CXcellence:
How to achieve CX success in B2B

2017

BENCHMARKING REPORT

B2B Marketing
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Circleresearch
The B2B experts

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Introduction: What is CX?

CX, or customer experience, is a relative newcomer into the world of marketing acronyms that B2B marketers have to contend with.

Unlike those that have gone before, such as CRM, DM or SEO, CX is not a technology, a marketing channel or a channel-specific promotional function. Instead, CX is a term which encapsulates and seeks to align all of the many and varied touchpoints and interactions a customer has before, during and after purchase.

As with many marketing acronyms, CX originated in the B2C space, driven by the digitisation of marketing and the proliferation of different devices or screens through which consumers increasingly engage with brands.

But CX in B2B is not exclusively digital, nor is it exclusively 'marketing' (at least in the narrowest sense of the word) – it has a different flavour or iteration. This is a result of all of those things that make B2B different: long purchasing cycles, complex decision-making units and the role of the sales team. As a result – and as we'll see in the results of this research project – the physical or real-world iterations of B2B CX are just as important as the digital ones.

Saying CX is different in B2B is not the same as saying CX isn't relevant or important, or something that both brands and marketers should seek to understand and improve, with some urgency.

Increasingly, the B2B brands that succeed will be those that understand the many and varied interactions or engagements that a buyer or member of the decision-making unit may experience on the long and convoluted road to purchase.

The leading B2B brands of the future will be those who take CX seriously, understand the role of different touchpoints, provide consistent and connected brand experiences and demonstrate their relevance and appropriateness to customers over the length and breadth of the sales cycle. That's far from an easy thing to achieve, but make no mistake: that's the CX challenge facing B2B marketers.

The physical or real-world iterations of CX in B2B are just as important as the digital ones

What does CX encompass?

CX overlaps with and encompasses a variety of different established disciplines, many of which are not traditionally considered to be part of 'marketing', at least in its traditional or narrowest definition. That's not to say CX is more important than these things, or that they should be subservient to it, but that they play a part in achieving excellent CX.

CX can and should have more significant implications – in terms of the very culture of the organisation

This list of activities includes, among other things:

- The customer journey – understanding how customers move from awareness, through to ultimate purchase or conversion (however that is qualified), typically in a transactional digital environment.
- User experience (UX) – focusing on the functionality of the website, and its digital presence more generally, and behaviour of customers during interactions.
- Branding – the sum total of the customer's beliefs and expectations of the vendor, and how that organisation positions itself (not just its graphical or textual iterations).
- Customer service – the proactive and reactive management of customer issues encountered by using a brand's products or services.
- Customer feedback – efforts to drive reflections on product and service quality through various channels.

Perhaps more fundamentally, CX can and should have significant implications at more profound levels – in terms of the very culture of the organisation behind the brand, and the emotional engagement that its customers have with it.

It's a broad discipline, with far-reaching implications for how a brand conducts itself, and how its customers perceive it.

About this report

In the making of this report we surveyed over 100 business buyers from both the UK and the USA. We only surveyed buyers who were responsible for purchases of £20k or more, and we asked them a whole host of CX-related questions regarding their most recent business purchase above this price.

We also surveyed 165 B2B marketers to find out how much focus they place on CX, and where they're struggling the most in delivering an exceptional experience that will keep them coming back for more.

The pre-sale customer experience

01

How much does CX matter in the early stages of the buying journey?

We've all seen the stats showing how far down the funnel buyers already are when you have your first interaction with them (a clue – it's a long way down), and this is comprehensively backed up by our research.

When we asked buyers about their most recent business purchase above £20k, 79% were already aware of at least three potential suppliers at the start of the buying process, and 28% didn't look to identify any additional potential suppliers.

At the start of the buying process:

79%

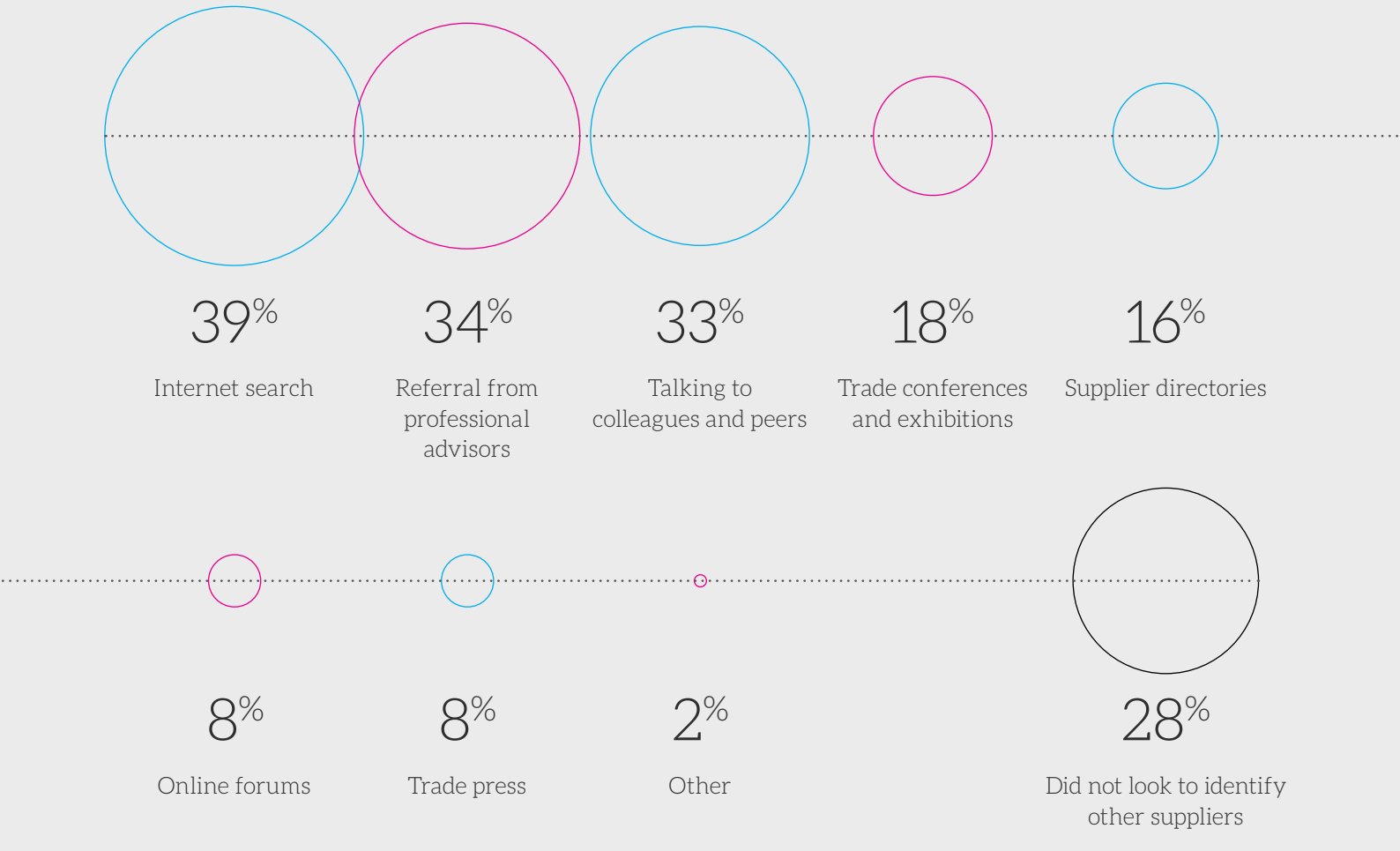
of buyers are already aware of at least three potential suppliers

28%

did not look to identify any additional suppliers

Among the buyers who did look into other potential suppliers at the start of the buying process, most began their search in the simplest and most obvious place: Google. 'Internet search' came out as the top method of looking for additional suppliers, mentioned by 39% of buyers. This was followed up by 'referral from professional advisors' (34%) and 'talking to colleagues and peers' (33%).

How buyers identify other suppliers



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Before making a detailed evaluation of potential suppliers:

14%

of buyers had
no preference

40%

of buyers had
a strong preference

46%

of buyers had
a slight preference

To make matters even more difficult for marketers trying to stand out at this stage of the buyer journey, 82% of those who had a supplier preference had done business with this supplier previously. Moreover, a massive 94% of those who'd bought from the company before ended up buying from them again.

This means that most people have already made their minds up before they even start. As a vendor in this situation, you have to work pretty hard to screw it up, which means that if you're not in this fortunate position, it's really hard to get a look in.

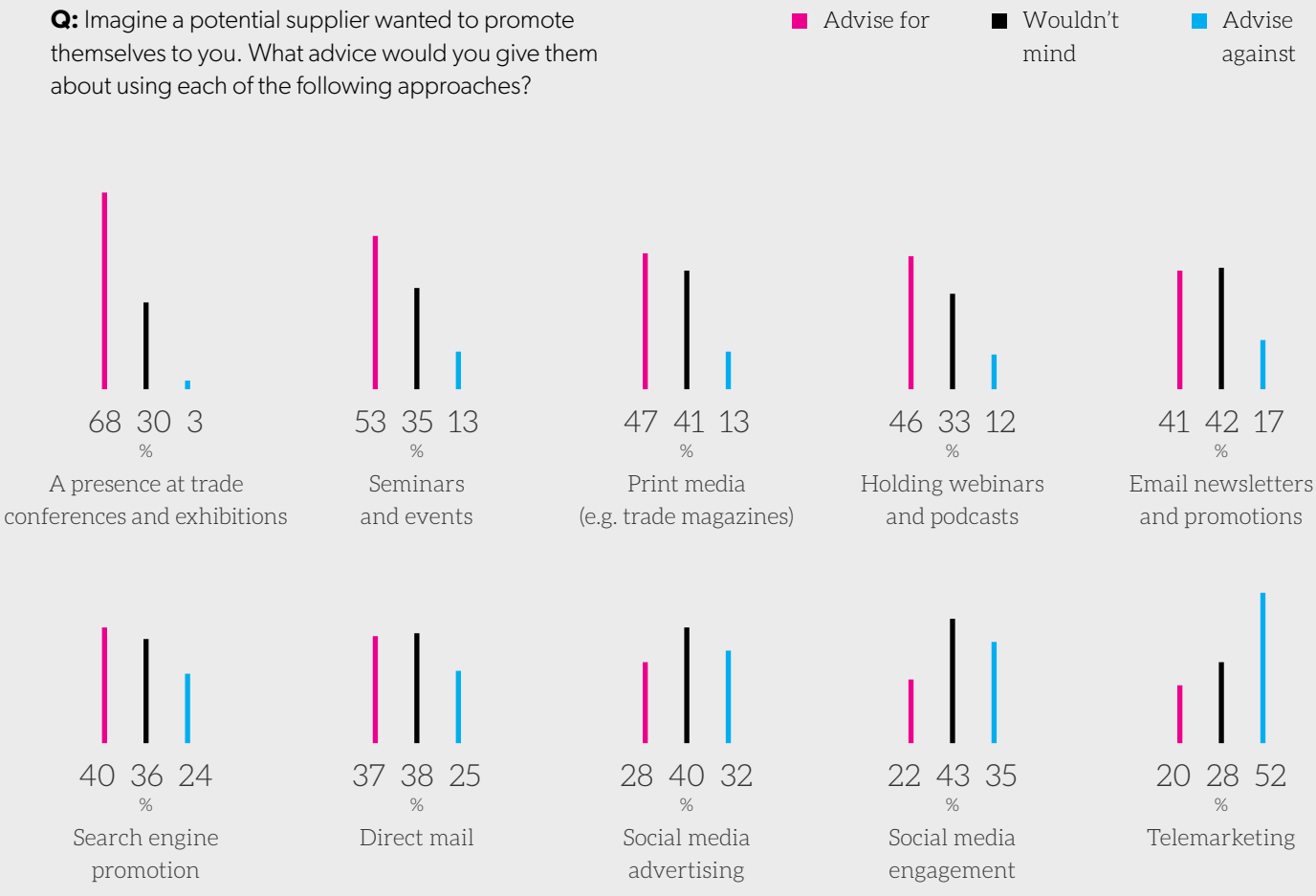
And all of this shows us that if you're not already doing it, you need to make sure your brand is out there in the market and making yourself known, particularly online. So although a great experience may have some impact at this stage of the buying process, you're likely to have difficulty in really influencing buyers. The reality here is that customer experience is out of your hands – so as we'll see next, in order to get yourself on the original supplier shortlist, the most powerful thing you can do is create advocates and cultivate recommendations.

The power of personal relationships

So, how do you go about getting on buyers' original shortlists when they're already likely to have a favourite? Right from the beginning of the buyer journey, a clear trend emerges. When we asked buyers how they'd advise potential suppliers to market to them, an overwhelming majority (68%) recommended 'a presence at trade conferences and exhibitions'.

Buyers' advice on supplier marketing methods

Q: Imagine a potential supplier wanted to promote themselves to you. What advice would you give them about using each of the following approaches?



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Some 54% of buyers also revealed that trade conferences and exhibitions are the key way they like to keep up with their industry or profession more generally, followed by their own professional networks (mentioned by 47% of respondents).

Buyers' preferred methods of keeping up with their industry or profession

Most preferred

- **54%** Trade conferences and exhibitions
- **47%** Talking to colleagues and peers
- **24%** Online forums
- **23%** Webinars
- **22%** Trade associations

Least preferred

- **4%** Podcasts
- **5%** TV and radio
- **5%** Blogs
- **12%** National press (online or print)
- **12%** Trade press (online or print)

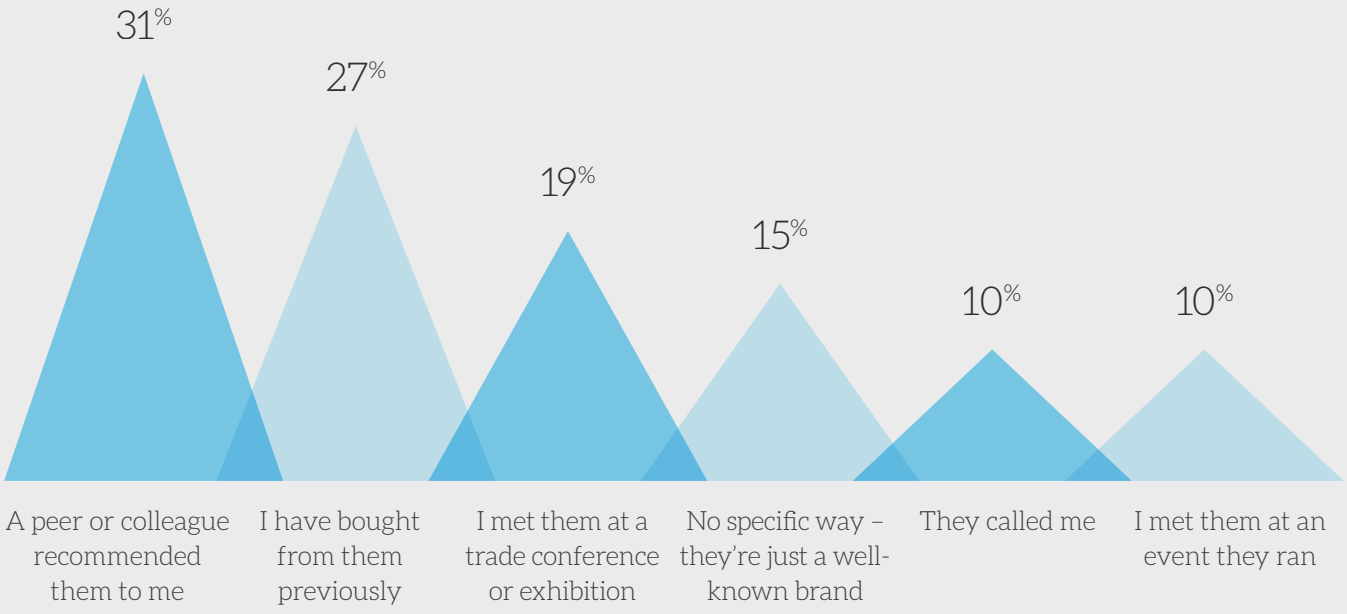
It's clear that securing new business without any form of personal recommendation is really tough

And when we look at the importance of personal relationships when getting to know the suppliers that buyers end up working with, the findings below indicate just how much buyers want to feel in control – by choosing to attend a trade conference or exhibition, they've willingly put themselves in an environment where they're prepared to be marketed to.

Furthermore, the importance of personal recommendations and the role that buyers' own professional networks play cannot be underestimated. It's quite clear that securing new business without any form of personal recommendation is really tough.

The takeaway here for marketers is not to underestimate the power of advocates, and this, in fact, brings us right back to the question of CX. As we'll see later, by delivering a great experience to your existing customers you will also be fuelling growth at the beginning of the buyer journey through the power of those advocates and influencers. So although the experience itself may not have a direct role to play early on in the buyer journey, indirectly it actually matters more than you might think.

How buyers first became aware of their chosen suppliers



How does experience drive the purchase decision?

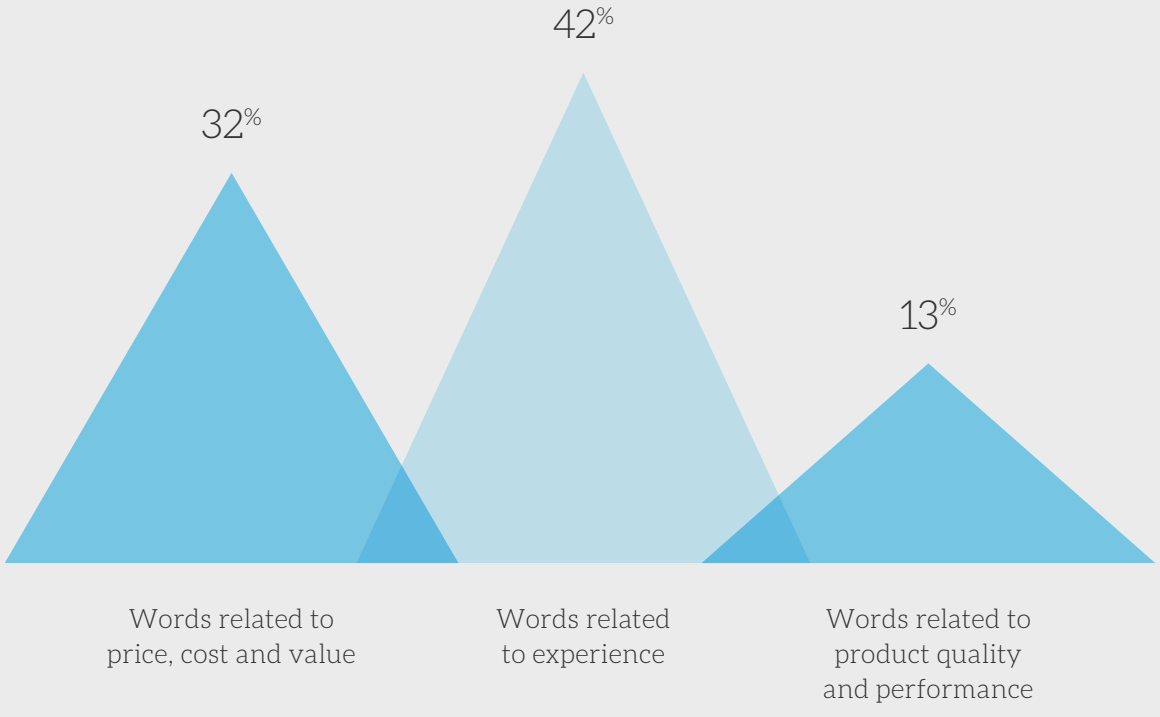
02

Is CX as important as quality and price?

So when it comes down to it, what actually drives buyers to choose one supplier over the other? And what is the role of customer experience at this point in the buyer journey? Although, as we've seen already, the reality is that buyers are pretty likely to remain loyal to suppliers they know, it's still possible to determine the role of CX at this stage, compared to other elements such as product quality and price.

When we asked buyers what drove them to pick their chosen supplier as an open question, at first glance the most popular aspect was price – with the words 'price', 'cost' and 'value' mentioned by a third of buyers. And this does trump other elements of the experience such as 'responsiveness' (mentioned by just 2%). But when you take all of the experience-related factors as one – everything ranging from 'support' and 'trust' to 'past experience' – the total is approximately 42%, thereby outweighing the importance of price alone. It's worth noting that product quality and related terms such as 'performance' were also a considerable factor, mentioned by some 13% of buyers.

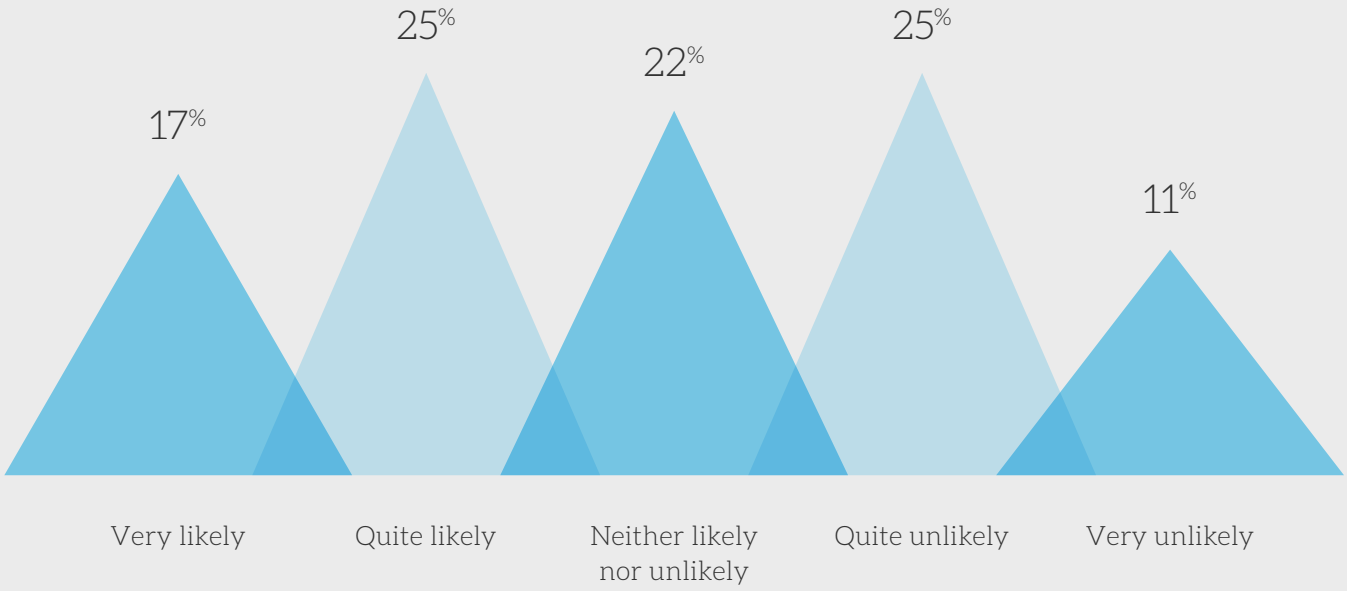
What drives purchase decisions?



This shows just how hard it is to get customer experience right – it's such an all-encompassing discipline. While being particularly responsive might drive one buyer to sign on the dotted line, being seen as especially trustworthy may swing it for someone else.

There is also the question of the *expectation* of experience post-purchase – if buyers know the experience is unlikely to be outstanding, but the product is still the cheapest on the market, will that sway their decision? Much as millions of passengers book flights with Ryanair every year because it's the cheapest option, is the same phenomenon true in the B2B world? We asked buyers just this, and the experience they expect to receive clearly has a considerable part to play; over a third (36%) of buyers are unlikely to purchase from a company if they've heard the customer experience will be poor, even if the product quality or price is better than alternative suppliers.

Likelihood of buying from a brand if the experience is expected to be poor



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The marketer's perspective

So it's quite clear the customer experience (whether received or expected) has a significant role to play in terms of getting a new customer over the line. But do marketers recognise how important it is? We asked them how important the customer experience is (either buyers' own or that of others) when they're choosing between potential suppliers:

- 59% said 'it's one of a smaller number of things that influences the decision'
- 22% said it's 'the single most important consideration'
- 18% said 'it matters, but doesn't drive the decision'
- 1% said 'it's not something buyers really take into consideration'

Can a personal relationship seal the deal?

Buyers don't realise how much their emotions actually come into play during the decision-making process: although 89% of buyers believe their decision to purchase from a supplier is based on purely transactional experiences (emotional at 11%), the importance of face-to-face interaction is a key theme throughout the buyer's customer experience.

So in the knowledge that experience does make a significant difference in the decision-making process, which specific elements of CX are likely to give your brand the edge? As we've already seen, personal relationships play a huge role in the early stages of the B2B buying process, and this is also true when buyers are making their final decision. It really is human relationships that make or break a deal: during the buying process, a massive 47% of respondents said 'meeting with suppliers' was influential in their decision-making process, while 32% said it played the 'most important role' in their decision.

Q: When deciding which supplier to work with, other than any proposal, pitch or quote, which of the following factors played the most important role in your *decision to buy* from your chosen supplier?

Most and least influential factors in buyers' decision-making process

Most influential

32% Meeting with suppliers

17% Talking to colleagues and peers

13% Opinions on different suppliers shared by industry analysts

11% Supplier websites

10% Testimonials and references from suppliers' customers

Least influential

0% Supplier whitepapers and thought leadership pieces

1% Industry league tables

1% Discussions about suppliers on social media

1% Discussions about suppliers on online forums

3% Comparison/rating websites

The marketer's perspective

We also asked marketers which elements they thought most influenced buyers in their markets, and it seems that they have a good understanding of the value of personal relationships too. The following were seen by marketers as playing the most important role in buyers' decisions:

1. Meeting with suppliers **(42%)**
2. Talking to colleagues and peers **(24%)**
3. Testimonials and references from suppliers' customers **(11%)**

It pays to get in there first

We've seen that personal relationships clearly their a part to play, but there is another potentially unexpected aspect of the experience that's likely to give B2B companies an edge over the competition. When we asked buyers where their chosen supplier excelled compared to the second choice, their chosen supplier most frequently had the edge when it came to:

- Responsiveness to feedback
- Responsiveness to enquiries
- Their interest and hunger to do business with the buyer
- Ease of making contact.

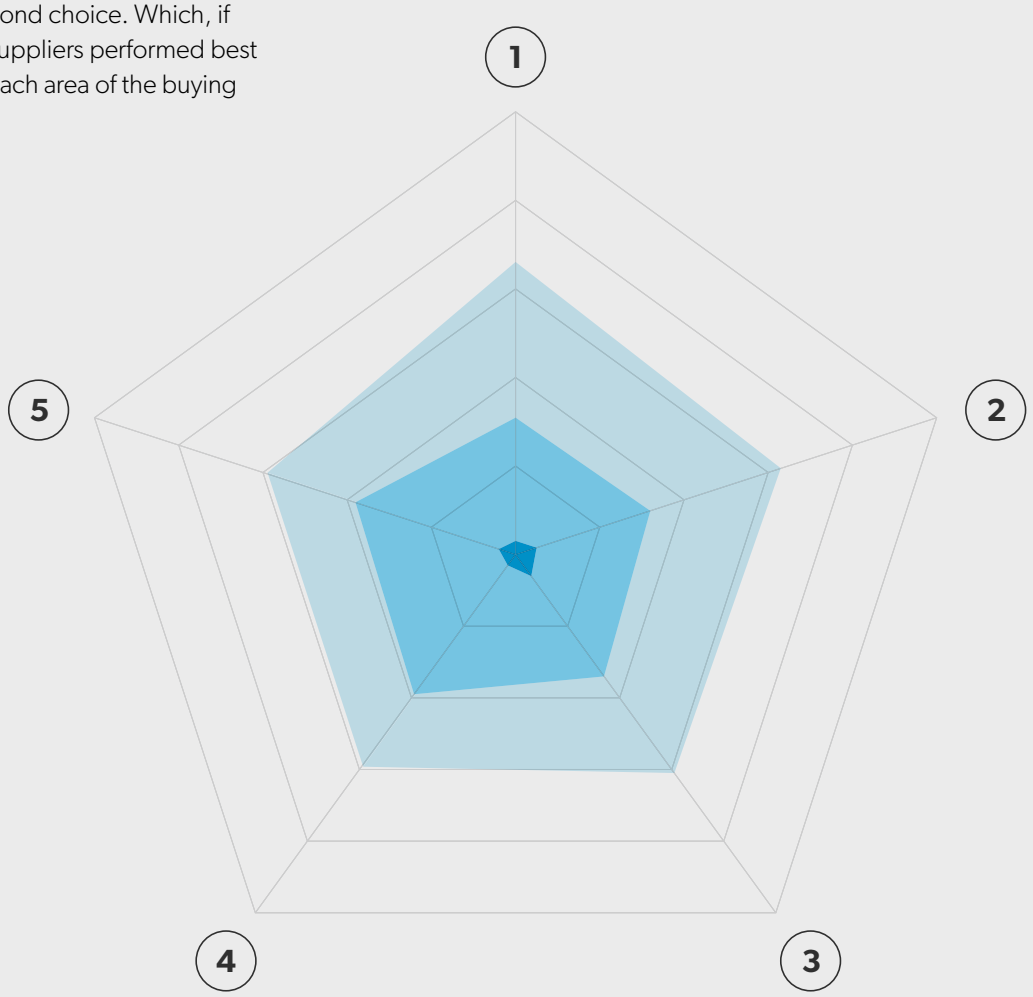
All of these suggest one thing – that companies that show an active interest in their potential customers, whether that's through their responsiveness or enthusiasm, are far more likely to gain that customer.

But it's important to note the bigger picture here too. Crucially, the suppliers chosen by buyers performed best in almost every aspect of the customer experience, indicating that it really is about getting the full experience right, rather than just a part of it.

Companies that show an active interest in their potential customers are far more likely to clinch the deal

How successful suppliers outperformed the competition

Q: Compare your chosen supplier with the supplier who would have been your second choice. Which, if any, of these suppliers performed best in relation to each area of the buying experience?



		Chosen supplier best	No difference	Second choice supplier best
1	Responsiveness to feedback	66%	31%	3%
2	Responsiveness to your enquiry	63%	32%	5%
3	Their interest and 'hunger' to do business with you	61%	34%	6%
4	Ease of making contact	59%	39%	3%
5	Ease of reaching an agreement with them	59%	38%	4%

The post-sale customer experience

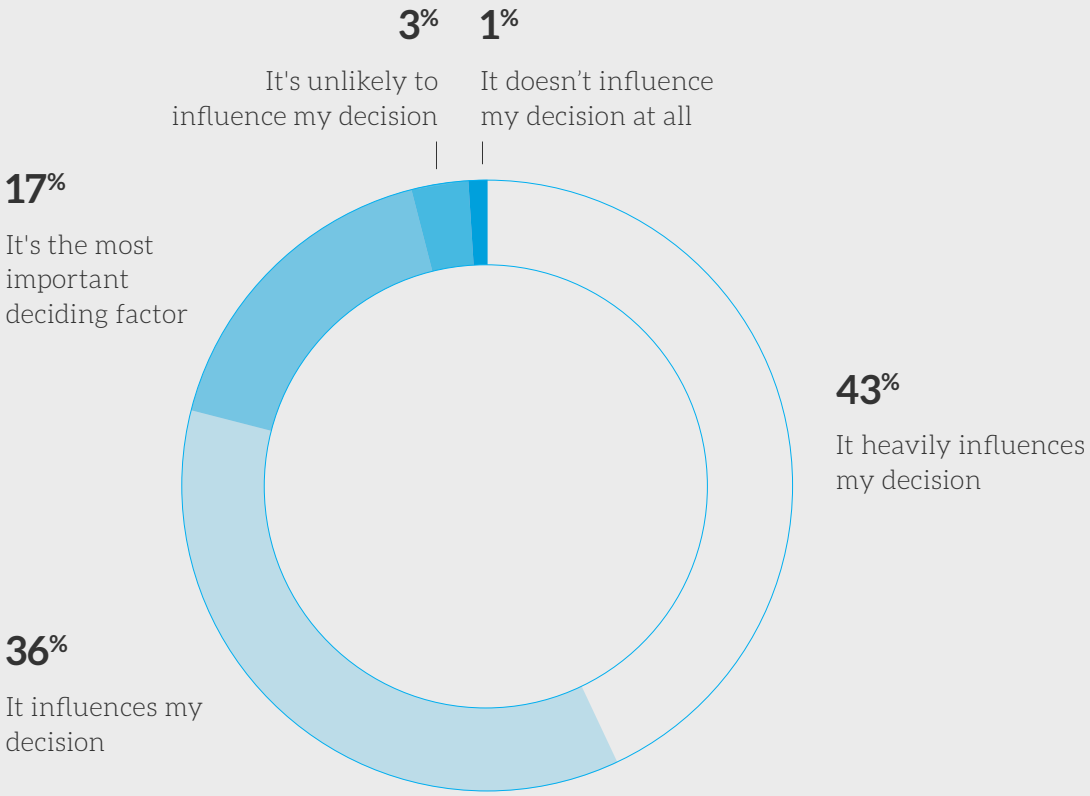
03

Is this when CX is at its most important?

As mentioned at the beginning of this report, delivering a fantastic customer experience once the purchase has been made may in fact be the most important element of the programme you put together. And buyers certainly support this theory. Some 60% say their experience with a supplier either 'heavily influences' or is 'the most influential factor' in their decision to buy from a supplier again. Furthermore, 96% of buyers said that it 'influences' their decision at the very least.

Influence of CX on buyers' decision-making

Q: To what extent is your experience of a company (good or bad) likely to influence your decision to buy from them again (as opposed to factors such as product quality or price)?



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The consequences of a bad experience can be just as significant

A lot of this report's focus has been on the positive impact of delivering a fantastic customer experience. But in order to provide one, it's important to understand the impact a bad experience can have on the customer, and how it can increase the likelihood of ending a relationship or, at very least, losing a referral.

Delivering a bad experience is really something B2B firms can't afford to do. We already know that buyers rely heavily on personal recommendations at the very earliest stages of the buying journey, so when almost 70% said they are unlikely to recommend a company they've had a bad experience with, the importance of delivering a fantastic post-sale experience cannot be underestimated.

It's also worth noting here that buyers are more likely to speak badly about a vendor in an interpersonal environment than on social media – this means a lot of bad news is also probably being buried, and you really need to dig for it.

Impact of negative CX on brand referrals and reputation

Q: Imagine you have a bad customer experience with a supplier in a business context. How likely would you be to:



The marketer's perspective

Do marketers recognise the importance of delivering a satisfactory experience in retaining their existing customers? We asked them: "If your company had a better product or price than its competitors, do you think that customers would remain loyal even if the overall experience with your company was poor?" a considerable 68% said 'probably not'.

Even more revealingly, marketers admitted they are already losing customers because the customer experience isn't up to scratch: 53% said they lose anywhere between four and 50% as a direct result, and just 12% said they don't believe they lose any.

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Why delivering on your promises is essential

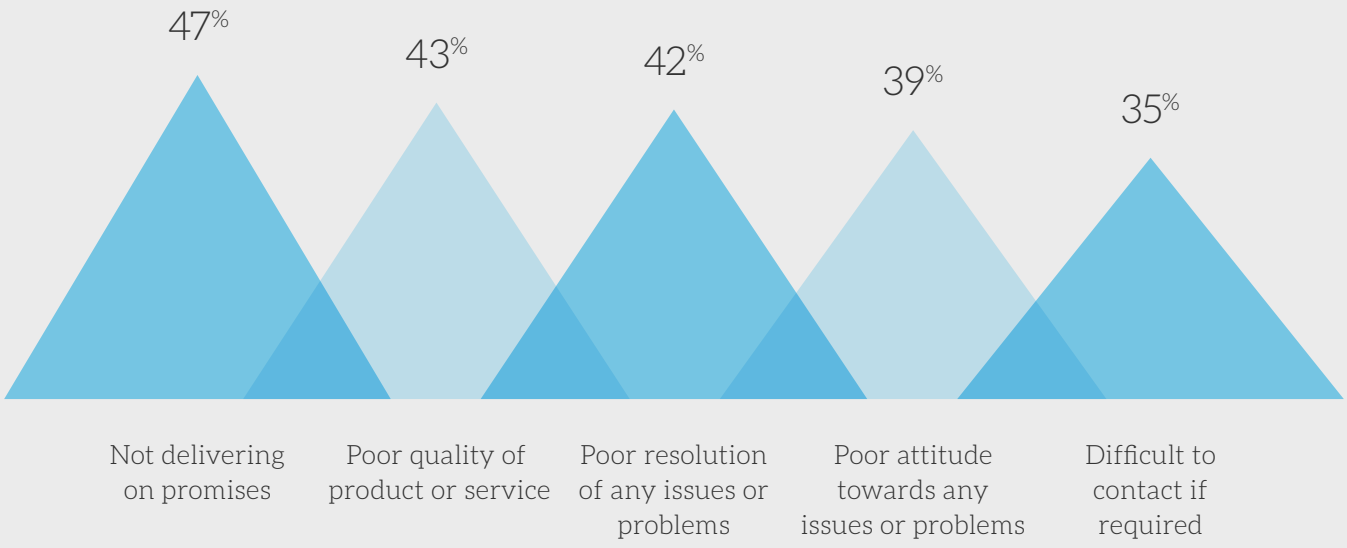
So it seems quite clear that post-sale customer experience is perhaps the most crucial part of the buyer journey when it comes to CX. But which specific elements of CX are most important at this stage? What is most likely to keep your customers coming back for more, or conversely, not renewing their contract when the time comes (or even ending it early)?

Buyers here are pretty unequivocal – we asked what would most likely cause them to end or not renew a supplier relationship, and the top answers were:

- Not delivering on promises (cited as the number one reason by 25%, and one of the top three by 60%)
- Poor quality of the product or service (cited as the number one reason by 20%, and cited in the top three by 49%)
- Poor resolution of any issues or problems (cited in the top three by 37%).

Furthermore, buyers **will follow through** with this: 47% said they have either ended or not renewed a relationship with a supplier because they did not deliver on their promises, while 43% have ended a relationship because of the poor quality of the product or service.

Top reasons for not renewing supplier relationships



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The results show there are clear benefits of going above and beyond

These top two reasons are arguably two sides of the same coin – no buyer would purchase a product or service in the knowledge that it would be below par, and all companies have a responsibility to deliver the high-quality product that has been promised both in marketing campaigns and by the sales team.

But how about not just delivering on what you promised, but actually going above and beyond, and exceeding customer expectations? The results show there are clear benefits of doing this: among the buyers who had a 'better than expected' experience with a supplier, a whopping 96% said they'd probably buy from them again and 91% would probably recommend them to a colleague or peer.

The marketer's perspective

Marketers believe the following are the most important factors when creating an excellent customer experience:

1. Understanding customers and their needs **(55%)**
2. Making it easy to do business **(37%)**
3. Delivering on promises **(36%)**

What's the value of customer satisfaction surveys?

A big proportion of marketers are still using customer satisfaction surveys to help them manage the customer experience – but are they really that useful from the customer's perspective? We asked both buyers and marketers for their views on customer satisfaction surveys, and although 73% of marketers who measure CX do so with surveys and 88% of all marketers said regular surveys help them improve the customer experience, buyers don't necessarily agree:

- 47% believe companies are unlikely to do anything about the feedback.
- 53% say the same issues tend to remain year-on-year despite the fact they've provided feedback.

But there can be value in carrying out surveys and making sure your customers know you're acting on the results: 82% of buyers said they would view a company more positively if it did run a satisfaction survey and actually acted upon the results.

Later in the report, Andrew Dalglish from Circle Research will highlight the steps you can take to make sure your customer satisfaction surveys are as effective as they can be.

How to achieve CXcellence

04

How to achieve CXcellence

1. Define excellence at each stage and for each interaction

- Map and quantify customers' needs and expectations at each stage of the journey.
- Conduct an audit of current practice and determine a capability gap.
- Create feedback loops to ensure CX is adapting to changing expectations.
- Cultivate a culture of constructive criticism.
- Carry out competitive evaluations to identify best practice and stimulate new thinking.

2. Create a joined-up and consistent plan

- All relevant departments must be on board and committed.
- Set clear objectives, which are ambitious but achievable.
- Departmental collaboration and linkages must be (re)defined.

3. Centralise ownership of CX

- Ensure all CX processes and engagements are robust and aligned.
- Create processes for interdepartmental collaboration and ongoing learning.
- Ensure all protagonists understand their role in the bigger picture.
- Marketing must take responsibility for driving business value from CX.
- Sales cannot 'own' the customer for the duration.

4. Establish a clear and balanced set of metrics

- These must be agreed by all relevant parties and reported to the board.
- They must encompass the full customer journey.
- By definition, this may be a disparate data suite – some could be difficult to access.
- The board must show demonstrable commitment by feeding back on progress.

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5. Make sure *everyone* gets CX

- Good CX is delivered at every touchpoint, therefore every employee plays a role.
- A company-wide ethos of CX must be established, and implications communicated.
- The board must live and breathe CX, and be its best advocates.

6. Engage the influencers

- Know your influencers. Who are they and where are they? What are their profiles?
- Tier them in levels of priority or accessibility.
- Audit or quantify their current relationship with your brand.
- Establish personal or brand relationships on mutually beneficial terms (ie. 'stop selling, start helping').

7. Build a 'customer alumni'

- Both formal and informal advocacy is essential to manage your reputation.
- Document and capture great CX via testimonials and case studies.
- Use storytelling techniques to bring these alive and propagate.
- Continue to engage with customers beyond the commercial lifespan of your relationship.
- Extend relationships beyond commercial relationship lifespan.

8. Embrace and respond to feedback

- CXcellence is never a given.
- Hard-won success can be quick to unravel.
- Ensure feedback is enshrined in corporate culture.
- Go out of your way to demonstrate you're listening – and responding.
- Where you can't change things, say why.

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The CXcellence checklist – can you say 'yes' to the following?

- ◯ We have mapped excellence in CX across the customer journey.
- ◯ We have clear, coherent metrics that are reported to and discussed by the board.
- ◯ We have a coherent and consistent plan.
- ◯ We are actively engaging influencers.
- ◯ All relevant departments are aligned and on board.
- ◯ We are building our customer alumni.
- ◯ Staff at every level understand CX's relevance to them.
- ◯ We cultivate feedback and demonstrably act on it.

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The marketer's perspective

- 70% of marketers say creating an excellent customer experience is a top priority.
- 84% say they'll be placing more emphasis on CX in the next 12 months.
- 52% say the experience their customers currently receive is 'good', but just 15% say it's excellent and 30% say it's 'okay'.
- 47% have not mapped out the customer journey and identified what makes a positive experience at each stage.
- Just 51% regularly measure the quality of the customer experience.

The biggest challenges marketers face in relation to customer experience management are:

1. Lack of clarity over who is responsible for the customer experience
2. Lack of action taken on customer feedback
3. Lack of strategic vision.

Which brands deliver the best experiences?

05

Which brands deliver the best experiences?

We asked buyers to name brands whose customer experience they'd been particularly impressed by, both in B2B and in B2C. These are some of the names that came out top:

B2B













B2C















Andrew Dalglish
Director
Circle Research

CX: From insight to action

If you don't measure, you can't manage. Among the B2B companies measuring the customer experience (disappointingly, only half of them), customer satisfaction surveys are the most common tool, used by 73%.

However, it seems many customers treat these surveys with cynicism. Consider these stats: 45% of B2B buyers believe that most companies don't listen to feedback from customer satisfaction surveys and 47% believe suppliers are unlikely to act on the findings even if they did listen.

So, how do you ensure that your customer satisfaction programme makes a positive difference? Here are nine golden rules:

Rule one: Create stakeholder ownership

Things don't happen unless people make them happen. So the first step in any customer satisfaction programme is to identify those who have the power, skills and motivation to drive action on the back of the findings. These critical stakeholders should then be invited to form a working group that shapes and owns the programme.

Rule two: Measure the right things

Before anything is measured, another group of key stakeholders needs to shape the research – your customers. A small selection of customers should be engaged to reveal the critical areas of their experience and potential drivers of satisfaction at each stage. This will ensure that the research provides a complete understanding of the customer experience and identifies the actions that will make the biggest impact.

Rule three: Prioritise

Once you know wha to measure, a survey can then be deployed to measure it. This survey should prioritise action areas so that your resources can be effectively deployed. To do so, avoid asking customers what matters most to them, as people often lack insight into their own motivations and in B2B environments there's a tendency to over-rationalise. Instead, use statistical techniques such as regression analysis to reveal the relative power of each area of the experience in driving overall satisfaction.

The first step in any programme is to identify those who have the power, skills and motivation to drive action

Rule four: Get the detail

To take action in each of these areas you need to know not only if there's a problem but also the exact nature of the problem. Therefore, be sure to include open-ended questions in the survey where customers can

give this valuable detail. Post-survey, you may also want to consider some further focus groups or interviews to explore in detail specific issues raised by the survey.

Rule five: Create a plan

Now comes the most important bit – doing something with all this insight. The first step is to craft it into an engaging story that brings the customer experience to life, clearly identifies any issues and details and what to do about them. Then reconvene the working group of key stakeholders, share the story and run a workshop that explores how to drive improvements. This session should result in an action plan with goals, responsibilities, timelines and targets.

Rule six: Cascade

This action plan is the most important output, but don't keep the insights in a silo. Rather, using an easy-to-digest format such as video or infographics, share the customer story across the entire organisation.

Thank customers for their support and tell them what you'll be doing to make their experience better in future

This will help to build a customer-centric culture and contribute to improved performance through a mass of small, spontaneous actions.

Rule seven: Create accountability

A small set of customer satisfaction KPIs should also be set and reported at board level. This will provide further impetus for action, especially if KPI targets are linked to bonuses.

Rule eight: Close the loop

Finally, feed back to customers. Thank them for their support and summarise the key survey findings – good and bad – and tell them what you'll be doing to make their experience better in future. This communication serves two purposes – it builds goodwill and it commits the organisation to action.

Rule nine: Repeat

Having created an action plan, action it! To measure the impact of these actions and further refine them, repeat your customer satisfaction survey on a regular basis. In B2B environments, that usually means every 12 months, which is a sufficient enough gap to allow actions to bite and really make a difference.

About

B2B Marketing

B2B Marketing is the comprehensive information resource for B2B marketers. Its mission is to provide practitioners with the information they need to perform better and achieve more, whatever sector of the B2B space they are operating in.

Launched in 2004 as *B2B Marketing* magazine, it has since evolved into a multi-faceted resource, delivering a broad range of content in a variety of different forms and formats.

Its key products are:

- Online community
- Magazine
- Awards
- Research and reports
- Training
- Events
- Membership.

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Circle Research

Circle Research uses market research to help clients solve business issues, grasp opportunities and develop competitive advantage. The average client engages Circle Research on more than four projects, and counting.

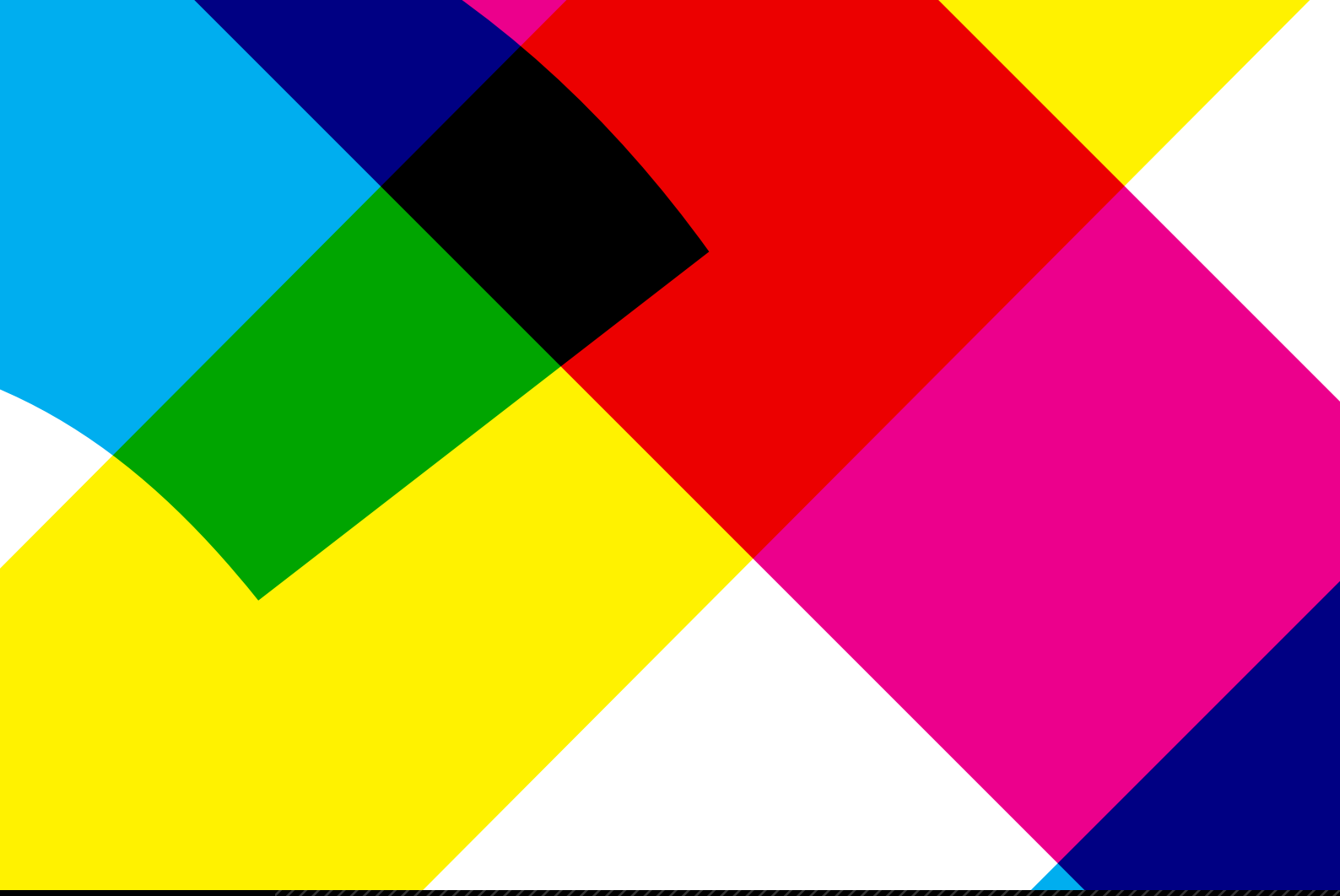
Here's why:

- The B2B market research experts – understanding your sector and seeing things others miss
- Multi-award winning – benefit from extensive experience and best-in-class approach
- Commercial acumen – receive commercially sound, engagingly presented recommendations that drive action
- International – seamlessly covering your entire footprint
- Delighted clients – you'll love the Circle experience.

Get in touch and let's talk about uncovering those Eureka! moments – insights that transform your view of the situation.

Call Andrew Dalglish, director at Circle, on +44 (0)20 7960 3802 or email him at andrew.dalglish@circle-research.com

Circleresearch
The B2B experts



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