

Tools and templates



Using customer research to determine which digital sales channel to use

Your customers are the most important part of your sales strategy. Developing an understanding of where they buy online and how they make purchasing decisions will make the process as effective as possible.

Research the market

Your marketing team may already have already conducted market research projects and built customer personas. If not, start by looking at your customers' online behaviour and how your brand compares to others in the market. Consider:

- Which channels competitors are selling on
- What messaging competitors are using
- Which platforms your target customers use

Connect your marketing data to your CRM

Relying on emails, spreadsheets or manual processes makes it hard to track and organise sales activity. If you're dealing with a lot of customers or leads each week, you need a customer relationship management (CRM) system that can:

- Include fields to organise customers by demographic data or buying behaviour
- See which channels are driving the most sales
- Keep track of where prospects are in the pipeline

Speak to customers

Once you've got a good idea of your most popular sales channels based on past purchases, it's a good idea to support your research with customer insights.

- Conduct focus groups with your target customers
- Send follow-up surveys in post-purchase emails
- Ask loyal customers to meet over coffee and find out more about how they make purchases

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Put your findings into practice

Once you've decided which sales channels you think are the best, test how they work in practice. This might be in the form of paid ads or an email marketing campaign.

- Measure the number of enquiries you get from each channel
- Prioritise high-performing channels and scrap those with low response rates
- Calculate the ROI or cost of acquisition of different sales channels
- Continue to analyse and review sales channels to identify market opportunities or new patterns in buying behaviour