

# THE ULTIMATE B2B MULTI CHANNEL TROUBLESHOOTER 2022



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Multi channel management is a fine balancing act with lots of components at play. The quicker you can pin point any channel performance problems, the quicker you can get your channels working to their optimum ability to help you achieve your overarching multi channel strategy.

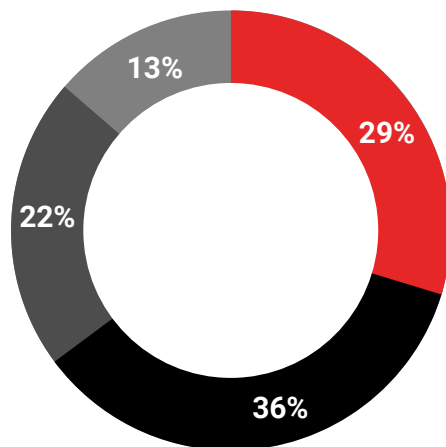
Highlighting key problem areas as voted by senior B2B marketers, these checklists are designed to help you diagnose the health of your channel activity.

## AUDIENCE OVERVIEW

The first party research included in this guide was conducted among senior B2B marketing professionals within our global **Insights for Professionals (IFP)** community.

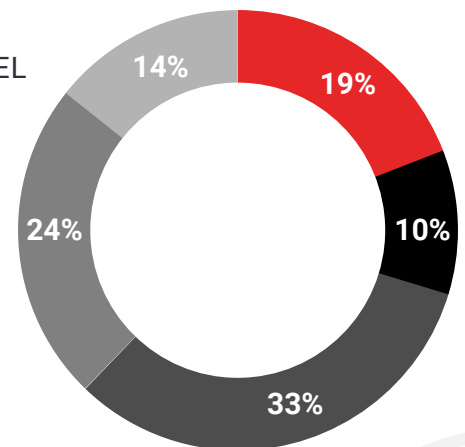
HOW MANY  
EMPLOYEES ARE  
THERE IN YOUR  
ORGANIZATION?

- 500-999
- 1000-2499
- 2500-4999
- 5000+



WHAT IS YOUR  
AUTHORITY LEVEL  
WITHIN YOUR  
ORGANIZATION?

- Senior Manager
- Head Of
- Director
- VIP
- C-Suite



## WHAT VALUE WILL THIS TROUBLESHOOTER DELIVER TO B2B MARKETERS?

This invaluable channel troubleshooter will guide B2B marketers through the most prominent pain points concerning individual channels, as identified by our first party research panel. It aims to provide a one-stop point of call for solutions and actions to be derived, based on intelligence and expert support.

## READY TO TROUBLESHOOT?

TICK YOUR WAY THROUGH THE FOLLOWING CHECKLIST. HOW CAN EACH PAIN POINT BE REMEDIED? THE CORRESPONDING NUMBER IN THE PLAN OF ACTION REVEALS ALL...



# EMAIL



EMAIL	YES	NO
1. Are you seeing low click-through rates (CTRs)? (voted by 56%)		
2. Are you experiencing high bounce rates? (voted by 47%)		
3. Are your open rates below the industry average? (voted by 46%)		
4. Are you experiencing low send volumes? (voted by 44%)		
5. Do you suffer from high unsubscribe rates? (voted by 26%)		

## EMAIL - PLAN OF ACTION

<p><b>1.</b> <b>How to increase CTRs:</b></p>	<ul style="list-style-type: none"> <li>• Ensure emails are optimized for all devices</li> <li>• Have clear and compelling calls to action (CTAs)</li> <li>• Include images, videos and visuals</li> <li>• Optimize your headline and copy.</li> </ul>
<p><b>2.</b> <b>Reduce bounce rates:</b></p>	<ul style="list-style-type: none"> <li>• Optimize your CTA placement – place above the fold</li> <li>• Improve the speed of your website and loading times</li> <li>• Use videos to engage your audience</li> <li>• Adopt A/B testing to gauge best performing email content, layout, subject lines etc.</li> </ul>
<p><b>3.</b> <b>Increase open rates:</b></p>	<ul style="list-style-type: none"> <li>• Personalize subject lines using recipients' name or location</li> <li>• Keep subject lines short: use <b>no more than 9 words and 60 characters</b></li> <li>• Test subject lines using A/B testing to identify which see highest open rates</li> <li>• Be direct and descriptive in the copy used for subject lines to demonstrate benefits.</li> </ul>
<p><b>4.</b> <b>Improve send volumes:</b></p>	<ul style="list-style-type: none"> <li>• Ensure your data is of good quality – keep clean and up-to-date lists</li> <li>• Authenticate your email domain and maintain proper IP allocation</li> <li>• Ensure subject lines do not contain common <b>spam words</b></li> <li>• Rely on the mailbox provider's resources to identify any nuances specific to their platform – having a look through their blogs is a good place to start.</li> </ul>
<p><b>5.</b> <b>Reduce unsubscribes:</b></p>	<ul style="list-style-type: none"> <li>• Offer customizable email frequency</li> <li>• Ensure your emails aren't loading slowly</li> <li>• Perform email frequency testing</li> <li>• Segment subscribers to ensure maximum relevancy in what they are being sent.</li> </ul>



# EVENTS



EVENTS	YES	NO
1. Are you concerned about the accuracy of your data? (voted by 50%)		
2. Is it difficult to keep your team motivated at events? (voted by 37%)		
3. Do you struggle with event follow up? (voted by 34%)		
4. Is it difficult to get the quality of attendees? (voted by 31%)		
5. Are you experiencing low audience numbers? (voted by 31%)		

EVENTS - PLAN OF ACTION	
<p><b>1.</b> How to improve data accuracy:</p>	<ul style="list-style-type: none"> <li>Standardize and simplify the data entry process</li> <li>Keep data sources in sync</li> <li>Capture and store all data results</li> <li>Create and maintain a centralized database.</li> </ul>
<p><b>2.</b> Keep your team motivated at events:</p>	<ul style="list-style-type: none"> <li>Set clear goals to give them a focus – both individually and at team level</li> <li>Allow regular breaks and a chance to look around the event</li> <li>Keep the atmosphere friendly, supportive and collaborative</li> <li>Give positive feedback and reward staff – maintain a positive environment.</li> </ul>
<p><b>3.</b> Follow up events effectively:</p>	<ul style="list-style-type: none"> <li>Send a 'thank you' follow up email – keep it short and direct, nothing too gushy</li> <li>To any no-shows, send a 'sorry we missed you' email</li> <li>Emails should include a CTA directing them to a specific post-event webpage</li> <li>Ask them to complete a post-event survey to identify what they liked and what could be improved</li> <li>Ensure sales teams personally follow up and share relevant content</li> <li>Invite them to another upcoming event.</li> </ul>
<p><b>4.</b> Ensure a good quality of attendees:</p>	<ul style="list-style-type: none"> <li>Create a captivating agenda with your target audience in mind</li> <li>Ensure the location is near to your target audience and accessible</li> <li>Consider a VIP guestlist, offering specific people a superior experience</li> <li>Send around 'save the date' reminders early on, to ensure it is kept free.</li> </ul>
<p><b>5.</b> Increase audience numbers:</p>	<ul style="list-style-type: none"> <li>Leverage event technology to showcase how the event will benefit audiences</li> <li>Connect your event speakers with attendees prior to the event</li> <li>Offer alternative sessions to standard talks – such as live demos, workshops, masterclasses...</li> <li>Promote your event in the right places and across the right channels to reach your target audience – consider the power of social media such as LinkedIn for corporate events, as well as press releases and emailing your target segments with ticket offers</li> <li>Send reminder emails to registrants in the run up to the event with sneak peeks of the day.</li> </ul>



# ORGANIC SOCIAL



ORGANIC SOCIAL	YES	NO
1. Do you struggle to create a mix of content on social vs owned platforms? (voted by 49%)		
2. Is it difficult to integrate social effectively with marketing automation platforms? (voted by 48%)		
3. Is using a similar strategy for all social platforms a key challenge? (voted by 45%)		
4. Do you struggle to create enough webinars or live videos for social? (voted by 42%)		
5. Is frequency of posting a top concern? (voted by 40%)		

ORGANIC SOCIAL - PLAN OF ACTION	
<p><b>1. How to create a mix of content on social vs owned platforms:</b></p>	<ul style="list-style-type: none"> <li>• Understand what content your audience needs at each stage of the demand generation funnel</li> <li>• Produce a wide variety of content formats to support this, including – video, blogs, infographics, images, webinars, podcasts, slide shares</li> <li>• Define the purpose of each format in terms of the stage of the funnel it complements</li> <li>• Measure and observe effectiveness across social and owned platforms.</li> </ul>
<p><b>2. Integrate social effectively with marketing automation platforms:</b></p>	<ul style="list-style-type: none"> <li>• Utilize the ability to schedule social posts in advance</li> <li>• Automation platforms often recommend optimal posting times based on your previous posts – don't ignore what the data is telling you!</li> <li>• Keep a close eye on what's working across social platforms by taking full advantage of the inbuilt analytics that most automation platforms will possess – allowing you to gauge the full picture and areas for improvement.</li> </ul>
<p><b>3. Master using a similar strategy for all social platforms:</b></p>	<ul style="list-style-type: none"> <li>• Select social media marketing goals that align to your business objectives</li> <li>• Perform a social media audit to refocus it towards your business goals</li> <li>• Create compelling content that all social platforms will support – beware for instance, that Twitter only allows videos up to 2 mins 20 seconds</li> <li>• Ensure you have enough content, formats and engaging copy ready to resonate with your social audiences at each stage of their buyer journey.</li> </ul>
<p><b>4. Create enough webinars or live videos for social:</b></p>	<ul style="list-style-type: none"> <li>• Create full videos or webinars, then cut these into shorter, mini versions – calling them 'mini masterclasses' for example</li> <li>• Repurpose existing webinars and videos</li> <li>• If you're attending an event, ensure your speaker or attendees are captured on live video</li> <li>• Invite experts to talk on webinars, removing the pressure away from your busy inhouse teams and providing an alternative speaker / voice.</li> </ul>
<p><b>5. Get to grips with frequency of posting:</b></p>	<ul style="list-style-type: none"> <li>• Don't overdo it</li> <li>• Research reveals that the <b>optimal number of LinkedIn posts a day is between 1 and 5</b></li> <li>• Every social media platform is different, so test and analyze your own posts to identify what is optimal for your brand</li> <li>• Benchmark your top competitors; how often are they posting and on which platforms?</li> </ul>



# PAID SOCIAL



PAID SOCIAL	YES	NO
1. Are you struggling to consistently create quality, engagement worthy content? (voted by 47%)		
2. Do you find managing spend difficult? (voted by 42%)		
3. Is keeping social performance in line with a multi channel strategy a challenge? (voted by 42%)		
4. Is measuring ROI a struggle? (voted by 41%)		
5. Is your time and resource management lacking? (voted by 39%)		

PAID SOCIAL - PLAN OF ACTION	
<p><b>1.</b> How to consistently create quality, engagement worthy content:</p>	<ul style="list-style-type: none"> <li>• Know your audience, in detail, to understand what content resonates best</li> <li>• Show what you do rather than tell – videos are a great way of achieving this</li> <li>• Wherever possible, use your own photos and graphics</li> <li>• Share customer testimonials and reviews</li> <li>• Tag any brands you've quoted</li> <li>• Maintain a clear social media strategy setting out tone of voice and style of writing, to ensure message consistency.</li> </ul>
<p><b>2.</b> Manage spend effectively:</p>	<ul style="list-style-type: none"> <li>• Understand your social media goals</li> <li>• Analyze spend from previous months, quarters, years</li> <li>• Evaluate effectiveness of ad conversions being achieved</li> <li>• Set your social media budget accordingly.</li> </ul>
<p><b>3.</b> Ensure social performance stays in line with your multi channel strategy:</p>	<ul style="list-style-type: none"> <li>• Key to this is continuous monitoring and reporting to assess social performance against your multi channel strategy</li> <li>• If one of your social platforms is seeing a drop in impressions, engagements or conversions for instance, investigate why: copy length, creatives, ad placement and targeting could all be causing a drop in performance</li> <li>• Continue to observe and make changes until your social activity is achieving what your multi channel strategy sets out.</li> </ul>
<p><b>4.</b> Measure ROI:</p>	<ul style="list-style-type: none"> <li>• Define your social objectives in line with overarching business goals</li> <li>• Calculate your social media spend</li> <li>• Track the metrics that align with your objectives</li> <li>• Create an ROI report to reveal how well social is performing.</li> </ul>
<p><b>5.</b> Better manage time and resources:</p>	<ul style="list-style-type: none"> <li>• Set SMART (Specific, Measurable, Achievable, Relevant and Time-bound) goals</li> <li>• Set weekly priorities</li> <li>• Delegate tasks – identify skill strengths and training needs</li> <li>• Ensure all meetings are productive and focused.</li> </ul>



# PAID SEARCH



PAID SEARCH	YES	NO
1. Are competitors targeting your keywords? (voted by 60%)		
2. Are your clicks failing to generate leads? (voted by 58%)		
3. Are your campaigns suffering from wasted spend? (voted by 57%)		
4. Do you struggle to optimize your bidding strategy? (voted by 54%)		
5. Is optimizing landing pages for conversions a challenge? (voted by 38%)		

PAID SEARCH - PLAN OF ACTION	
<p><b>1.</b> How to overcome competitors targeting your keywords:</p>	<ul style="list-style-type: none"> <li>• If your trademarked brand name is the keyword in question and competitors are using this in their ads, submit a complaint form to Google to have it removed</li> <li>• Use a free keyword tool to identify all keywords your competitors are using and the reason for their interest in yours</li> <li>• Conduct keyword research to identify alternative strong keywords</li> <li>• Most importantly, ensure your content includes the targeted keyword significantly (though be careful not to overuse it as you can be penalized for this), to outperform them on SEO.</li> </ul>
<p><b>2.</b> Ensure your clicks are generating leads:</p>	<ul style="list-style-type: none"> <li>• Write engaging, compelling ad copy that will resonate with target audiences</li> <li>• Ensure ads reach the right people through targeting by topic, location, audience, placement – practice target audience segmentation</li> <li>• Choose the right ad platforms and creative based on previous successes and performance analysis</li> <li>• Deliver an integrated campaign and continue to track performance.</li> </ul>
<p><b>3.</b> Ensure campaigns aren't suffering from wasted spend:</p>	<ul style="list-style-type: none"> <li>• Set a time limit for each ad to perform</li> <li>• Monitor how well it's achieved your intended goal and make changes – to copy and/or creatives – if you're not seeing the anticipated results in the set timeframe.</li> </ul>
<p><b>4.</b> Optimize your bidding strategy:</p>	<ul style="list-style-type: none"> <li>• A/B test regularly</li> <li>• Establish negative keywords to exclude specific search terms from your campaigns, placing focus purely on the keywords that matter</li> <li>• Change your minimum and maximum bids temporarily and rarely</li> <li>• Use strong audience data and add data exclusions</li> <li>• Look at day parting and reducing spend over the weekend.</li> </ul>
<p><b>5.</b> Optimize landing pages for conversions:</p>	<ul style="list-style-type: none"> <li>• Simplify your landing page and include clear CTA buttons</li> <li>• Include your key messaging high up on the page</li> <li>• A/B test different headlines and copy</li> <li>• Make the landing page purpose clear – avoid information overload.</li> </ul>



# PROGRAMMATIC DISPLAY



PROGRAMMATIC DISPLAY	YES	NO
1. Are you having difficulty controlling ad placements? (voted by 38%)		
2. Are you struggling to reach engaged audiences? (voted by 38%)		
3. Is optimizing creative a challenge? (voted by 35%)		
4. Do you find optimizing ad spending strategy a key obstacle? (voted by 34%)		
5. Are you unable to access the best data to make remarketing ads as relevant as possible? (voted by 34%)		

## PROGRAMMATIC DISPLAY - PLAN OF ACTION

<b>1.</b> <b>How to control ad placements:</b>	<ul style="list-style-type: none"> <li>• Select your objective in Ads Manager</li> <li>• Choose manual placements to exclude any placements that aren't suitable</li> <li>• You can also choose to turn off placements by unselecting those specific platforms.</li> </ul>
<b>2.</b> <b>Reach engaged audiences:</b>	<ul style="list-style-type: none"> <li>• Use intent data to identify and segment your audience</li> <li>• Understand the customer journey and map which creatives and copy will engage each stage of the journey</li> <li>• Use powerful, compelling creative to make your ad stand out on the page</li> <li>• Execute with integrated technology.</li> </ul>
<b>3.</b> <b>Optimize creative:</b>	<ul style="list-style-type: none"> <li>• Design ads with a specific platform(s) in mind</li> <li>• Test regularly to assess effectiveness of each creative and compare to others</li> <li>• Segment creatives into ad groups</li> <li>• Keep copy concise and simple – avoid cramming too much in</li> <li>• Use multiple banner sizes to maximize inventory available and use GIFs, videos and interactive elements to increase engagement.</li> </ul>
<b>4.</b> <b>Optimize ad spending:</b>	<ul style="list-style-type: none"> <li>• Refine your keywords, and keep refining</li> <li>• Use negative keywords</li> <li>• Use AI to adjust your bids in real-time</li> <li>• Tailor your landing pages to your ads so that they resonate as best as possible with those clicking through</li> <li>• Create whitelists of sites that have performed well in the past.</li> </ul>
<b>5.</b> <b>Access the best data to make remarketing ads relevant:</b>	<ul style="list-style-type: none"> <li>• Enable data collection for remarketing purposes in your Analytics property settings</li> <li>• Create remarketing audiences</li> <li>• Set up remarketing lists from the data collected under the remarketing tab – enabling search ads in your ad platform to identify users who's behavior meets your specified criteria, and target them with your ads.</li> </ul>





# THIRD PARTY PLATFORMS



THIRD-PARTY PLATFORMS	YES	NO
1. Is investment against premium offerings an area of concern? (voted by 59%)		
2. Do you struggle with rolling renewals? (voted by 50%)		
3. Do you find managing a high number of profiles (review sites, directories etc.) difficult? (voted by 42%)		
4. Are subscription models a real issue? (voted by 32%)		
5. Are out of date profiles a recurring challenge? (voted by 10%)		

THIRD-PARTY PLATFORMS - PLAN OF ACTION	
<p><b>1. How to invest against premium offerings:</b></p>	<ul style="list-style-type: none"> <li>• Ask for a free trial before committing to check it has the capabilities and functionality you require</li> <li>• See if you can negotiate or create a barter deal to help bring costs down</li> <li>• Speak to peers and check reviews to feel confident the investment is right for you.</li> </ul>
<p><b>2. Manage rolling renewals:</b></p>	<ul style="list-style-type: none"> <li>• Firstly, be aware if you have a rolling contract which automatically rolls over</li> <li>• Check the terms – are they fair and acceptable? Check whether the price agreed will rollover or increase, as this can catch a lot of people out!</li> <li>• Check the length of the new contract – after is has rolled over, how long is the tenure?</li> <li>• What is the termination notice period? Again, check! It's also very worth finding out your options if you were to miss this notice period (there should be several)</li> <li>• Set a reminder in your calendar for the next renewal period.</li> </ul>
<p><b>3. Manage a high number of profiles (review sites, directories etc.) effectively:</b></p>	<ul style="list-style-type: none"> <li>• Set clear objectives for each and continuously assess performance against these</li> <li>• Assign a set amount of time to each profile</li> <li>• Regularly monitor how well they're achieving goals – don't let any fall behind</li> <li>• Re-use or repurpose copy and content across profiles where appropriate.</li> </ul>
<p><b>4. Understand subscription models:</b></p>	<ul style="list-style-type: none"> <li>• Check whether your subscription is set to increase over time, and by how much</li> <li>• Be sure to know the frequency of your recurring fee (monthly, quarterly, annually)</li> <li>• Find out if you can renew or cancel at any time, and whether there are any penalties to do so.</li> </ul>
<p><b>5. Address out of date profiles:</b></p>	<ul style="list-style-type: none"> <li>• Request regular reviews of the third party data coming across to you – schedule routine check-ins to ensure this is being completed by your provider</li> <li>• Keep a log of any outdated profiles you come across</li> <li>• Flag them – raise any concerns directly with your 3rd party platform provider</li> <li>• Good 3rd party providers will track any profile changes for you to avoid data decay, so consider opting for one of these to prevent inaccurate data wasting valuable time.</li> </ul>



# WEBSITE



WEBSITE	YES	NO
1. Is diminishing time on page a key area of concern? (voted by 33%)		
2. Are you experiencing a low number of pages consumed? (voted by 33%)		
3. Are you struggling to manage your chatbot? (voted by 29%)		
4. Are your 404 pages going unnoticed? (voted by 23%)		
5. Does your website contain too many forms? (voted by 22%)		

WEBSITE - PLAN OF ACTION	
<b>1.</b> <b>How to increase time on page:</b>	<ul style="list-style-type: none"> <li>• Improve your page design – benchmark competitors to see how their pages look</li> <li>• Enhance readability across your site</li> <li>• Optimize images</li> <li>• Include videos – introduce interactive elements</li> <li>• Optimize your copy</li> <li>• Perform user testing: look at heat maps and recorded sessions to determine where or why users leave a page.</li> </ul>
<b>2.</b> <b>Improve number of pages consumed:</b>	<ul style="list-style-type: none"> <li>• Know your target audience and what they are looking for</li> <li>• Include internal links</li> <li>• Make all of your pages engaging and interactive</li> <li>• Have a clear user journey – map this out to fully understand it</li> <li>• Concentrate on user experience and how they navigate your site</li> <li>• Include clear CTAs to guide users on where to go next.</li> </ul>
<b>3.</b> <b>Manage your chatbot:</b>	<ul style="list-style-type: none"> <li>• Define the goals you want your bot to achieve</li> <li>• Give it a unique, catchy name</li> <li>• Create a natural conversation flow</li> <li>• Start simple with your bot responses and monitor how well these address user queries</li> <li>• Continue to evaluate and enhance your chatbot in line with user needs.</li> </ul>
<b>4.</b> <b>Avoid 404 pages going unnoticed:</b>	<ul style="list-style-type: none"> <li>• In Google Analytics, navigate to Behavior &gt; Site Content &gt; All Pages</li> <li>• Choose 'Page Title' as the primary dimension</li> <li>• Search for '404' or 'Page not Found' to explore all URLs with a 404 status code</li> <li>• Add this process into your weekly or fortnightly to do list.</li> </ul>
<b>5.</b> <b>Reduce the number of forms on your website:</b>	<ul style="list-style-type: none"> <li>• Direct users to your contact form where applicable</li> <li>• Keep number of fields to a minimum</li> <li>• Monitor which forms are getting the most completions and any that are getting few and assess whether to direct users to an alternative form instead</li> <li>• Create dynamic form completions to avoid repetition for prospects.</li> </ul>

## TROUBLESHOOTERS, IT'S OVER TO YOU...

You now possess the know-how to take charge of your channels when they're not working effectively or in line with your goals. Use this best practice to generate the maximum potential from your channel mix and drive your B2B multi channel strategy ahead of your competitors with expert tried-and-tested tactics.



### About Insights for Professionals

IFP is a centralized knowledge platform that brings together professionals across multiple disciplines and sectors through the common goals of professional development and knowledge acceleration.

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