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PUTTING HEART INTO YOUR BUSINESS:

PROVEN TECHNIQUES FOR ENGAGING B2B/PROFESSIONALS ON A DEEPER, MORE EMOTIONAL LEVEL

Tactics and strategies used in the past by marketers to target B2B/Professionals have typically been quite distinct from those used to reach consumers (B2C). But there is a growing trend among B2B marketers to understand their buyers as people, more than just their professional role. In that respect, the lines between B2C and B2B are starting to blur.

As B2B marketers look to adopt a more personalized approach to marketing, they will turn to qualitative research to help find those deep emotional connections that can differentiate brands in the marketplace and lead to brand loyalty in the B2B world.

While emotion-based research has been at the core of consumer under-

standing for years, it has yet to truly break through when it comes to understanding and engaging B2B professionals, who are known to strongly self-identify as rational decision-makers.

By applying creative techniques typically reserved for consumer research, researchers can reveal rich

untapped emotions that have the potential to drive behavioral change among business customers.

Approaching B2B Projects Like Consumer Ones

The biggest challenge facing researchers is not getting insights using this approach, it's convincing your clients to give you the chance! How often have you heard that you can't get doctors / farmers / CEOs / [fill in the name of your professional target audience here] to talk about their emotions?

Clients are very quick to point out all the reasons why it won't work:

- They don't have time to participate.
- They won't open up and share with others whom they see as "the competition".
- They can't think creatively.
- They have short attention spans and won't have the patience.
- Their rational self-awareness gets

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in the way of acting on their emotional drivers.

- They only want to talk about what they think is important, not what you want them to focus on.
- They will think it’s silly.
- This isn’t an emotional category.

What follows are some proven techniques designed to help you approach your next B2B project like a consumer one.

Step 1: Identifying the Best Methodology

A client once approached me to do insight generation focus groups with grape growers in California. I explained that getting a group of farmers together at the same time for two hours at a central location in the middle of harvest to talk about their feelings was likely not going to happen!

However, online discussion forums (or bulletin boards) represent an ideal way to reach busy, geographically dispersed professionals. They have the luxury of time to reflect and respond on their own schedule, and the anonymity allowed by online reduces the influences of others in a group and lets them express themselves more freely.

Work around their schedules—time tasks so the last day is a Friday and give them the weekend to complete.

Ensure they have enough time to complete the required tasks—if you plan three days of “activities” allow at least a week to complete.

Assign “code names” to protect privacy—colours, spices, animals (but avoid countries if you can).

Step 2: Getting the Right People

Well it’s true, not every B2B professional is cut out to find a picture that represents how selling propane makes them **feel** or

find a metaphor that speaks to the challenges of growing corn. Just like you would for insight generation with consumers, you need to start by getting the right people. Use creative screens (yes, the same ones you use for consumer work!):

Statement agreement:

- If asked to describe something, I can usually do so in detail.
- My friends consider me to be friendly and outgoing.
- I enjoy meeting and talking to new people.

Comfort and willingness:

- To use Google or other search engines to search the Internet about related topics.
- To upload a picture through the Internet to a website.
- To express opinions and thoughts in an online group setting.

Creative task:

- Imagine you were chosen to be on the cover of an agricultural magazine—what would your cover story be?
- If you could invite three people from history to dinner, who would you invite and why?
- If you were a book in a library, what book would you be and why?

Step 3: Engaging Their “Human” Side

We are all human beings with a need to be heard. The secret is getting professionals to tap into their inner “every day Joe” while still speaking to you from their perspective as a professional.

Show them you are “real” and not a computer program—give them your personal email in the event they have questions. Video record introductory instruc-

tions where possible (which also forces them to listen to your instructions and not skip ahead making assumptions!)

Acknowledge their expertise—in the introductions ask them for three words to describe themselves, then reflect that back in your welcome response.

Encourage interaction—participants want to share (and hear from!) their peers more than you realize (code names will protect their privacy).

Step 4: Generating Insights

Once you’ve created a safe space for people to be heard, it’s time for activities that allow those deeper, more unconscious human emotions and feelings to come to the surface as participants start to let their guard down. Not only are activities a lot more fun than answering direct questions, they also make participants feel like you’re really listening when you probe to find out more.

Mind Map—get business participants thinking emotionally right from the start by having them come up with 8-10 statements describing thoughts, feelings, hopes and concerns (a greater number of statements forces them to move beyond the functional and into the emotional).

Let’s Vent—let them get things off their chest. What they love and what they don’t, what they wish things were like and what prevents that from happening, etc. Giving participants a chance to focus on some of the things they want to talk about makes it easier to get at the things you want them to focus on later in the discussion.

Advice Activities—stroke their egos a bit by speaking to them as experts using activities like asking them to give advice to an outsider (such as someone from another country visiting to learn about industry best practices) or participate in an

interview where a journalist is writing an article and has asked to interview them.

Projection Techniques—photo collages (e.g. “What does it mean to be a doctor?”) and word analogies (e.g. “For me, growing cotton is like...”) work really well. Just reinforce in your instructions that you do not want pictures related to the topic such as stethoscopes, tractors, etc.!

Deprivation—take their brand away and ask what they would miss. What kind of impact would it have? How does that leave them feeling?

Word Pick—expose them to a list of 15-18 emotions/feelings and ask them to select three that describe how they feel (and their reasons of course!)



Other Things I've Learned along the Way

Although every project comes with its own unique set of challenges, here are some things I've learned along the way that are important in all situations and can make it easier when it comes time to put what you've learned into practice.

Tell participants exactly **what** they will be doing over the course of the project and be honest about how much **time** you expect it will take.

Don't skimp on their incentive—these are professionals, and their time is valuable. Assume they will take 50% longer to answer your questions than you think, and pay them accordingly.

Be respectful but don't be afraid to give them gentle reminders and follow up if they're running behind or not giving

thorough answers—as professionals they understand they are being paid (well!) for their time.

Offer bonuses—you would be amazed how excited senior executives can get about winning a \$50 bonus draw! Tie it to a deadline—you've given them a week, but you really want them to wrap up on the day the final activities are posted.

Over-recruit and ask a couple of participants to standby for the first day. Even if everyone you recruited recently confirmed their interest and willingness to participate the day before, things will come up, and they will truly feel bad about having to bow out.

Ask for feedback—on the last day when you wrap up and thank them for

their time, ask them what they thought about the experience. Both you and your client will be surprised by what you hear!

Engaging B2B professionals using proven consumer techniques to get at deep emotional insights can help position clients for long-term success and achieve differentiation in an increasingly competitive marketplace. If your client is still not convinced, simply remind them that B2B professionals are people just like you and me! They walk the dog, take the kids to soccer practice, buy groceries, binge-watch *Breaking Bad* and sing in the shower... the secret is getting them to tap into that inner “everyday Joe” while speaking to you as the professional that they are. 🐾

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