, and experiences through A/B testing to optimize the client journey.



#3 Omnichannel as a necessity

Integrating a wide range of marketing channels to deliver a consistent experience is paramount for crafting effective client journeys. In an interconnected digital landscape, prospects interact with brands through diverse platforms, making it essential to maintain a cohesive brand identity and messaging across channels. This fosters trust, recognition, and a seamless user experience, ultimately enhancing client loyalty and retention.

Organizations must also recognize the diverse channel preferences of different generations and client personas. Tailoring content to resonate with each group's distinct behaviors and values ensures relevance and resonance. Moreover, repurposing content across channels not only maximizes reach but also optimizes resources and messaging consistency.

Recognizing that engagement is not linear is also pivotal. Clients often traverse a non-linear path, jumping between channels and touchpoints. By synchronizing efforts across platforms, brands provide a holistic journey that adapts to clients' evolving needs and behaviors. This agility enables brands to establish deeper connections, adapt strategies swiftly, and deliver experiences that captivate, regardless of the platform. In today's marketing landscape, integrating channels for consistent experiences is a strategic imperative that underpins successful client journeys.

[Learn how to successfully build an omnichannel strategy to drive demand excellence in our 4-step guide](#) →





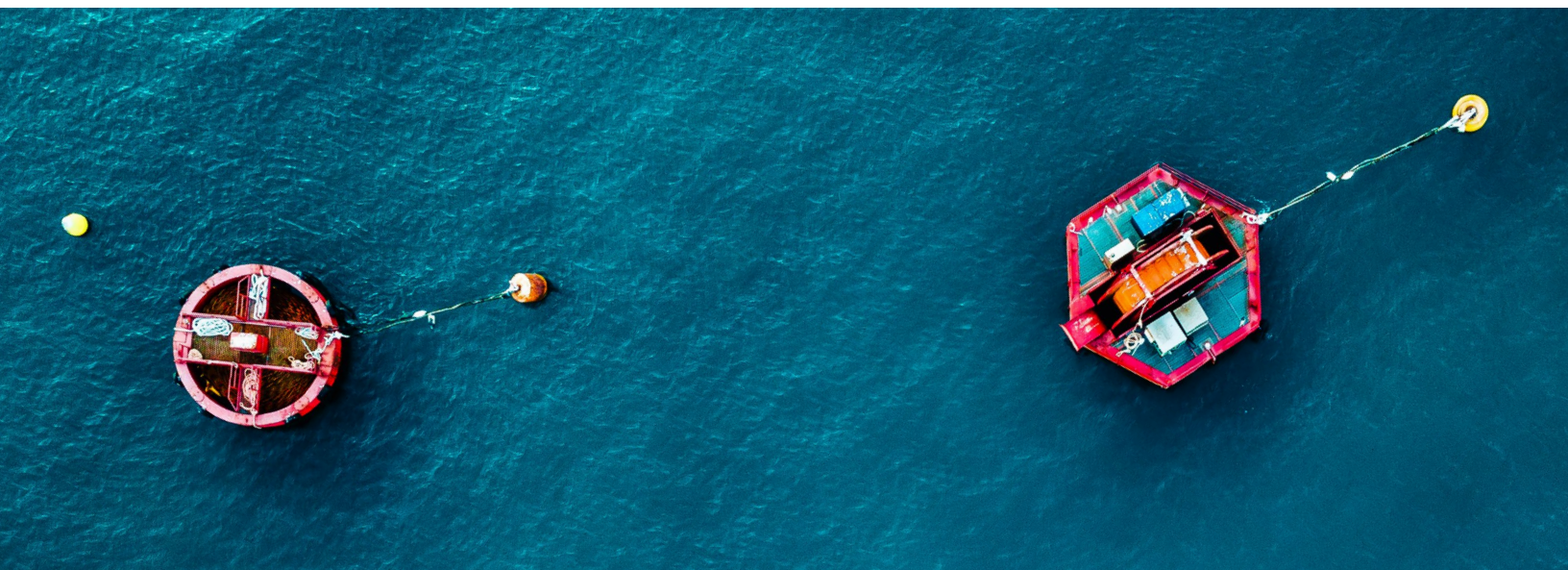
#4 Collaboration between teams

Effective client journeys hinge on seamless alignment between marketing, sales, and client success teams. This synergy ensures a consistent narrative from the initial touchpoint to post purchase, enhancing client engagement and trust.

1. Marketing teams craft compelling messages
2. Sales tailors conversations accordingly
3. Client success fosters excellence in service

This alignment not only accelerates conversions but also nurtures lasting client relationships.

- **Shared goals:** Ensure that teams understand and share common goals, such as revenue targets, lead generation, and client retention. This helps create a unified vision.
- **Open communication:** Foster open and transparent communication between teams. Regular meetings, joint brainstorming sessions, and feedback loops can help bridge gaps and build trust.
- **Lead qualification and scoring:** Establish a clear [lead scoring](#) and [qualification process](#) that teams agree upon. This is particularly important for a seamless marketing-sales handoff.
- **Joint campaigns and content creation:** Collaborate on campaigns and content creation. Sales and client success teams can provide real-world insights into client pain points, objections, and frequently asked questions, which can then be used to create relevant and effective marketing materials.
- **Regular cross-functional meetings:** Meet frequently to discuss ongoing initiatives, share successes, and address challenges. These meetings encourage collaboration and problem-solving.



Identifying early intent

The first step in crafting any client journey is learning how to identify early intent signals so the journey can begin in the right way, on the right channel, and at the right time.

Identifying early intent signals in prospects requires a keen understanding of subtle cues.

To identify early intent, keep the following best practices in mind:

- Monitor tracking keywords or mentions related to your industry.
- Analyze website behavior: frequent visits, specific page views, and prolonged engagement suggest interest.
- Subscribed newsletters and downloaded resources signify growing curiosity.
- Interact proactively by initiating personalized communication.
- Pay attention to comments, questions, or shares on relevant content.
- Monitor social media interactions and industry trends and identify prospects showing alignment with your solutions

Early intent is often implicit; adapt and refine your strategy as you gather more data. Building relationships based on these incipient signals can lead to stronger and more fruitful long-term partnerships. Utilizing [ABM](#) in identifying early intent signals can also assist by narrowing the focus down to a smaller group of targeted organizations and their committee members.

[Explore the top 10 sales and marketing alignment best practices to support collaboration and growth](#) —>

How to build client journeys that drive conversions

 **For beginner teams**

1. Process

Creating a well-defined and effective process for each stage of the client journey maximizes the chances of successful conversions.

- **Keyword research:** Conduct keyword research to identify the terms potential clients are searching for. Optimize your content to appear in search results and attract organic SEO traffic.
- **Website and landing pages:** Optimize your website and landing pages for user-friendly design, compelling content, clear messaging, and effective calls to action. Also ensure mobile-friendliness, fast loading times, and on-page SEO.
- **Lead nurturing sequences:** Enhance your lead nurturing strategy with an omnichannel approach that ensures engagement across various touchpoints. Craft a seamless journey that educates your leads about your offerings while leveraging email, social media, and webinars to share success stories, case studies, and valuable educational resources that emphasize the true value of your product or service.
- **Segmentation:** Further segment your list based on engagement and interests. Tailor your content to each segment's preferences to increase relevance.
- **Follow-up communication:** Check in with cross-functional teams after a few weeks to ensure seamless alignment of messaging, address questions, and fix challenges that may have arisen.
- **Social media engagement strategy:** Develop a strategy for driving engagement on social media platforms. This could involve responding to comments, initiating discussions, and sharing user-generated content related to your brand to foster a brand community.



2. Team

Creating a dedicated client success team with well-defined roles ensures a coordinated effort to guide clients effectively.

- **Client success:** Assign team members to promptly address client queries and concerns. Provide them with the necessary training to offer accurate and helpful assistance.
- **Content creation:** Gather a team of writers, designers, and content creators to generate compelling content that resonates with buyers at each stage of the client journey. This content should educate, engage, and inspire action.
- **Marketing efforts:** Collaborate with your marketing team to strategize and execute campaigns that align with the client journey stages. Consistent messaging and branding across all touchpoints will create a cohesive and satisfactory client experience.

3. Content

Creating captivating content tailored to each stage enhances client engagement and trust.

- **Articles, whitepapers, and blog posts:** Develop informative and relevant articles that showcase your expertise and address common client pain points. These assets should offer solutions and demonstrate your understanding of their needs.
- **Email newsletters:** Craft newsletters that provide value beyond sales pitches. Include success stories, industry insights, and useful tips that keep clients looking forward to your emails.
- **Paid Media:** Implement paid advertising campaigns to target specific audience segments and drive traffic to your website or landing pages. Utilize platforms like Google Ads, Facebook Ads, and LinkedIn Ads to reach potential clients effectively.
- **Social media updates:** Share bite-sized content on social media platforms to keep your audience engaged and informed. Use visuals, short videos, and engaging captions to capture attention.

[Kickstart your demand strategy with top of funnel best practices by CRO Dan Freeman](#) →



For intermediate teams

1. Process

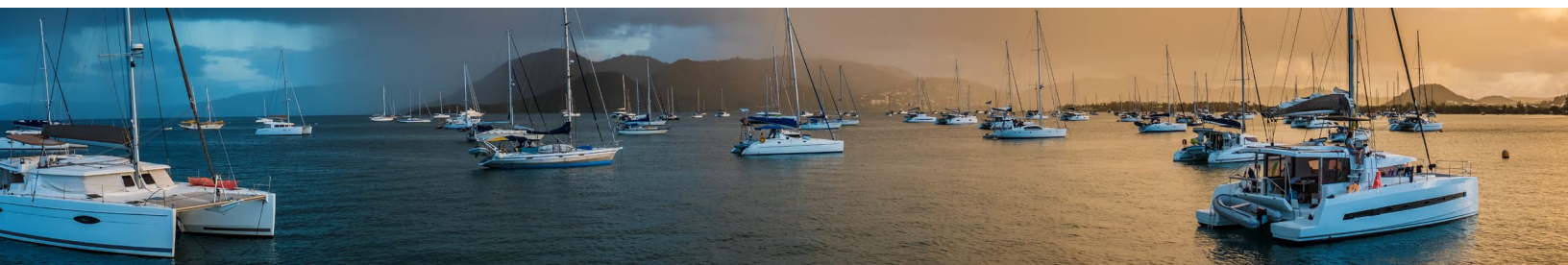
Focus on continuously optimizing and personalizing your processes to address evolving buyer needs:

- **Content personalization at scale:** By leveraging AI-driven content generation tools, you can create personalized content variations for different segments without significantly increasing production time and costs. Caution must be taken, of course, to make sure this content does not sound robotic or generic.
- **Advanced lead scoring:** Enhance your lead scoring model with more advanced criteria. Incorporate external factors that go beyond engagement metrics, such as industry trends, market changes, and economic indicators (e.g., recent company funding) to assign more accurate scoring. Refining your [marketing segmentation efforts](#) can greatly improve lead scoring efficiency.
- **Multi-touchpoint nurturing:** Implement multi-touchpoint lead nurturing programs that span various communication channels. Combine automated emails with personalized video messages to establish a deeper connection with prospects. These could be from key team members or executives, for example.

2. Team

As your B2B organization expands, the collaboration among specialized teams becomes even more crucial to ensure engaging client journeys:

- **Cross-functional agile teams:** Form teams that consist of data analysts, UX designers, content creators, and developers. These teams can work on specific projects, such as optimizing the client onboarding process, in a focused and efficient manner. [Spotify's squad model](#) is a good example of this.
- **Client journey task force:** Establish a dedicated task force that periodically reviews and fine-tunes the client journey. This team should be empowered to identify bottlenecks, suggest improvements, and implement changes swiftly.
- **Unified client insights platform:** Invest in a unified platform that aggregates data from various touchpoints, allowing teams to access a comprehensive view of the client journey. This platform fosters collaboration by enabling teams to make informed decisions based on real-time insights.



3. Content

Expand your content strategy to include a wider array of relevant formats and channels:

- ▮ **Interactive workshops and masterclasses:** Offer virtual workshops and masterclasses that provide in-depth insights into industry trends, problem-solving strategies, and product utilization. These interactive sessions enable clients to actively engage and learn.
- ▮ **Customizable data visualizations:** Provide clients with tools that allow them to create customized data visualizations using your solution. This empowers them to extract insights relevant to their specific needs and makes your solution an indispensable part of their decision making process.
- ▮ **Co-creation initiatives:** Collaborate with your clients to [co-create content](#), such as industry reports, research papers, or joint webinars. This not only strengthens your relationships but also positions both parties as thought leaders.

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For advanced teams

In the realm of advanced client journeys, the emphasis shifts towards a more nuanced understanding of client interactions, leveraging cutting-edge technologies, refining agile processes, assembling specialized teams, and creating truly immersive content experiences.

1. Process

Adopt agile methodologies to fine-tune your client journey.

- ▮ **Continuous experimentation:** Instill a culture of experimentation and data orchestration, where A/B and multivariate testing, and data-driven iterations become the norm. This approach ensures your client journey is always optimized based on findings from real-time insights and trends.
- ▮ **Hyper-personalization:** Utilize advanced client segmentation techniques, combining demographics, behaviors, and psychographics. Craft hyper-personalized content, offers, and experiences that resonate deeply with each client segment and specific accounts within.

2. Team

Build a multidisciplinary team focused on innovation and mastery:

- **Data science experts:** Employ data scientists who delve into complex behavioral analytics, uncovering hidden insights that shape your strategies.
- **Behavioral psychologists:** Engage behavioral psychologists to understand the psychology behind client decisions. This knowledge can be applied to crafting persuasive touchpoints at critical moments.
- **Advanced marketing specialists:** Recruit experts well-versed in emerging marketing techniques, such as [neuromarketing](#), sentiment analysis, and predictive modeling.

3. Content

Create truly immersive content experiences to captivate and engage clients.

- **Immersive technologies:** Integrate immersive technologies like virtual and augmented reality (VR/AR) to provide clients with hands-on experiences of your solutions. For instance, consider simulating a real-world application of your product through VR.
- **Data visualization dashboards:** If your B2B organization works with data analytics or software solutions, offer interactive data visualization dashboards that allow clients to input their data and visualize how your solution can analyze and present insights.
- **Interactive storytelling:** Develop interactive [storytelling experiences](#) that guide clients through virtual scenarios. This helps them visualize the impact of your solutions on their business in a creative and engaging manner.
- **User-generated advocacy:** Foster a sense of community by actively encouraging clients to share their success stories through video testimonials, blog posts, and podcasts. This approach not only enhances trust but also transforms clients into advocates.

Leverage full funnel strategies and avoid common lead nurturing challenges →

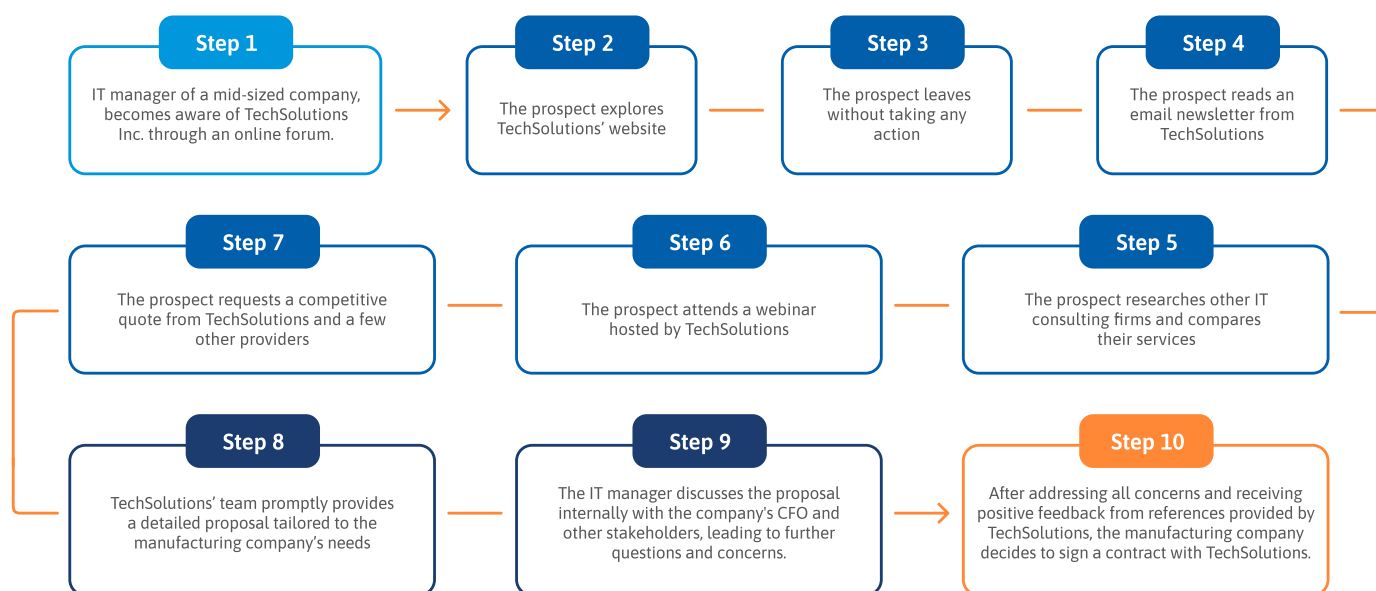


Although the aforementioned suggestions can enhance the optimization of your client journeys, it is essential to remember that organizations cannot control the routes clients follow when making purchasing decisions. Clients do so at their own pace and opt for the channels, devices, and platforms that suit them best. Additionally, buyers navigate various stages of the process fluidly, which means they may move both forward and backward

It is important to recognize that this backward movement is an inherent and often integral part of any client journey. In fact, it should be anticipated and accommodated within your sales and marketing strategies. Understanding that customers may revisit earlier stages in their decision making process helps businesses create more agile and responsive approaches to meet their evolving needs and preferences.

Hence, the key to truly enhancing client journeys lies in utilizing relevant and useful content and ensuring that buyers can effortlessly interact across all channels and devices to ensure a smooth and consistent experience.

IT Manager Example Client Journey: TechSolutions




Key takeaways

- **B2B buyer behavior has evolved**, necessitating a transformation in different, new ways for organizations to map their buyer journeys.
- **Developing successful client journeys** is essential for effective demand generation, as they outline the ideal route for prospects to follow, from initial awareness to client loyalty.
- **Successful client journeys lead to enhanced client experience**, improved retention, better brand perception, higher conversion rates, data-driven decision-making, and optimal resource allocation.
- **Crafting effective client journeys demands a profound grasp of buyer personas** and Ideal Client Profiles (ICPs) through research, collaboration, and validation.
- **Prioritize high-value personas**, iterate continuously, and utilize data for tailored experiences. Integration of channels and aligned marketing-sales efforts ensure personalized, lasting client relationships.
- **The process of building effective client journeys will change significantly** depending on the technology, processes, team, and content that is possible and accessible to your organization.

Our INFUSE demand experts are available to help craft personalized client journeys specific to your target audiences, which incorporate impactful demand generation strategies that drive your growth.

**CONTACT OUR TEAM AT letstalk@infusemedia.com
TO BUILD AN EFFECTIVE STRATEGY FOR BUILDING
PERSONALIZED CLIENT JOURNEYS AT SCALE →**



Discover more comprehensive strategies for driving conversions with our detailed guide →



About the Author

Larysa serves as the VP of Business Operations and leads the INFUSEmedia Client Success Department. One of the founding members of INFUSEmedia, she is recognized as an industry pioneer, having overseen the development of the first Client Success team in the demand generation space.

