

# A Closer Look at Customer Journeys

Influencing Content Strategy

*Special Resources Section*

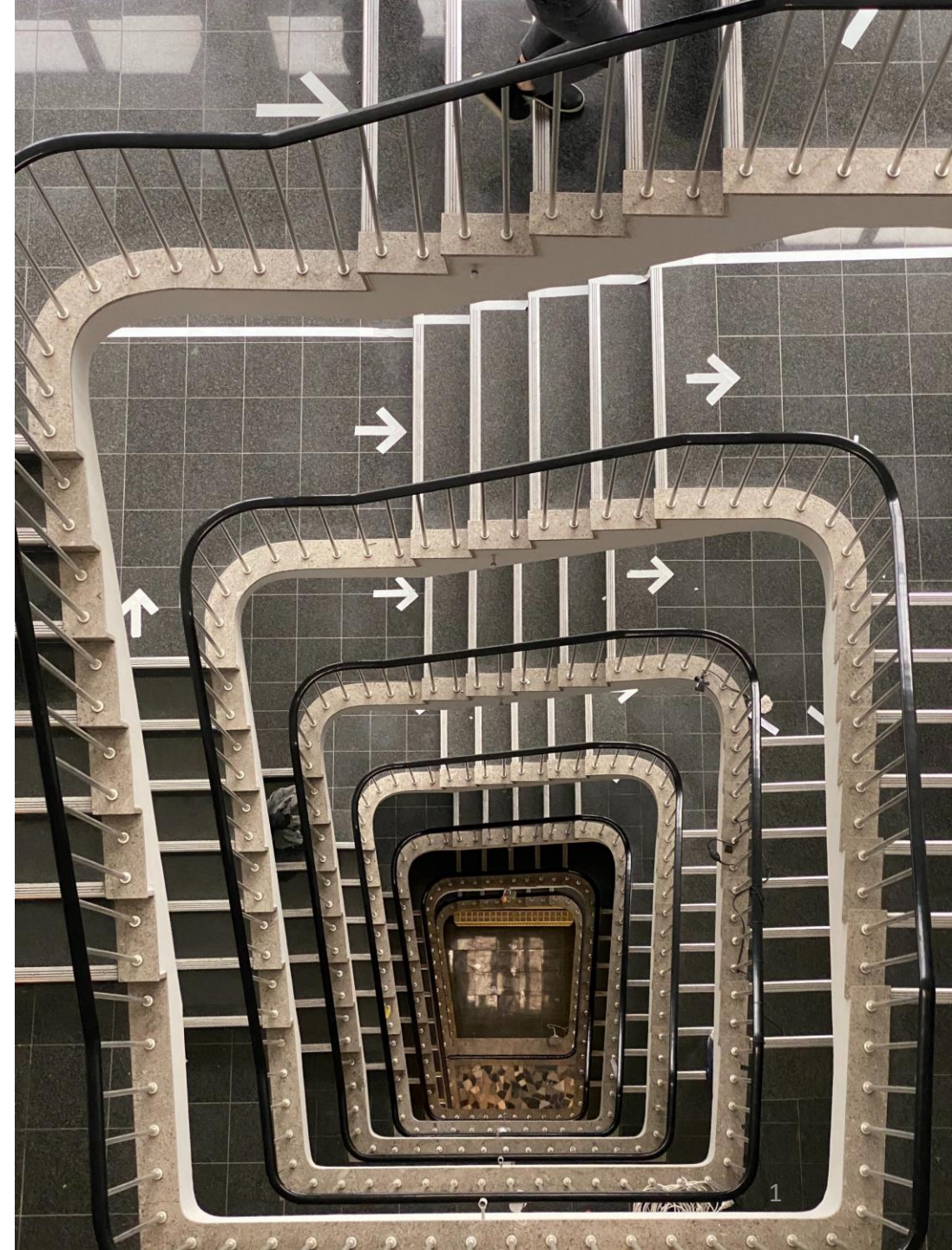
August 30, 2022



CORPORATE FINANCIAL GROUP, INC.

Presented By

**COM** | CONTENT  
**BLU** | SOLVED



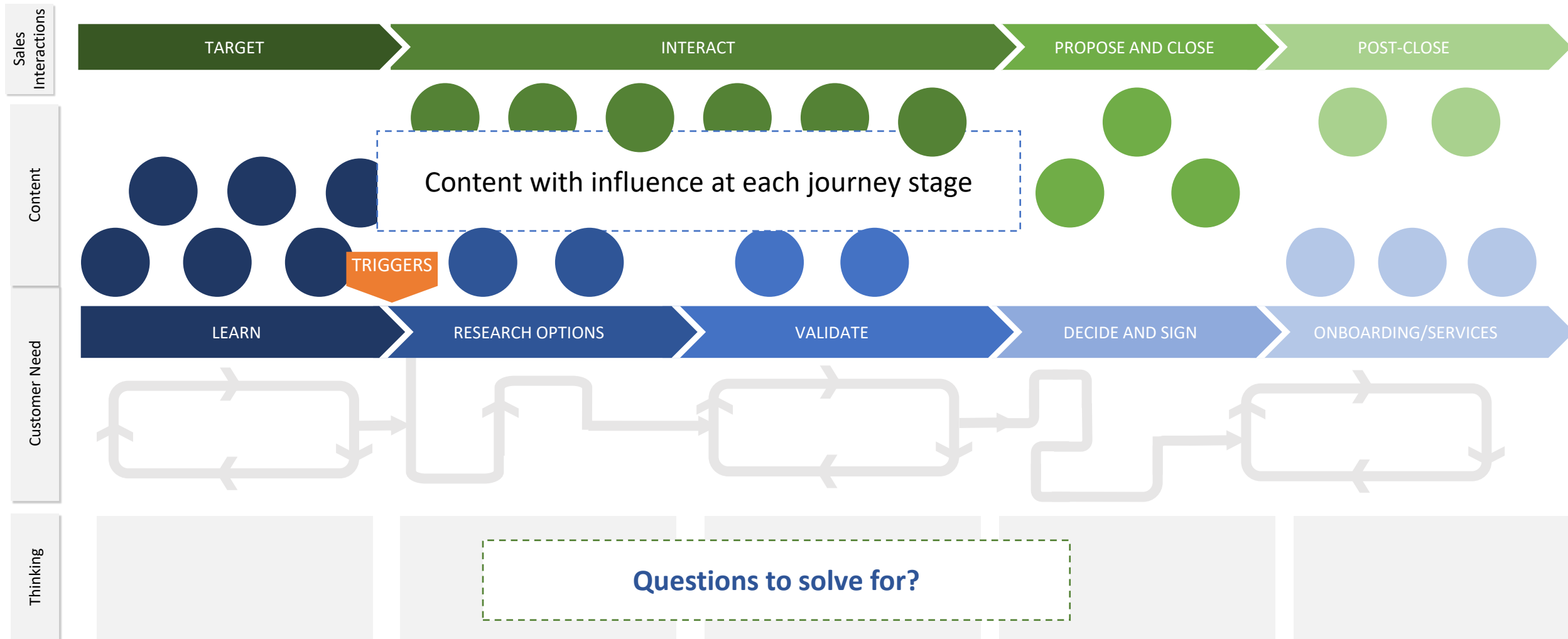


# Resources

A collection of templates, persona data, and examples  
*from ComBlu*

# Journey framework

Starts with customer needs and key touchpoints and content through the process



# Content roles and influence

Journey Stages

TYPE	ROLE	 Awareness	 Consideration	 Preference	 Purchase - Post	SAMPLE FORMAT
Capabilities Overview	Describes general offering, approach and company's core value message.		●			1-2 PAGE FLYER VIDEO PITCH BOOK (INTRO)
Case Studies	Provides a working example and social proof about the ability of your products and services to solve a business problem.		●	●		SHORT-FORM (PRINT) FEATURE FORMAT VIDEO
Testimonials	Presents powerful ratification of your services through the voice of the customer.			●		SHORT-FORM (QUOTES) LONG-FORM (1 PARAGRAPH)
Deal Announcement	Shows depth of expertise in a specific transaction type and underscores who you have worked with.		●	●		TOMBSTONES (DIGITAL LIBRARY) PRESS RELEASES
Product & Solutions Overview	Highlights the benefits and features of each product of service offering. Best practice is to present in context of buyers' pain points and product value messages.			●		1-4 PAGE FLYER VIDEO DEMO
Thought Leadership	Showcase expertise on relevant business issues in a variety of formats. Self-published, sponsored or earned media.	●	●	●	●	ARTICLE WHITE PAPER EBOOK INFOGRAPHIC WEBINAR/EVENT

# C-Suite alignment is vital to digital success and corporate growth



**CEO**

- Frustrated with the pace and results of digital transformation to date; doesn't care how it gets done, just wants it done.
- Looking to the CIO to create new and effective ways to engage with customers
- Wants IT and Finance to become better enablers and collaborators with the business
- Wants the CIO to make the C-Suite 'cloud-smart'
- Wants the CFO to redefine and design the finance function
- Relies heavily on CFO for M&A, cash management and risk
- Continues to prioritize CX and looks to the CMO for customer insights



**CFO**

- Trying to ensure solvency without standing in the way of performance
- Challenged with cloud financial models; working to reconcile experimentation and the Agile way
- Needs the most time to evaluate; thinks about budgeting differently.
- Wonders if CIO is too close with cloud vendors to be objective
- Gets most of their vendor info from Procurement
- Driving use cases around risk
- Interested in AI for DX and data analytics for visibility



**CMO**

- Always operating at speeds faster than technology can keep pace with
- Most interested in how the CIO can exploit data – core to their objectives
- Needs CIO to help evaluate products that integrate with existing systems
- CMOs and CIOs speak different languages – prefer CIOs to talk use case v. techno-babble
- CMOs and CIOs have common pain points around talent and need to outsource
- Biggest challenges for CMO is in demonstrating ROI
- In many organizations CMO owns CX and might be looking to reignite their partner-channels (PX)
- Works closely with CEO on strategic marketing initiatives
- Forging a new alliance with the CFO to fund CX and thought leadership

# Demographic shifts are impacting how we interact with buyers now and in the future

- More than **63%** of Millennials stated that they prefer live chats over interacting with brands in an old-school fashion. (Magellan)
- And will not pick up the phone if they can help it. (Magenest)
- 59% of B2B buyers are Millennials, putting them in the majority for this role. (Zippia)
- Boomers make up the third largest segment, but not for long. Gen Z will be **1/3** of the workforce by the end of this decade.
- Vitriol between Boomers and Millennials is legendary, and they both gravitate towards roles in the Financial Services.



# Engagement and industry preferences can vary widely

## Boomers

- Prefers verbal communications
- Human support
- Learns through traditional media
- Believes in consensus building, process and statistics
- Brought us concepts like due diligence
- Can get bogged down in details making tough choices a challenge for others
- Values longevity and experience, especially organizational loyalty

Found in **Healthcare, Financial Services and Professional Services, and Entertainment, Private Equity**

Large concentrations in sectors hit hard by pandemic - **education, travel and tourism, residential construction and food/restaurant**

## Gen X

- Interaction using digital tools
- Automated support with personal touch
- Learns through traditional and social media
- Problem solver, technology translator, bridge builder
- Wants to work smarter not harder
- Prefers autonomy but can align with other groups
- Wants clear and concise information
- Likes to see/know how things work
- Can be innovative and agile, but also thoughtful and rationale

Working in **Technology, Transportation and Logistics, and Construction**

As entrepreneurs, leads **Health and Wellness, Retail** with a focus on ecommerce and social business as well as **Hospitality**

## Millennials

- Digital and electronic communications
- Fully automated/self-serve support (prefer to engage with chatbots)
- Learns through social media
- Requires feedback, fun and instant gratification
- Dislikes manual tasks, spreadsheets & repetitive work
- Tends to micromanage and control all details
- A strong desire to ideate, driven to advance new thinking and ways of doing things
- Wanted it yesterday, workshops on the fly

Found in **Technology, Financial Services and Healthcare, Private Equity**

Prior to the pandemic, Millennials were drawn to unexpected sectors like **Retail/wholesale, manufacturing, and supply chain**

## Gen Z

- Face-to-face interactions using digital or in person
- Automated support with a human behind it
- Learns through YouTube and the Internet
- Creatives with small attention spans (snackable)
- Likes to learn through interaction and quizzes
- Thrives in marketplace settings
- Digitally and financially savvy
- Is a trend setter but looking to learn best practices

In entry-level positions working on data, social media and cyber security in **Retail, Tourism and Business Services**

Aspires to work in **Technology, Arts, Recreation, Social Services, and Entertainment**



# About ComBlu

---

# Why our clients like working with us

## Domain expertise

- ✓ Buying center and persona behaviors and preferences mapped to content best practices
- ✓ Creating and executing integrated content, influencer engagement and thought leadership strategies and roadmaps

## Industry experience

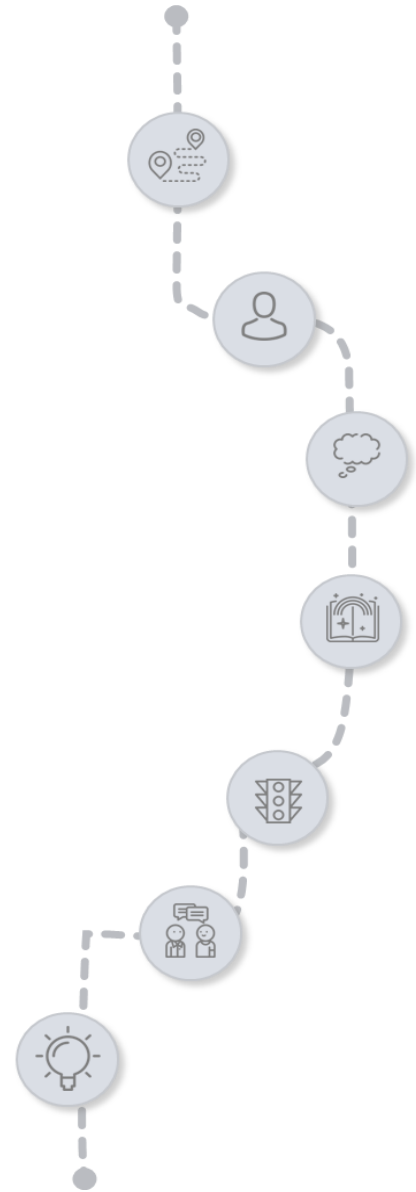
- ✓ Working with major brands in and across Financial Services, Technology, Healthcare, Legal and Professional Services industries

## Strategy + execution

- ✓ Help operationalize the strategy and insights
- ✓ We go deep to give clients prescriptive recommendations and action plans

## Partner orientation

- ✓ Quick study – will dig deep to understand nuances of client organization, target markets and prospective customers
- ✓ Foster collaboration with stakeholder teams and other agency partners



# Select industry and client list

## Technology

B2B and B2C, SaaS, Cloud, Datacenter, IoT, ecommerce, CMS, large enterprise, middle-market, small business, MarTech, WorkTech, HRTech, LegalTech, support communities, partner channel



## Financial Services

Banking, accounting, treasury management, consumer credit card, commercial lending, credit reporting, debt collection, insurance



## Professional Services

Legal, architecture, staffing, management consulting, NFP charitable organizations



## Healthcare and Lifesciences

Analytics, health systems, pharmaceuticals, medical device and equipment and supplies, Healthcare IT (HIT)



## Real Estate

Commercial real estate lending, healthcare real estate, multi-family, property management solutions



## Communications and Media

Telecommunications, social media, TV, e-learning





## The Story: Content Strategy

The goal was to help the Commercial Bank develop an overarching content strategy that would:

- Reinforce new brand attributes and support the go-to-market plan
- Establish an integrated, multi-channel approach across the business
- Build awareness and visibility of its market expertise



## ComBlu Deliverables

- Strategic framework to guide content creation, distribution and channel amplification
- Cohesive, replicable approach to determining topics that customers and prospects find relevant and engaging and align with Client's expertise
- Plan and support for building a publishing organization that would facilitate executing on the strategy
- Map out an initial approach to measure success and guide what's next



## Impact

- Improved the breadth and quality of the content
- Consistent approach to content roadmaps across lines of business
- Fully staffed content organization to more efficiently produce and better leverage content across channels



### The Story: Enterprise Content Strategy

Cisco wanted to develop a content strategy that aligned to buyer behaviors, multi-channel consumption preferences and emerging technology trends by market segment, partner type and geographic region. The goal was to build a strategic framework as a pilot designed to scale across multiple business units and integrate workstreams. It included:

- Buying center definition and organizational construct
- Persona work
- Content journeys
- Audits and assessments
- Commissioned and third-party research
- Socialization



### ComBlu Deliverables

- Developed and augmented 10 buyer personas, both customers and partners
- Executed multiple content journeys, audits and assessments
- Worked with top analysts for commissioned studies and supplemented with third-party research
- Conducted topic modeling to inform a variety of emerging technologies and topics
- Facilitated workshops on content best practices and preferences of multiple decision-makers and segments
- Created customer and partner surveys and conducted one-on-one interviews
- Coordinated and set shared goals for multiple workstreams including:
  - Digital
  - UX
  - Search
  - PR
  - Branding
  - Product groups
  - Leadership
- Delivered content roadmap with short-, mid-, and long-term recommendations



### Impact

- Informed digital, social and mobile strategies and redesigns to significantly improve the user experience
- Created a common understanding and nomenclature of content best practices and customer behaviors in the company
- Integrated disparate workstreams and established shared KPIs
- Provided a wealth of data and turnkey tools, processes and approaches for scale and replication

[Full Story](#)

## OUR STORY

For over four decades, we've been adapting our business to reflect changes in marketing disciplines and clients' needs.

We balance ongoing innovation with proven strategies and approaches.

And we continue to be a team of lifelong learners that bring sound counsel and stellar execution to client engagements.

## ComBlu Milestones

1970's

Haddon, Lynch & Baughman, the PR arm of an ad agency, was founded

1980's

HLB Communications spins off as an independent PR firm, specializing in strategic and crisis communications, media and thought leadership programs

1990's

HLB Communications grows as a leading PR firm in Chicago and marks its 25th anniversary

2000's

HLB launches Communications Blueprints, a digital, content and social media engagement agency

2010's

The firms merge and rebrand as ComBlu, integrating marketing services for global brands and SMBs

2020's

ComBlu continues to help brands navigate customer experience delivery in a time when the only constant is change

thank you!

ComBlu.com