company X
Buyer Journey Research & Content Strategy

2022

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Sarah MacKinnon

Buyer Enablement Research & Content Strategy

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

audience network
by Facebook

commonsku

MDBilling.ca™

hotjar

eventmobi

coconut
SOFTWARE

DataHen
web scraping services

HYALTO

Mindflash

potential project
Focused Minds | Organizational Excellence

MAGNET
FORENSICS®

BRIDGEWAY
Most Recommended

FleetComplete

eventmobi

ergoCentric
SEATING • SYSTEMS

SAMUEL
1855

ROGERS™

Quark
Expeditions

ECOSYNTHETIX®
SUSTAINABLE POLYMERS FOR PLANET EARTH™

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

J.
JUDI.AI

ODGERS INTERIM

Agenda

1. Intro to the new buyer journey

2. Buying promotional products software:
   a. Qualitative insights across 6 buying jobs
   b. Buyer journey hurdles and opportunities

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Buyer Jobs (In Their Own Words)

- **Problem identification.** “We need to do something.”
- **Solution exploration**. “What’s out there to solve our problem?”
- **Requirements building.** “What exactly do we need the purchase to do?”
- **Supplier selection.** “Does this do what we want it to do?”
- **Validation.** “We think we know the right answer, but we need to be sure.”
- **Consensus creation.** “We need to get everyone on board.”

Buying Promo Products Software

Qualitative Research

The ultimate goal while mapping out the buying process is to uncover struggles that customers would have with any supplier.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Research Questions

- Who is buying? What are their needs/challenges?
- Why are they buying from us? What triggered their purchase?
- What features do they love? What features do they dream about?
- Why did/didn't they choose company X over other alternatives?
- What is slowing down/halting the sales cycle?
- What advice would they give to other buyers?

Research Approach: Buyers

- 15 x 30-40 minute interviews with company X buyers
- 4 closed-lost, 11 closed-won
- 2-15 licenses (most around 9-11)
- 3 Canadian, 10 American businesses

WHO ARE YOUR BUYERS?

Psychographics

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Buyer Titles

Buyer titles included:

- President
- Owner
- CEO
- COO
- Senior Account Director
- Brand Manager

However, there were no observable differences in buying approach based on title.

“It's not just the actual platform or the efficiency of order processing. It’s the whole community of what company X is, it has really brought our team together in a lot of ways and has educated the entire industry differently.”

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Other Stakeholders Involved

Often, the following functions were exposed to demos and in some cases, platform trials.

- Accounting
- Finance
- Sales Representatives
- Customer Service Representatives

“We took a hard look and I signed up for a demo, then I got a couple of reps involved, and I got the customer service person involved, then we all started taking a look at the system through the different introductory calls.

Then we'd get a couple of the group calls that you guys host each week. And I mean, we spent a lot of time so when we looked at it, it still took six months of looking at it hard to make the decision.

So it wasn't just like, Okay, let's do. I mean, there's still a lot of a lot of internal just debate in pulling the trigger was. It was asking a lot for people at the time, but it was the right decision.”

Our Ideal Buyers Believe That:

- There is enough business to go around for everybody.
- The promo products industry is going through a generational shift and we want to make it more fun (company X is leading the charge)!
- Community and events are a key opportunity to share with like-minded people, learn-from mentors and level-up our business.
- Software should evolve responsively as users (and their businesses) change and grow.
- Providing a modern, seamless buying experience to our clients is key.

Ideal Buyers Are:

- Ever-evolving, creative, fun, young-at-heart businesses.
- Abundance, growth and progress-oriented mindset: How can we do better?
- Gut-first, details-later people (some exceptions).
- Learning how to run and scale a business as they go.
- Not *order in order out, turn and burn* distributors.

"I got the sense that company X is very active in updating the platform and would make adjustments if they got feedback.

To me, that's huge. I know enough about how these things are built that changes aren't that hard, it's not that crazy.

And so it blows my mind when companies are not making updates in a timely manner."

"There are a lot of ways we were exposed to the community beyond just the system.

Yeah, that was a big attraction as we felt for the first time that we were developing a kind of an opportunity to mind-share with like minded people."

"That's the beauty of company X. We all want to help each other. There's plenty of business to go around. Obviously, you might not want to be competing with the same person in your group but people are doing totally different things than what I do."

"I'm a gut kind of a gal. I'm kind of the girl who jumps in feet first. And then I worry about the details later, which is pretty much how promo works if you're going to be successful anyway."

"You are very forward-thinking, you have a similar mindset to us. And that's big. We are in a fun industry that is definitely going through a generational shift and you guys support that.

You make it fun for young creative people instead of just "order in order out, turn and burn" you know? It just was a better match for us.

I don't want to say the other vendors are out-of-date, but your modern approach and that you guys continue to foster that creativity and continue to help us grow, and continue to add features and ask for feedback.

That's how I want our team to be thinking all the time anyway. So it's nice to be supported by a platform that fosters that."

PROBLEM IDENTIFICATION

Starting Point Challenges, Goals and Feelings

GOAL: Transform the Business From the Inside Out

- Improve efficiency of internal workflows.
- Scale number of orders they can take on with a lean team.
- Enable the entire team to work remotely seamlessly.
- Become more attractive to clients who are looking for a more modern buying experience.

“We needed something to help us keep up with the volume of requests we were receiving as a smaller team.”

“How can we become more efficient? How can we become more attractive to clients who are looking for something newer?”

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

PAIN: Workarounds And Point Solutions

Current workflow:

- **Involves many workarounds.**
- **Patches together multiple platforms.**
- **Is time-consuming and often leads to human error.**

“**Major workflow issues.** I had an Excel spreadsheet for my POS, and then a separate email thing, which I still do, but it was like email addresses over here and contact information here, and then POS over here, and in my Dropbox, and like files everywhere. And then I was doing accounting on QuickBooks and having to cross reference, this Excel with my QuickBooks with my bank statement.

I was like, Oh, my God, it's taking so much time. I'm a one person business at this point. And I wanted to scale, but I was thinking, I'm spending so much time on these administrative tasks, **there's no way I can scale.**”

PAIN: Trying to Sell More on a Clunky System

Buyers are aware of the disconnect in asking reps to work harder/more efficiently on an old, slow system.

"It would take some of our account managers 45 minutes to input an apparel order. Between checking the inventory, making sure everything is correct, and then getting the pricing from the decorator. 45 minutes is a long time, if you've got 20 orders coming in a day.

Before you know it, you're three days behind."

"I know from speaking with the reps about how old and archaic the system was and how there was always a lack of improvement and it was a workaround system. I just thought that was old, slow and inefficient.

If we're asking reps to work hard for us, we have to make it as efficient as we can. Instead of asking them to dedicate more hours in the day, we need to get a bit more efficient.

And that way, they can tackle their book of business and squeeze more out of it."

PAIN: Lack of Production Oversight Makes it Hard to Scale

Buyers lack visibility and control over the entire process and this is holding them back from expanding to take on more business.

"And that's a big thing. As we've grown, when we only had so many orders that we knew in our head. But when we have so many orders now a day, we couldn't keep track of what was at our facility and what was being produced.

Now especially post-pandemic we are in the middle of inventory levels issues... I'm ordering 500 mugs, and they're going to be shipped in three days like all of a sudden it goes out of stock or that color goes out of stock or they have production delays. And so our jobs are all over the place and we have no good visibility. So I really needed a system that has amazing job tracking and like a production timeline."

But many of these pain points had existed for years. <u>Ultimately, what was the buying trigger?</u>

- **Have outgrown old system (s).** Frustration with inefficiencies of first-generation solutions and hobbled together tech stack comes to a head.
- **Want to grow but have hit a wall.** Many feel that they can't scale the business when their processes are such a mess.
- **Found out an industry-specific tool exists.** Hearing about company X from a colleague, Facebook group, or the company X community/events.
- **Realized the importance of working in the cloud during the pandemic.** Understand that they need to enable their future workforce to work remotely.

And many wish they'd pulled the trigger sooner. Buyers put off making a change as long as they could, waiting for breathing room to consider a transition. But now realize that they lost valuable time.

"We only decided to start looking at something else when Janet heard about this and came to us. Epromo wasn't a bad system. We are creatures of habit, right?

Like, we been using it for so long, and it works for us. Until we came up, and we saw something new, it wasn't even really on our mind."

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Trigger: Outgrew Their Old System

“We'd just outgrown Quickbooks which was very cumbersome, since we can only have so many seats. They don't really allow us to have more than that for our business model. So my VP was emailing all of her purchase orders to me or somebody else. So that was taking time and that that was a motivating factor, because I don't want to be spending most of my day creating POS and invoices and all of that. We were losing time for sure.

So I've known for a while that we needed something, but we just haven't had the time. So when COVID hit in 2020 that summer, we were a little slower than usual. And I started kind of looking around trying to see what was out there and I actually found out about company X because over the pandemic, I joined Facebook personally for the first time.”

Did the pandemic influence the buying decision?

During the pandemic, buyers experienced a revenue decrease, which made it feel riskier to invest in a new platform.

Still, most appreciated the downtime they had to consider, buy and implement a platform.

"We definitely slowed down. In some ways, there's never a perfect time to make the jump but COVID made it more perfect, because transactionally we were down. I think COVID made it easier for us to transition to a new system."

...More time to consider, buy and implement a platform

“We also made this change in the middle of the pandemic, like everybody started working with the system in January 2021. So sales obviously were not as fruitful as they have been. You know, we still kept everybody employed, we got through the worst of it, right. So we weren't doing badly by any means. But we weren't hitting the sales targets that we had been the last couple of years.”

“The pandemic didn't really affect my decision making, it just kind of gave me a little bit more time to think about it. Because I wasn't in the office and didn't have distractions, I wasn't traveling. So it just allowed me to focus a little bit more on it.”

SOLUTION EXPLORATION

Gathering information online, from vendors and peers

Previous tech stack included

ASI Profitmaker, Epromo, Smartbooks, Antera, Quickbooks Enterprise, Dropbox, Excel, Indesign, SAGE.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

“Profitmaker was outdated”

“So it definitely was the gold standard old-school platform, a lot of the industry was on it. And it was designed specifically for the industry as an an-all-in-one accounting or ERP order management everything but it just was a very outdated system. It wasn't web-based, no integrations, very little customization but it was solid.

It was solid and tight and had the accounting. The one thing Profitmaker never had was any sort of quoting modules. We would have to do our POs offline, and rekey everything and they just weren't developing it. They launched a secondary product but I heard that was a disaster.”

“Antera was not confidence-inspiring”

“Antera upgraded their system with a new user interface. And there were supposedly some other benefits that came along with it. We looked at it at that time, and we had a Zoom call and it was just was not confidence-inspiring at all.

We knew we had to move because we did not want to stick with them long-term. We got the impression their team was really small and communication was terrible and so it was more of a trust thing than the actual Antera advanced software.”

Buyers were not impressed with upgrades to their first-generation solution, and in many cases this was a trigger to seek a new platform.

“Quickbooks Enterprise seemed easier than company X”

“It was easier to appoint than company X is because you don't have to put in so much data. The front end I compare it to when I throw my dirty clothes next to the hamper, instead of going ahead and putting them into the hamper and making it all nice and pretty. Whereas company X definitely keeps you organized.”

“SmartBooks had been so challenging”

“We were using SmartBooks as our platform. And it was beyond difficult. When we looked into company X we had a few reservations, because of the lack of accounting support behind it, because we would have to transfer everything into QuickBooks. When we decided that we were going to make the change, we were met with so much resistance from our team, because SmartBooks had been so challenging to learn. And it just was not a good fit for this industry.”

Based on the experience with a previous solution, some teams perceived company X to be more or just as complicated as their old platform.

New solutions considered

Netsuite, Aturian, Essent, Facilis, Brightstores, Zoho, Hubspot, Shopify, Opencart, Salesforce.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Doing nothing and decision paralysis were also common alternatives.

“I mean, I've looked at all of them. We've looked at Facilis. We've looked at Antera. We've looked at different buying groups that “have technology”. I wish I could list all the names, but no joke, it was 6-8 options. I mean, we looked for 5 or 6 years and then kind of just gave up.”

Perspectives on other solutions

Aturian

“We looked at another startup called Aturian. They were also industry guys and it was like Windows-based. The thing I really liked about Aturian was the accounting was in the system–you didn't have to punch out of QuickBooks. Luckily, a couple of our colleagues went to Aturian and were very candid sharing info with us that they were just in their infancy stage. I thought “I can't be the beta for this.” Aturian is still around, and they're still onboarding people and they’re doing some really great things but still there were too many bugs.”

Essent

“When we looked at Essent, we said, Wow, this is an amazing, really robust system. It's probably an accounting's dream. Also, the CSRS were in love with it. The sales side, were like, What benefits are we getting? Okay? It's a it's a CRM, but it does what our old system does. There's really nothing, nothing new that it was bringing to the table for the sales side.”

Perspectives on other solutions

Closed lost to Facilis: “Facilis was closer to how we are running our current processes”

“Facilis software looked and felt more like QuickBooks, like our previous system. It was also closer to how we are running our current processes, the way we were doing things. There was a certain comfort level in that.

The fact that the buying group offset the cost was part of the decision but not was not a big part.

Facilis probably looked like it was going to be the least resource required. It came down to yet a gut feeling: where did we feel would have the safest onboarding experience. Honestly, it was probably the number one thing in our minds.”

Closed won to Facilis: “It’s not about who can do it the cheapest”

“All this buying power—it isn't going to gain change my business at the end of the day, let's be honest. And I also didn't like the idea of Facilis taking over our payables and losing our name and being under their group.

We're very loyal to our vendors. It's not about ‘Okay, which of the five can do it cheapest?’ It's like ‘Who are go-tos that we trust, that can support us here?’”

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

How are buyers exploring solutions?

company X events and the community were mentioned frequently as big draws to the brand.

“I'm obsessed by the whole company X community. I love it. It's awesome. Skucamp was a game changer for me in terms of how I see my business going in the next year, two years, three years, five years. Actually, you're forced to spend three days thinking about your business.”

It's amazing for business owners. But also to have access to our biggest vendors. As a small distributor, you don't get that opportunity.”

Exploring solutions: Asking a friend, colleague or reference

- **Colleagues and friends were often consulted for recommendations via Facebook, Ripple Initiative or other forums, calling/emailing industry contacts for an honest take.**
- **When possible, buyers called vendor-provided references, which they noted was a huge help in getting the full picture of company X.**
- **Facilis offers up a long list of current customer references whom buyers can call for a candid review.**

"I joined the promotional products group on Facebook. And that's where I heard about company X. Since 2020, I have been talking to people who had used it, and they really had nothing bad to say about it.

While people talk very highly of company X it's hard to tell if it's Sandy selling T-shirts out of her garage or Sally Sue operating business of 20 people.

That was hard to tell. I could have asked them for references, I just didn't have to with Facilis. They were just like, 'hey, while you're in this decision making process, here are some people are who are willing to talk'. "

Buyer observations of company X marketing

- **Buyers appreciated company X webinars and other educational resources.**
- **Still, a few noted that they didn't understand what company X is or how it works until they got onto a sales call.**

"A lot of the education stuff prior to onboarding was more just industry-specific and not-company X specific, you know, conferences and webinars. They had industry people talking about different topics and stuff. When Ashley reached out (for a demo) I was like, yes! Because I still don't really know what y'all do, even though you had an event.

I thought they would do like a section of company X, what it is and how to do it. Yeah, I appreciate that they aren't always like selling themselves, but at the same time, I was like, I still don't get it."

"Our logistics manager could look up webinars that applied to her role, so I think also how you've separated those roles and execution, that is great. The **only one I feel is missing is that high-level owner webinar, how to how to make the most out of company X for the owner.**"

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Buyer observations of company X sales

Buyers appreciated the non-pushy, patient, no-pressure company X sales experience.

“Your people weren't like: Oh, this is the holy grail. It was more like...what do you need? What are your struggles? Okay, this is how we can help. I mean, all the webinars are lovely, and, nice to have. But for me to pull that trigger, one-hundred percent it was your team.

Everyone at company X makes it really easy and seamless. But nothing was rushed. With all the questions or concerns we had they allowed us to take the time, even though we went through several rounds of presentations with Ashley and the team.

And there was no like animosity, there was no like, nothing negative when we decided not to do it in 2019. When we came back a couple years later, everyone was still was really kind and helpful.”

company X trial was a game-changer

Having the opportunity to play around in the platform was a key part of the decision-making process for some buyers, to give a sense of the scale of change and potential for efficiency.

“It's really great that company X allowed that test phase. That was huge, because that ability to get in there, test it out. Play with it a little bit. Typically they give us a month, but actually provided us with 2-3.

It allowed us to really look exactly what we'd be doing. That gave us the confidence that it was going to provide us with enough of a change to make us more efficient.”

“They gave us a couple of weeks to try to learn it. That was invaluable.

I would say that, you know, the smartest thing for y'all to do would be include in your contract three free weeks in the system to practice, do some orders, learn, find out what questions you have before we start.

I think Joe did have a session where we got to come back and say, we don't know what the hell we're doing on this or that or but having those couple of weeks for them, just to get around and play in the system and navigate, I think is crucial.”

“When we did the first kind of intro to company X, I realized very quickly that it was going to be a game changer for us in terms of how we were following production.

But a two week trial was not going to get me committed. A two week trial was never going to get me into a yay or nay.”

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Key hurdles & buyer enablement opportunities

Hurdle: Buyers are confused about what functionality will be covered by their old tech stack vs new solution? Which platforms can they get rid of? Or downgrade?

Opportunity: How can we help buyers compare old tech stack vs company X?

Tool/Resource: Comparing company X features vs old tech stack (charts or dynamic tool)

- Create a series of comparison charts or a tool that helps buyers compare the feature set of the most common first-gen solutions (Smartbooks, Epromo, Profitmaker, Quickbooks Enterprise, etc) to company X.
- Clarify which areas of functionality the new solution will offer more and less vs their current tech stack.
- Identify opportunities to downgrade or upgrade different parts of their tech stack for maximum efficiency.

Key hurdles & buyer enablement opportunities

Hurdle: Buyers are looking for an honest take on vendors and platforms—warts and all.

Opportunity: How can we take advantage of the fact that buyers are already talking about company X and there is significant positive momentum for the brand?

Tool/Resource: Reference list of buyers to call

- Provide list with multiple options and don't tell buyers who to call (this is key).
- Could provide suggested questions around the riskiest parts:
  - How did you get your employees onboard to adopt the change?
  - How did accounting manage the transition?

BUILDING REQUIREMENTS

Key Buyer Needs

How did buyers build requirements?

1. **They didn’t, at first.** Most buyers had no idea what they needed until they got onto a call with company X or another vendor.
2. The general sentiment was that **company X offers more than distributors realize they need.**
3. As they started to think through how the solution would fit into their business, some developed a spreadsheet of requirements, and began cross-referencing with vendor capabilities, which **“got overwhelming really quickly”.**
4. Whether or not buyers performed a detailed analysis, **many just went with a "gut" decision**, based on a big-picture feeling and/or understanding of the platform's capabilities.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

How did buyers build requirements?

“There was so many differences with software. At one point, we had a big Excel spreadsheet with all the things we wanted.

Then when we started doing demos, we realized, there's so much more that we can get. And they are so so different from each other. We started looking at it very granularly like, Okay, can we save courier numbers in the system? In the end, it was more of a gut decision.”

“Y'all offered more solutions than I thought I needed.

The system had more than I was looking for, I was really looking for a good order management system that centrally housed stuff and made commissions easy. That's what I was looking for.”

“A list of requirements, we really didn't have that. The way this came about was from an industry supplier who said ‘You guys really need to check this out, you're not going to believe how incredibly efficient this is’

So when we went into it, we really were surprised about the efficiency of it and what it had to offer. No, we really didn't have a list of what we were looking for. Now, when we got into it, then we can present a list once we were working in it of like, okay, how does this work?”

Which requirements did buyers mention the most?

- Remote-work-friendly (cloud-enabled)
- A system that would help them grow
- Production tracking
- Sales order management
- Web store/online shop
- Quickbooks integration
- Purchase order info package

Honorable mentions

- A system that would fit their current processes
- Sales commission tracking

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

1. Remote-work-friendly (cloud-enabled)

- Most buyers noted that the pandemic accelerated their decision to adopt a remote-friendly platform AND processes to enable a virtual workforce.

“We really needed an online platform that was going to be web-based that could support working from home, as well as provide us with that online presence.

COVID certainly did a number on us with that. It kind of fast-tracked this, to be able to work remotely.”

“Before, we weren't super mobile friendly or our software. Antera was cloud-based. But we had file systems on a server and things that you couldn't access if you were out of the office. Okay, so we made a few changes to be more remote, paperless and mobile-friendly. It was sort of a long-term goal but this forced us to do it.”

2. A system that would help them grow

- **Buyers were looking forward to make an investment in their business for the future, and sought a platform that could grow with them.**
- **One closed-lost buyer expressed her concerns that they would soon outgrow company X.**

“If you don't have the right systems in place to be able to grow, it’s hard to be able to make sure the production is moving forward and that you've got the people who are checking on your POS and checking on your proofs and checking on all that stuff. When there isn't some way to track all of that, you can't grow.”

“We're really trying to grow. And I worried that we were going to outgrow company X in like five years, and then what do I do? With Facilis we seem like a small fish, and we have a lot of room to grow. At company X it seemed like we were one of the middle to big distributors. And that kind of worried me. I kind of like to be on the small guy have something to aspire, for sure.”

3. Production tracking/visibility

- **Whether buyers referred to this as production tracking or project management capabilities, it was a key priority for teams who wanted to improve collaboration and scale to include more team members.**

“Also to better track production so that there was way more visibility at any point in time, so we can go into an order and see exactly what the status is. Whether I'm sales, or someone's on vacation, and our customers asking; that was one of the big things I was looking for.

Being able to streamline the production process. So we wanted one place that we could go and look at what exactly we have in our pipeline.”

“I realized very quickly that if I was going to add people, I had to have some systems in the background to be able to manage the other things going on, and to give whoever was going to be doing CRM, job management or production, the ability to see everything in front of them.

And for me to be able to see it at the same time with them, because I'm a little type A and so I like to know exactly what's going on with my company at all times.”

4. Sales/order management

- **Buyers called out the importance of centralized communication, and being able to manage the sales pipeline at a glance.**
- **Commission tracking was mentioned as a subset of sales management functionality.**

“The whole sales pipeline, being able to look at it at a glance, and be able to manage that information, since there's so much of it in a efficient and, you know, in a team environment way as well, that everybody was able to look at the same information. At the same time.”

“The sales aspect with the order management aspect, you know, centralized communication where someone else can go pick up someone else's project and they can read through and see, you know, what's been communicated.

And salespeople commissions are probably one of the biggest reasons I selected it. The commision reporting was I mean, super key.”

5. Web store/online shop

- **Buyers noted that they were looking for a good webstore or a decent integration.**

“So there were certainly the online stores, being able to present customers with solutions that were online versus any paper or mail or any of the other traditional media's.”

“Did the software have some sort of good web store or platform, either that they support or they integrate with?”

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

6. Quickbooks integration

- **Buyers who had already been using Quickbooks wanted to stick with the same solution and minimize disruptions.**

"We wanted to have something so we can we still work out of QuickBooks as well. We're learning better and better how to make that relationship better, but the fact they can kind of marry and work together was nice versus having to totally get rid of QuickBooks. That just doesn't work for me, I need to see my balance sheet every week."

"Having it connect to my QuickBooks, so it was just kind of an all in one package so I can just export it, and it's all there.

And my accountant can look at it, and I don't have to be like, constantly searching for everything. I think that's those are the main features."

7. Purchase order info package

- **A few buyers called out that a PO template and 'info package' for consistency, efficiency and time savings.**

"I really needed to have like a PO template. Because before I was making them myself, like in Illustrator, and I just a template there. But it was me having to like key in and do the math; like I was making mistakes and not marking things up correctly.

That was another reason why I was like, 'This is too much'. Because it was taking me so much time to just like send estimates or figure out pricing for people and stuff."

"In the end company X enabled us to check all the boxes, and one of the boxes being the ability to attach all of that information to a purchase order."

Key hurdles & buyer enablement opportunities

Hurdle: Buyers often get overwhelmed comparing functionality between new solutions and end up just going with their gut.

Opportunity:

- **How can we capitalize on this gut-feeling decision-making process, and help buyers clarify which vendor feels like the "right" fit for them, based on their values?**
- **Rather than comparing new solutions side by side, how can we attract buyers to company X based on a differentiated vision that competitors cannot claim?**

Key hurdles & buyer enablement opportunities

<u>Tool/Resource:</u> Revamp Why company X messaging and double-down on your vision and values

- **What can we claim about the company X brand that is either impossible or very difficult for other vendors to claim?**
  - **Values:** Lots of happy buyers noted that they felt alignment with company X in how you think and this allowed them to justify all sorts of minor technical deficiencies.
  - **Vision:** How you see the world, and your unique vision of a better future for buyers.
- **How?** Create *why company X* content that paints very clear what type of buyer is the "right fit" for company X, based on what they care about, believe, their mindset–aka psychographics.

- **Note:** In Hotjar session recordings, buyers are bouncing between the why company X page, the homepage and the product page looking for answers so this seems like the right place for this messaging to live.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

SUPPLIER SELECTION

Why buyers chose company X

Why did buyers choose company X?

- Built by industry people
- Time and cost savings
- company X brand affinity

1. Built by industry people

“It's just so industry-specific. I've been in this industry for almost 30 years. I started where you had, you know, no computers, and then you had catalogs you're working out of and I mean, it, I've kind of seen it all the way through for a long time. And I mean, just everything about the whole system, it's just industry-friendly.

And that was so worth the transition of changing. It makes a big difference for us with efficiency, for sure.”

“It's just the ease of access, which I mean, it makes sense. It just comes from them being in this industry and working and knowing what makes our lives easier.”

2. Time and cost savings

"We did a cost comparison with our old system, epromo and company X and saw the price difference. And then we put a price on our time. How much are we saving with company X? Give or take 30 hours a week."

"It's kind of the speed and the ability to collaborate with each other and communicate with suppliers. And even little things like being able to tag people; I mean, all that helps interoffice communication, whereas before, we didn't have tools like that in place."

"We decided ultimately, to go with company X because it's really reduced our overhead costs as far as servers, desktop stations, working in the office and in a controlled environment."

3. company X brand affinity

"Catherine, and Mark and the whole community, they're very community-driven. It's great, like the events, plus you can, like ping the community for help. It's a really good idea."

"When we did the analysis of the three, it was going to be the one that was most in line with how the system fits us culturally."

"There are a lot of ways we were exposed to the community beyond just the system.

Yeah, that was a big attraction as we felt for the first time that we were developing a kind of an opportunity to mind-share with like minded people."

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Other too-good-to-be-trues about company X

Sales commision calculator “The commission thing is 100% too-good-to-be-true and solves my problems with one touch of a button. Those margins are calculated, those costs are out and people have their reports done and so that is saving my sales time.”

Reporting “I absolutely love the information that I can get in reports. I think the data in real time that I'm able to pull about sales and profitability and things like that is really, really cool.”

Ability to copy orders “You can copy sales orders, presentations, invoices, sales orders, presentations, from one customer to another. That was really a big selling feature for us.”

What were the biggest risks of buying from company X?

Big Risks: Cost

- **Price was a concern, particularly for those making the change mid-pandemic when sales were down.**

"The biggest risk was just the cost. And we also made this change in the middle of the pandemic. So sales obviously, were not as fruitful as they have been. We kept everybody employed, we got through the worst of it. We weren't doing bad by any means. But we weren't hitting the sales targets that we had been the last couple of years, obviously."

"Finances at the time. Because we were headed into February 2020 and then the world came apart and I'm was like sorry, I'm not gonna invest that money.

I didn't know if I was going to be in business in six months. My business dropped 40% in Q2 2020. I did not really feel like investing more money."

How did buyers navigate budgeting?

- Frame of reference was often their previous solution (if they had one), although most realized they would have to spend more.
- Most buyers justified budget based on:
  - Time efficiencies that they anticipated.
  - Parts of their tech stack this would allow them to get rid of (servers, etc).

“I'm really cheap. I mean, it wasn't expensive, by any means. It was just like, am I going to be able to, justify paying for yet another thing. I did justify it by downgrading to QuickBooks and that saved me so much time. So it was worth it. But that was really the only risk for me.”

How did buyers navigate budgeting?

Got rid of other parts of their tech stack

"So like with our other program, we pay a monthly fee for ten users. This one we priced for eight users at the time. It was about five times as expensive. We're up to eleven users now. So it is quite the investment.

But when we broke it down, we saw that it does all our invoicing, which we used to do that in a separate program. All of our estimates, presentations and orders are all in there."

Knew they would gain their investment back in efficiency

"We kind of knew what company X cost. Yeah, we knew that we were going to basically be increasing our expenses, because we're maintaining ASI as well.

But can you make back $800 or so a month in efficiencies? And the answer is yes."

Big Risks: Accounting/finance transition

- **Both closed-won and closed-lost buyers felt uneasiness about the accounting and finance transition.**
- **Key concerns included changing accounting systems, disruption to the books, new processes for accounting.**

"We were just trying to figure out how it would all function like on the accounting side with like our tax software and things like that."

"One challenge that we had with company X was we couldn't really get our heads around the way the finance worked. As far as doing billing, and then syncing it with our QuickBooks.

I think we'd have to do like a weekly export, view and import into QuickBooks. And that whole process we just didn't really like.

The finance transition...how long was it going to take? What was required from us? Should we just keep invoicing our orders in the previous software while we're entering new orders in the the new software?"

"There was always a hesitancy to take company X a little bit more seriously, because they lacked the inventory management component, and the perception was that they lacked in accounting package."

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Big Risks: Accounting/finance transition

- **To help navigate through this process, some brought in a Quickbooks expert, a CPA, or a CFO on company X.**

"It was really just a transition for our accounting team because we do not have our account managers do the invoicing now. Where they did everything all the way through invoicing in Smartbooks.

So that was part of the resistance, they didn't have the control (like the used to) to see it all the way to the end.

And now we've pivoted, where we have our accounting team prepare the invoices, receive the bills, and then they go to our account managers for them to do the final approval before they're sent to the clients."

"Having to downgrade my QuickBooks situation, which has not been perfect. I'm having to pay a CPA firm to clean up my books. Just an absolute disruption of my ability to process orders quickly and keep up with the demand while learning this new system. That's a huge risk. I mean, Again, that stopped me from doing it for six months earlier than I probably would have.

Financial people definitely need their own onboarding meeting.

I think there was a financial meeting, but you know what, you know, until you really do some transactions. Maybe after six weeks, y'all need to really tap back into that financial person and say "how's it going" before their books are screwed up or it's too late.

I know we double invoiced a lot of people for for a stretch that we had pre-invoiced. I feel like there is a neglect of the financial people."

Big Risks: Accounting/finance transition

- To help navigate through this process, some brought in a Quickbooks expert, a CPA, or a CFO on company X.

> “Aaron set us up with another distributor in the Chicago who was a company X customer. And our finance team talked with their CFO on two calls, and the CFO was really, really kind with his time.
>
> He gave us very good feedback on what was good and what was not good and anything that would be clunky with the data exchange from company X to QuickBooks. And so our team just understood what they were getting into.
>
> They also felt like the customer experience was going to be so much better now that they were able to see the big picture and get over the little bit of clunkiness that they would have to deal with.”

Big Risks: Taking time to learn something new

- **Anticipating a learning curve for the team, and taking time away from working hours to implement a new tool were both significant risks for buyers.**

“The risk of breaking our habits and getting everybody used to something new because for sure, there was a learning curve and struggles at first. Just making sure everybody is doing things the same way and the right way. ”

“A change is hard. And it's going to be a lot of work to set up and take time away from the team doing other things.

So that's always hard to spend time on stuff that's not immediately making money.”

Big Risks: When to transition

- **Some buyers anchored their transition after their furthest order out.**
- **Others planned over an anticipated slow (ish) time.**

"We really based it more on what we had in Smartbooks for the farthest order out. We said, ok we want to close it out, and be done September 1, with nothing else being entered into Smartbooks.

We started transitioning, of course, before that order was completed with the training and all that stuff. But it was really, it was a pretty easy transition."

"It's usually kind of quiet over the holidays which is what we did.

But you probably have a big challenge with that, because there's a big transition. This is not a little thing and this business moves so fast to have people confused, like 'how do I place a basic order? Or I don't know how to place the screenprinting order. I mean, that could be a big issue."

Big Risks: The community?!

- **One closed-lost buyer saw the community as a downside, and was afraid of losing employees to other distributors.**
- **Mindset around the community may be a polarizing aspect of the company X brand.**

"One of the things that did come up, but that we didn't really love was the company X community and the fact that it's right there in the software.

We felt like company X was fairly commonly used in Ontario, Canada, and so it would be so easy for sales reps to move over....and we're having staffing as a challenge.

And we were like, wow, are we basically telling our customers, here's all the other people in the industry that are using company X. I mean, if they want to look at other options for deployment, that's fine, but we're not gonna get in front of their face and say, Here you go."

Supplier selection was slowed down by a few big questions:

- What kind of ROI will we see with company X?
  - How many licenses do we need for our team?
- How should we manage the accounting software/finance transition?
- How and when should we transition?
- What does the company X onboarding process look like?
- What if it doesn't work for us? And all our data is lost/in your system?

Key hurdles & buyer enablement opportunities

Hurdle:
The cost seems high to some buyers. To justify the cost, buyers need to understand the return on investment they can anticipate.

Opportunity:
- How can we help buyers estimate ROI?

Tool/Resource: ROI estimator (spreadsheet or dynamic tool)
Help buyers estimate potential ROI by modelling:

a. How long it currently takes to process orders (assign a dollar value to their time).
b. Compared to the average order processing time with company X.
c. Cost of previous solution vs company X and number of licenses they'll need.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Buyer-created resource: ROI estimator

CommonSku Math .XLSX

File Edit View Insert Format Data Tools Help Last edit was 4 minutes ago

100% $ % .0 .00 123 Calibri 11

A1:E1 fx E-Promo

	A	B	C	D	E	F	G
1	E-Promo						
2		Monthly					
3		USD	CAD	Accounts	Yearly		
4	E-Promo	$96.13	$132.66	3	$2,785.85		
8	Labour						
9		Rate	Day	Week	Month	Year	
10	Accounting	30	1.2	6	27	324	$9,720.00
11	Orders	30	1.2	6	27	324	$9,720.00
12	Other	30	0	0	0	0	$0.00
22		E-Pomo	Commonsku				
24	Software	$2,785.85	$14,754.96				
25			$2,785.85				
27	Accounting	$9,720.00	$3,240.00				
28	Orders	$9,720.00	$2,430.00				
29	Other	$0.00	-$3,240.00				
31		$22,225.85	$19,970.81				
32			$17,184.96				

	I	J	K	L	M	N	O
1			Commonsku				
2		Monthly					
3		USD	CAD	Accounts	Yearly		
4	E-Promo	$96.13	$132.66	2	$3,183.83		
5	CommonSku	$99.00	$136.62	9	$14,754.96		
8	Time						
9		Rate	Day	Week	Month	Year	
10	Accounting	30	0.4	2	9	108	$3,240.00
11	Orders	30	0.3	1.5	6.75	81	$2,430.00
12	Other	30	-0.4	-2	-9	-108	-$3,240.00

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Key hurdles & buyer enablement opportunities

Hurdle:
The cost seems high to some buyers. To justify the cost, buyers need to understand the return on investment they can anticipate.

Opportunity:

- How can we help buyers estimate ROI?

Tool/Resource: Adjust approach to case studies

- Buyers are looking to estimate the potential ROI of using company X.
- One way is to illustrate the results that other buyers have seen, with quantitative proof points.
- Consider doing short, bite-sized case studies that focus on one problem solved, one company X feature/group of features that helped, and HOW they did it.
- Could include some very practical best practices/lessons learned.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Key hurdles & buyer enablement opportunities

Hurdle:

Some buyers were paralyzed by the anticipated confusion of the transition and related challenges, ie working in two systems.

Opportunity:

- How can we proactively address these implementation-related concerns so they don't slow down the sales cycle?

Tool/Resource: Onboarding process comparison: company X vs different vendors

- Create a detailed template for buyers to showcase different aspects of the onboarding process for company X, and leave space for buyers to compare this and make notes on other vendors.
- Include: time, budget, how to manage integrations, best practices for how long to overlap working in two systems, best practices around the finance transition, which files are required at which times, buyer-responsibility tasks vs vendor-responsibility tasks.

Key hurdles & buyer enablement opportunities

Hurdle:
Others freaked out because they weren't sure how to help accounting manage the financial transition, and anticipated (and experienced) significant disruption to "the books".

Opportunity:

- How can we proactively address these implementation-related concerns so they don't slow down the sales cycle?

Tool/Resource: The Accountant/CFO's Guide to Integrating with company X

- Provide strategic guidance to accountants/bookkeepers looking to transition from another version of Quickbooks and/or another system to company X and Quickbooks.
- Consult your CFO, CFO (s) and/or accountants on company X and create a transition guide to help accounting understand what they are getting into.
- Consider bringing in a Quickbooks expert to review content.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

CONSENSUS CREATION

How did buyers sell through this decision internally? And build momentum for adoption?

Buyer Titles

Buyer titles included:

- President
- Owner
- CEO
- COO
- Senior Account Director
- Brand Manager

However, there were few observable differences in approach to buying a platform based on title.

"Just everything about the whole system, it's just industry-friendly. And that was so worth the transition of changing."

Other Stakeholders Involved

Often, the following functions were exposed to demos and in some cases, platform trials.

- **Accounting**
- **Finance**
- **Sales Representatives**
- **Customer Service Representatives**

“We took a hard look and I signed up for a demo, then I got a couple of reps involved, and I got the customer service person involved, then we all started taking a look at the system through the different introductory calls.

Then we'd get a couple of the group calls that you guys host each week. And I mean, we spent a lot of time so when we looked at it, it still took six months of looking at it hard to make the decision.

So it wasn't just like, Okay, let's do. I mean, there's still a lot of internal debate in pulling the trigger. It was asking a lot for people at the time, but it was the right decision.”

How Buyers are Building Consensus

- **Nearly all buyers exposed accounting, finance, sales and any admin team members to the software through the demo or trial or both before making a decision.**
- **"Nobody likes change" is how buyers described the response to a new platform.**
- **Some teams had been through messy implementations in the past and anticipated huge disruption to their workflow.**

“Our sales team, CSR and finance were involved. Once we narrowed it down to the three, we did some Zoom demos. And we tried to touch on those three areas of business.

So we brought in a couple of salespeople and said, Okay, this, we're gonna focus on sales today, and we’d look at software, and ask what do you think? We would just ask them for their for their feedback after the Zoom call.”

“We weren’t sure if our account managers were really going to get it, understand it and learn it, because of the resistance of change.

Some of them said “I'm just gonna keep doing it in the old platform. And, you know, we were telling them “You can't do that.”

Then they said “I don't have time to learn this, I'm slammed, I'm so busy, I've got to just get my orders in. And I really had to be like…we are committed to this, you have to be committed to this too.”

How Buyers are Building Consensus

- **In most cases, the final decision was made by the owner/CEO, regardless of team resistance.**
- **On one occasion, there were enough nay-saying team members that the software decision was delayed for a few years.**

"I probably talked to my team, I can't imagine I would make a change like that and just say 'I'm gonna cram this down your throats' but it was my decision to jump off the cliff and just do it."

"Having a smaller team, we didn't have the same pushback (when company X came up again). So it was easier to make the decision because there were fewer of us involved and it made it easier to just, like commit fully without having to like, convince anybody that this was the right choice."

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

The Role of the Change-Leader

- On a few occasions, buyers noted that successful team adoption was thanks to an internal change-leader who spearheaded the initiative internally, from pre-sales to post-implementation.

"Our director of business development Mike really talked to the team, when we'd have our meetings and say, 'Listen, you guys aren't gonna believe this, you're not gonna believe how it works.'

And so he was like the quarterback and the cheerleader and really picked it up the quickest.

He worked with different account managers to say, Hey, listen, we can make it into the office work a couple hours on it together".

"The reason it has been a success truly is that Kate has been committed to it. To utilize it and trained our people to use it and really embraced it. I mean, it makes a big difference. That's why it's been successful.

And again, just the commitment from accounting operations, everybody to make the most of it."

Key hurdles & buyer enablement opportunities

Hurdle:
Everyone anticipated resistance to change and challenges building new habits.

Opportunity:

- How can we help give buyers a heads-up on the potential roadblocks they may encounter when selling through this change to their team, and help them build consensus?

Tool/Resource: How to Rally the Troops When Everyone is Resisting Change Guide

To work through the resistance to change, buyers shared a few strategies for bringing their team around:

- Demonstrating with specific examples how the new tool would change their day-to-day and help them squeeze more sales into less time (sales).
- Appoint (either officially or unofficially) an internal change-agent to lead the change and rally the teams around it.

Consider collecting more of these from buyers (via the Ripple Initiative) and creating a guide with recommendations, quotes and examples.

PRODUCT & SERVICE FEEDBACK

Pros/Cons Post-implementation

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

The value of company X: Time saved=money

"We can process orders so much faster. Probably like in 15 or 20 minutes. Let's say 10 quotes in a day, that's significant. It just gives you that much more time to go and, you know, follow up on the other orders, figure out where, what their status is, etc."

"We finished the year at 2.1 million, and we our fourth quarter run rate was twice that.

We had a really nice second half of the year two, we wrote over a million dollars the last three months, and we didn't break. We definitely experienced growing pains. We definitely experienced cashflow pains. Like, how do we operate as a team with more demands. But everybody is in agreement, that company X is one of the reasons that we didn't have to hire somebody.

Although we maintain our previous team headcount, with ASI, we broke at a much lower volume. And with the company's growth, you can definitely understand that it's more manageable with company X versus ASI."

The value of company X: The community beyond the platform

“The value is beyond the system, the value is the mind share with the community. After we were exposed to the community, it just got us excited about here's a platform that is all technology.”

“With Skucon just having that community. And I think that company X staff and other vendors and distributors that are involved, it's all seems more like people are supporting each other rather than being quite so competitive to a point I mean, yeah, for sure. But it seems much more like open and friendly.”

“It's not just the actual platform of the efficiency of order processing it’s the whole community of what company X is, has really brought our team together in a lot of ways of being educated differently in this industry.”

“I just think it's a wonderful platform and the community is just so top shelf, I cannot even express what a nice thing it's been for me personally. ”

PRO: Obsessed with dashboard/reports

"I absolutely love the ability of information that I can get in reports. I think the data in real time that I'm able to pull about sales and profitability and things like that is a really, really cool."

"Now I run reports all the time. All the time. Like, I'm obsessed by it. It's taken me a little while to get to that point and kind of start thinking, bigger picture in terms of what's profitable. How do I generate those sales? How do I set goals?"

"I'm trying to get more organized by having sales meetings, and the new dashboards that are rolling out are super valuable.

The way they're showing the data is going to allow me to run my sales meetings better. I can really see drill down to data where it makes sense to me as I guess as far as retention, that kind of stuff is really positive."

CON: Quickbooks woes

“Because QuickBooks and company X functionalities are so separate, it's very difficult for me to see for real what I have coming in or going to come in. At least it's very cumbersome with financial projections.

There is a lot of stuff in hindsight where I'm like, ‘Oh, my God, you know, had I known this might I've made a different decision’. It made me very insecure to not have good control of my finances at any moment last year.”

“Yeah, with company X, there was zero accounting advice, so I was like, I have to figure this all out on my own–how do we transition between the two systems?’. I reached out to colleagues of mine that are also on company X and it sounds like the process for everyone has been kind of ugly.

It continues to be the thing I hate the most about company X; I really wish the accounting was somehow built in.

Just in general the system was not designed for accounting controls, and QuickBooks is an embezzlers’ dream. In 30 minutes I could figure out how to embezzle very easily. I can keep a handle on these things, but it's very scary.”

CON: Sink or swim moment post-implementation/learning curve

"We were realistic with what we expected, but I will tell you that we were surprised with the lack of support after we turned it on.

Once you turn it on, and once you get everything going, you're gonna have a sink or swim moment. There's no true handholding. It's like when you turn that system on, you have a reference to go ask questions, but you need to deep dive into it and do the work to learn that system."

"The onboarding is pretty overwhelming and then you feel like you get left out on your own to see where you're at. I'd say, I'd say the most terrifying part of this whole thing was the onboarding process. There's a huge learning curve and I mean, I've seen that comment a million times, about company X and then people have reached out to me and said, I see you are using it, whatever and I just am like 'Be prepared. There's going to be a huge learning curve.' I don't know what y'all can do to bridge that gap.

If there were training sessions before you ever get to touch it, I mean, touching it and actually doing it is only the only way you're really going to learn and see what happens."

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

PRO: Responsive customer success/support

“I really liked that they have the support and the chat and all this stuff. So you can really just troubleshoot yourself and not have to be calling someone all the time, or trying to email or connect with somebody. And it's more of that, like, constant availability, and just easy access.”

“I mean, we to this day, we email Aaron about whatever we need. And yeah, response is immediate. I'm talking like 15 minutes, you're getting a response.”

Buyers advise others on how to buy

On exploring solutions “Ideally, I would suggest mapping out your business processes the way they are currently. Don't think about the CRM providers and what they offer, but look at your own business and say,how do we run our business as it is now? And then I would say go and look at this CRM options and evaluate them with that in mind.”

On taking the plunge “Embrace change, change is the only constant and with change comes great things. So don't be afraid to get out there and look at something that's only going to make you better.”

On planning the transition “It's like having a baby. There's never a perfect time. You just have to do it, pick a date. it's tough, because it's such a big thing.”

On getting references “I would tell them to get references and talk to people who have actually used it.”

On the learning curve “It takes time to learn it. That's part of the initial investment is you have to take the time to learn it, then your return on that investment is the efficiency. In the beginning, you have to allow, at least in my opinion, four to six weeks to truly grasp this and be confident in being able to use it.”

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Buyers imagine the future of company X...

SAGE and company X merge “The dream would be if you and SAGE would merge together. Like, your presentation-maker system having to push from sage or push from ASI or whatever, y'all could own the world.”

Different tiers of licenses based on function “So if you had sales people who are not placing their own orders, but they would like to have access and you would have a sales view log in at a lower cost-per-user membership. Or for someone who's not working in it all the time, but they would like to be able to keep up with their commission, use the reports to use the sales pipeline, so more of a Salesforce-type functionality for them than it is an order management system and invoicing system.”

Client profitability evaluation “Ok well, this client takes like 10 proposals, right, or $2,000, or this client takes three for $20,000. There's a piece to where we have to evaluate clients and with loss of time or money on them, and maybe change how we approach those clients, what they get at first, just data like that would help. I would like to see the data so that we can plan and evaluate.”

Missed opportunity: Best practices tune-up

- **A few buyers spoke about the need for more guidance around operational best practices.**
- **One noted that the actual best practices guide didn't provide the guidance she was looking for.**
- **Some owners created their own "protocols" or best practices guides, while others leaned on a power user to figure it out and share with the team.**

I still do want to I'm going to have to do like a big tune up and just have everybody sort of re-trained and and learn what we're not using.

"We have been creating their own best practices. We held our own best practices internal call yesterday to just build consistency in how we're using company X. I call consistency-sku, even though it's intuitive, we're still not all using it the same way. And so we were using best practices yesterday to get everybody caught up."

Buyer-created best practices documents

“I would say that there is a lack of guidance and we're finally catching our breath. There's definitely an actual guide, but there's no real guidance in that, you gotta develop your own.

For the first several months, all I would do is like release our own internal protocols, like every week, like multiple protocols. People were asking really good questions constantly and I was relaying them to company X, they're were very responsive on getting back to me, but then I would have to turn them into a protocol.

At some point I need to rewrite our whole launch guide, because half the stuff in there doesn't pertain to us, or it's not specific enough to what we're doing. And a lot of this is just learned by doing, you know, like, experimenting to figure out what the system does, and how that can work for how you do business.”

Key hurdles & buyer enablement opportunities

Hurdle:
Buyers are left with a “sink or swim” feeling post-implementation, and feel that, while company X does provide a guide and support resources, there is a huge learning curve.

Opportunity:
- How can we give buyers a leg-up on best practices for using company X, and soften the learning curve?

Tool/Resource: Post-implementation Best Practices Guide

- Buyers are developing their own best practices, by imposing top-down protocols, or by using an internal “power user” and encouraging the team to do what he/she does.
- What can we learn about how to better enable them by looking at what they are doing for themselves?
- While some will be specific to how their company uniquely functions, perhaps there are also some general best practices that could be provided to buyers.

SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Buyer-created best practices documents

Guide to Sales Order Lines .XLSX

File Edit View Insert Format Data Tools Help Last edit was 9 minutes ago

B14 | 2. If the Decorator is providing the Kitting and Drop Shipping - enter the charges under the Decoration Location - click (+ run charge for this decoratior

	A	B	C
1	**Sales Order - ADD**		**PO?**
2	**Product**	self-explanatory	yes
3	**Title**	If you want to call out/say something on the Sales Order - message to the client - big and bold/ bigger than 'Introduction'	no
4	**Freight**	Do not use (Only Jerrica can use for vendor cost)	n/a
5	**Fulfillment**	Do not use (or ask me if you think you should)	no
6	**Shipping**	Charges the Customer Shipping	no
7	**Service PO**	Add a non-product related charge i.e. digitzing or artwork conversion (outside vendor, different from product vendor OR Tugboat Fulfillment - creates a PO/Instructions for Amy)	yes
8	**Other Services**	Add a non-product related charge i.e. drop shipping, royalties etc. (in-house and Warehouse does NOT need instructions)	no
9			
10			
11		**Big Picture**	
12			
13		1. If the product vendor is the one who is providing the service, ex. Leeds is Kitting and Drop shipping then click (+ Additional Cost) under the Product Info and add the charges there	
14		2. If the Decorator is providing the Kitting and Drop Shipping - enter the charges under the Decoration Location - click (+ run charge for this decoration) and add charges there	
15		3. If we (Tugboat) are providing the Kitting and Drop Shipping in-house the Create a Service PO, put 'Tugboat Fulfillment' as the vendor. Type in the Kitting Instructions and price if you are breaking out. You can also create a Service PO for the Drop Shipping if that has special/different instructions as well	
16			

Key hurdles & buyer enablement opportunities

Hurdle:
Once the dust had settled post-implementation, some buyers expressed a desire to level up on their use of company X as a tool for visibility, control and oversight of their business.

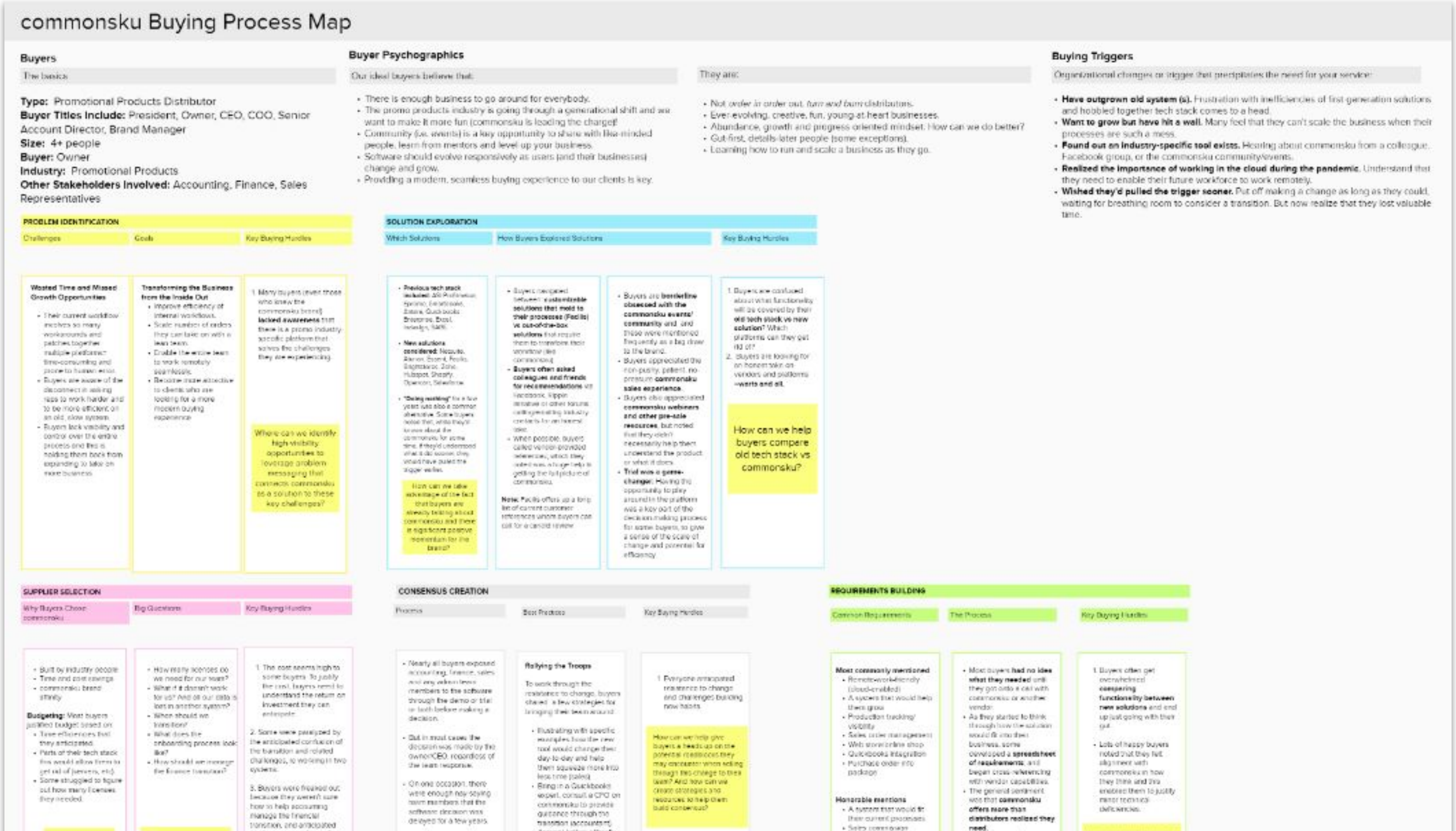
Opportunity:
- How can we help prospects and buyers understand how to strategically use company X for more control and visibility in their business?

Tool/Resource: Level-up on company X: Webinar for executive/owner

How to strategically use company X as a business owner to:

- Maintain high-level visibility and control over business processes
- Award team members for big wins
- Plan and project future business
- Run better team meetings

Summary version: Buying process map



SARAH MACKINNON
BUYER ENABLEMENT CONTENT STRATEGY

Content Strategy documents

SARAH MACKINNON

BUYER ENABLEMENT CONTENT STRATEGY

commonsku Buyer Enablement Content Strategy & Outlines

"What's holding you back from growing?" self-assessment checklist

Comparing commonsku features vs old tech stack (charts or dynamic tool)

Reference list of buyers to call

Revamp Why commonsku messaging and double-down on your vision and values

ROI estimator (spreadsheet or dynamic tool)

Adjust approach to case studies

Onboarding process comparison: commonsku vs different vendors

The Accountant/CFO's Guide to Integrating with commonsku

Guide: How to Rally the Troops When Everyone is Resisting Change

commonsku Editorial Calendar (2022)

PUBLISH DATE	CONTENT TYPE	WORKING TITLE	FOCUS KEYWORDS	WRITER	PEER EDITO
Mid-March	Checklist	*"What's holding you back from growing?" self-assessment checklist*			
Mid-March	Blog	*Why do we need to make a change now?*			

PUBLISH DATE	CONTENT TYPE	WORKING TITLE	FOCUS KEYWORDS	WRITER	PEER EDITO
	Chart series/dynamic	*Comparing commonsku*			

Eavesdrop on Ripple Initiative for ongoing learning

- Fantastic opportunity to listen in on buyer needs, pain points, hurdles, goals and best practices on an ongoing basis and just generally learn how buyers are using the platform.
- Could even organize and facilitate group discussions around certain topics.
- Brenda Speirs is very open to collaborating on this.

“I am part of Ripple Initiative and it’s really great to see the hints and the best practices that people are doing. In our next roundtable we're going to do best practices and how to best utilize company X. How people are doing things like invoicing through company X? How are you integrating taxes? The community component of it is phenomenal.”

Thanks for your time!