

The Impact Of AI On B2B Sales



In this guide, we cover how deep learning-based tools are revolutionising various aspects of B2B sales and marketing operations. Ultimately, they will deliver reduced costs and increased efficiency. What follows are some early examples.

First, we take a quick tour of how B2B marketing has evolved to the current day before. We then go on to define some terminology used throughout the text.

As all good marketers should, we start with the customer and the impact of AI on their processes before turning to the impact on B2B sales. Finally, we describe some use cases before considering future trends.

Before reading on, please note that the bulk of the following discussion is most relevant to those businesses with up to 300 (existing or potential) key accounts. At this level, deep-learning-driven tools can deliver many benefits....But..

One of the major advantages of deep learning-driven tools is their ability to identify patterns in data sets. To deliver maximum benefit requires vast amounts of data and, therefore, high hundreds if not thousands of key accounts. This we cover in Appendix B.

We don't cover the impact of AI on SEO, paid ads (social and search), organic social or the funnel concept in the main text. If they are of interest, our view is outlined in Appendix A.

Although we discuss knowledge bases below, we believe they are so important to the future of B2B marketing that they deserve a section of their own. To read more, refer to Appendix C.

What's Changed?

The earliest known flint arrowheads date back at least 40,000 years. We can safely assume these were traded (exchanged) in some way.

Move on through history and for centuries, little changed. Sales were based on show and tell and, when tribes started to move and interact, word of mouth. This approach had obvious limitations, but that all changed with the development of the printing press.

Now, it was possible to deliver a message to a greater audience. All it needed was some way to increase access to that message. First, the audience needed education and secondly, there needed to be a mass delivery mechanism.

By the early 1980s, those problems were solved. Print was joined by other mass media, including television and radio. Marketers developed efficient ways to create awareness and generate enquiries. Then along came the internet.

Facebook launched in 2005, so social media marketing became a thing. Also in 2005, The term inbound marketing was (allegedly) first used by HubSpot's Brian Halligan.

Then, in late 2022, with little prior warning, ChatGPT was released. From that point onward, the number of AI-driven tools and their capabilities has exploded.

Definitions

Artificial Intelligence (AI) is a generic term. Under the AI banner sits visual recognition, voice recognition, NLP, expert systems, robotics and more. There is weak AI and strong AI.

Weak AI is what exists today. Alexa, chess-playing programs and facial recognition systems are all examples. They perform very well within relatively narrow boundaries. Most define ChatGPT as weak AI.

Strong AI is better known as AGI (Advanced General Intelligence). This is where things get wild and woolly. There is an awful lot of hype and nonsense spouted about AGI.

We could argue all day about definitions, but let's try one. Strong AI is a system with the ability to reason, learn, and solve problems in a generalised manner; it has no boundaries but has true understanding, consciousness, and self-awareness. Today AGI does not exist and, therefore, we are not going down the rabbit hole of discussing it any further.

Under the Artificial Intelligence category sits machine learning, a subset of that is deep learning. Most of the discussion below relates to deep learning-driven tools.

Again, there are many definitions of Artificial Intelligence (AI), but we use an IBM definition - Combining computer science and robust data sets to enable problem-solving.

We define machine learning (ML) as using algorithms and statistical models to analyse and draw inferences from patterns in data. Machine learning enables computers to learn and make decisions without being explicitly programmed for each specific task.

Deep learning uses multi-layered artificial neural networks based on the architecture of the human brain. They can learn patterns in data by building abstract representations of the data as it passes through the layers of the neural network.

Both ML and DL require significant human input at the setup stage. To compare them in any detail is beyond the scope of this guide but, in short, they are based on different architectures and each has advantages over the other depending on the application.

ChatGPT is a Large Language Model (LLM). An LLM is a specific application of deep learning (there are several others for different applications) designed to understand and generate human-like language. They are trained on vast data sets. ChatGPT is the OpenAI variant, but there are others, including Google Gemini and Anthropic Claude.

A CustomGPT is a helper based on ChatGPT that simplifies a repetitive or common task. Other vendors have similar solutions. They help a user, but it is up to the user to use that information to perform the task.

AI Agents take the CustomGPT type helper to the next level. Rather than just helping, they perform a task within clearly defined parameters.

Finally, a definition of generative AI. This refers to artificial intelligence models that generate text, images, or music outputs based on training data. ChatGPT is one form of generative AI.

AI Impact On The Customer

Let's imagine in early 2025 an engineer is trying to solve a problem with one of their new designs. Where are they going to look for information? We suggest they will work through (from top to bottom) the following list.

- Word of mouth.
- Customised knowledge bases.
- AI-based search engines (e.g. Perplexity.ai).
- Offline resources.
- General LLM-type applications (e.g. ChatGPT).
- The World Wide Web.

Any one item from the list may satisfy their need. More likely, those in research mode will use a combination to find a way forward. The theory behind inbound marketing remains valid. In

general, prospects seek the information they need before engaging with sales.

Information Sources – An Overview

First, a quick overview of the advantages and disadvantages of each information source.

Word Of Mouth – The natural first stop for any engineer trying to solve a problem will be to ask trusted colleagues. Has anyone had a similar issue? Can anyone provide some initial help or guidance?

Sometimes, this approach will deliver a solution. More often, it will at least provide a starting point to guide further research.

Customised Knowledgebases – We expect significant growth in this area over the next few years. Knowledge bases may be internal to the business or external (provided by suppliers).

The key word is customised. These knowledge bases (of which there might be many) will be domain-specific and focused on a particular topic.

Significant knowledge bases already exist (under several different names), a key supplier list is just one simple example. More on knowledgebases in Appendix C

AI-based Search Engines – These are starting to emerge. No clutter, no Ads (at present), and short, on-topic answers to questions with links to further resources. The experience is an order of magnitude better than the World Wide Web.

ChatGPT-type Solutions – Unlike customised knowledgebases they are more general research tools. With customised knowledgebases, AI-based search engines and ChatGPT type solutions, to receive a relevant answer you must ask the right question. The prompt is key.

Offline Resources – These include print, PR, exhibitions and conferences, seminars and webinars. Many engineers continually educate themselves, so they are better placed to identify a solution if/when a problem occurs.

Internet – There has been a steady decline in the World Wide Web as a useful research tool for years. With the rise of AI-generated content, the situation will only get worse.

In response, Bing has incorporated AI-driven features into their search results. Google will follow with search generative experience (SGE).

Can SGE be rolled out at scale? How will it fare against AI search engines, Claude and ChatGPT, that currently have a lead? At this point, we don't know. More on this in Appendix A

The Impact On Sales

In the rapidly evolving B2B market landscape, businesses must retain existing customers while attracting new ones to sustain and grow their operations.

Key elements of the sales process include:

- Existing customer support and sales development
- Awareness & Brand building
- Prospecting & Lead generation - focussed
- Prospecting & Lead generation - general
- Planning, Recording & Admin

Where a focused lead generation approach targets specific target accounts that research shows could be particularly valuable to the business. They may be a good match with the product or service provided by the business, be a competitor key account, or be identified by a project tracking system.

In most cases, tasks are split between internal sales, business development professionals and key account managers. Marketing will often provide support and take on market research and intelligence duties. All should be driven by an established business and marketing strategy. Where is the business headed, how does it provide value, and who are its customers?

Today, B2B sales tasks typically include:

- Regular touch - existing customers.
- Prospect (Accounts and individuals) identification.
- Prospect outreach.
- Lead follow-up - targetted content generation (inc email).
- Response to enquiries and bid management.
- Progressing opportunities - meetings and presentations.
- Forecasting.
- Onboarding new customers or contacts.
- Sequencing and planning - organising the next steps.
- Securing internal help where needed.
- Attending events, exhibitions & networking events.
- Record keeping (inc. CRM).
- Admin - expenses, meeting reports, travel arrangements etc.

Someone needs to generate awareness and build the brand (marketing). They also need to generate enquiries from those in the market for a solution (marketing and sales combined)

With the rise of deep learning-driven tools and applications, sales practice will have to develop and change. All sales tasks outlined above will be impacted by AI-driven tools to an extent but lead-generation tactics will see the most dramatic change. The Internet will be

joined by other information mediums. Knowledge bases and communities are silos that sales will find it challenging to penetrate.

Generic Solutions

There are several levels of potential deep learning-driven solutions. The user implements one or more of these depending on the requirement.

- Generic LLM's (ChatGPT, Claude, Gemini and others).
- Customised versions of the above to simplify specific tasks (for example, customGPT).
- Customised GPT's integrated with Zapier (or similar) Apps.
- Vendor-specific tools (for example, Microsoft Sales Co-pilot).
- Deep learning integrations into existing tools (for example, Pardot, Hubspot and Drift).
- AI Agents to perform a specific task.

All are tools to be used by a human to achieve or simplify some task. As stated above, AGI is some way off.

It's all too easy to jump in and try to implement a deep learning-based solution as they are new, capable and exciting, but it is vitally important to stand back and think through the options.

What is the task and what is the required outcome? Is an existing application or technology the best way to achieve that task? If deep learning-based tools are the best way forward, what is the plan (tools, resources, people, timescales)? What are the security implications, if any? It is always best to start small, test thoroughly, and build from there.

Large organisations with significant investments in tools (such as Salesforce or Microsoft Dynamics) and staff training may find it best to continue with the upgraded version of those tools. SMEs might seek to integrate several stand-alone Apps to fit their needs. That is our focus in this guide.

Application Examples

Many deep learning tools are emerging. Some are invaluable, some are useful, some are not deep learning at all but are dressed up that way simply as a promotional tool and some are useless. It is important to evaluate what is available (or ask someone already in the know) and make a selection.

Let's pick from the list of typical B2B sales tasks (above) and look at how deep-learning-driven tools can help.

Content Generation

[Regular touch](#) | [Lead follow up](#) | [Response to enquiries](#) | [Meetings](#) | [Progressing opportunities](#)

Deep learning models can generate or optimise sales presentations, brochures, case studies, and other collateral based on specific customer profiles, pain points, and industries.

If existing information is loaded to a knowledge base (see below) that knowledge base can be interrogated using a simple Chat style interface to extract and re-format information to fulfil a given task. Think of an intranet on steroids. This can personalise content and save salespeople a considerable amount of time.

Deep learning tools can vastly simplify presentation creation or create a structure for a talk. Where, in the past video creation would require specialist skills, tools are now available that significantly reduce complexity.

Of course, just because you can doesn't mean you should. Whatever output is produced needs to fit within brand guidelines and be error-free. There must always be a sign-off stage.

The content creation capabilities of DL-driven tools are well-known and are improving all the time. We don't suggest pumping out DL-driven content with little to no human input, but we do suggest using them for ideation and for developing structure.

Email

[Prospect outreach](#) | [Lead follow up](#) | [Bid management](#) | [Admin](#)

First, let's look at the general time-saving element. People waste lots of time on email. Whether it's doom scrolling down through the list as an alternative to starting on the next task or searching for that elusive email they know is in there somewhere.

Unfortunately, DL-driven tools cannot deal with procrastination. However, they can help with searchability and more. They can create folders with emails that need a response and categorise them according to urgency.

There are lots of Email tools available already. Many come built into whatever email package you may use. So, how are DL-driven tools different? Deep learning-driven tools can learn from user behaviour? They can automate complex tasks like email prioritisation and categorisation.

Based on how often a user opens, deletes, replies or marks an email for later DL-driven tools can learn, sort and prioritise emails. They can automatically organise emails into specific folders and categories, reducing manual intervention.

At a higher level, DL-driven email tools can auto-generate emails or templates that require minimal human intervention before release. They can help generate Email titles and content to improve open rates and engagement. If there is sufficient Email volume, they can learn from response indicators.

Research

[Prospect \(Accounts and individuals\) identification](#) | [Prospect outreach](#) | [forecasting](#)

Custom GPTs can be configured to identify potential target accounts in any industry. Using a multi-step (multi-custom GPT) process initial target lists can be refined to deliver precise targeting of accounts or individuals.

Data can be pulled from a firm's own resources or external sources (via Zapier-type Apps) into lists that can be analysed by a range of deep learning-based tools. Large documents or industry reports can be summarised by ChatGPT or Claude-type tools in minutes saving the researcher a significant amount of time.

Data analysis tools built into ChatGPT and other deep learning-based tools can simplify data analysis tasks and provide new insights. They can help with analysing customer surveys.

Most firms need a level of data analysis. It's a common frustration that obtaining information in the format required can be a laborious task.

Some firms work with a bunch of spreadsheets, but most use some industry-specific system or package from a standard software provider. Those systems may simplify many issues, but often they do not work exactly as the business may like. They can be overly complicated, stacked with too many features or clunky.

With DL-driven tools, it is possible to customise data analysis to match the business needs. This delivers quick access to information and aids faster/better decision-making. It's not necessary to throw away existing systems. DL can act on existing data to refine, simplify or speed up the process.

Chatbots

[Response to enquiries](#) | [Onboarding](#)

Chatbots have existed for many years, but DL-driven Chatbots are a leap forward. Where traditional Chatbots rely completely on their initial training DL-driven chatbots can understand much more thanks to natural language processing and an in-built understanding of language.

DL-driven chatbots learn from each interaction, allowing them to update themselves over time. Hence, they can customise their responses to each user, providing a more personalised experience.

Ideally, your existing customers or prospects should be able to talk to a human if they prefer. If that is not possible, an ML-driven Chatbot is a reasonable alternative. If a customer needs a quick answer to a question, a Chatbot can deliver with a minimum of fuss.

Customised Chatbots can be used for customer (and/or employee) onboarding. Answering initial questions and taking out some of the frustration customers feel when they cannot speak to a human to deal with a pressing issue.

To function, a Chatbot needs a knowledge base that contains all the relevant (not commercially sensitive) information a customer could ever need on your business.

The structure of the knowledge base and the content needs to be thought through and structured. What is added (and removed) over time must be carefully controlled.

In future, the traditional website may disappear. Instead, it could be simply a Chat-style interface that links to a back-end knowledge base.

Knowledge Bases

A knowledge base is a centralised self-service online library of information about a product, service, or topic. Contributors who are well-versed in the relevant subject add to and expand the knowledge base over time.

Knowledgebases facilitate information collection, organisation and retrieval. When a user inputs a query, the software attempts to deliver relevant answers based on information in the knowledgebase.

To function, many of the solutions outlined above need a knowledgebase. More in Appendix C.

Knowledgebases are not a new idea. ChatGPT, with its advanced language processing capabilities, is the game-changer. It offers efficient, real-time assistance and enriches knowledgebases by facilitating seamless communication.

Internal Knowledgebases

Internal knowledge bases improve efficiency. They deliver consistency and allow employees to find the information they need without delay. They can help with training and improve customer service by delivering consistent answers to queries.

Other

[Record keeping \(inc. CRM\) | Admin - expenses, meetings, travel arrangements etc | CRM load | Meeting notes | Organising next steps](#)

Most salespeople have simple manual administrative tasks they perform often. Although individually each can be relatively quick, the time involved can build over a working day/week to become significant.

By using ChatGPT and its custom GPT feature, it is easy to create personalised assistants to complete simple tasks. You don't need to be a software engineer to set up a custom GPT. You

don't need to code, you just need to understand how ChatGPT works, prompt construction and training principles.

Deep learning-driven tools exist to compile notes from video calls, analyse call recordings and suggest actions, auto-load CRM systems, convert voice to notes, take meeting notes auto compile actions and upload them to in-house systems, manage diary systems and much more.

Smart Assistants

Smart assistants take customGPTs to the next level. They will be true personalised assistants that both make suggestions and help complete tasks. These tools are still in development but will have a significant impact on sales (and many other roles) in future.

Events

Deep learning models can analyze data from past events (attendee profiles, engagement levels, lead generation, etc.) to identify the most effective event formats, locations, and target audiences.

In conclusion, deep learning-based tools will (we suggest) revolutionise various aspects of B2B sales and marketing operations, delivering reduced costs and increased efficiency. From content generation and email automation to research and data analysis, these AI-driven solutions will transform the B2B sales process.

The future holds even greater potential as smart assistants and knowledge bases become more integrated. The internet was a disruptor and before that, the printing press, Artificial intelligence-driven tools are the next wave. Yes, there is much unjustified hype, but there is little doubt significant change is coming. Best to be prepared.

Appendix A

We speculated above that an engineer looking for a solution in 2025 would work through the following resources:

- Word of mouth.
- Customised knowledgebases.
- AI-based search engines (e.g. Perplexity.ai).
- Offline resources.
- General ChatGPT type applications.
- The World Wide Web.

Here, we consider the implications for marketers. How can they ensure their content is available to existing customers and prospects on both the WWW and its new competitors?

To clarify, what follows is an early opinion. We don't (yet) know the answers. It will take time, experimentation and reflection to understand this new landscape. Nobody really knows how search engine optimisation works and that has been a thing for over twenty years.

The World Wide Web

Let's discuss what's new. That is Search Generative Experience (SGE) from Google, Bing AI and AI summarizer from Brave.

The technological details behind how each performs are different. As we want to give an overview rather than a detailed comparison, we only discuss Google SGE here.

Google states "SGE is an early step in transforming the Search experience with generative AI. When using SGE, people will notice their search results page with familiar web results, organised in a new way to help them get more from a single search." They go on to list the advantages – "people are able to:

- Ask new kinds of questions that are more complex and more descriptive.
- Get the gist of a topic faster, with links to relevant results to explore further.
- Get started on something quickly, like writing drafts or generating imagery.
- Make progress by asking conversational follow-ups or trying suggested next steps.

In summary, SGE is much better than a standard search engine at understanding complex queries.

SGE is currently in a testing phase in the USA and many other countries. It will not be available in the UK until early 2024 and even then on limited release as a testing phase.

Google wants to provide users with quick answers to their queries. One solution is features snippets. These are text elements pulled from web pages and displayed at the top of the search results page.

These push the organic search results down the page and result in fewer click-throughs to the publisher's web pages. What Rand Fishkin terms zero-click searches. SGE takes this problem (for content producers) to a whole different level.

What Google pulls into the SGE panel depends on the query – is it informational, learner or transactional? It also (we suggest) depends on the marketplace. Is it B2B, B2C or E-commerce?

So what's the impact on Search engine optimisation (getting your content found) likely to be? This post from Animalz neatly sums it up.



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9mo

the future of SEO in a post-ChatGPT world:

- ~ massive increase in competition for all SERPs
- ~ massively reduced returns from SEO as a channel
- ~ more zero-click searches as Google answers most queries directly in the SERP
- ~ off-page ranking factors become even more important
- ~ brands with established brand/backlink moats become even harder to challenge
- ~ bylined authorship of content becomes more important
- ~ programmatic SEO becomes commonplace (but offers a lower return)
- ~ return to prominence for publishers (trusted entities that vouch for the authenticity of content)
- ~ huge increase in alternative search engines trained on niche datasets
- ~ content dollars reallocated to media, social content
- ~ huge rise in gated content & community-exclusive content

[#chatgpt](#) [#seo](#) [#ai](#)

ChatGPT

Think of ChatGPT as a featured snippet generator, but without linking to the source material. Worse still, it does not provide any organic links to other potential sources of information.

Of course, you can ask (prompt) ChatGPT for more information, but the response depends on both your initial question and the content of your prompt. Using a search engine effectively and getting the most out of ChatGPT requires two different skill sets.

To get your content to show in ChatGPT, it must show in the training data. To use an SEO-related phrase, you need to get your content indexed. At present, the training data is out of date (late 2022 vintage), but that will change.

Unlike a click in internet search, the best you can hope for is ChatGPT will pull an element (snippet) from your content. Often, it will combine this snippet with information from other sources. Unlike a WWW search, it will not show the full page or post.

How do you get your content to show on ChatGPT? One answer could be to use the same approach SEOs use to get content to show in featured snippets.

DL-Driven Search Engines

There are an increasing number of DL-driven search engines. Perplexity.ai and Komo.ai are two examples.

As with a traditional search engine, a user types in a search phrase (a prompt), but instead of a cluttered search results page, DL-driven search engines deliver a short block of text that specifically answers the question asked.

The block of text could come from a single web page (like a featured snippet) or other online resource. Sometimes, it is a compendium of several pages/resources.

DL search engines deliver a selection of links to pages should the user want to read more. They also suggest related search phrases the user may wish to explore.

The output of DL search engines is similar to the experience Google intends to offer with SGE (see above). One advantage DL search engines currently have over Google is there is none of the clutter (or Ads) found on a typical search results page.

Another is they are here now and are rapidly gaining traction in the marketplace. Google is

still trialing SGE.

There are significant battles to be fought over the coming months. What if ChatGPT starts showing links to resources and related searches? What happens to Perplexity (and others) then? Given Google's dominance in Web search, what happens if they get the SGE experience right (de-clutter)?

The marketer would be wise to learn how all options (DL search engines, LLMs like ChatGPT and SGE type search) pull in content. They can't influence who will dominate, so it is prudent to cover all the bases.

It is difficult to understand the algorithms used by DL search engines to pull in content in response to a prompt. As discussed with SGE (above) it seems to depend on the market. All the marketer can do is experiment and learn over time.

In Conclusion

The fundamental problem for marketers is a loss of control. It has become increasingly difficult to deliver content online, the rise of LLM's and DL-based tools will take the problem to a whole new level.

Some businesses, particularly those in B2B markets, have already found solutions by reverting back to marketing practices that existed long before the Internet. This makes sense, but there needs to be a balance.

Those searching for information online cannot be ignored. Diversification in how information is sought and consumed requires marketers to adapt their tactics.

The emphasis has shifted from trying to rank higher in search engine results to understanding the intricate workings of AI algorithms and how they curate and present content. This shift poses a significant challenge, particularly as the algorithms behind these tools are complex and continually evolving.

For content creators, the increase in zero-click searches and the possibility of their content being summarised or paraphrased by AI poses a real threat. Marketers must consider how their content can be optimised for AI.

Appendix B

The real strength of artificial intelligence is spotting patterns in data. For the best return on investment, you need a lot of data, generated by high hundreds, if not thousands of customers. If large amounts of data are available combined with the resources to build tools and processes then some advantages of implementing deep learning-based tools are.

Personalised Content and Targeting

Deep learning algorithms can analyze vast amounts of data on customer behaviour, preferences, and interactions to deliver highly personalised and relevant content to specific accounts or decision-makers within target companies.

Predictive Analytics

By leveraging deep learning models trained on historical data, B2B marketers can better predict customer needs and the most effective marketing channels and tactics for specific accounts or segments. This can optimize marketing ROI

Content Generation and Optimisation

Deep learning can assist in generating personalized content at scale, such as email copy, social media posts, and longer-form content, It can also optimize content for better search engine visibility and engagement.

Lead Scoring and Prioritisation

By analyzing a wide range of data points, deep learning models can more accurately score and prioritise leads, allowing sales teams to focus on the most promising opportunities.

Marketing Automation

Deep learning can enhance marketing automation platforms by improving segmentation, campaign optimisation, and real-time decision-making based on customer interactions .

Deep learning can help identify key influencers, decision-makers, and accounts within specific industries or target markets.

Advertising and Retargeting

Deep learning can improve the targeting and optimisation of digital advertising campaigns,

including account-based advertising and retargeting efforts,

Deep learning models can analyze online conversations, reviews, and social media mentions to identify potential issues or opportunities.

Appendix C

A knowledge base is a centralised self-service online library of information about a product, service, or topic. Contributors who are well-versed in the relevant subject add to and expand the knowledge base over time.

Knowledgebases facilitate information collection, organisation and retrieval. When a user inputs a query, the software attempts to deliver relevant answers based on information in the knowledgebase.

But haven't We Been Here Before?

Yes, we have.

Intranets first emerged in the mid-1990s. As the World Wide Web developed, organisations realised they could build a localised version for internal use.

The initial goal was to increase employees' productivity by simplifying access to company documents, reports, and product and customer support information.

Various tools were added to intranets over time to encourage employee communication.

The user interface with the intranet was a problem that was never resolved. Today, many of the remaining intranets feel old clunky and slow.

We predict suppliers to large companies with many hundreds of potential users and a distributed workforce will develop the next generation of intranets. These will be powered by Chat-style interfaces.

It will be expensive to implement and run these systems, but for some large organisations, they could pay for themselves several times over.

In this post, we focus on relatively small customised knowledgebases designed for a specific purpose.

How do Large Language Models (LLMs) Help?

As discussed above, the intranet concept was valid but had two major problems. One was the user interface (clicking through multiple pages/links to find information). The other was data preparation, formatting and loading,

A user needs an efficient and reliable way to interrogate a knowledgebase and that's where ChatGPT comes in. ChatGPT (Bard and others) allow a user to interrogate a knowledge base using standard text.

ChatGPT understands words (tokens) and context. It learns over time depending on the data and prompts it receives.

Of course, it is not that easy. Although setting up and maintaining a knowledgebase is potentially easier than an intranet, developing the instruction set, formatting and training is crucial.

It is not possible to simply upload a mass of data, run training and expect this to change (update) the LLMs (ChatGPT) understanding.

Knowledgebases – The Customer

Now, back to the fundamental problem. Let's assume the customer has an idea of what they want and has a grasp of which suppliers might be able to supply that product/service.

They want some initial questions answered, but as outlined in our earlier post, the internet is a hopeless research tool.

What if the customer could access separate knowledgebases provided by suppliers A, B, C and D and ask questions via a simple text-driven interface? Would that solve their problem?

They could pick up the phone and ask, but they won't. This is the principle behind inbound marketing.

At this stage, the customer's questions will be relatively simple as they are nowhere near ready to buy. The supplier could provide a knowledgebase to answer these early-stage questions. With access to that knowledgebase tightly controlled.

Of course, if a customer does not know that supplier E can offer a solution, they are not considered. Knowledgebases do not resolve the awareness (demand generation) issue.

Knowledgebases – The Supplier

From a marketing/sales perspective, there are obvious downsides for the supplier with the above approach. The customer needs to know the knowledgebase is available, be able to interrogate it reliably and trust its output.

The potential benefits to a supplier are:

- Small and specific knowledgebases can be tailored to address the unique challenges of a particular industry, or customer segment.
- As information in a knowledgebase is highly relevant and useful to the audience, it leads to better engagement and customer satisfaction.
- The knowledgebase can demonstrate expertise and a deep understanding of the industry or niche. This establishes thought leadership and makes the company more attractive to customers.
- Like the introduction of the internet, those first to the party will have a competitive advantage.

There could be one (or more) customised knowledgebases for customer consumption and one (probably several) for internal use.

Let's look at the potential benefits of knowledgebases for the supplier from an operational perspective.

- Creating and maintaining a specific knowledgebase can be more cost-effective than building a large, all-encompassing one.
- Small customised knowledgebases can be scaled up if it makes sense to do so.
- Centralising knowledge in internal knowledgebases can foster innovation and collaboration.
- Knowledgebases equip sales and support teams with up-to-date information.
- A small and specific internal knowledge base can significantly reduce employee time spent searching for information.

Challenges

Implementing small-scale, application specific knowledgebases is not without its problems, these include:

- Specifying the use case
- Developing the instruction set and training
- Tailoring knowledgebases to the task and/or customer segments
- Curation – Garbage In = Garbage out
- Populating the knowledgebase with content, structure and data management
- Integration with existing systems, for example, CRM
- Data security

The larger the data set and the less defined the use case, the more significant the issues.

Supplier Knowledgebases

If a supplier has:

The time, resources and inclination to create (and maintain) a knowledgebase of content that is useful to their customer base.

AND

An existing relationship with a customer that is strong enough to persuade the customer to at least try that knowledgebase.

AND

Sufficient decision makers within the customer find the knowledgebase useful as a resource.

Then there is something for sales and marketing to build on, at least for existing customers.

That's a big ask, you may say, but no more so than publishing content online (or social) in the hope a target customer finds and reads it.

Content To Include

Access to the knowledge base can be controlled (to a point), but it should not contain any commercially sensitive material.

Insights

Include research-based content. Share research, trends, and forecasts related to your industry that can help your customers stay ahead of the curve. Wherever possible, these should be unique content or at least a different spin on what is already available.

Show that your business is considering the future and its implications. Address trends your customers may not have thought of. Cover shortcuts you know your competitors take with their product/service and the long-term problems they can cause.

Product

Content to add to the knowledgebase includes datasheets, user guides, and technical reports. Further enhance this by offering advanced product guides that cover unique features or uses of the product or service that may not be widely known.

Without giving away any trade secrets, cover manufacturing limitations and how these can affect the technology's performance or long-term reliability.

New product previews give your best customers a peek at new products or features before they're released to the general market. This can make them feel valued and provide an opportunity for feedback.

Deliver educational material that encourages your customers to think about solutions rather than 'me too' type products.

Custom solution case studies can help. These should cover (with appropriate permissions) details of solutions developed for other customers. Try to demonstrate a capability to solve complex problems.

Training

Offer in-depth training materials and video tutorials. These resources can help customers better understand how to use your products and integrate them into their systems.

At a basic level training materials can be used to onboard new customers or new contacts with existing customers. This will ensure they receive the best possible initial experience.

FAQ Responses

These should cover everything from the most basic questions customers may ask, to more advanced topics.

Also include FAQs for advanced scenarios. Compile a list of frequently asked questions that address more complex or less common issues that customers might encounter.

The answer provided must be a complete response to the query. If the customer needs to make another attempt or, worse yet, seek assistance elsewhere for a solution, it undermines the potential advantage of the knowledge base.

Company Information

You want the knowledge base to include everything a customer might need regardless of their position in their organisation. You don't want them clicking away to consult some other resource.

The knowledge base should include all the necessary company information. That may include company history, some basic (non-commercially sensitive) financial information, contact details and key staff details.

Consider contact information for dedicated support representatives or account managers who can provide personalised assistance. This ensures that your best customers always know how to get help quickly.

Also, include information that reinforces the brand. This can include information on key customers & projects (with permission).

Although they should be promoted elsewhere, the knowledge base should include information on company events, workshops and webinars.

Sales Requirements

The primary purpose of the knowledge base is to increase customer retention. Its secondary purpose is to increase sales opportunities. Hence, the account-based sales team must understand the depth of information held in the knowledge base.

The sales team must have full access and be encouraged to interrogate the knowledge base with the types of questions their customers might ask. If the answer they receive is inadequate, they should give feedback.

Any feedback, wherever it may come from, should be acted upon by the knowledge base curators as a matter of urgency. If not, the knowledge base will soon fall out of use.

The Customer Interface

If the customer does not find the knowledgebase a joy to use, they will drift away. Content must be easily navigable.

The ideal interface might be something similar to Perplexity.ai, with a short (specific) answer to a question with links to more detail. Whatever form it takes must match customer needs. We will cover the knowledge base interface in more detail in future posts.

B2B customer knowledgebases can help nurture relationships and drive sales opportunities for existing customers. But, to create and maintain a knowledgebase takes significant time and effort. As outlined in our impact of knowledgebases post, there are some hard questions to ask before committing those resources.

It is important to tailor content to meet the specific needs of customers. If there is insufficient information to answer the customer query, there is a chance they will interrogate some other resource and the knowledgebase will fall into disuse. Integration with sales efforts is crucial for success, as is sales and customer feedback.

There is a balance to be struck between the amount of access to information (improving personalisation) and content security. You may wish to allow your best customers more detail (without giving away confidential information), but you probably don't want that information available to competitors.

Want to learn more? Give us a call on 07716 871892, let's see if we can help. Alternatively, email team@outsourcedmarketingservices.co.uk.

At Outsourcedmarketingservices we support the B2B account-based sales process by facilitating customer access to the information they need, when they need it.

We operate as a geographically displaced group. The outsourced marketing team includes B2B marketers (Project Leaders), content writers and editors, curators and support. In the first instance contact our project lead - Phil Smith

About The Author

Phil Smith is a experienced marketer with over 15 years marketing and business development management experience in the semiconductor, personal computer and electronic component packaging marketplace prior to establishing his marketing advice business.

Since 2008 Phil has run his own marketing advice and marketing mentoring business (HundredOctopus Ltd) working with SME's operating in B2B markets.

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