



Deliver the consumer experience business customers crave

Three key steps to increase
the power of B2B personalization

B2B customers have craved buying experiences similar to those in their daily lives as consumers for years. For example, a [Salesforce study found](#) 70 percent of business buyers want an “Amazon-like” buying experience from their vendors and 74 percent of business buyers expect vendors to provide personalized experiences.

This is even more true recently, with typical B2B in-person sales interactions completely upended.

B2B customers increasingly demand the same seamless, personalized path-to-purchase with features like overnight delivery, BOPIS, and flexible returns.

Most notably, B2B customers want more efficient self-service tools, so they can access their account and easily reorder without needing to go through a salesperson, and products and services specifically tailored to their role, company type, and buying preferences.

B2B personalization challenges and opportunities

However, even fairly mature B2B companies haven't figured out how to tailor services, content, workflows, and messaging for customers. Personalization requires the right organizational capabilities and cross-department collaboration to support improved customer experience across all touchpoints. It also requires connected technology capabilities that can gather the right information and deliver the best data-driven insights across channels.

Unfortunately, few companies possess the deep, granular customer segmentation that defines B2B customer journeys in order to discover unique selling opportunities. With the right roadmap, however, they can begin the process with these key steps.

Define B2B customer journeys

The right analytics program can help companies begin to fully understand the entire path to purchase. There are two key differences in B2B customer data: the relationships last much longer and the journey is more complex because it involves numerous roles as well as supply-chain partners. The variety of touchpoints, longer lead-times, and entangled purchase workflows are much more involved. Understanding these steps and then refining and optimizing them so that they are streamlined and in the right order are key to building the seamless, friction-free experience buyers now expect.

Understand B2B customers in context

It is important for companies to understand the context of every B2B buyer – including their industry, role, location, and challenges they face – and how these cues impact their purchase (or recurring, multiple purchases). With this information on hand, companies can develop relevant, targeted recommendations and workflow notifications for the employees based on accurate, actionable data-driven insights and online consumer behavior.

Tackle B2B personalization at scale

A holistic customer data strategy and roadmap can target B2B customers in the right way at the right time, at scale. A successful program organizes data into key segments and understands the value of each: identity, quantitative, descriptive, and qualitative. This new data foundation can identify specific behaviors that will help develop tailored offers and relevant content and empower self-service capabilities with customizable options. With those capabilities in place, companies can create an unbroken, end-to-end B2B experience without limits.

The evolving roadmap towards B2B personalization

Historically, personalization has typically been more focused on product recommendations and “you may also like” functionality, as opposed to establishing a deep understanding of the customer at the qualitative level: that is, what they are trying to solve, what the brand means to them today, and how the brand value proposition resonates as it evolves over time.

Personalization has been, up until now, a missing piece. However, expectations of B2B customers will continue to grow, and no matter what the future holds, those buyers will continue to demand the same seamless yet personalized experience they get when they press “buy” on Amazon.

Increased customer loyalty, renewed brand affinity, and new customer acquisition are a few benefits of a well-executed personalization strategy. Programs can also reduce operating costs due to more efficient, integrated systems that allow for self-service, cross-organizational communication, knowledge sharing, and streamlined customer service.

Clearly, it is not something that companies can ignore if they want to succeed in B2B. Now is the time to consider the technological capabilities and operational design necessary to provide the personalized digital customer experience that today’s B2B buyer craves.

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