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eBook

Managing Change With a New B2B Strategy or Technology



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Introduction

Implementing something new — be it a strategy or technology — has important [change management](#) implications for marketing leaders. After all, without effective leadership during this stage of the process, you might end up with shiny new tools but disparate data, disillusioned team members, and confusion about how to move forward.



DID YOU KNOW?

47% of marketers say that silos are their biggest problem when it comes to gaining insights from data.

* Source: Treasure Data, *The State of the Customer Journey 2019*

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3553 West Chester Pike
Newtown Square, PA 19073
1.866.780.5955

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Here's an example scenario:

You, the marketing leader, come to the team with a new tool and accompanying strategy to implement. The marketing ops team gets to work. However, as they focus on the project management side of that task, no one is considering how the new tool will play with the chat tool the website team bought, the CRM tool the sales team owns, and the marketing automation tool you already have.

All of the sudden, your team and outside stakeholders might view the new tool as a burden rather than a value-add, and no one quite understands how it fits with your current demand generation and media strategy, or how it aligns with the sales plan.


To avoid this scenario and achieve effective change management, marketing leaders should align all of the stakeholders on a tool or strategy before it's ever purchased or implemented, ensure all existing technologies play well together, and educate the team about how the change will adjust day-to-day activities for all those involved.



6 Questions to Drive Effective Change Management

- What departments, and people in that department, does this change impact?
- What processes are going to be impacted?
- What systems does the change impact?
- What priorities does the change impact?
- What are your contingency plans? (What can you do if other things are not ready?)
- How will the customer be impacted by this change?

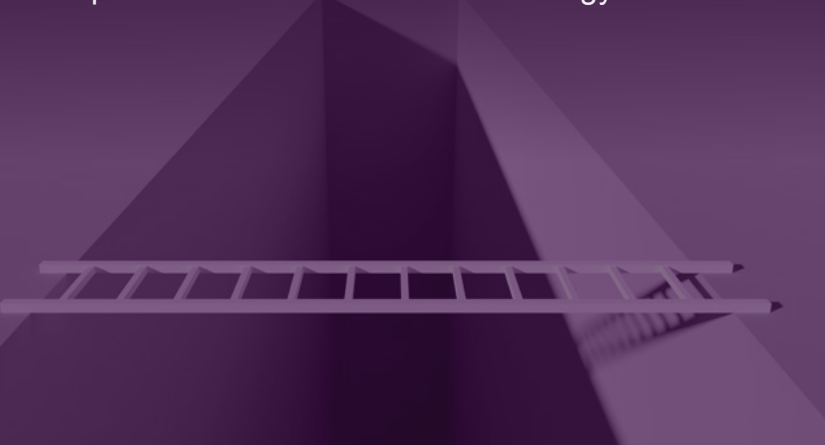
Your roll-out plan should keep those six questions in mind. In addition, good change management should consider your communication channels and how you'll gather feedback along the way. After all, any roll-out of your new strategy isn't a set-it-and-forget-it deal. You should have an ongoing plan to develop and implement new use cases, provide training and support, and sustain interest and engagement.



Tip: Test your change management effectiveness by asking:

- One year from now, what would have to happen for this change to be considered successful?
- What are people doing differently?
- How are conversations different?
- How are business results different?
- How does this change move our company towards the overall company goals?

Effective change management is a way to bridge the gap between technology and strategy — not a hurdle. It helps you think through how you'll get to your ideal state, as well as consider all roadblocks that might get in the way. [Friction](#) on the change management side will only create a deeper divide between tech and strategy.



When More Technology Is the Answer (Spoiler: It Usually Isn't)

After one change management initiative fails, we often see investing in more and more technology used as a Band-Aid to resolve the resulting organizational issues. After all, when a new vendor emails and promises all kinds of wonderful analytics, it's easy to let your marketing monkey brain jump on it right away.

However, relying on technology to resolve deeper structural issues more often exacerbates the problem rather than fixing it. More technology, more often than not, translates into more data silos.

The Myth of Going From Zero to 60

No matter what changes you're implementing, it's a myth to believe you can go from zero to 60 in a matter of days or weeks. Despite your vendor's talk of how easy and simple it is to implement a new tool, the reality of change management is much more complex.

It helps to think of change management as an evolution rather than an unattainable zenith to reach at day 25 of implementation. There are three areas of evolution to consider. First, what skills are required to implement change? Second, how will the adoption process work? Third, what does data completeness look like for your organization?

3 Stages of Change Management Evolution

- **Creating Skills:** Are there gaps to meet your goal? What kind of training does the team need to leverage your technology, both from a technical perspective and a feature/function/use case perspective?
- **Pursuing Adoption:** What is each team's role in actualizing your use cases? Adding more use cases as you go along helps you get better value out of your tools. Also, the more teams that are involved, the more sophisticated your use of the technology will be.
- **Data Completeness:** Do you have the data you need? Do your integrations work so data from your new tool feeds into your content hub, chat bot and/or CRM? Have you collected the data needed to drive the level of personalization you desire?

Adopt an Evolutionary Mindset

You can set yourself up for success by determining how your new tool will be implemented a little at a time, instead of overwhelming your team all at once. We like to think of this as the crawl, walk, run approach to your tech stack.

“It’s not just getting them integrated. It’s, how does your process change and how do you do marketing differently because of all those connections now?”



Kathy Macchi,
Inverta Co-Founder and Vice
President of Innovation.

Effective change management should determine how your marketing landscape shifts because of the new tool, instead of simply focusing on how to get a tool up and running.

Determining use cases for each stage of evolution

Use cases are key at this stage in the process. While you've most likely created general use cases, your use cases should now start becoming more granular and cross-functional.

Rather than general use cases, you should create use cases for each phase of your “crawl, walk, run” approach. That way, you can slowly build out the functionality and capability for the use cases in your team to drive effective change over time. Use cases are important because they help your new tools become embedded in your process, rather than ancillary to it. If your tool isn't embedded, it won't be adopted.

The benefit of use cases in stages is that the more cross-functional your use cases become, the more your marketing will transform as all teams begin to leverage the tool to execute the overall strategy. The more your team adopts the tool in the right ways, the more value you'll get out of your strategy as a whole. That positive flywheel then sets you up to create lasting value for your organization.

The Path to Value

The ultimate question your boss will ask when it comes to implementing something new is this:

How does this new strategy/technology make sense for the business?

In an ideal world, everyone would get value from a new tech/strategy investment within 30 days (as promised). In reality, however, this is rarely the case. Getting value out of your investment requires setting the right expectations up front. Otherwise, you might lose valuable stakeholder investment or the necessary budget to implement your strategy.

Proving the value from your strategy and technology comes down to setting the correct expectations. Here are a few guidelines to help you along.

“Your ABM success will be dictated by you and your organizations’ readiness to craft, scale and deliver on this precision GTM strategy.”

An honest, in-depth assessment in advance to identify gaps in strategy, resources, talent, data and technology becomes your fastest path to delivering results.”

*-Scott Vaughan, CMO
Vaughan GTM Advisory*

Identify and agree on use cases for each stakeholder group before buying tech.

Again, use cases are key when it comes to implementing a successful strategy. Proving ROI is much easier when use cases have been predetermined because they provide a blueprint of the outcomes you want to achieve.

Remember, use cases describe the *ideal* state of the end-use by your team. If your use cases are generic or haphazard, there isn't any incentive and motivation for your team to implement them. Therefore, it's key that use cases are agreed upon by marketing, sales, and any other group that will use the tool before you buy it. It's tough to prove the value of something that no one prioritizes because the use cases provide no value.

Determine and document hypotheses and success KPIs for each stakeholder group.

In other words, answer the question,

“One year from now, how do we know this worked?”

Knowing this question at the start helps you determine your approach from day one. Creating a charter and vision ([check out our eBook here](#)) is a great way to do this.

Again, this is where your use cases come in handy. What exactly should this tool accomplish in each specific scenario? How can you measure it? That's how you set yourself up to prove the value of your strategy.



Don't rely on the vendor to prove ROI for you.

Do the work upfront to know exactly where you expect your new tool to move the needle. You should compile both qualitative and quantitative measurements beforehand. That way, your vendor can help you track them along the way, all the way up to when it's time to renew. Know the value you need and make sure to chart how the tool is providing it.

Expect a 90-day implementation period.

Most technologies require at least 90 days from start to finish to become fully implemented. After all, most of the upfront work is operational. It takes time to get everything firing on all cylinders.

In order to prove the value of your new strategy, it's key that you set the correct expectations for yourself and your key stakeholders about the timeline to get it up and running. You won't be seeing much value until your use cases have all been implemented. Hold your strategy accountable once it's running as expected.



Conclusion

Effective change management comes down to understanding how launching and adopting a new tool or strategy changes the day-to-day work of your team. By getting buy-in from the right stakeholders, you can ensure the change goes smoothly and without interruption. Remember, it's up to you to understand exactly how your new tool and strategy solves organizational problems instead of creating more of them.

Finally, you can prove ROI by knowing what ROI looks like. Be specific and clear. We know you want to increase revenue, but how does your new strategy or tool specifically help you accomplish that?

At Inverta, we're experts at helping marketing teams implement effective change management tactics. We can provide a clear roadmap to value so that you can prove the worth of your approach to leadership and beyond.

Learn more about what we do [here](#).

