

MERKLE B2B

DRIVE IMPACT, DELIVER VALUE

UNLOCK SEAMLESS B2B EXPERIENCES
with Adobe Marketo Engage

The takeaway

Through Adobe Marketo Engage and its related platform solutions, Adobe helps B2B brands take their marketing maturity to the next level, streamlining sales and marketing processes while enabling personalized engagement across channels at every stage of the customer journey. **The benefits of Adobe Marketo Engage include:**

It aligns sales, marketing, and service through sophisticated segmentation, lead scoring, and nurturing, with easy data sharing across business teams.

It provides a level of automation that enables marketers to respond to customers' needs with the right content at the right time on the right channel – with efficiency and agility and scale.

It improves marketing impact and ROI with out-of-the-box and custom reporting that moves the focus from vanity metrics to true visibility into how content and campaigns drive pipeline and revenue.



The context

Fifty-two percent of B2B marketers say that customer experience (CX) is a top challenge.[1]
Here's why:

The new generation of B2B buyers expects personalized customer experiences.

Millennials are quickly becoming the most important and discerning B2B audience, having an influence in 73 percent of purchase decisions.[2] Millennials' influence is followed closely by that of Gen-Z professionals, the oldest of whom are approaching their mid-twenties.

It's imperative that B2B brands meet these digitally savvy professionals' expectations for personalized, seamless, and emotionally relevant experiences.3 A Merkle B2B study shows that millennial and Gen-Z customers reject a far larger proportion of brands considered before contacting them. Seventy percent of brands considered were rejected before the proposal stage, compared to only 58 percent for older respondents.[4]

B2B organizations need to gain efficiencies, remove silos, and improve attribution.

The emergence of new decision makers is accelerating disruption in this sector. As B2B buyers come to expect B2C-like omnichannel interactions, the level of complexity B2B marketers are faced with increases. **This can only be addressed when B2B organizations build programs that encompass the end-to-end experience** of their products and services, rather than operating marketing, sales, commerce, and service as siloed channels.

As the nuances of B2B selling and buying persist and evolve, **attribution becomes crucial to ensure these channels are interconnected** and contribute to streamline the buyer journey as much as possible.

B2B CMOs need to optimize how they invest their budgets and create ROI.

Our recent survey shows that **B2B CMOs** feel that their remit is expanding and that, ultimately, they **are responsible for fueling business growth.[5]** With **US B2B ecommerce sales expected to reach $1.8 trillion by 2023** and make up for 17% of all US B2B sales, it's clear that progressively incorporating omnichannel digital customer experiences in their approach to selling is key to competing for this revenue.[6]

While full digitization of the B2B buyer journey may be unobtainable or even undesirable for some players in the space, **building a robust customer experience founded on data attribution can help B2B marketers understand what type of programs are generating results** and when a human interaction is expected.



1 - B2B International. "2020 Trends Report: Customer Centricity." B2B International, March 20, 2020. https://www.b2binternational.com/publications/customer-centricity/.
2 - B2B International. "B2B Digital Transformation: Creating Digital Experiences for Today's Decision-Makers." B2B International, October 23, 2020. https://www.b2binternational.com/publications/b2b-digital-transformation/.
3 - Digital Pi. "Key Considerations for B2B Marketers in 2021." Digital Pi, February 8, 2021. https://digitalpi.com/ebooks/key-considerations-for-b2b-marketers-in-2021/.
4 - "The Ultimate B2B Customer Experience." dentsu.com. Accessed May 24, 2021. https://www.dentsu.com/us/en/access-content/pardot-form--merkle-b2b-superpower.
5 - "The Ultimate B2B Customer Experience."
6 - Cicman, Joe, Allen Bonde, Kara Wilson, and Madison Bakalar. "B2C (Still) Sets The Standard For B2B." February 1, 2021. https://www.forrester.com/report/B2C+Still+Sets+The+Standard+For+B2B/-/E-RES61686.

*"B2B marketing leaders must **transform their organizations** – and quickly – from their traditional role of brand steward, lead-generation machine, and sales supporter to **become the architect of engagement across the entire customer life cycle.**"*

—**Lori Wizdo,** Forrester, "A Guide to Surviving and Thriving in the B2B Marketing Renaissance," March 2020

Risks and rewards

B2B companies that fail to ignite digital customer experiences...

lose customers to innovative competitors.

A 2% increase in customer retention is the same to profits as cutting costs by 10%.[7] **B2B brands that don't deliver** the type of experiences that the new generation of buyers expect **risk account base churn**.

miss crucial customer insights.

Brands that don't view measurement as the key to optimizing program performance fail to accelerate their transformation toward a customer enterprise.

Investing in digital CX allows B2B brands to clearly link actions to those measures.

invest in initiatives that don't create results.

77% of B2B buyers state that their latest purchase was very complex or difficult.[8] **Disjointed experiences lead to revenue loss.**

Investing in self-service customer experiences creates a faster path to customer satisfaction.

B2B companies that excel in the activation of robust CX programs...

build stronger loyalty.

B2C brands have long favored loyalty programs to retain customers' business. **Delivering robust customer experiences can enable B2B brands to unlock this engagement strategy.**

Digital interactions that solidify customer loyalty include exclusive offers and promotions, streamlined reordering and checkouts, personalized onboarding content, and self-service support.

gain better performance.

71% of businesses want to improve the customer and market data and insights to anticipate future needs more effectively.[9]

Digital customer experiences are the most effective way to gain a better understanding of changing customer behaviors.

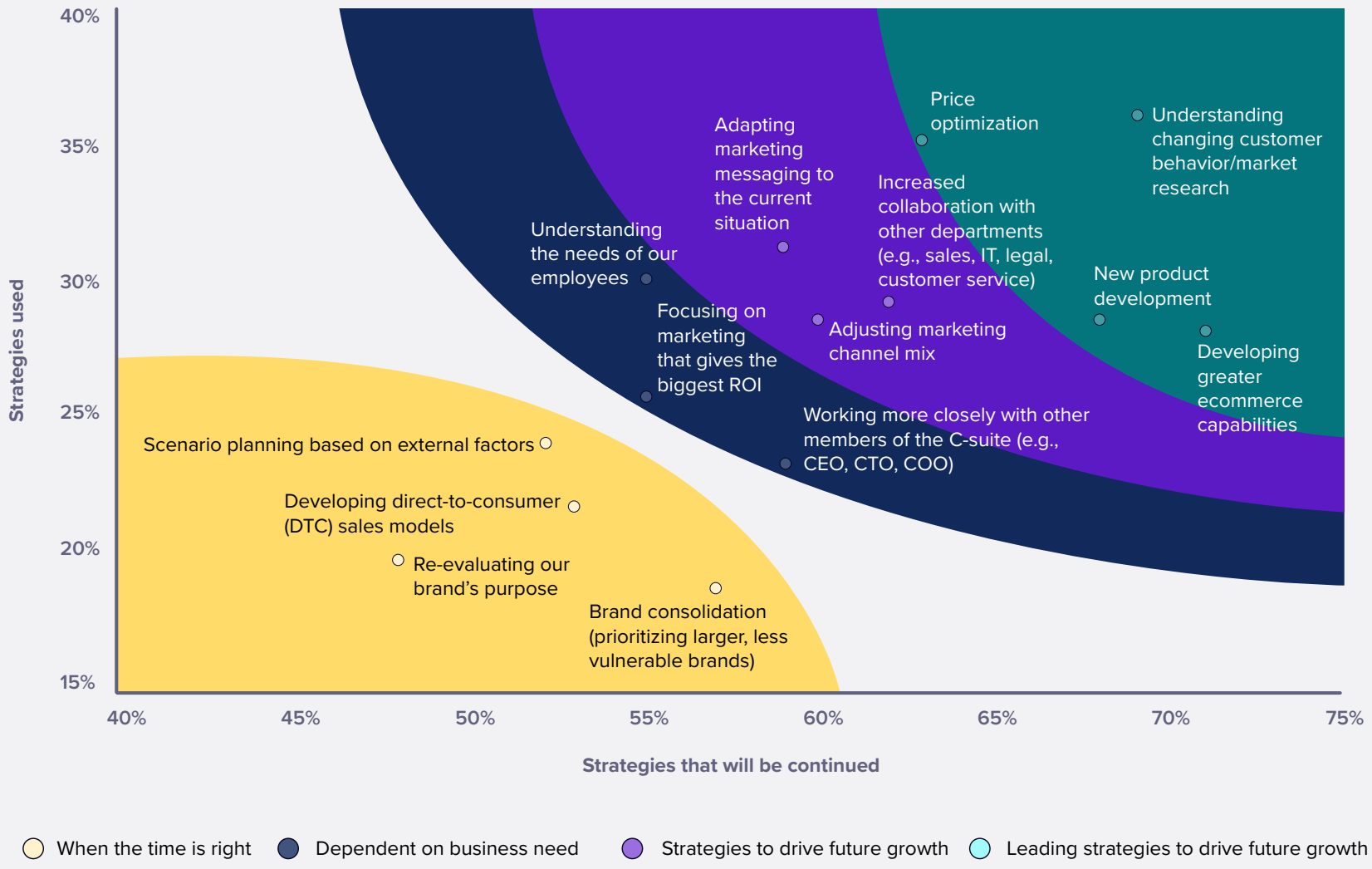
double-down on growth-generating investments.

86% of B2B buyers are willing to pay more for a great customer experience.[10]

Delivering personalization and gaining the agility to quickly deploy campaigns online gives B2B businesses faster insights into the marketing efforts that are generating the desired outcomes.

7 - Morgan, Blake. "50 Stats That Prove The Value Of Customer Experience." Forbes. Forbes Magazine, February 9, 2021. https://www.forbes.com/sites/blakemorgan/2019/09/24/50-stats-that-prove-the-value-of-customer-experience/?sh=49cd242b4ef2.
8 - "The New B2B Buying Process." Gartner. Accessed May 24, 2021. https://www.gartner.com/en/sales/insights/b2b-buying-journey.
9 - B2B International. "B2B Digital Transformation: Creating Digital Experiences for Today's Decision-Makers." B2B International, October 23, 2020. https://www.b2binternational.com/publications/b2b-digital-transformation/.
10 - Puthiyamadam, Tony, and Jose Reyes. "Experience Is Everything: Here's How to Get It Right." PWC.com. Accessed May 24, 2021. https://www.pwc.com/us/en/advisory-services/publications/consumer-intelligence-series/pwc-consumer-intelligence-series-customer-experience.pdf.

Strategies used by B2B CMOs during the pandemic – and those that will be continued in the future



Source: dentsu CMO Survey 2020 data; Merkle B2B analysis

Tomorrow's B2B will look like this

Investing in CX transformation can help B2B brands future proof for some of the forces that will shape this sector going forward:

Some B2B players will start to bleed into B2C.

Not only do B2B organizations need to accommodate the B2C-like expectations of their new buyer cohorts but innovation is also going to enable them to ignite B2B2C models or open part of their business to B2C opportunities. **Companies building a CX foundation will be better positioned for this transition.**

Collaborative buying will become more dynamic.

B2B transactions often involve a number of stakeholders, including approvers, procurement, and legal. **Most B2B commerce portals today use dated processes that make these collaborations cumbersome.** CX orchestration and marketing automation enable brands to build dynamic collaborative experiences that accelerate the realization of revenue.

Manufacturing and distribution equipment will become "smarter."

As B2B companies in industries such as heavy manufacturing, pharmaceuticals, transportation, and utilities develop machinery and vehicles with connected capabilities and diagnostics, **brands with a robust CX technology platform will be able to monetize those innovations by enriching the buyer's journey with the services and data they deliver.**

Human interactions will become a value-add.

As the world becomes increasingly automated and virtual, human skills and interactions will become a dominant brand value.[11] To seize this opportunity, **B2B brands will need to move from a model where marketing- and sales-led interactions are disjointed to "next best action" orchestrated buyer journeys** that enable sales to intervene at the right time.

The data privacy revolution will transform targeting.

The death of the third-party cookie, driven by new privacy legislation and paradigm shifts in the technology provider landscape, is going to threaten common B2B marketing tactics, such as retargeting, multi-touch attribution, and building look-alike segments.[12] **Brands invested in CX management will be able to build a first-party data foundation more efficiently.**

Digital analytics will impact forecast accuracy.

As digital-savvy consumers continue to gain a more active role in B2B purchasing decisions, **brands invested in CX capabilities will be able to enhance the precision of the back-end systems tracking the sales funnel**, feeding them information tied to front-end interactions, such as the consumption of marketing content.

11 - Dentsu. "The Human Dividend - Consumer Vision 2030." Dentsu, March 2, 2021. https://consumervision.dentsu.com/consumer-vision-2030/the-human-dividend.
12 - Digital Pi. "Key Considerations for B2B Marketers in 2021." Digital Pi, February 8, 2021. https://digitalpi.com/ebooks/key-considerations-for-b2b-marketers-in-2021/.

Roadblocks for B2B marketers

Some of the big **challenges to CX transformation** for B2B brands include:

Rudimentary marketing automation structures don't provide the capabilities needed to capture customer behavior and act on it at the right time and on the right channel.

Limited reporting or siloed data make it impossible for marketing teams to get a clear view of which programs, channels, and content are driving ROI and generating revenue.

Too many options can create confusion and/or organizational deadlocks. Many of the technologies delivering CXM offer overlapping capabilities, and B2B brands need to build an adoption roadmap that addresses their unique challenges.





Keys to success

To be successful in your CX transformation, **focus on these essential priorities:**

1 Integrate

Integrate data from across the organization and all relevant sources.

2 Align

Align marketing, sales, commerce, and service around a total view of the customer by removing operational silos.

3 Orchestrate

Orchestrate the delivery of marketing, selling, and support/service experiences across all relevant traditional and digital channels.

4 Automate

Automate back-end and front-end operations to do all of this at speed and scale.

5 Personalize

Personalize interactions for relevancy, context, and value delivery.

6 Measure

Measure the influence of specific content, campaigns, and channels on client engagement, pipeline, and revenue growth.

A key decision B2B brands face when starting to build CX capabilities involves **the selection of a technology platform to support core commerce and broader digital experience delivery.** With a complex technology environment featuring legacy systems and multiple commerce-related technologies, many firms struggle to create an integrated solution that meets their unique needs.[13]

For many B2B clients we work with, Adobe – in particular, its Adobe Marketo Engage application – is uniquely positioned to help them overcome this challenge and unlock a new level of maturity across their customer experience.

13 - "What It Takes To Be A Leader In B2B ECommerce." Magento.com, June 2018. https://magento.com/sites/default/files8/what-it-takes-to-be-a-leader-in-b2b-ecommerce-forrester-study.pdf.



Unlocking the experience

While Adobe Marketo Engage offers the power and agility to support complex, interconnected and highly customized B2B buyer journeys, today's overburdened marketing leaders often highlight the speed and ease of deployment it offers, citing a faster time to value for their investment of time and resources. In a commissioned study conducted by Forrester Consulting on behalf of Adobe in 2020 to quantify the Total Economic Impact™ of Adobe Marketo Engage on business outcomes,[14] **Forrester found companies using the platform gained in several ways**, including:

267%
ROI over three years

Less than 3-month
post-implementation payback period

$15M+
in business benefits over three years

14 - Digital Pi. "Key Considerations for B2B Marketers in 2021." Digital Pi, February 8, 2021. https://digitalpi.com/ebooks/key-considerations-for-b2b-marketers-in-2021/.

Unlocking the experience

At Merkle, we see a direct correlation between these benefits and the ability of Adobe Marketo Engage and related Adobe solutions to achieve the **six keys to success** mentioned earlier.

Integrate

Marketing Data Environment

Adobe Marketo Engage helps B2B marketers solve one of the most vexing foundational challenges to CX transformation by streamlining the ingestion, hygiene, and governance of data across marketing, sales, and other business sources. For both known and anonymous users, it also tracks engagement behavior into a centralized profile – giving greater confidence in your ability to segment, prioritize, and get creative with hyper-targeted messaging and experiences. You can even begin to incorporate its AI to build ICPs and predictive account lists to fuel new logo growth.

Align

Sales & Marketing Partnership

Agreement on sales and revenue objectives is important, but it's just the first step. Adobe Marketo Engage operationalizes a framework and daily discipline of truly aligned partnership between sales and marketing, empowering sales leads with outreach automation and personalization tools – while ensuring consistent branding and CX. More importantly, it provides a centralized, real-time record of truth, with insights both teams can leverage to drive increased engagement in a more efficient and coordinated manner.

Orchestrate

Cross-Channel Engagement

Delivering a seamless customer experience that follows B2B buyers across online and offline – and beyond just web and email – is a key foundational aspiration of many of the brands we work with. Many choose Adobe Marketo Engage not only for the data and insights it delivers to enable such orchestration, but also for the tools that streamline and simplify this process: the ability to conceive and create meaningful and engaging experiences at each step of their journey (display, SMS, direct mail, paid social, in-app, events, and more) and easily map the workflows that power them.

Automate

Lead Nurture & Management

To put those experiences into motion at speed and scale, Adobe Marketo Engage readily automates the component tasks of lead nurturing, including cloning, tokens, automated triggers, dynamic segmentation and more. Ready-to-deploy functionality for sophisticated lead and account scoring and routing – overlaid with easy-to-master UX – makes it simple and straightforward to activate, automate and optimize custom journeys for acquisition, pipeline velocity, and growth.

Personalize

Content Personalization & Delivery

One of the key capabilities Adobe Marketo Engage brings to our B2B clients is content and journey personalization. Importantly, this goes beyond dynamic content services that automatically deliver unique customer experiences aligned to buying personas; it also includes AI-driven decisioning that continuously learns and recommends the best-performing content for individual buyers across channels at any given time.

Measure

Marketing Impact and ROI

A key part of our CX work with B2B clients aims on enhancing their visibility into its impact on business outcomes – moving them from a focus on email opens and click-throughs to a clear-eyed understand of how journey moments and experiences drive pipeline and revenue. Adobe Marketo Engage makes it easy to optimize your marketing mix, starting with out of the box dashboards and reporting on campaigns, channels and content – to which clients can add custom attribution models and more advanced analytics to uncover areas of opportunity. For both practitioners and growth leaders, this ROI data is a proven and invaluable resource for guiding future actions and investments.



A recognized leader in B2B experience

While Adobe is globally acknowledged as a leading CX partner for traditionally B2C-focused businesses, the company has proven itself a go-to resource for B2B brands seeking to take greater command of their customer experience. Adobe earned recognition as a Leader in the 2020 Gartner Magic Quadrant™ for CRM Lead Management, and was similarly recognized as a Leader in The Forrester Wave™: B2B Commerce Suites, Q2 2020.

More importantly, Merkle B2B has helped clients drive CX transformation to revenue and business growth on a foundation of Adobe Experience Cloud applications like Adobe Marketo Engage – along with related offerings like Adobe Analytics (which provides an even more advanced analytics workspace for deeper insights), Bizible (for multi-touch attribution), and Adobe Experience Manager (AEM) Assets (for improved content creation to delivery workflows). In addition, Adobe Marketo Engage integrations with Salesforce Sales Cloud, Microsoft Dynamics for Sales, and SAP Cloud for Customers provide a high degree of flexibility, cost efficiency, and adaptiveness in the face of uncertainty.

Benefits to marketers

B2B brands that have built a strong CX foundation by implementing the right technology platform are able to realize the following benefits:

Shared roadmap
Their marketing, sales, product, and technology resources work together to cocreate their digital technology roadmap.

True collaboration
They have an iterative and collaborative approach to technology development.

Agile connections
They leverage a modern architecture (cloud-based and API-oriented) to promote speed, flexibility, and integration with legacy apps, marketplaces, and external technology partners.

Customer centricity
They use customer experience assets, such as personas and journey maps, to steer their technology design.

Rich content
Their content tools, such as content management system, digital asset management, and product information management, adequately support their direct and indirect digital selling channels.

Bespoke selling
They are investigating or deploying personalization in their ecommerce channels, such as account-defined catalogs, pricing, and asset management.



How an Adobe Marketo Engage migration drove growth and efficiencies for Poly

Challenge

Following its acquisition by Plantronics, Poly faced the challenge of merging two legacy marketing automation platforms: a seven-year-old decentralized instance of Adobe Marketo Engage and a nine-year-old centralized Eloqua instance.

Each platform came with technical and creative debt, making any potential merger of these systems a large and complex undertaking.

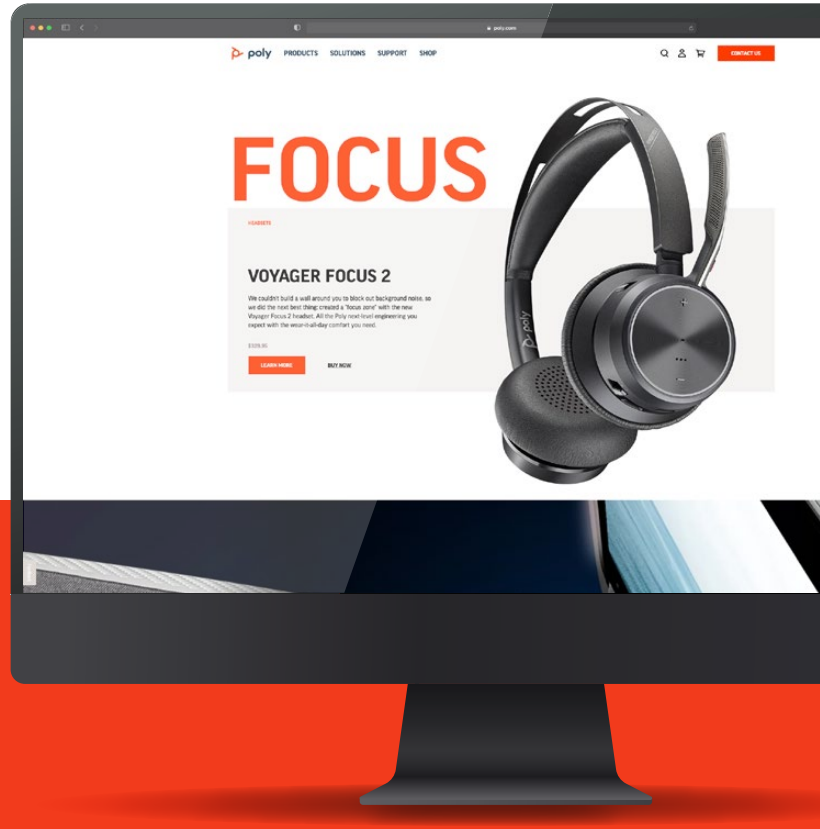
Ultimately, the team decided that the best way to move forward would be to start fresh, and Marketing formed a decision committee from both Eloqua and Adobe Marketo Engage users.

Solution

Adobe Marketo Engage was determined be the best choice to support Poly's long-term strategy and growth. To execute, Poly formed a migration group, consisting of marketing intelligence, sales operations, and a team from Merkle B2B (our Marketo specialists at Digital Pi).

Poly worked independently of the production team, which allowed the legacy systems to keep running even as the new Adobe Marketo Engage system was configured and tested.

Following its Gold Standard practice framework, the team from Merkle B2B/Digital Pi completed the initial Adobe Marketo Engage setup and retired the legacy systems in just 90 days.



Results

"After our new Adobe Marketo Engage instance was live, we saw immediate results," said Poly's Head of Marketing Technology and Automation.

In total, the Poly team, who had been running double production under the legacy systems, was able to **reduce its project effort by 66% over 900+ projects annually.**

Moreover, new best practices implemented by the Merkle/Digital Pi team contributed to improved life cycle monitoring – which in turn drove approximately **$3 million in incremental sales pipeline in about six months.**



Merkle B2B x Adobe

Merkle B2B is a purpose-built agency that leverages the deep customer experience management capabilities of Merkle, a dentsu company, to help brands succeed in today's dynamic B2B environment. Combined, Adobe and Merkle's strengths empower sales, marketing, and service to align and engage our clients more effectively, work more efficiently, and measure to improve continuously. Some of the ways Merkle helps B2B companies make the most of Adobe Marketo Engage include:

Assessment

Lead-to-revenue

Tap into the knowledge of hundreds of Adobe Marketo Engage implementations, gain insights on how you can improve your marketing automation initiative, and get a full review of lead-to-revenue processes.

Implementation

Deployment

Includes initial configuration of your Adobe Marketo Engage and implementation of a proven framework of 12 foundational processes for strategic marketing, as well as technical and campaign operational services.

Migration

Migrate data, campaigns, templates and assets to Adobe Marketo Engage using best practices. Set up new platform to scale as you grow and operate in line with your business strategy.

Operation

Marketing operations

Our managed services streamline your day-to-day marketing ops to drive best practices. It includes systems optimization, data enhancements, ongoing ops management, and troubleshooting.

Campaign services

Put your content into action with services to ensure your campaigns run smoothly and scale with ease. Campaign services include campaign launch, management, monitoring, and measurement.

Optimization

Additional service to make the most of Adobe Marketo Engage:

- **Data services:** a suite of data services to help you quickly regain control of your data
- **Custom development:** architecture, design, coding, and scripting to extend your Adobe Marketo Engage instance
- **CRM services:** tools to connect your Adobe Marketo Engage instance and CRM to ensure proper data sync and integration
- **Template services:** intuitive settings and customizable drag-and-drop modules to simplify email and landing pages customization



Merkle B2B x Adobe

With full-stack capabilities supported by over 1,000 talented individuals across the globe, Merkle B2B is uniquely positioned to help global marketers drive impact and deliver value through more connected and compelling B2B experiences.

Brand	Brand Activation | Brand Message Platform	
	Brand Research	
Activation	Integrated Creative | Channel Activation	
	Integrated Media	
Orchestration	Campaign Planning & MRM | Content & Digital Asset Management	
	Experience Orchestration and Nurture	
Insights	Experience Analytics | Audience Analytics	
	Performance Analytics	
Data Management	Database Solutions | Data Sourcing & Enhancement	
	Identity Management	

Technology | Customer Strategy & Transformation | Connected Commerce & CRM

Merkle B2B, in conjunction with Merkle and dentsu, has been recognized as an Adobe Premiere Partner and a global leader in Adobe Experience Cloud solutions for B2B and B2C brands:

- Adobe Emerging Solution Partner of the Year, Digital Experience, Americas (Digital Pi) – 2020
- Adobe Delivery Quality Enterprise Solution Partner of the Year, Digital Experience, Americas (Merkle) – 2020
- A Leader in The Forrester Wave™: Adobe Implementation Services, (dentsu) – Q2 2020
- Together, Merkle and dentsu deliver Adobe Experience Cloud-powered solutions to 180+ clients globally, thanks to 1,400+ staff trained on Adobe applications and 1,300+ ACE certifications. Learn more.



Let’s get started

Contact Us.

Ready to make your move? **Get in touch** with our Merkle B2B team to discuss how Merkle B2B and Adobe Marketo Engage can support your upcoming initiatives.

Explore our insights.

Visit the **Merkle B2B website** to learn more about our work with leading global brands, or download our latest research, reports, webinars, and other **thought leadership** from proven experts across our team.

Engage with Us.

Tap into knowledge gained from hundreds of Marketo implementations, gain insights on how to improve your marketing initiatives, and **talk directly with a Merkle B2B strategist** in a 60-minute consultation — at no cost.

MERKLE B2B