

# Methods to Engage B2B Industry Professionals

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Input from current or prospective target customers is an essential ingredient in your innovation efforts. The biggest challenge is obtaining access to the highest quality participants. There are several methods to consider, and each has its tradeoffs and requirements.

## METHOD — Current Customers or Users

### PRIMARY UPSIDES

- Considered the “easiest” group to engage given there is an established relationship
- Especially true for site visits and observational research
- Usually forthcoming about pain points & needs

### REQUIREMENTS

- Someone from the client organization must “pre-sell” the research and get buy-in
- Clearly explain the “what’s in it for me” for the sales person. Position the exercise as a loyalty-builder

### PRIMARY DOWNSIDES

- Can find frequent requests for feedback a nuisance
- Typically necessary to involve account manager or a sales representative. Scheduling research is not a top priority
- Depending on assignment, current customer may not be the right target
- Can be too focused on the “here & now” with current products & services. Getting beyond requires specialized techniques

### TYPICAL MOTIVATIONS TO PARTICIPATE

- To help out
- Loyalty to sales rep or account manager
- Curiosity about what company is working on

## METHOD — Event-based interviewing: identify and enroll participants in conjunction with an industry event

### PRIMARY UPSIDES

- Yields highest-quality participants
- Obtain geographic and job-place diversity
- Easier to engage those in more senior positions
- Convenient for participant

### REQUIREMENTS

- Events coordinators may not allow onsite research. More willing to consider if the organization is a sponsor or exhibitor

### PRIMARY DOWNSIDES

- Events are scheduled throughout the year and may not meet internal deadlines
- May require attendance at multiple events

### TYPICAL MOTIVATIONS TO PARTICIPATE

- Ability to network with like-minded professionals
- Curiosity about what is occurring in the industry (stay on the forefront)

## METHOD — Key Opinion-Leader (KOL) Panels

### PRIMARY UPSIDES

- High interview compliance
- Can review verified bios in advance and handpick candidates of interest
- High-quality participant

### REQUIREMENTS

- Often a subscription-based service with an annual commitment, so a plan is required to ensure the organization gets full value

### PRIMARY DOWNSIDES

- Limited reach outside the U.S.
- Will only reach a small number of KOLs
- Sometimes participant is not an exact match to needs, which is not discoverable until the engagement is underway
- Limited to phone methods

### TYPICAL MOTIVATIONS TO PARTICIPATE

- Curiosity about what is occurring in the industry (stay on the forefront)
- Opportunity to consult/earn some money

## METHOD — Employment Services/Recruiters/Placement Professionals

### PRIMARY UPSIDES

- High interview compliance
- Can review resumes in advance and handpick candidates

### REQUIREMENTS

- Time-consuming screening of employment firms to find one that will work with you

### PRIMARY DOWNSIDES

- Candidates may not be as knowledgeable as resume suggests
- Not the primary business of these organizations
- Less feasible outside the U.S.
- High chance of contacting someone between jobs or who works free agent. Careful consideration needed on amount of time between gigs/actual knowledge level

### TYPICAL MOTIVATIONS TO PARTICIPATE

- If unemployed or a free agent, opportunity to consult and earn some money
- Networking
- Stay on the forefront

## METHOD — Enrollment to a Telephone or Web-Based Interview

### PRIMARY UPSIDES

- Quicker to deploy
- Easier to scale across multiple job titles and geographies

### REQUIREMENTS

- Targeted sample
- Heavy screening and re-screening to verify credentials
- Scheduling interviews

### PRIMARY DOWNSIDES

- Low response rates
- Must cast a wide net to achieve enrollments, thus increasing the risk of scheduling lower-quality interviewees
- More difficult to enroll participants from the largest organizations (participation from smaller to medium-sized organizations more commonplace)
- Not feasible in all countries

### TYPICAL MOTIVATIONS TO PARTICIPATE

- Opportunity to earn money piques interest
- Stay on the forefront

Also useful is understanding what motivates a B2B professional to participate in a research and innovation assignment. For some, it is indeed the money, especially if they are unemployed or are a free-agent. For others, the primary motivation is curiosity and knowledge (references below). That is, these individuals use the opportunity to stay on the forefront of what is occurring in their industry.

As an inducement, we have offered study participants a synopsis of what was learned during the study. In other assignments, we have involved the customer and the customer's customer. One past assignment required an engagement with fast-food managers. As a motivator, we allowed the fast-food managers to observe a group of fast-food diners who were known to dine in that manager's store. After the diners' group, we pulled the managers into a follow-up discussion. It was a win-win: the end-consumer was heard, the client's customer (fast-food restaurant managers) were highly-motivated to participate and they learned something new from their customer.

B2B research can add significant value to your innovation efforts. Careful consideration is required on how and where to engage the highest-quality participants. There are several time-tested methods, and many creative strategies to increase customer interest and engagement. Now, let's get to work.

#### References

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#### **ABOUT KIP CREEL & STANDPOINT**

*Kip Creel is the President and Founder of StandPoint, an Atlanta-based agency specializing in the front-end-of-innovation including insights, ideation, content building, and concept evaluation. Over the past 15 years, StandPoint has generated impactful insights for many notable Fortune 5000 companies in healthcare technologies, pharmaceuticals, medical supplies, medical devices, and consumer packaged goods.*

*Kip developed SCORE™, an award-winning process used by many companies in their front-end-of-innovation activities. In 2012, StandPoint was named a runner-up for the EXPLOR award, recognizing innovations in market research. Later that same year, StandPoint was named a finalist for Atlanta Marketer of the Year based on its unique methods. In 2014, StandPoint won the Atlanta Marketer of the Year award for Innovation in Marketing Research.*



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