



Mapping the Technology Buyer's Journey: Survey Questions & Responses



500 business technology buyers and influencers reveal how they discover, evaluate and decide to purchase products and solutions.



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Mapping the Technology Buyer's Journey: Survey Questions & Responses

Harte-Hanks recently surveyed 500 buyers and decision-influencers involved in the purchase of business technologies. The goal was to learn how buyers move from awareness to purchase – the communication channels and styles that impact their decisions, the information they require, the people involved and the processes they follow to make a decision.

The survey included contacts from the Harte-Hanks Ci Technology Database (CiTDB), located across North America, spanning nine industries, ten technology areas and the full spectrum of authority – from front-line staff to CEOs, decision influencers to decision makers. This report details the questions in the survey and the aggregate responses. It also provides insights into responses from specific groups of responders where they vary from the average or highlight particular trends.

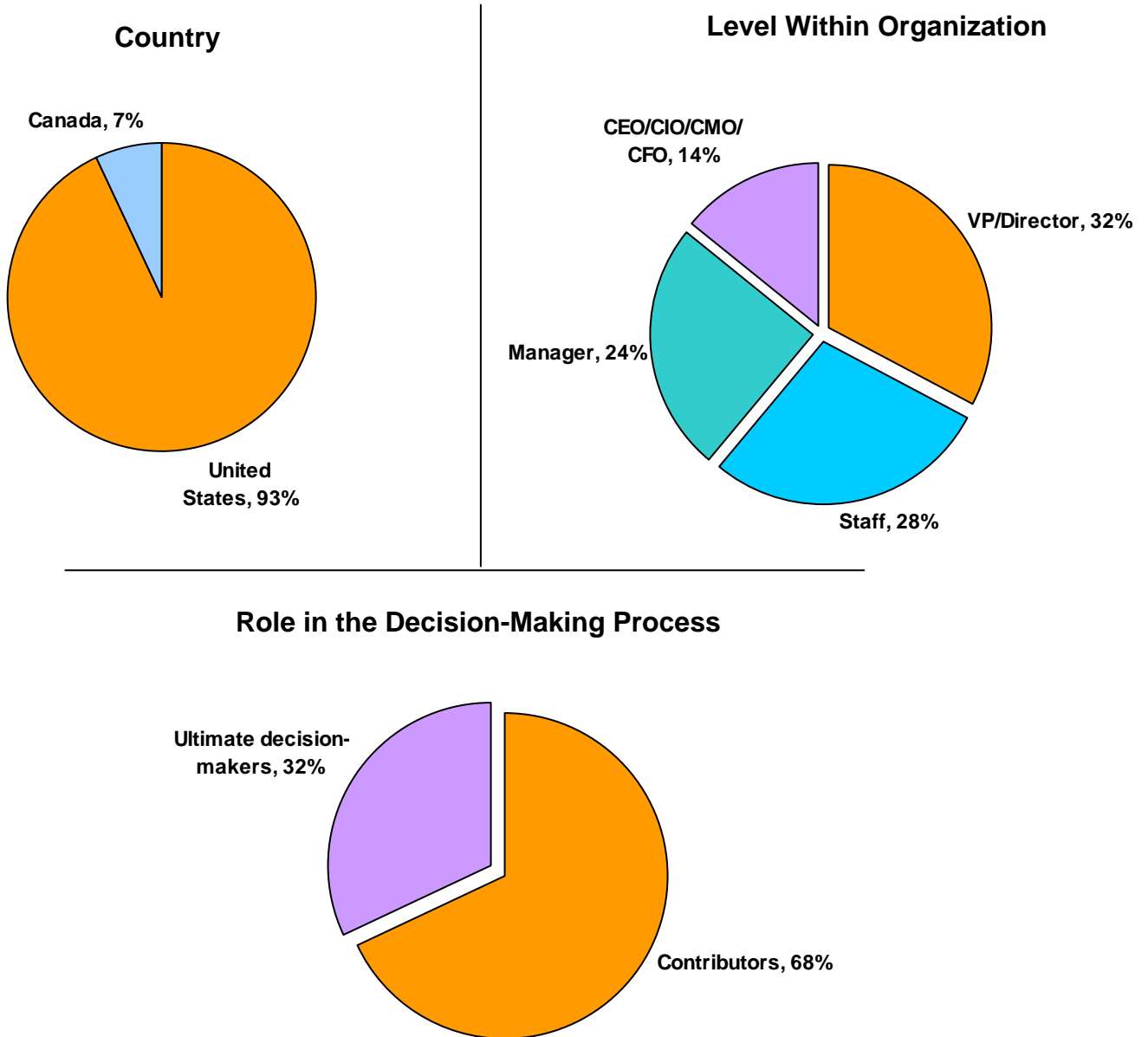
For more detail on key observations and conclusions, and how they impact the marketing and sale of business technologies, see the accompanying white paper, *"Mapping the Technology Buyer's Journey: Transforming Insights into Action."* A PDF is available upon request to b-to-bsolutions@harte-hanks.com.

For a more in-depth analysis of the buyer's journey for specific technologies, industries, budgets and more, contact a Harte-Hanks representative, call 800-470-3623 or e-mail b-to-bsolutions@harte-hanks.com.

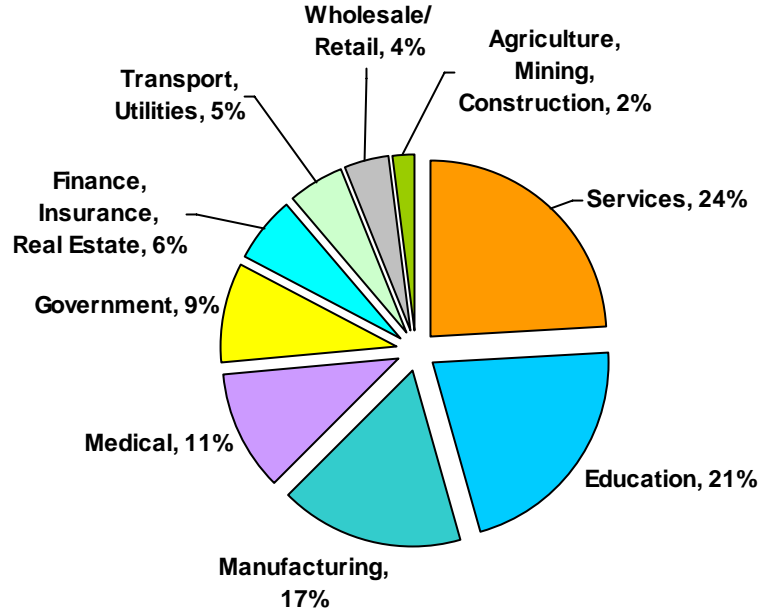
Who Participated in the Survey	3
The Technology They Purchase Regularly	5
How They Become Aware of New Technologies	6
How They Evaluate Technology Products	10
How They Make a Purchase Decision	14
Next Steps	20

Who Participated in the Survey

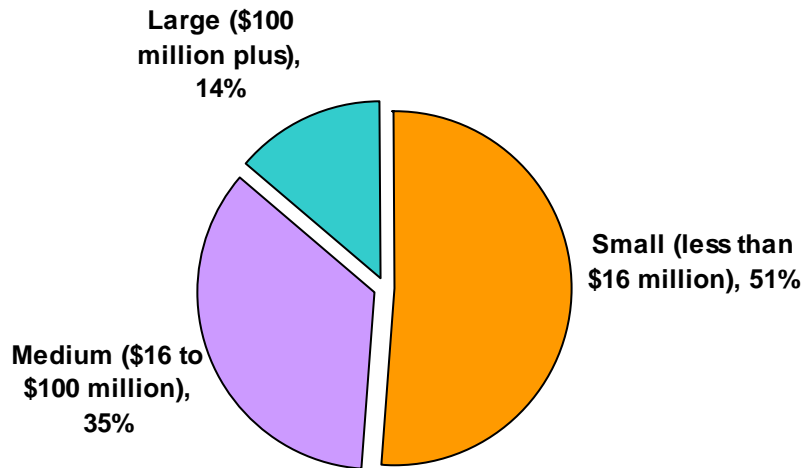
A total of 500 respondents participated in the survey, from the United States and Canada. The tables below provide demographic and firmographic details. Due to rounding, some percentages may not total 100%.



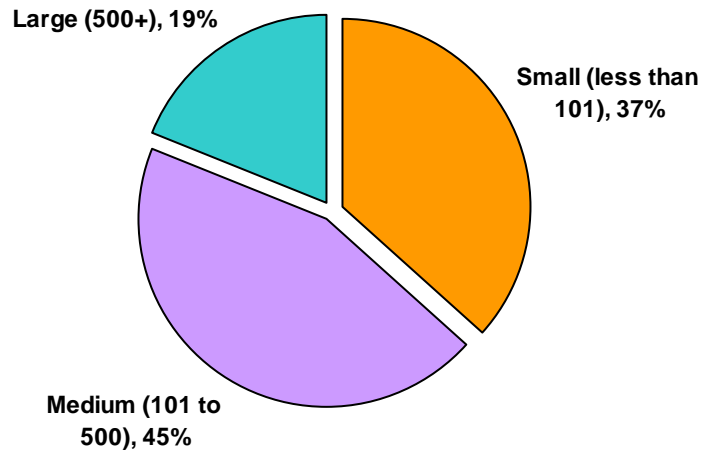
**Industries Surveyed
(by SIC group)**



**Size of Organization
(by Revenues)**

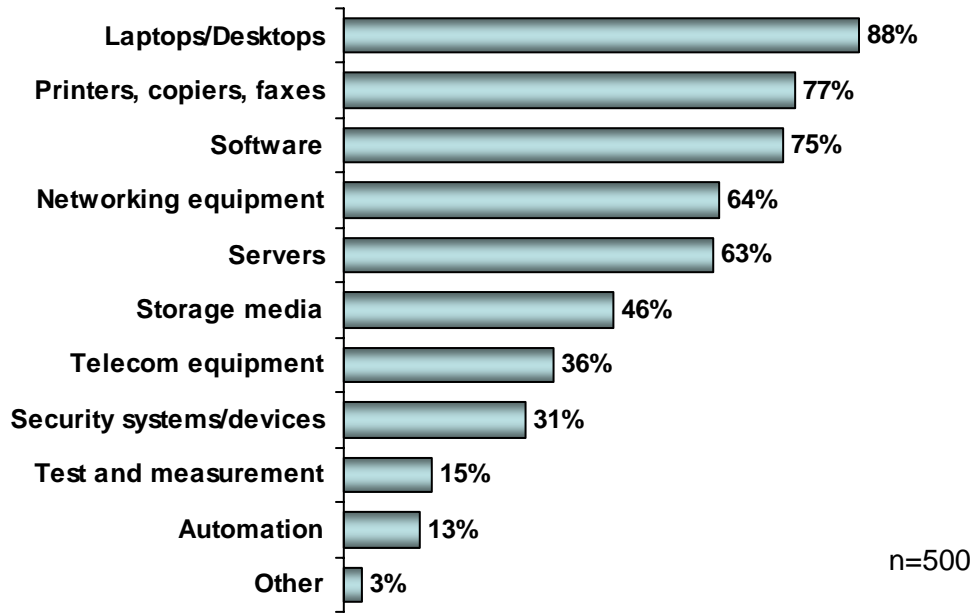


**Size of Organization
(by Employee Count)**



The Technology They Purchase Regularly

QUESTION: Please indicate what type of technology products your organization purchases regularly.



Not surprisingly, laptops, desktops, printers, copiers, and faxes top the list of most regular purchases. Software is also high on the list. These items are typically essential to the highest number of employees and wear out or become obsolete quickly. Interestingly, those in the C-suite (CEO, CIO, CFO, CMO) ranked the purchases slightly differently – 91% placed Software at the top of the list. Potentially this is because this group has the most visibility across the organization, so executives here are more likely to be aware of software purchases across most or all of the company.

The frequency of technology purchases also varied by industry. For example, 58% of those in the transportation & utilities group indicated that printers, copiers and faxes are a regular purchase, compared to fully 89% of those in the Medical group.

How They Become Aware of New Technologies

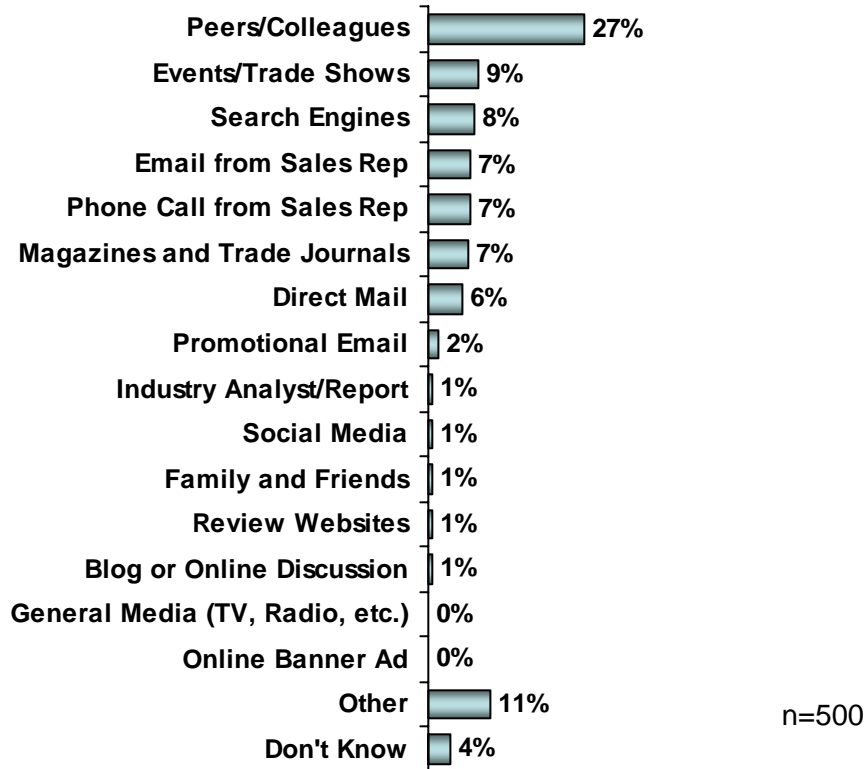
QUESTION: How do you typically become aware of technology products?



Regardless of the respondent's industry, technology budget, authority or role in the decision-making process, Peers and Colleagues are the top source of information about new business technologies. But variations appeared in all other means of awareness.

Overall, Ultimate Decision-makers and those in the C-suite are more acquisitive/active when it comes to gaining awareness. Compared to others, they demonstrate a greater use of channels that require proactive behavior, such as Events & Tradeshow, Blogs & Online Discussions, Review Websites, and Magazines & Trade Journals. Middle managers and the C-suite appear to be slightly more active socially than senior managers or staff.

QUESTION: Thinking about the last substantial technology purchase that was made by you and your organization, how did you become aware of that specific product?

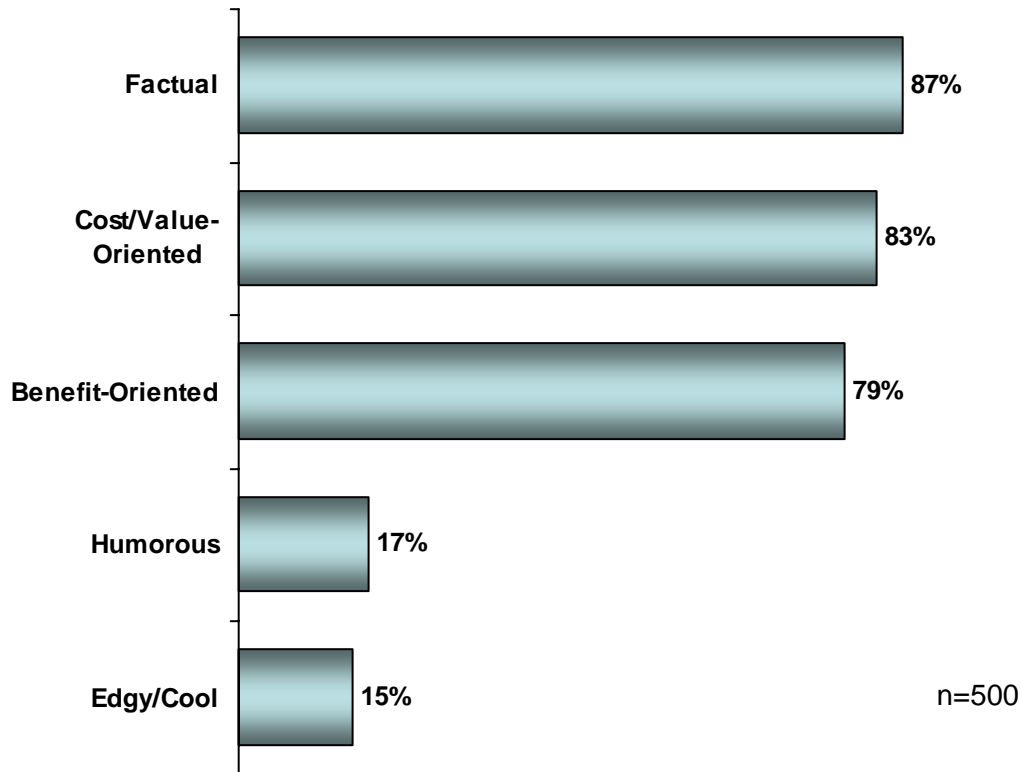


Interestingly, when responding about a specific purchase, the picture changes somewhat compared to the previous question. While Peers and Colleagues remain at the top, “Other” moves from nearly last into the second position and “Events/Tradeshows” moves from fourth to third. There is a fairly even spread across the third through seventh means of awareness.

Responders in companies with 500+ employees were more than twice as likely as those in smaller firms to indicate events/trade shows as the awareness driver of their most recent substantial technology purchase (16% vs. 7%).

QUESTION: How effective are the following marketing "tones" in initially attracting your attention to technology product advertising?

Top 2 Box Scores Shown (Extremely + Very Effective)

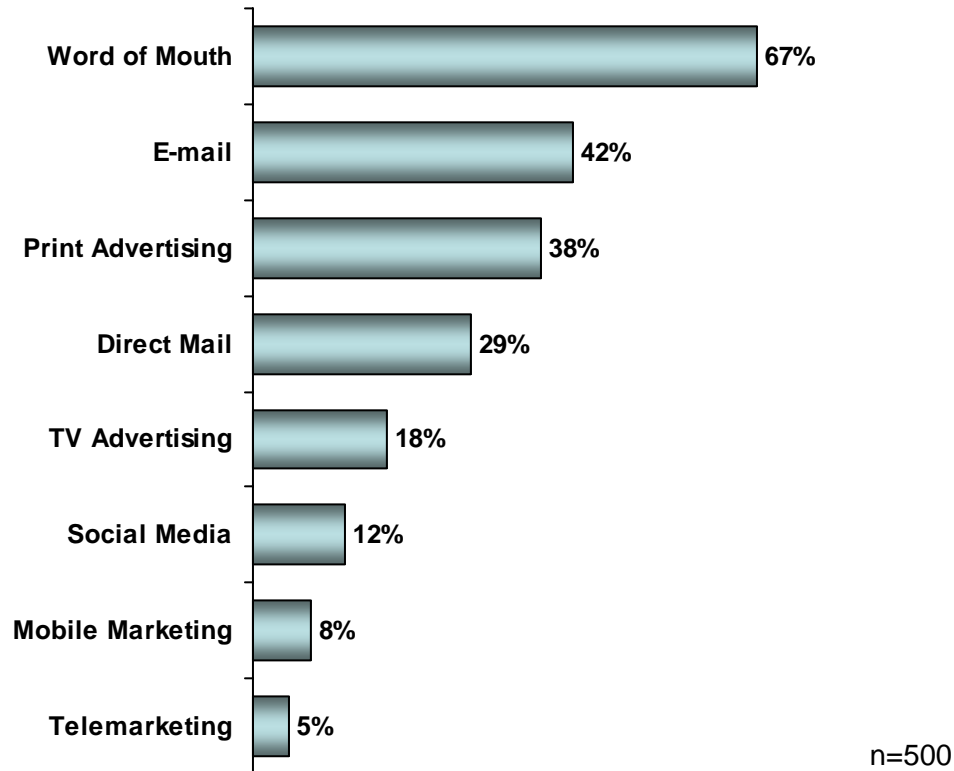


A Factual tone received the highest scores of any. Fully 87% of responders placed this tone in the Very or Extremely Effective category for attracting attention to advertising. This was especially true among Staff responders, who placed this tone in the top two boxes 90% of the time.

The overall favorability of Humorous messages was low, yet while Staff responders definitely favored Factual messages, they were also the most responsive to humor. Nearly 24% ranked a Humorous tone as Extremely or Very Effective. The combined top-two box scores for this tone drop precipitously as the level of the responder increases. CEO/Presidents rate Humorous as Extremely or Very Effective only 12% of the time.

QUESTION: How effective are the following channels in increasing your awareness of technology products?

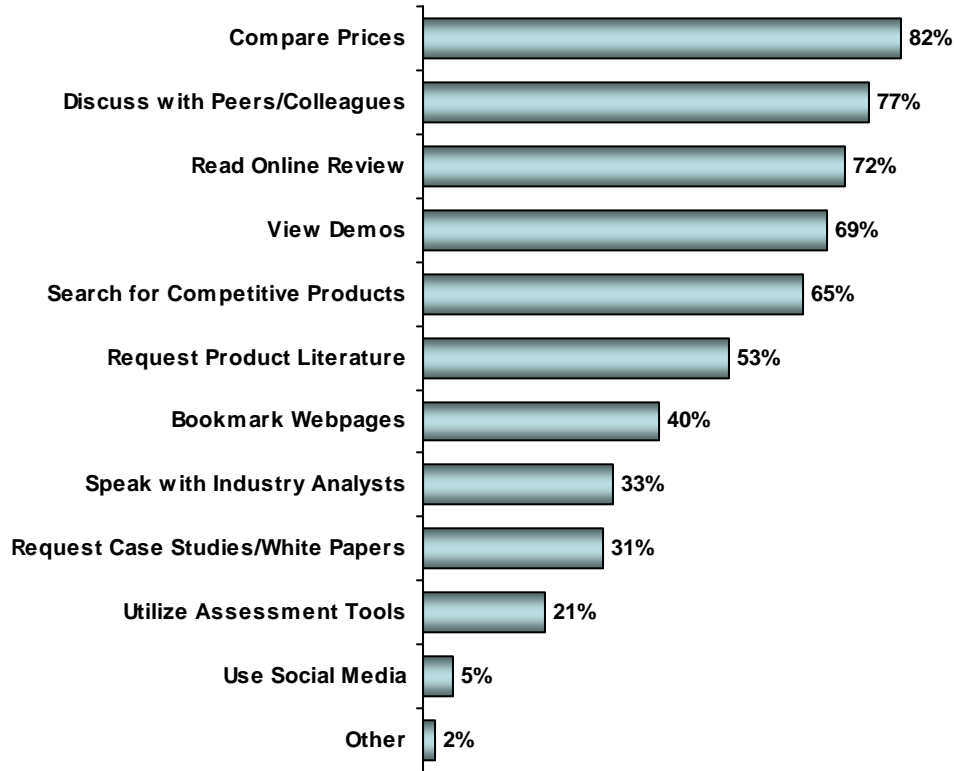
Top 2 Box Scores Shown (Extremely + Very Effective)



Word of Mouth (WOM) marketing appears to be most effective among mid-sized companies. Its Top Two Box scores were highest, albeit by small margins, in this group. Among industries, 84% of respondents in the Financial/Insurance/Real Estate group ranked WOM as Extremely or Very Effective, compared to the next highest score of 73% among the Services industry, and scores ranging from the mid-50s to mid-60s elsewhere. In general, however, WOM scored highly across all groups and industries, giving it the #1 spot by a wide margin. This speaks to the need to build strategies to identify who the influencers are and align activities to engage them.

How They Evaluate Technology Products

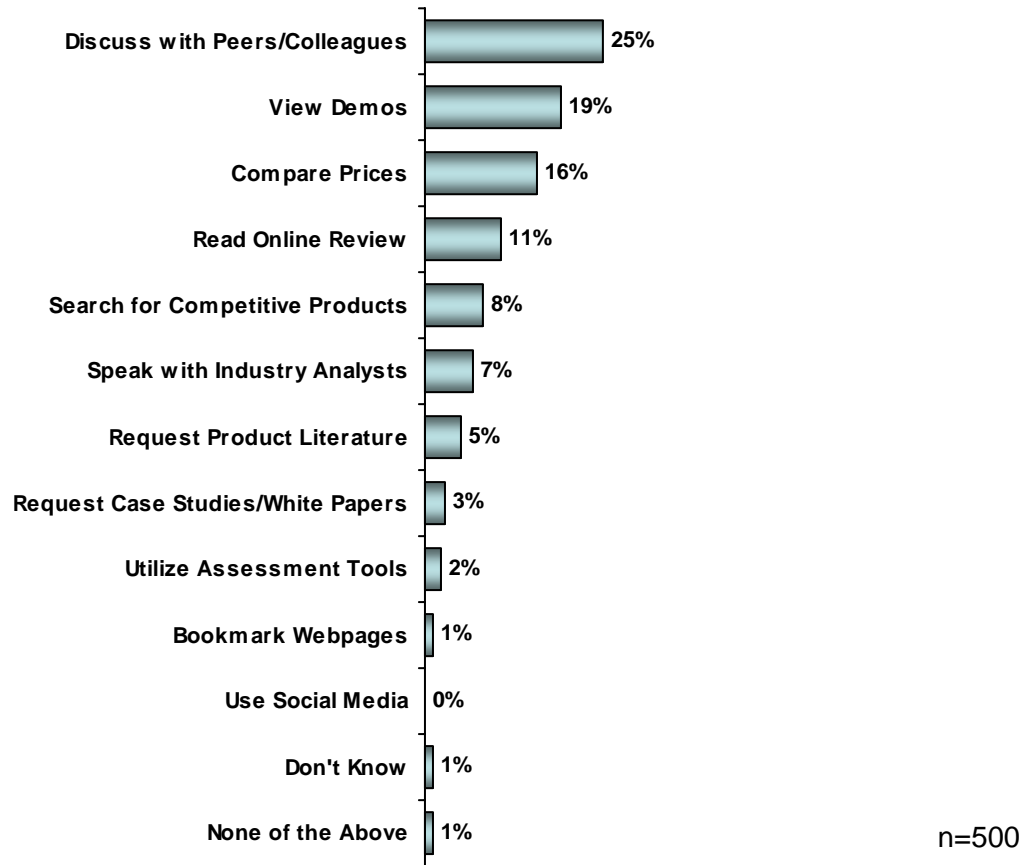
QUESTION: Please indicate which of the following you do when you collect and organize information on products of interest.



n=500

Across all groups, price comparisons are the most often selected activity – higher even than discussing with peers/colleagues (which is #2 for all groups). Those in the C-suite were the most likely to request product collateral/data sheets. Similarly, they were the most likely to request case studies/white papers. Online reviews received consistently high ranking (scores ranging from 68 to 78% based on the role of the respondent).

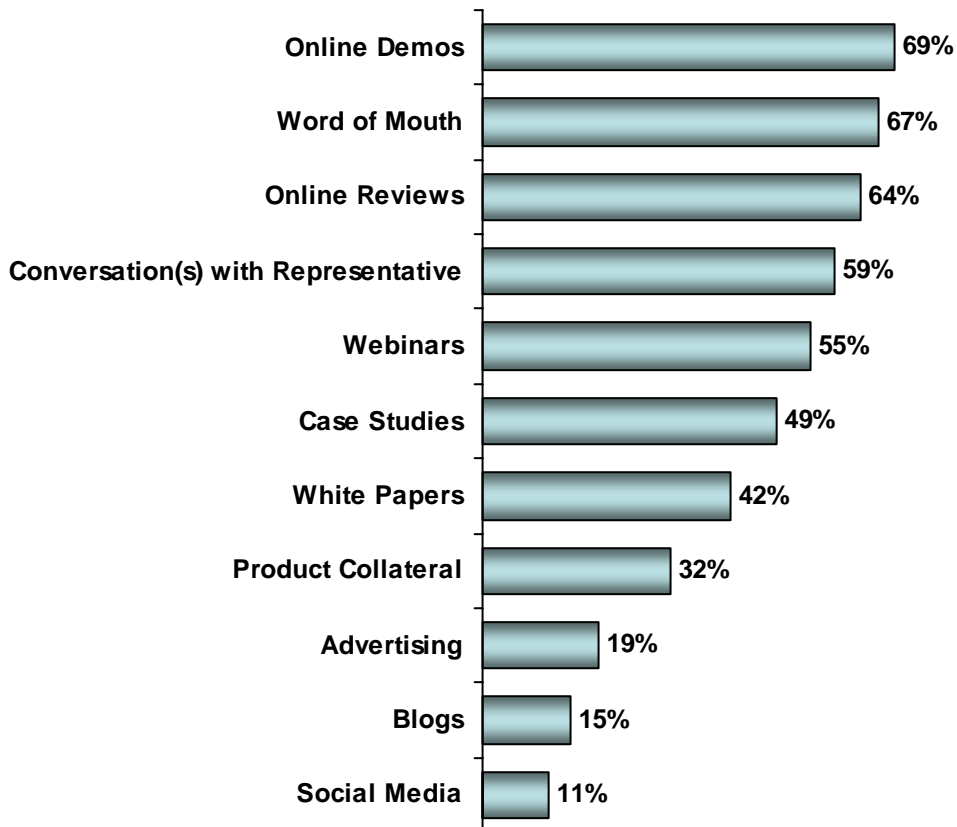
QUESTION: Which one tactic is the best in helping your organization determine which specific products to further evaluate?



While the previous question shows that price comparisons are the closest thing to a universal activity among those evaluating a business technology, it is ultimately one's peers that are most highly valued in the evaluation process. That said, no single activity scored higher than 31% in any group of respondents, demonstrating that there are no "evaluation silver bullets" for technology buyers or marketers.

QUESTION: How effective are the following sources in evaluating technology products for purchase consideration?

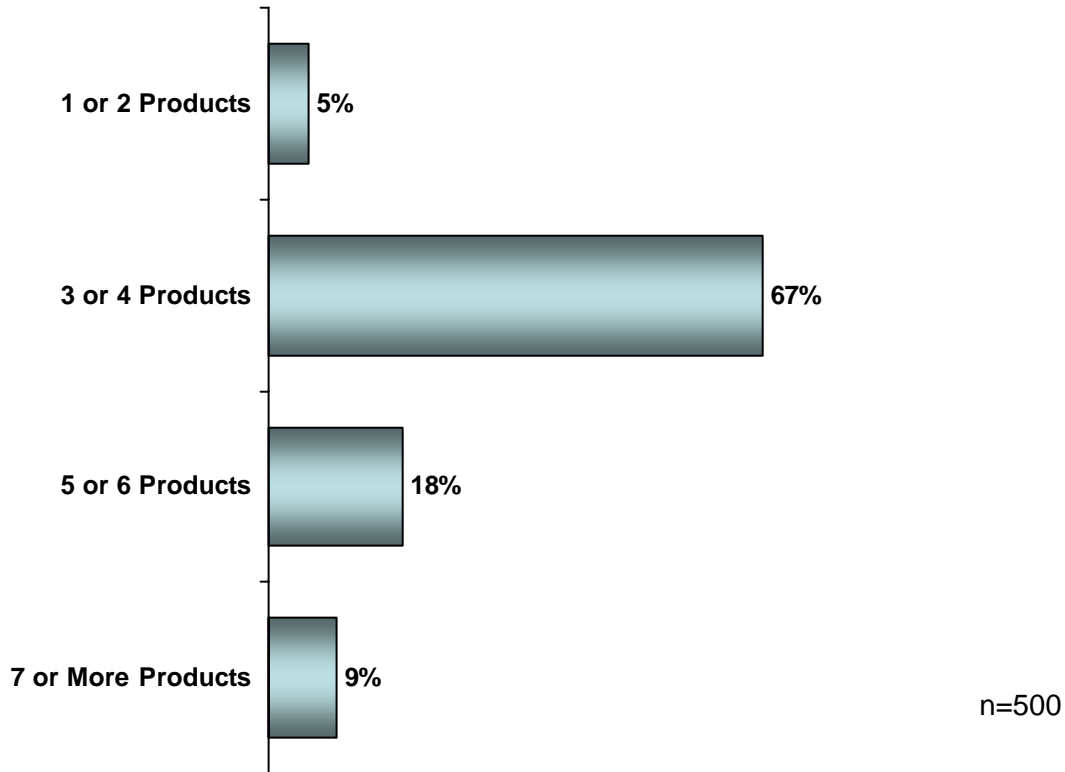
Top 2 Box Scores Shown (Extremely + Very Effective)



Note that three of the top five are online (Demos, Reviews, Webinars), which demonstrates the need to ensure that Marketing departments inform their peers in Inside Sales and Field Sales about online activities such as demos and Webinars, as well as insights that arise from tracking online reviews.

White papers received their highest Top-Two Box score, 50%, among responders in organizations where decisions are made at the CIO/CMO/CFO level. Blogs, on the other hand, received their highest scores among those in the Staff group.

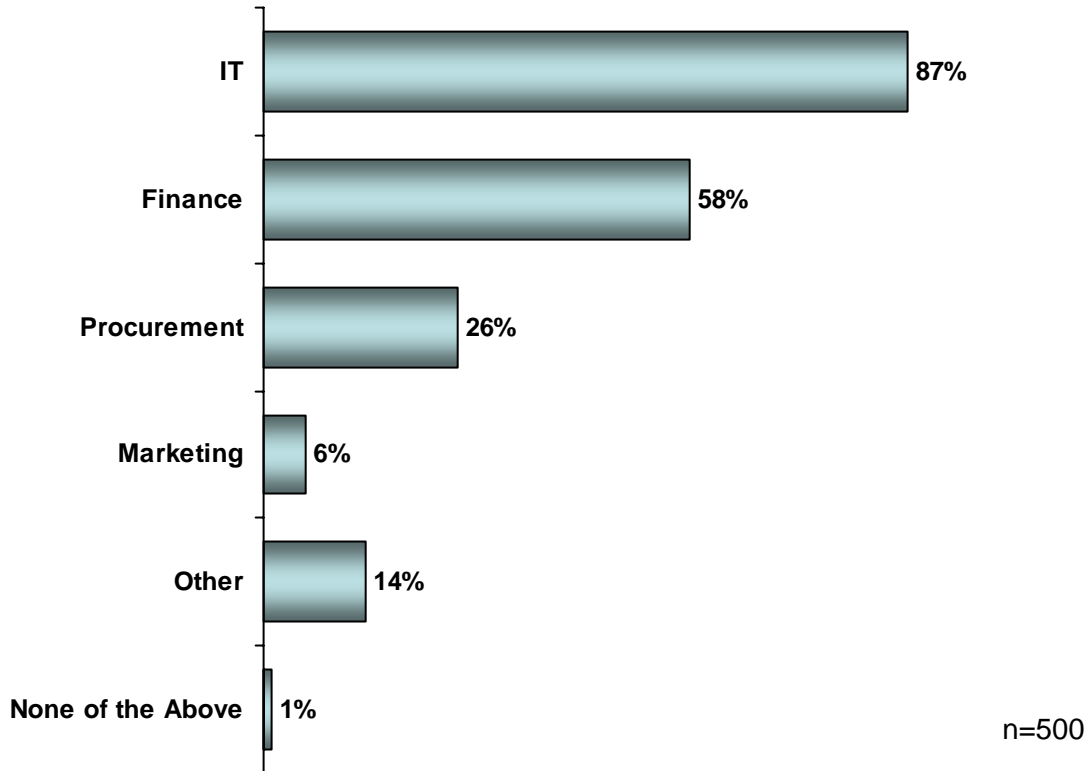
QUESTION: When purchasing a technology product or solution, on average how many do you evaluate carefully before making a decision?



The mean response to this question was 4.2 solutions, and the results were consistent regardless of the respondent's industry, company size, decision-making or organizational authority, technology budget or geography. The point is clear – even in the middle of the funnel, when potential buyers are actively evaluating technology solutions, there is plenty of competition.

How They Make a Purchase Decision

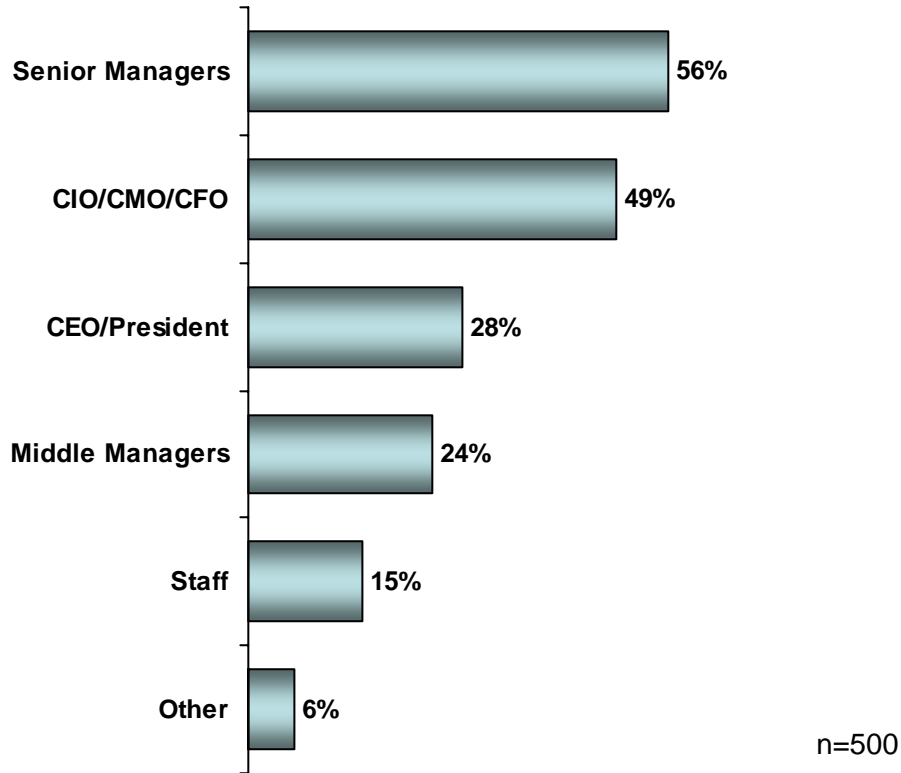
QUESTION: Which departments are typically involved in making a final purchase decision?



It is certainly no surprise that IT plays a role in most technology decisions.

Organizations that indicate that middle managers are often decision-makers report that Procurement is more likely to be involved in their purchases (40% vs. 23% when decisions rest with the CEO/President). Strikingly, middle managers are 53% likely to have Finance involved in decisions, whereas CEO/Presidents are 74% likely. This probably reflects the size of the purchases each group is making – in many organizations Finance may only get involved in supporting large purchases, above the authority of middle managers and within the purview of the CEO.

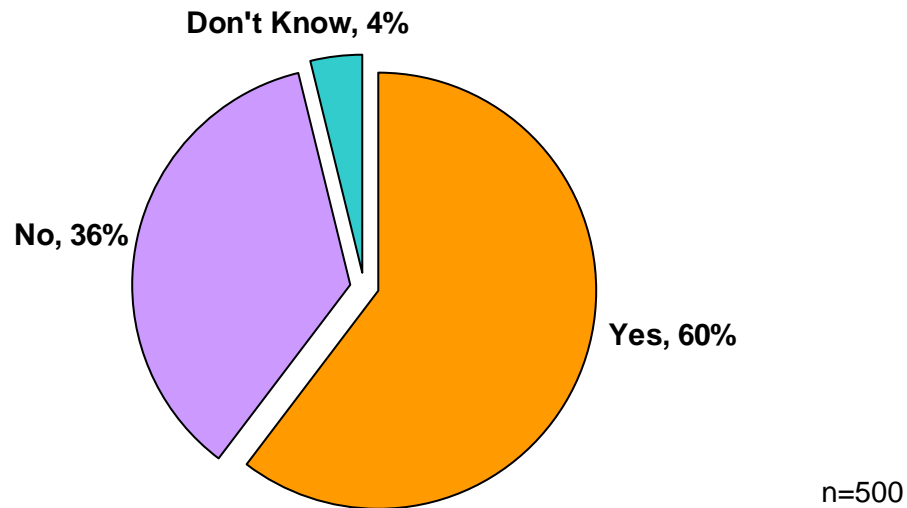
QUESTION: What level within the organization are the individuals who are typically involved in making a final purchase decision?



Senior managers receive the highest scores overall, followed by the CIO/CMO/CFO group.

In general, responses to this question showed that organizations with smaller revenues, employee counts and technology budgets make purchase decisions at higher levels in the organization.

Looking at specific industries, those in the Transportation/Utilities group are significantly more likely than others to have middle managers involved in final purchase decisions (50% vs. 33% in Agriculture/Mining/Construction, the next highest group). The Education sector is most likely to include Staff (23%).

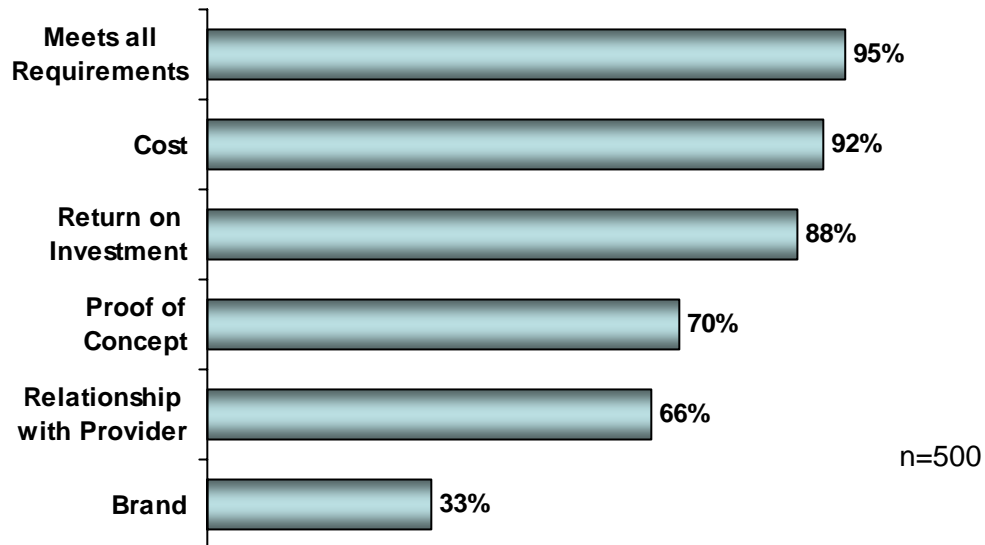
QUESTION: Do you typically require potential suppliers to present their product(s)/solution(s) to your organization?

In companies indicating that decisions are made at senior levels (Senior Manager or above), there is a better than 60% chance that the answer to this question is Yes, and the probability goes up with the level of the decision-maker. At the CEO/President level, the answer is Yes among 75% of respondents.

Similarly, as technology budgets rise, so does the likelihood of a request for a presentation. Companies with an annual technology budget between \$50k and \$199k appear only 43% likely to request a presentation, compared to 74% among firms with budgets above \$2 million per year. The same trend appears when looking at staff size and company revenue – as the firm gets bigger, so too does the demand for presentations.

QUESTION: How important are the following things in making a final purchase decision?

Top 2 Box Scores Shown (Extremely + Very Important)

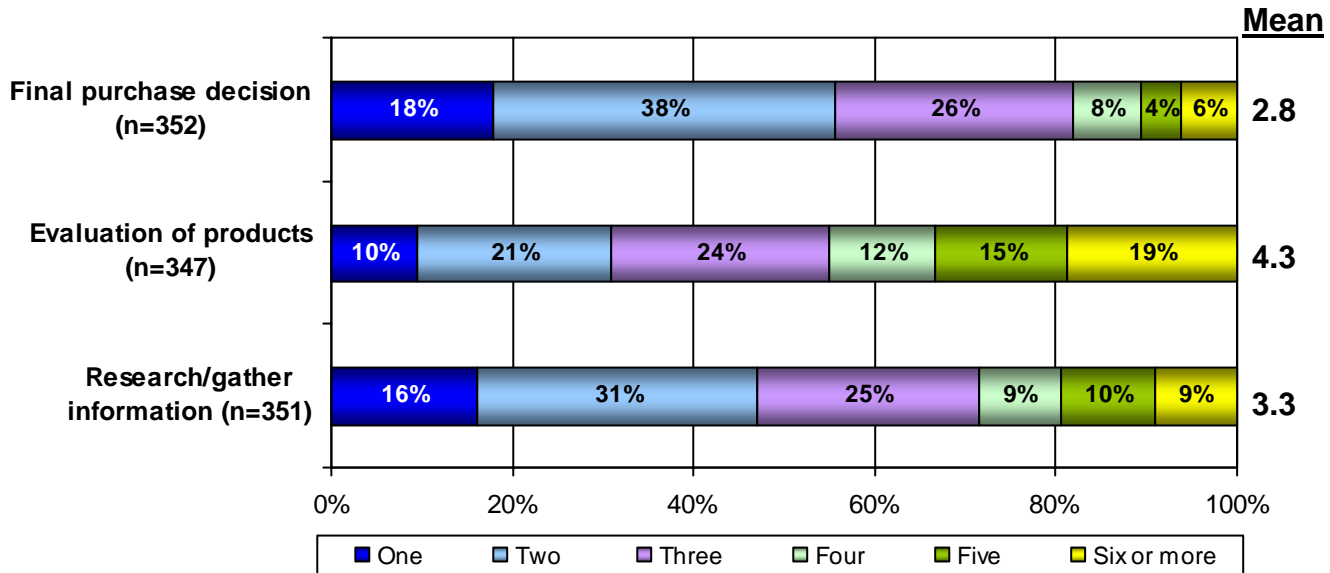


These results paint a clear picture of priorities – technology buyers focus first on ensuring their purchases meet their requirements. Cost is a close second, followed by return on investment (ROI).

While ROI ranks high, it is interesting to note that its score drops slightly with the level of the decision-maker. For example, in organizations where the CEO/President is the final decision-maker, ROI is Extremely or Very Important among 92% of respondents, but that number drops to 86% in organizations where Staff make purchase decisions.

Overall, the focus is on value – less on relationships, and least on brands.

QUESTION: How many individuals are typically involved in the decision-making process for technology products?

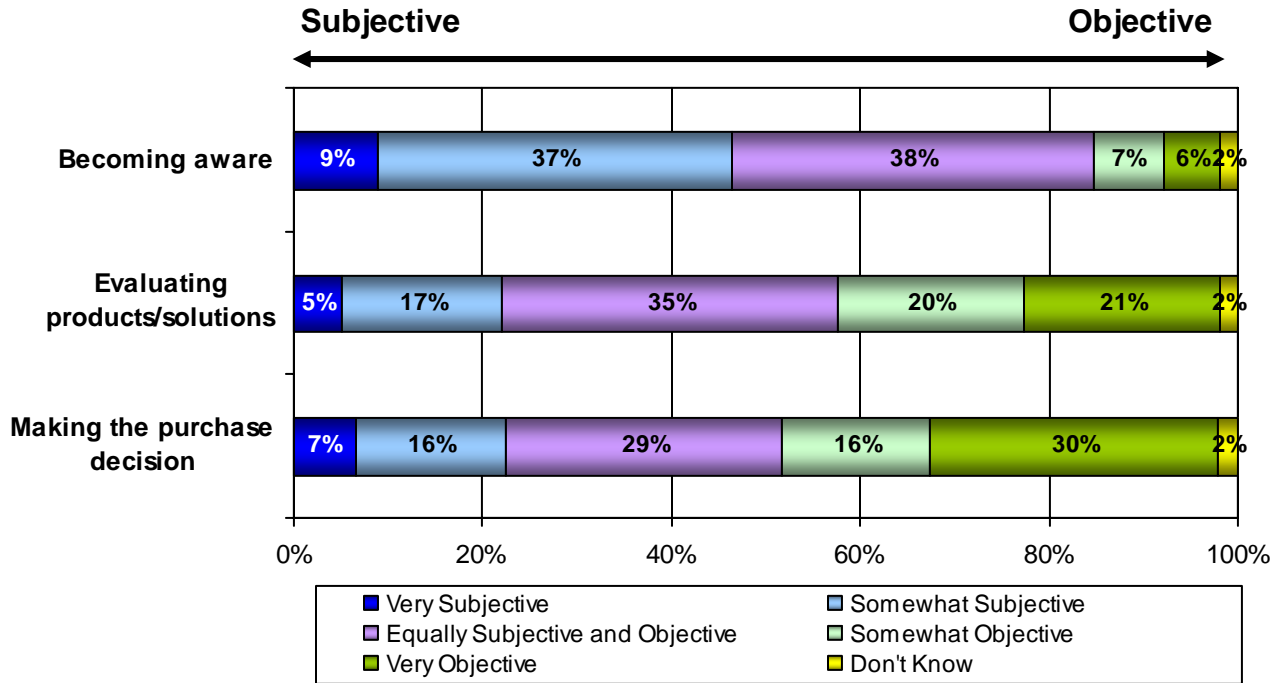


This question looks at the entire buying process, from initial awareness and research through to the purchase decision. The answers reveal that evaluation – the point in the buying process when buyers and decision-makers are actively comparing their options – is also the point that involves the most people. Nearly 20% of organizations report that six or more are involved in this process.

Not surprisingly, the number drops considerably when the purchase decision arrives. The key for marketers and sales people, of course, is to stake out a strong position early in the process, maximize influence through effective targeting and message delivery, and make an impact on the decision-makers before it is too late.



QUESTION: Please think about the three phases we've covered in this survey. Do you feel the decision-making process in your organization is more subjective or objective during these phases?



n=500

Comparing the rankings that are Very or Somewhat Objective to those that are Very or Somewhat Subjective, it becomes clear that subjectivity is most prevalent (or at least most recognized) in the Awareness phase of the buyer's journey. As the process moves toward a final decision, responders perceive the process to be increasingly objective.

Phase	Very or Somewhat Subjective	Very or Somewhat Objective
Becoming Aware	46%	13%
Evaluating	22%	40%
Making the Decision	22%	46%



Next Steps

Of the many findings that the research uncovered, one that stands out was not a part of any question in the survey: *mapping the buyer's journey has become an imperative for B2B marketers of technology.*

Buyers and influencers have a tremendous (and increasing) variety of mechanisms for discovering new technologies, evaluating those that capture their interest and making a purchase decision. By understanding the mechanisms a particular market or audience prefers, technology providers are in a better position to:

- Create relevant content for each person involved in the process, at every point in which they play a role
- Deliver that content where, when and how it will have the greatest impact on the buying decision
- Focus attention on those most likely to affect the decision to buy
- Understand the signals that indicate readiness to move from one phase of the purchase process to the next
- Improve sales and marketing effectiveness through better collaboration and a shared understanding of roles and responsibilities
- Simplify the buying process for customers

The key to getting started is to assess the resources available – internal and external – then begin asking questions. The answers may be surprising, and will certainly be informative.

For details about how Harte-Hanks can help B2B technology marketers map their buyers' journeys through a detailed analysis of these survey results or proprietary market research, please contact:

Harte-Hanks Direct Marketing

800-470-3623

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