

B2B customer experience management: A marketer's guide

Your step-by-step guide to designing
a marketing blueprint for CX success



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Section 1:

What are CX and CEM?

1.1 What is customer experience (CX)?

In the simplest terms, customer experience is the relationship between an organization and customer over the course of their interaction.

Which stages of a customer journey does customer experience encompass?

- › Customer attraction
- › Awareness
- › Discovery
- › Research
- › Cultivation of relationship
- › Purchase
- › Advocacy
- › Referral

Some elements of the customer experience involve active and direct dialogue between brand and customer; others, such as the early stages of discovery and research, are more indirect. As the customer makes their way along the customer journey, each touchpoint they happen upon shapes their overall experience of the brand in question.

“There is only one boss. The customer. And he can fire everybody from the chairman down simply by spending his money elsewhere.”

Sam Walton,
CEO of Walmart



1.2 What is customer experience management (CEM)?

Customer experience management (CEM) is the process by which an organization can influence, shape, monitor and measure any or all of the interactions which make up the customer experience.

Customer experience management can apply across a complete customer group or segment, right down to an individual customer.

1.3 Why CX matters more than ever

CX is becoming the new marketing: in commoditized, highly competitive markets where product features no longer drive purchase decisions and customer loyalty, it's how brands can truly differentiate themselves.

The proliferation of mobile, social media, user-generated content and the 'always on' customer means customers can experience and share their experiences of your brand across numerous touchpoints and media, more than ever before.

1.4 What can customer experience management do for your business?

Delivering a standout customer experience can reap many benefits for B2B organizations across each stage of the customer journey, including increased:

- › Pipeline opportunity value
- › Sales conversion rates
- › Word of mouth message reach
- › Customer lifetime value
- › Customer retention rates
- › Repeat purchases and up-sell purchases
- › Customer advocacy and referrals
- › Competitive advantage and point of difference
- › Revenue and profits

1.5 Who owns the customer experience?

Because the customer experience and its related touchpoints can impact on so many different areas of a business – from marketing to sales, product to customer support – ownership of CX and CEM can be a gray area leading to disconnect.

But increasingly, it is the marketing team that owns this function. Many global brands will now hire customer experience officers (CXOs) as well as heads of user experience (UX) – both of these functions chiefly concern the management of the customer experience.

Regardless of where CX ownership currently lies within your organization, marketing's opportunity lies in championing the customer experience, and seeking collaboration and CX buy-in from across the business.



1.6 How can you become a CX champion for your organization?

Acting as a CX champion for your organization requires a number of key character traits. A brilliant customer champion should:

- › Be an excellent communicator at all levels, and to both internal and external stakeholders.
- › Be able to understand, develop and fine-tune processes, and link customer data to both process metrics and KPIs.
- › Be a team player, able to motivate and inspire colleagues, and ensure the customer is kept front of mind at all levels.
- › Be a good negotiator, able to persuade different functions of the importance of placing CX-related metrics and KPIs at the heart of their strategies.
- › Have a broad understanding of the company's wider goals and the ability to link these to the CX strategy.
- › Be passionate about each and every customer.
- › Be a leader and agent of change.



A brilliant customer champion should be passionate about each and every customer



1.7 How can you embed a CX culture in your organization?

- › Ensure CX is discussed regularly at board level (or senior management level if you don't currently sit on the board).
- › Ensure you have a written customer mission statement which can help keep CX front of mind for all employees.
- › Determine who, within each department, can act as a CX champion: it might be a particularly enthusiastic member of the sales team or a colleague in marketing. And don't rule out junior colleagues: they can be great CX advocates.
- › Bring these CX champions together and form a CX team which has a shared understanding of the overarching CX goals.
- › Invite your customers to attend regular meetings: this will help put them at the heart of everything you do.
- › Provide training on how employees can deliver the intended experience and ensure the onboarding process for new employees underlines the wider organization's commitment to CX.

- › Make hiring decisions based on the individual's propensity to show a strong commitment to customer experience.
- › Give employees a certain degree of autonomy in decision relating to customers and create an open working environment in which changes to systems and process can be shared and discussed.
- › Forge feedback loops that allow employees to gather intelligence as quickly and easily as possible.

1.8 Incentivizing employees

Offering both formal and informal incentives for employees who demonstrate commitment to CX is one way of embedding a CX-focused company culture. Here are some ways to reward customer-centric behavior:

- › Connect customer experience goals and employee behaviors in formal KPIs and appraisals.
- › Consider offering cash incentives/bonuses for customer-focused employees.
- › Celebrate good behavior by highlighting excellent work via company-wide communications.



Section 2: Designing the customer experience

Your step-by-step guide

Step 1. Understand who your customers are

First, get a clear picture of what your customers look like – both as individuals and as companies.

Mine your database and make sure you have the demographics and transactional data that provide identifiable segments, including:

- › Company size
- › Company sector
- › Company location
- › Budget
- › Contact job title
- › Contact seniority
- › Contact purchase role
- › Purchase preferences and behavior

Step 2. Understand your customers' needs

Understanding your customer doesn't end with demographics. It's essential to identify and profile your customer segments based on their needs as business customers and as individuals.

Follow these approaches for collecting data to paint a clear picture of your customers' needs:

Data mining and analytics

Your CRM and marketing database is likely to hold a lot of data pertaining to your customers' needs – their buying patterns, purchase lead times, communication preferences etc. Be sure to get this data mined.



*Want to understand
your customers' needs?
Ask them*

Customer surveys

Want to understand your customers' needs? Ask them.

Incentivised customer surveys, across multiple media – online, postal, telephone – are an important tool in getting the insight you need.

Focus groups

A deeper dive than a customer survey, focus groups will enable you to really get under the skin of your customers and formulate hypotheses around their needs that can be tested through wider customer surveys as a follow-up.

Buyer persona creation

Buyer personas are a useful way of understanding and articulating who your customers are and what they need.

This B2B Marketing buyer persona template will help make the process of creating buyer personas straightforward, saving you time and resources. → *See next page*

Persona names

1.

From your data gathering and analysis, how many buyer personas have you identified? What names have you given each of them to identify them? You'll need a separate template for each one.

Data gathering

2.

Outline how you have collected the data that informs each buyer persona you have identified. Methods might include face-to-face interviews, tele-research, online surveys or analytics. Outline your approach across each of the groups and channels questioned:

- Customers
- Prospects
- The sales team
- Customer services/client support
- Database analysis
- Website behavior
- Social media and search behavior

Company profile

3.

What kind of business or organization does your persona work for? Think in terms of:

- Geography – is it a local business, regional, national, international or global? Where is it based?
- Size – how many employees are there and what is its annual revenue?
- Vertical – what industry type/sector is the organization in?
- Lifecycle – what lifecycle stage is the business in (e.g. start-up, growth, maturity, decline)?
- Business culture – how would the employees describe the organization's culture (e.g. fast-moving, innovative, agile, traditional, bureaucratic)?

Person profile

4.

4.1 Their job

- Age
- Gender
- Job title and job function/role
- Career path
- Tenure (how long have they been in their career and how long in their current role?)
- Reporting line

4.2 Their personality type

Are they likely to be any of the following?

- Process driven
- Results driven
- Very ambitious
- Go-getting
- Risk-averse
- Change-averse
- Open-minded
- Set in their ways

4.3 Their working life

- Goals
- Barriers to success
- Challenges
- Pain points
- Hopes and fears
- Motivators
- Feelings

4.4 Their role as a buyer

How do they source and consume information? Think about the media consumed, information sources, social media and influencers.

4.5 Their role in the decision-making process

- Budget versus influence: what is their degree of budgetary control and degree of influence on a purchase decision?
- Key decision criteria.
- Key success criteria.
- Likely objections to purchasing your solution.
- Preferred sales engagement experience – where/how do they prefer to buy and be sold to?

4.6 The problem and solution

- What problem are they looking to solve by making the purchase?
- What will their buying cycle look like? How long will each stage be?
- What will a successful solution purchase look like for them?
- What results will they want/expect to see?



Step 3. Understand what your customers do

The customer journey audit

The customer journey is the route by which an individual finds your brand/ product/service, engages with you, chooses you, enters into business with you, and interacts with you as a customer.

These journeys may differ by customer segment (the segments you've

profiled, based on the data collected in the previous steps).

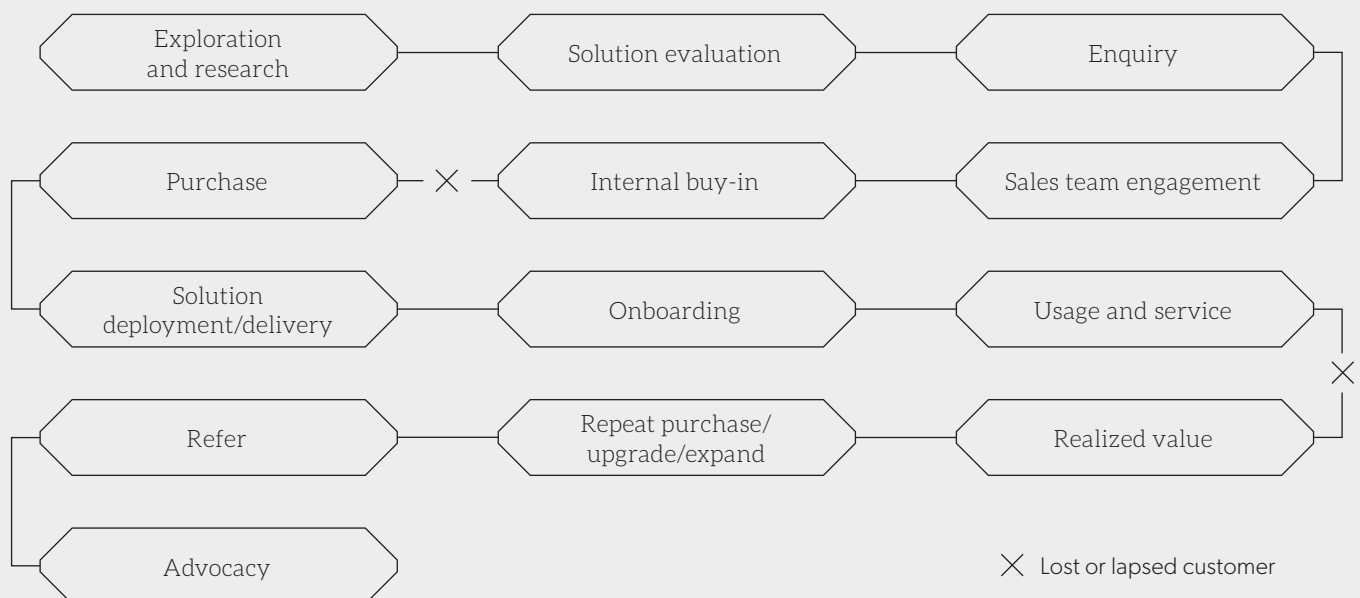
You may have more than one customer journey to identify. Ideally, you'll be focusing on your key customer segments, those with the highest:

- ▶ Spend
- ▶ Lifetime value (LTV)
- ▶ Retention rate

There will be opportunities to shape the customer experience at each key point on this journey – this is a fundamental part of your CX design process.

Map out each customer journey, stage by stage, for each of your key customer segments, identifying each pivotal point. The basis of the journey is likely to look something like this template (see graph below).

Remember that your customer journey won't always end in the same destination: customers may lapse or defect. You should design and manage the experience of these customers as much as that of your live customers, so build these routes into the journey map.



Step 4: Understand the role your business plays in what your customers do

Customer touchpoint audit

Once you've mapped your typical customer journey (or journeys), the next step is to identify all the key touchpoints where the customer interacts with your brand and/or organization.

These are the 'moments' that influence and impact the customer experience. The touchpoint audit is likely to encompass most, if not all, departments within your organization.

You may have varying degrees of influence over these different touchpoints, both as a marketing team and as a business. But it's important to map them all, so you can later focus your design process on those that impact the customer the most and on those over which you can exert the most influence.

When mapping out these touchpoints, it will help to group them roughly by stages of the customer journey. The basis of your touchpoint audit should look a lot like the template on the following page.



The touchpoint audit is likely to encompass most, if not all, departments within your organization

Basic template for your touchpoint audit

	Awareness	Discovery	Engagement	Sale, fulfilment and onboarding	Servicing
Customer touchpoints	<p>Owned media</p> <ul style="list-style-type: none"> › LinkedIn feed and Groups › Twitter › Website › Blogs › YouTube <p>Earned media</p> <ul style="list-style-type: none"> › Engaged LinkedIn users › Engaged Twitter users › Google search <p>Paid media</p> <ul style="list-style-type: none"> › LinkedIn › Twitter › Display retargeting › Paid search <p>Face to face</p> <ul style="list-style-type: none"> › Trade shows 	<p>Owned media</p> <ul style="list-style-type: none"> › LinkedIn feed and Groups › Twitter › Website › Blogs › YouTube › Email › Whitepapers › Webinars <p>Earned media</p> <ul style="list-style-type: none"> › Engaged LinkedIn users › Engaged Twitter users › Review sites <p>Real-time</p> <ul style="list-style-type: none"> › Trade shows › Breakfast meetings 	<p>Owned media</p> <ul style="list-style-type: none"> › Sales collateral › Case studies › Video testimonials › Email › Website and blog › LinkedIn › Twitter › Proposals/RFPs <p>Real-time</p> <ul style="list-style-type: none"> › Sales team – telephone › Customer services team – telephone › Sales meetings/pitches › Tailored inhouse events 	<p>Owned media</p> <ul style="list-style-type: none"> › Whitepapers › Blogs › User group <p>Real-time</p> <ul style="list-style-type: none"> › Invoicing › Warehouse despatch › User training › Courier › Customer support › Account management 	<p>Owned media</p> <ul style="list-style-type: none"> › Email – renewal program › Webinar education program › Whitepapers › Loyalty program <p>Real-time</p> <ul style="list-style-type: none"> › Account management › Customer support

Step 5. Design your CX blueprint

Once you've mapped your customer journey and produced your CX audit, it's time to bring the two pieces together into a CX blueprint.

Your CX blueprint will lay out the ideal customer journey, and define the experiences you will deliver at each key touchpoint to maximise success.

This is where the understanding of your customer that we covered in steps one and two of this guide becomes so important.

You'll need to apply your understanding of your customer – their professional characteristics and needs – to each stage and touchpoint, in order to design a tailored customer experience that delivers the right experiences at the right time.

The process doesn't have to be as complex or difficult as it sounds – here's what you need to do:

1. Bring your customer journey map and CX audit together into one plan, broken out into the key stages of the journey.
2. Agree what your customers want and need at each touchpoint on the journey.
3. Define how you want them to feel at each stage.
4. Bullet the actions and activities you will undertake to deliver against bullet points two and three above.

Tips for success – Dealing with silos

Organizational silos are an all-too-common pitfall when it comes to designing and managing the customer experience.

Silos create issues around ownership, prioritization and consistency. Don't try to fix these issues in the blueprint stage. But be prepared for them by noting against each touchpoint the current owner within the organizational structure and recognizing where there is a significant gap between the current and the desired experience.

CX Blueprint template

An example of the ‘Solution deployment/delivery and onboarding’ stage of the customer journey

OWNED MEDIA					
	Owner	Customer needs	Desired customer feelings	Activities and actions	Gap
Whitepapers	Marketing	Product user best practice and information on measuring and reporting	Confident, informed, supported	Three new-user whitepapers delivered in weeks one–three following purchase	Two more whitepapers needed
Blogs	Marketing	Tips from product users on how to deliver success fast	Confident, informed, supported	Five up-to-date blogs for new product users	Need updating
User group	Marketing	Share questions and new user experiences to gain feedback and user solutions	Part of a community, belonging, supported	User group maintained and promoted across website, blog, Twitter and email newsletters	In place
Email	Marketing	See three sections above	See above	Four-stage automated email welcome program beginning on day one of customer activation. Week one–three promoting whitepapers and providing links to new-user blogs and the user group. Week four email focused on user group and training options	No welcome program currently in place

CX Blueprint template (continued)

An example of the 'Solution deployment/delivery and onboarding' stage of the customer journey

REALTIME					
	Owner	Customer needs	Desired customer feelings	Activities and actions	Gap
Invoicing	Finance	Clear detail of the purchased. P/O number quoted	Trust	Invoice sent within 24 hours of signed purchase agreement, listing chargeable product features and including customer P/O number	Chargeable features not currently listed
Warehouse despatch	Fulfilment team	Delivery in three working days following signed purchase agreement	Valued	Automated email notification on day of purchase agreement specifying target delivery date. Automated email one day after delivery date checking customer is happy	No current delivery communications in place
Courier	Third party	See above	Valued, trust	Ensure courier takes proof of receipt, to be fed back to CRM	Currently in place
Customer support	Customer support	Office hours access to proactive telephone and email support enabling fast uptake of successful product usage	Confident, informed, supported, valued	Weekly CRM scheduled onboarding call to check on customer needs, beginning one day after delivery	Onboarding calls are currently random and not scheduled
Account management	AM team	Support with any queries that go beyond standard new-user onboarding to help achieve first agreed success milestone	Valued, supported	Account management call scheduled for end of week two following delivery. First success milestone agreed, monitored and reported on. Any AM opportunities identified by customer care calls to be scheduled as tasks in CRM by customer care exec	Account management new user follow-up calls not currently scheduled



“Most marketing organizations have people focused on demand, but almost no-one focused on supporting customers after they buy”

Megan Heuer, VP research at SiriusDecisions

Tips for success – After-sales support

All too often, businesses switch off the engagement after the contract has been won, leaving the buyer feeling undervalued and unsupported.

Successful B2B CX leaders cite after-sales support and onboarding as the most important part of the customer journey, and prioritize it two to three times more than their peers. They know loyal customers are made directly after the sale.

Formalise the customer onboarding process including all communications, available media and options, and then roadmap the first successes.



Section 3:

Customer engagement

3.1 Marketing automation and CX

No company has the manpower, time or resources to follow up with every single prospect or customer that interacts with its brand.

Marketing automation (MA) is indispensable for successful CX management because it allows you to design, control and scale your customer engagement activities with minimum resource. So build your MA plans and activities into your CX blueprint.

The most effective first step for MA is the automation of email marketing. This includes:

Personalisation

Anonymous communications don't make for a great customer experience. What's more, 74% of marketers say personalisation increases customer engagement.

Make sure your customer experience feels as personal and human as possible by personalising your automated email content.

Real time location-based messages

Location-based email marketing gives you the opportunity to enhance your

customer experience by delivering content to them at the right place and at the right time.

Think trade shows, seminars, training sessions, show rooms, hospitality events – any experience that is location-based can trigger messages that provide real value in real time.

Behavior-based messages

Email MA enables you to automate key aspects of your CX management, based on customer behavior and actions.

Tailored, personalized email messages and message streams can be triggered by tracking customer action, engagement or interaction with your brand.

Remember that you will have also tracked the journey of lapsed and lost customers in your blueprint. MA can help here, with automated:

- › Renewal programs
- › Reactivation programs
- › Abandoned cart emails
- › Abandoned webform emails

Lifecycle-based messages

Lifecycle-based marketing is about ensuring specific messages resonate with prospects and customers at the right point in their lifecycle or customer journey.

Creating automated message streams that trigger when a customer moves from one stage to another will enable you to tie your automated emails to the customer journey. As a result, this enables the delivery of highly relevant and engaging content which enhances the customer experiences of your brand.

Here's a simple way to group lifecycle messages:

- › Interested prospects
- › Engaged customers
- › Lapsed customers

Cross-channel marketing automation

Beyond email MA, cross-channel automation offers even greater opportunities to shape and control your customer engagement and CX efficiently and effectively.

Once you've nailed email automation, build cross-channel MA into your CX blueprint, including:

- › SMS push notifications
- › CRM
- › Social CRM
- › Dynamic website and landing page content

Beyond email MA, cross-channel automation offers even greater opportunities to shape and control your customer engagement and CX efficiently and effectively



3.2 Brand experience

Delivering the brand promise

At the core of your brand lies the promise, the unique and resonant change you vow to deliver your customers. Your brand promise is supported by other key branding elements that you can build into your CX:

- › Tone-of-voice
- › Visual identify
- › Personality

Each of these elements should work on an emotional and personal level, eliciting an emotional response above or alongside a rational one. Each touchpoint and activity in your CX blueprint should be planned with these branding elements in mind.

Be sure that the language and tone-of-voice used across all messaging and communications is consistent and on-brand.

Emotion in CX

“Business customers favour brands that demonstrate personal value through emotional appeals.

“B2B customers are more than twice as likely to consider a brand that shows personal value over business value.”

*CEB/Google 2014 B2B survey
Forbes.com*

Each time your customer interacts with your brand, they will experience an emotion – either negative or positive. Here are the key customer experiences emotions most commonly in play:

Negatives

- › Frustration
- › Disappointment
- › Anger

Positives

- › Surprise
- › Gratitude
- › Reassurance

The most successful brands create and inspire these positive emotions through each touchpoint along the customer journey, and eliminate the negatives. They understand that emotion accounts for at least half of the customer experience.

Focus your emotional engagement efforts on the critical touchpoints in your customer journey – the delivery process, onboarding process, and complaints handling process, for example.

By implanting positive emotional responses into the most tricky, critical and potentially negative stages of the customer journey, you can create an overall positive CX perception.

“Open, honest communication is the best foundation for any relationship, but remember that at the end of the day, it’s not what you say or what you do, but how you make people feel that matters the most”

Tony Hsieh,
CEO of Zappos



Section 4:

Measurement and reporting

As with all areas of marketing, in the eyes of the board, investment in CX management is futile if outcomes can't be measured, returns attributed and results reported on.

Identify your KPIs, based on the objectives behind your CX initiative. Be clear about which customer behaviors and/or outcomes you're looking to change, think:

- › Cancellation rates
- › Repeat purchase rates
- › Pipeline conversion rates
- › Customer average order value (AOV) or lifetime value (LTV)
- › Customer referral rates

Commit to measuring the variables that will impact on these KPIs as a result of your

CX management initiatives, including:

- › Customer satisfaction survey results
- › Net Promoter Score (NPS)
- › Sentiment analysis scoring

Customer satisfaction surveys

Focus your customer satisfaction surveys on specific, key points throughout the customer journey so you can:

- › Identify the weak links
- › Understand and learn from what you are already doing well
- › Measure what really matters

Consider surveying your customers after each stage when the experience is fresh in their memories, i.e. right after the purchase and onboarding stage or directly after renewing.

Be sure to ask the same questions year on year so you can identify trends and track progress.

Net Promoter Score (NPS)

NPS is a widely adopted way of measuring an average satisfaction score without focusing on the granular elements of customer satisfaction on the customer journey.

Instead, NPS focuses on just one single question: How likely is it that you would recommend our company/product/service to a friend or colleague?

The scoring for this answer is most often based on a scale of 0–10 with respondents grouped into Promoters, Passives and Detractors. As a benchmarking tool for the effectiveness of a CX management programme, NPS is an obvious choice.

Tips for success

Reciprocity

Learning about your customers' satisfaction levels is fundamental, but there's a secret to taking this to the next level in order to deliver even greater CX success – and that's reporting your findings and plans back to your customers.

Reporting back can be as simple as sending them an email outlining the key issues and explaining what actions the company will take to make their experience better.

The fact you've listened, created a plan and are sharing it with them will make them feel valued – even indebted (the principle of reciprocity).

Sentiment analysis

Social media has given marketers free access to a complete world of customer sentiment, previously hidden behind closed office doors.

Fortunately, there are many listening tools to help you mine this sentiment and track how your customers' attitudes to your brand are changing. Some of our favourites include:

- › **Meltwater:** Assesses the tone of online commentary and mentions involving your brand
- › **Google Alerts:** Get email notifications any time Google finds new results on a topic that interests you
- › **People Browser:** Find all the mentions of your brand, industry and competitors and analyse sentiment
- › **Google Analytics:** Breakdown your website visitor data and gain insights into their online experiences
- › **Hootsuite:** The premium subscription provides enhanced tracking and monitoring of your social networks channels
- › **Social Mention:** The social media equivalent to Google Alerts.

CX analytics

Your CX analytics will be made up of tracking across each of your key customer touchpoints:

- › Website user data and UX analysis
- › Email engagement metrics
- › Pipeline metrics
- › Customer transactional data
- › Customer satisfaction survey results
- › Net Promoter Score
- › Sentiment analysis scoring

Although behavioral analytics such as Google Analytics can shed valuable light on the online customer experience, it will only tell a piece of the story.

Combine your online UX analysis with the attitudinal data collected through surveys and interviews, and customer transactional data from your CRM, to create an index of CX metrics that will drive success.

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