

B2B marketing in turbulent times: a playbook

A guide to responding to challenges—and getting back to business.



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We've heard it again and again: *"We're in this together."* And we've seen large consumer brands spread messages of hope, support and philanthropy. The widespread consumer brand response to COVID-19 has been nearly as unprecedented as the crisis itself. But as in normal times, many B2B organizations don't feel in it with them. Adapting to consumer behaviors and attitudes is tough enough; but anticipating how complex, often niche B2B landscapes and buying behaviors will evolve (with far fewer expert predications to guide the way) is exponentially more challenging.

But there's always a silver lining—and in this case, many B2B brands may have a strong advantage. While some consumer segments have been decimated (travel, entertainment, hospitality, medical) many B2B industries are better positioned to ride out the storm—thanks to the essential nature of their products and services and the longer sales cycles associated with them. But having a leg up here doesn't make the challenge any less daunting.

That's why we've pulled together a simple playbook specifically for the B2B marketing community. Because—at the risk of sounding cliché—we really are in this together.

Step 1: Reorient yourself

Crisis situations inevitably knock us off our axis. In the days and weeks that ensue, many organizations become immediately reactive—without taking the time to align a response to core values, mission, organizational goals, etc.

In a recent article, Deloitte Global CEO Punit Renjen says, “Amid the crisis, a company’s purpose must remain steadfast: It’s never negotiable. Purpose is where the head and the heart meet. Purpose cultivates engaged employees, helps retain loyal customers, and helps companies transform in the right ways. Companies that are guided by their purpose when they face hard decisions have a keen sense for how they should evolve, and their myriad decisions remain internally consistent and coherent.”

So the first step in your playbook is to align internal stakeholders on your company’s position, mission and goals.

⚡ Exercise 1.1:

STATE YOUR POSITION

Chances are, your company has some form of a positioning statement. If so, grab it and fill in the blanks. If not, now might be a good time to get back to the basics and cement your brand position, values, mission, etc.

Use the template below to complete this exercise.

WHY:

[COMPANY X] exists [WHY?]

Details about why you do what you do

WHO:

to / for [TARGET AUDIENCE]

Details about who you do it for

WHAT:

through / via [WHAT YOU DO TO LIVE YOUR “WHY” FOR YOUR TARGET AUDIENCE]

Details about what you provide, deliver or do

HOW:

thanks to [DIFFERENTIATORS AND PROOF POINTS]

Details about how you set yourself apart

Details about how you set yourself apart

WHY:

LoSasso exists to **bring a vision to life for**

Our our prospective client is ambitious—and has a vision or strong need. But they come to us because they need help bringing it to life.

WHO:

change-agent marketers.

Our our prospective clients, like most marketers today, are on a mission to take their organization to the next level: Motivated by a passion to progress and/or pressure from above to elevate their performance. They need outside perspective from partners with the talent and energy to help them unlock their potential.

Need an example? Here's our position

POSITIONING

WHAT:

We **always provide a fresh perspective and deep expertise to take their business to the next level**

Whether it's a new project or an ongoing client relationship, LoSasso is never content with status quo. We're constantly evolving and helping our clients evolve—bringing cutting-edge insight, fresh viewpoints and new opportunities.

While looking to shake things up, our prospects still need a safe bet. Our unique experience with B2B and high-consideration consumer brands, paired with full-in house modern marketing capabilities, means clients can trust that we understand the complexities of their buyer's journey and sales channels—and can deliver results.

For us, it's all about helping our clients be the rockstars of their industries—delivering results that have real impact on their organization.

HOW:

thanks to **grounded, passionate professionals that deliver work driven by business insight and elevated by creative magic**

We've got the best of both worlds: smart, driven, big-city talent with great C.V.s, but who aren't bogged down by the same pretenses, ego, commute (and overhead) as our downtown counterparts.

Our roots are in direct marketing—so we're wired to think in terms of audience insights that will drive REAL results. Every project is guided by a strong strategic brief. Our full, in-house teams work hand-in-hand—no walls, no silos.

Great creative gets us going, but we know that there is no magic without logic. Our creative is impactful because it's derived from killer strategy and solid go-to-market planning.



⚡ Exercise 1.2:

DEFINE YOUR OBJECTIVES

Another cornerstone of your marketing approach in the coming months will be your business and marketing objectives. Chances are, you might have to adapt them based on current realities.

Fill them in below.

Original 2020 business objectives

1. _____
2. _____
3. _____
4. _____
5. _____

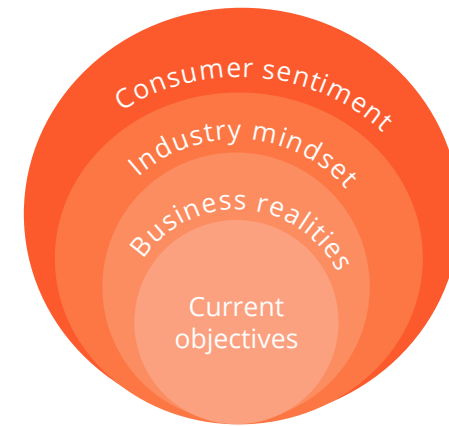
Updated 2020 business objectives

1. _____
2. _____
3. _____
4. _____
5. _____

Step 2: Assess early, assess often

We've all been privy to the cautionary tales: organizations fumble their response to a crisis or tragedy with tone-deaf marketing/communications. Sometimes it's a simple oversight (pre-crisis communications that continue to circulate post- or mid-crisis); sometimes it's an intentional response that lands wrong. Now that you have a guiding light in the form of positioning and objectives (and internal consensus on it), it's time to make sure you don't fall victim to poorly timed or insensitive messages.

This type of assessment should take place before each move to the next phase of your crisis response (see Step 5 on pg 11).



⚡ Exercise 2.1:

THE 4 LENSES

There are four lenses through which to assess your tactical approach during a crisis. Apply each of these as you evaluate current efforts to ensure a comprehensive, critical assessment.

1. **Current objectives and positioning.** See Step 1.

Notes _____

2. **Business realities.** What are the challenging realities your organization is dealing with in the face of the crisis?

Notes _____

3. **Industry mindset.** Your business realities are no doubt influenced by the overarching industry mindset/situation. How do your current programs stand up to that?

Notes _____

4. **Consumer sentiment.** Yes—this matters, even for B2B organizations. Particularly during turbulent times, consumer sentiment causes a ripple effect that reaches the far end of the supply chain. Applying this wider lens will ensure a clearer 30,000-foot view.

Notes _____

⚡ Exercise 2.2:

REVIEW CURRENT MARKETING PROGRAMS

You'll want to think through all current activities to determine what you should pause, continue with as is, or continue but with adaptations. This might seem overwhelming, but there are ways to prioritize. Think first about all the content and programs that are actively pushed out to customers and prospects via email, paid advertising or direct mail. Assessing these (and adapting as needed) should be your top priority.

Program	Pause	Continue as is	Continue with adaptation	NOTES
Nurture stream email XYZ			✓	Swap ABC content with XYZ content in emails 3 and 4

Automated emails and advertising campaigns are a boon to marketers everywhere. But during crisis situations, they can be dangerous. [Check out these tips](#) to help you assess and adapt your marketing automation activities—without hitting the pause button.

Step 3: Find ways to help

In tough times—whether it's a pandemic, a natural disaster or economic turbulence—people feel inclined to help. But for organizations struggling to find their bearings in the midst of these situations (adapting operations, doing right by employees, etc.) the thought of adding new philanthropic initiatives may seem out of the question. Especially for B2B organizations that don't always have the resources or budgets of their larger consumer counterparts.

That's why it may be best to start small—by identifying ways to help customers and prospects affected by the crisis. And those helpful acts don't have to involve charitable donations with complex logistics. In fact, helping could be as simple as offering valuable content or discounts on products or services.

For example, we've been proactively helping our clients navigate how they respond to COVID-19 and the implications it has on their business operations and marketing. From initiating strategy sessions and brainstorming to creating crisis communication plans and anthemic campaigns that remind us of our strength and resilience—we're here to help them in any way we can..

⚡ Exercise 3.1:

HOW TO HELP

There are lots of rewarding, exciting and mutually beneficial ways to step up in a crisis—that don't involve charitable donations or volunteer work. Jot down some ideas within these buckets for your organization.

- 1. Offer something to make a customer's/prospect's life easier.** Is there a product or service you can promote that will help make things easier in the face of current realities? Keep in mind, there's a fine line between helpful and opportunistic, so tread carefully with messaging when it comes to promoting certain products/services.

Ideas _____

- 2. Consider discounts or financial assistance.** Zoom offered special discounts/access to premium products for companies scrambling to transition to remote working amidst COVID-19. Is there something similar that your organization can do? Or perhaps you're well positioned to offer assistance via special financing or payment deferral options.

Ideas _____

3. Deliver content that informs or entertains. Your organization has expertise and information that matters—and that can help your target audience navigate turbulent times. Invest in creating articles/blogs, ebooks, audio content, videos and more on relevant topics. Equally important in a crisis—content that has the power to entertain or spark a smile.

Ideas _____

4. Do right by your employees. Your employees are one of your most valuable assets. And for organizations thrown into sheer survival mode during a crisis, this is a crucial focus area. Even if layoffs, furloughs and pay cuts are inevitable, find ways to handle them with integrity and compassion.

Ideas _____



Step 4: Keep your teams engaged, happy and healthy

As you shift your focus and acclimate to a new normal, it's vital to keep a close eye on the needs and productivity of your teams—both internal and external. Shutdowns spurred by the COVID-19 crisis, for example, brought remote working challenges and various operational interruptions. For many B2B organizations, technology affords us the ability to stay connected and maintain a fairly normal level of productivity, at least at a corporate level. The key to success here is effective, frequent communication.

⚡ Exercise 4.1:

THE 3 STAGES OF CRISIS COMMUNICATION

According to McKinsey, there are three stages of crisis communication—and each comes with its own implications. During phase one, organizations should primarily be instructing: providing thorough information and guidelines on how to react to the crisis now. During phase two, it's important to provide communication that helps people adjust: what information will help them acclimate to the current reality brought on by the crisis? Finally, phase three requires a focus on communication that helps people internalize, or make sense of the crisis and what comes next. What are some important communications or vital touchpoints to schedule with your internal teams during each of these phases?

Phase 1: Instruct

Give clear direction and facts

Vital touchpoints/communications for your team(s):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Phase 2: Adjust

Give clarity on long-term plans, chances to connect, stories to inspire optimism

Vital touchpoints/communications for your team(s):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Phase 3: Internalize

Provide a vision of the future and give teams a chance to grieve and reboot

Vital touchpoints/communications for your team(s):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

⚡ Exercise 4.2:

LEVERAGE EXTERNAL TEAMS

When crisis throws an organization into chaos, it becomes even harder to manage—and get the most from—external partners. But it's during uncertain times that you'll likely get the most from them, assuming they have valuable guidance and strategic insight to offer. Make an effort to include external partners in brainstorming and strategy sessions. Then set clear roles and responsibilities so partners can spring into action to help your organization. List your external partners below and jot down some ideas of how they might help you divide and conquer.

1. Partner 1

Ideas _____

2. Partner 2

Ideas _____

3. Partner 3

Ideas _____

4. Partner 4

Ideas _____

As we deal with the ramifications of COVID-19, the role of CMO will become even more diverse and demanding. We've seen it evolve in recent years to encompass everything from driving organizational change, acting as the voice of the customer, innovating, harnessing and analyzing vast amounts of data, and taking a seat at the IT table—all while minimizing costs and maximizing customer retention. [See our four predictions on how marketing leadership will evolve here.](#)

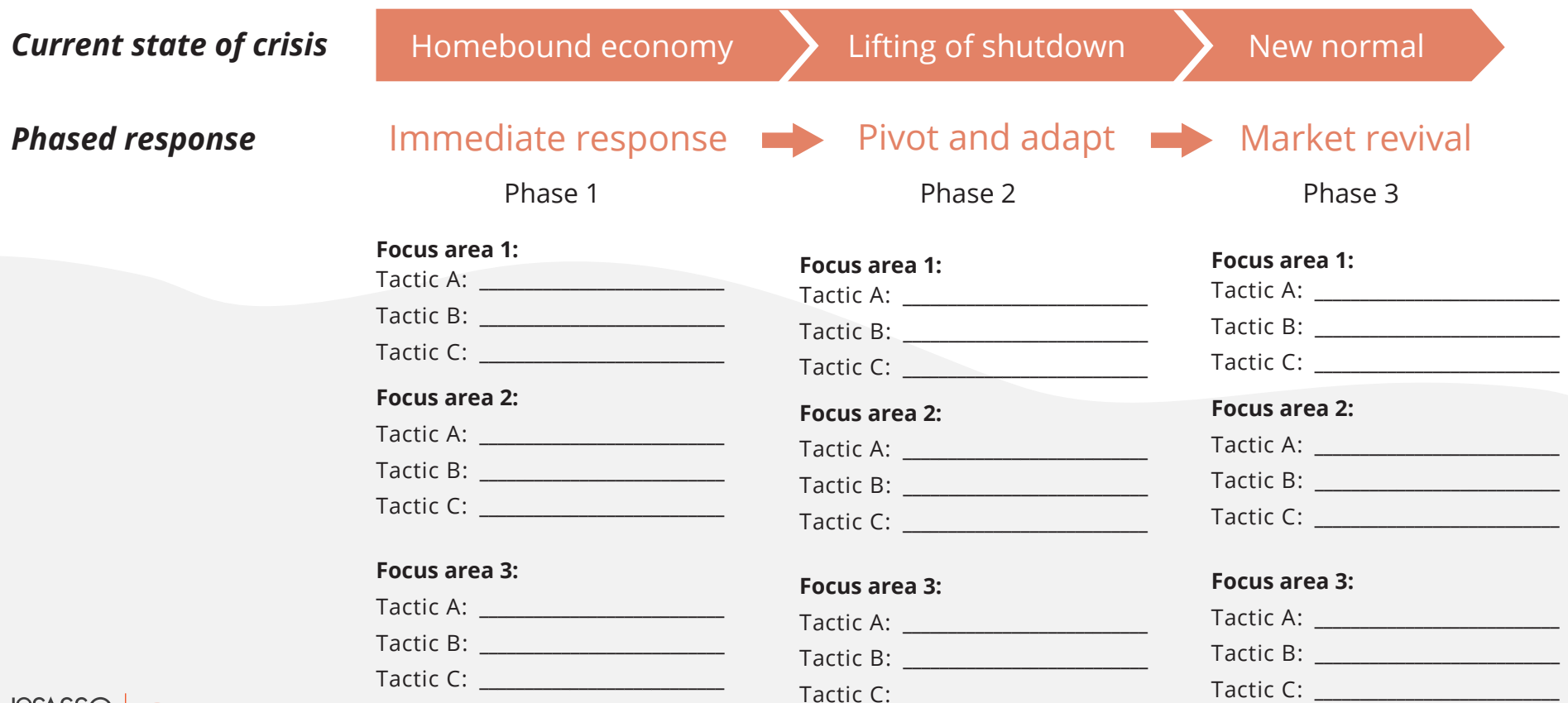
Step 5: Cement a phased response plan

Thanks to COVID-19, we're now all too familiar with the concept of a phased crisis response. But different crises, industries and organizations call for nuanced planning. After moving through steps one through four listed within, you should have a handle on your phase-one response. But what happens after? And what triggers will spur a move from one phase to the next? After the rush of the immediate response, you should have time to take a breath and plan proactively for the future.

⚡ Exercise 5.1:

YOUR RESPONSE PLAN

The top portion of this chart will depend on the nature of the crisis and its implications. In this case, we're using COVID-19 as an example. The current state correlates with the timing of response phases, but as mentioned above, your industry and organization will have its own unique triggers (to be determined in exercise 5.2). Based on steps one through four, you should be able to fill in focus areas and related tactics for phase one. Then proceed with ideas and planning for phases two and three. Note: Depending on the complexity of the crisis, the "Pivot and Adapt" phase may have multiple sub-phases.



⚡ Exercise 5.2:

THE TRIGGERS

As you plan your phases, it's helpful to determine what will trigger a move to the next phase; most likely, there will be several elements. Examples of triggers could include a resumption of regularly scheduled production, the opening of field/distribution or dealer locations, or other events necessary for business to begin to normalize.

Triggers to move from phase 1 to phase 2

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Triggers to move from phase 2 to phase 3

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Go forth and prosper.

Crises aren't enjoyable, but they can bring beneficial outcomes—especially for B2B organizations who take the opportunity to adapt, innovate and learn valuable lessons. During a crisis, more than ever, is the time to continue to invest your brand and key, foundational marketing efforts. Organizations that do will have a competitive edge as things stabilize. On the other hand, those who halt all activity could suffer irreparable long-term damage. Because especially when times are tough, it's vital to stay close to your customers and prospects.

So remain calm. Stay safe. And always look for the opportunity to rise above.



The authors

We hope this ebook was helpful and enlightening. Looking to bring more clarity and focus into your marketing strategies? Let's talk.



Amanda Callahan
VP Client Services, LoSasso

Amanda Callahan's experience in the marketing industry spans nearly 20 years and an impressive roster of clients including Citibank, Kraft and Merrill Lynch. As the VP Client Services at Chicago-based agency, LoSasso she leads the strategy and brand development for B2B and high-consideration clients in the manufacturing, technology, agriculture and insurance industries. From elevating brand identities to fostering client relations to motivating her team to find unexpected solutions, Amanda helps enable marketing programs that deliver meaningful results.



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With 15 years of B2B agency experience, Jada has helped several large global clients bring to market strategic branding, positioning and creative campaigns. As Creative Director at LoSasso, it's her job to make sure her team delivers work that is on-brief and results-driven. And that requires a strong grasp not only on the art and copy, but also the distribution channels, audience targets and overall client objectives. To that end, no two of her days are alike; you might find her concepting new ad campaigns, guiding creative production, contemplating retargeting strategies, or creating and executing multi-channel content plans.

About LoSasso

Integrated marketing strategy experts since 1989

With a focus on strategy and constant evolution, Chicago-based agency LoSasso helps marketers in B2B and high-consideration segments drive growth. And while we've been around the block a few times, we notice something new on every trip. Our clients know that this passion for progress—and obsession with optimization—helps them move the needle. After more than 30 years, we still feel like a start-up—always applying a fresh lens to keep our clients one step ahead.



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