

# A Guide to Building Customer-Centric B2B Experiences



LET'S STATE THE OBVIOUS...

## B2B Brands Require a Unique CX Approach

B2B organizations sell products and services to other organizations to enable the end customer to benefit—and this makes collecting feedback from the right party a lot more difficult than it is for B2C companies. In a B2B environment, instead of receiving feedback from the end customer, feedback is required along the journey and includes the different departments, organizations, and channels that enable the product or service to be delivered to the end customer.

Improving experiences as a company that sells products and services to companies with multiple lines of business, various stakeholders, and competing priorities requires a completely different setup than traditional B2C companies. However, many of the fundamentals of customer experience (CX) success remain the same.

## The CX Opportunity for B2B Brands

Many B2B companies state that customer experience is a priority, but it seems that the path to B2B customer experience isn't as direct as it is

for B2C. According to Forbes, B2B companies have an average customer experience score of less than 50%, far lower than 65%-85% for B2C companies.

And while that statistic may seem bleak, it actually reveals an incredible opportunity for B2B brands to improve experiences (and the bottom line). In fact, a recent Salesforce study supports the need for building a customer experience focus, with 80% of customers saying that the experience a company provides is just as important as its products or services. This is confirmed by the same proportion of B2B buyers (86%) who are willing to pay more for a great customer experience.

It's clear that B2B companies have a lot to gain from investing in customer experience: be it increasing competitive advantage, strengthening customer retention, winning new clients, and beyond. But how can B2B businesses design their CX programs to be successful in their unique environment? This will break down everything you need to set the stage for a revenue-driving program. Let's jump in!



## 8 Steps Towards Building a Customer-Centric Culture

In the world of B2B, there is often a lower volume of customers, which means less feedback data. Although there might not be as many customers, each customer can have a massive impact on revenue. Failure to listen and act on what your customers are saying could lead to businesses not renewing contracts and losing out on business deals in the future.

Creating a customer-centric culture forms the foundation for delivering and improving B2B experiences. The most successful B2B experience programs have one thing in common: they have changed and installed a customer-centric culture. By instilling good habits, creating a strategic focus and engaging employees and customers, your organization can create solutions that solve customer problems and enhance experiences so that businesses want to use your organization again and again.

Throughout our decades of experience helping the world's top B2B organizations, we've uncovered eight key steps towards achieving a more customer-centric culture—and how you can adapt your organization's mindset to achieve better, stronger business relationships and increase satisfaction. They are as follows:



# Be Committed

B2B businesses often have a sales-oriented mindset and shifting to a customer-centric paradigm can be challenging. As business models and strategic priorities change, it's more important than ever to level-up in the world of customer experience.

To show the value in customer feedback, you must align your CX goals to your overall business objectives. To develop and promote a customer-centric culture, all internal stakeholders, from C-Level to frontline, must be able to understand the benefits and value, both culturally and financially.

Having clearly defined CX KPIs that drive business outcomes will allow you to showcase the value of your CX program and prove the ROI to internal stakeholders in order to gain executive buy-in and promote a customer-centric culture throughout the organization.



## OUR TOP TIPS:

### ✓ **Align Your CX Measures to Business Objectives**

Identifying specific leadership objectives will help you create a CX program with KPIs that can influence this goal. Driving action in these areas will ensure your program supports and helps to achieve the broader organizational goals and will allow leadership to see the value in customer experience.

### ✓ **Educate Internal Stakeholders**

Once you define your CX goals, you must take care to infuse them across hiring, training, coaching, and professional development initiatives to build and nurture a customer-centric culture for the long run. Clearly communicate to employees the benefits of focusing on customer satisfaction and help them understand what delivering success looks like.

### ✓ **Share Customer Insights**

Feed customer insights across the business from account management teams up to the leadership. Work with them to ensure customer stories are communicated back through the organization and aligned with the overall vision of the company. This is critical for transformational success—people follow leaders, and their commitment and communications can build understanding, empathy, and engagement in teams, which drives positive cultural change.

## STEP 2

# Deliver a Consistent Customer Journey

Delivering a great B2B experience also means providing a consistent experience at every touchpoint—digital or physical. B2B purchasing often involves different buyer personas along the journey, and it is common for multiple channels to be used in a single purchase.

Ensuring consistency across different channels and departments within your organization is key. To remain consistent throughout the customer journey, no matter how they interact with you or what department they are interacting with, you must ensure they are getting the same message and experience whether it's from your webstore, phone, or face-to-face. Customers expect a seamless and consistent B2B experience, even when they switch between channels.

By analyzing the customer journey and identifying different interactions and buyer behaviors, you will learn what has motivated them to purchase, why they considered you, and the emotions behind their interactions. A key part of building customer loyalty is driven by a customer's broad perspective, including not just channel experiences, but also product experiences and marketing communications.



## OUR TOP TIPS:

- ✓ **Build Specific Customer Journey Maps**

If you haven't done so yet, start by building a customer journey map to identify every potential customer touchpoint and your buyer personas. Pinpoint opportunities throughout your business to add value and look for sources of friction and delay to take action and remove them.
- ✓ **Identify Customer Priorities**

Understand your customers' preferences and identify the points of success. Every interaction with a customer holds the answers to how you can improve your business, retain customers, and determine cross-sell and upsell opportunities appropriately. One of the keys to success is to actively listen to your customers throughout the entire customer journey.
- ✓ **Deliver Consistent Multi-Channel Experiences**

Along a typical customer journey there are endless touchpoints—identify and prioritize the high-impact and high-emotion moments to connect your brand to your valued customers from end to end. Ensure that customer listening points are ingrained across the journey to allow customers to provide feedback and interact with you with their preferred form of communication.



THOMSON REUTERS

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Thomson Reuters is a leading provider of business information services. The business underwent a restructure, reimagining almost every aspect of its operations in order to put the customer at the center.

Working with InMoment, six of the most important customer journeys were mapped out to develop clear and concise questions to ask customers to help the company gain a better understanding of what needs to be done to improve their service to their clients.

**“Partnering with InMoment on the journey-mapping framework was a very valuable exercise, we cut our broad 60-question survey down to just 8 targeted questions—a reduction of more than 86 percent that makes the process fast and frictionless for the customer. With our journey and transactional surveys, we can drill down even deeper. For example, if we bid for a contract and aren’t awarded it, we can run a targeted survey to understand why, and identify what we need to do to improve. Deeper still, we run transactional surveys to identify sources of friction in key processes, such as billing and account management.**

[Read the full Thomson Reuters Story here!](#)

## STEP 3

# Increase Feedback Response Rates

The goal for collecting customer feedback is to receive the maximum insights into your most pressing questions. However, if you aren't asking the right questions or reaching your target audience then the insights are irrelevant. In B2B, feedback is less frequent, so when you do ask for feedback, a high response rate and detailed responses are crucial in order to gain an understanding of your customer's emotions at the most important moments, and gain enough insight to make informed decisions and take action.

Think about the way you collate feedback, are you asking the right questions at the right time to the right person? Does your feedback experience reflect your brand and messaging? Does the feedback you receive help you achieve your business goals?



## OUR TOP TIPS:

### ✓ Identify Friction Points

Mapping out the key friction points where you need to receive your customers' opinions will allow you to really focus on the problem points and gain meaningful insights on what matters most to your organization to report back to the business and take informed action.

### ✓ Ask the Right Questions

Asking shorter, open-ended questions that get to the point will help in lowering survey abandonment. Leaving feedback shouldn't be a burden—by asking the right questions at the right moment, you'll gain quality insights that can be used to report on what changes need to be made to improve experiences in the future.



## STEP 4

# Understand and Deliver on Customer Needs

Business buyers are often under a lot of pressure. They have budgetary responsibilities as well as strict deadlines. By understanding their needs and expectations of what you can offer, this allows the customer to trust that you understand their requirements and deliver what they need.

Knowing who you are dealing with and their influence on the purchase is crucial to be able to understand what matters most to them and how your business can help. Getting to know the individual you are dealing with (rather than just the business) will allow you to understand the specific requirements they need to meet, such as deadlines and internal processes. Developing valuable customer insight for each and every customer underpins the delivery of great customer experience.



## OUR TOP TIPS:

### ✓ Analyze the Customer Lifecycle

Identify where along the customer lifecycle your client is and ask questions that focus on particular parts of the journey so you are able to pinpoint what is working and what needs to be improved. With this key information, you will be able to gain a clear picture of the whole story and understand your customers in more detail—and take action to deliver on their needs.

### ✓ Listen to All Feedback

Unstructured feedback gives us the opportunity to broaden our horizons and consider additional sources of information. B2B feedback is often less frequent than in B2C. However, the stakes are higher in B2B as all customers are of a higher value to your business. Losing just one customer due to a poor experience can result in loss of revenue, whereas if you listen and act upon their feedback, the customer is more likely to be encouraged to increase their order value and expand their account to do more business with you.



## STEP 5

# Anticipate Customer Needs and Be Responsive

Ease of doing business is a strong driver of loyalty in B2B. Finding opportunities to reduce cost, time, and effort are major relationship enhancers.

By listening to your customers, you can identify action items within their feedback and take action to be responsive and solve their problems. Learning from these issues will also help you to anticipate customer needs for the future and utilize the insights to improve your offering and build stronger relationships.

If you receive feedback from a customer with a specific CX challenge, it is highly likely that other customers in a similar environment are experiencing the same issues and are looking for guidance. By keeping up to date with what your customers are saying (and external factors that can affect their customer journey), you can be proactive and reach out to them before they have even asked for guidance and offer a solution that suits their needs at that current moment.

The ability to resolve issues quickly and reliably is paramount. In the B2B environment, customers are always working under deadlines. Resolving issues when they occur and receiving updates along the way can make the difference between a satisfied customer and an angry customer.



## OUR TOP TIPS:

### ✓ **Implement a Closed-Loop Case Management Feedback System**

Closing the loop is essential to any organization; responding to customers issues drives both loyalty and retention. Even an upset customer is much more likely to stick around if a brand truly listens to them. There is no easier way to lose credibility than by asking for feedback and doing nothing with it—companies that do this risk worsening an already bad experience. A well-developed loop-closing process highlights problems that brands may not even know are occurring.

### ✓ **Listen to Employee Feedback on Customer Issues**

Employees who participate in the closed-loop process and see change occur because of it will feel more engaged because they feel they can truly make a difference in their workplace. Employees dealing with customer issues are the face of your organization, and giving them the knowledge to solve problems as soon as they occur gives them the power to turn negative experiences into positive ones.



## DSV Panalpina Won the Award for Best Customer-Centric Culture at the CX Elite Awards 2021

With a global presence in 85 different countries, 45,000 members of staff, and more than 250,000 customers, DSV is one of the five largest transport and logistics companies in the world.

DSV Panalpina wanted a structured Voice of Customer (VoC) program that integrated customer-centric culture into the DNA of the company, bringing the added value of customer experience to the core of all the company's deliveries.

Working with InMoment, DSV implemented a customer journey based closed loop feedback process. Now, in less than a second after a DSV customer has submitted their feedback, an individual alert is sent directly to the inbox of the person responsible for DSV's relations with that particular customer. The account owner has 48 hours to respond to undertake service-recovery measures, should the customer be dissatisfied. Previously it took up to 10 days. As a result of this, customer follow up activities have increased from 60 to 95%.

**“Being able to see feedback in real time and react immediately is what makes this such a strong tool. Individual account owners are able to solve issues and at the same time increase customer retention. We are delighted that we are able to increase customer engagement for DSV and as a result provide them with opportunities to grow their business with them.”**

[Read the full DSV story here!](#)

## Explore All Your Data

A common pain point for B2B organizations is that internal systems and IT infrastructure holds various operational and customer data in different systems, resulting in data silos. When it comes to customer experience, companies should be analyzing multiple sets of data in one central platform to gain a holistic view (including omnichannel, post-transactional, call center, loyalty, and feedback data) in order to truly understand their customers' journey.

Customer feedback is inherently valuable in uncovering friction points and areas of opportunity. However, the more contextual data you append to customer feedback (e.g., financial, operational, digital, and CRM/loyalty), the richer the subsequent knowledge becomes. This helps you see the bigger picture, identify all of the potential factors that influence customer experiences, and understand how it all ties back to the bottom line.



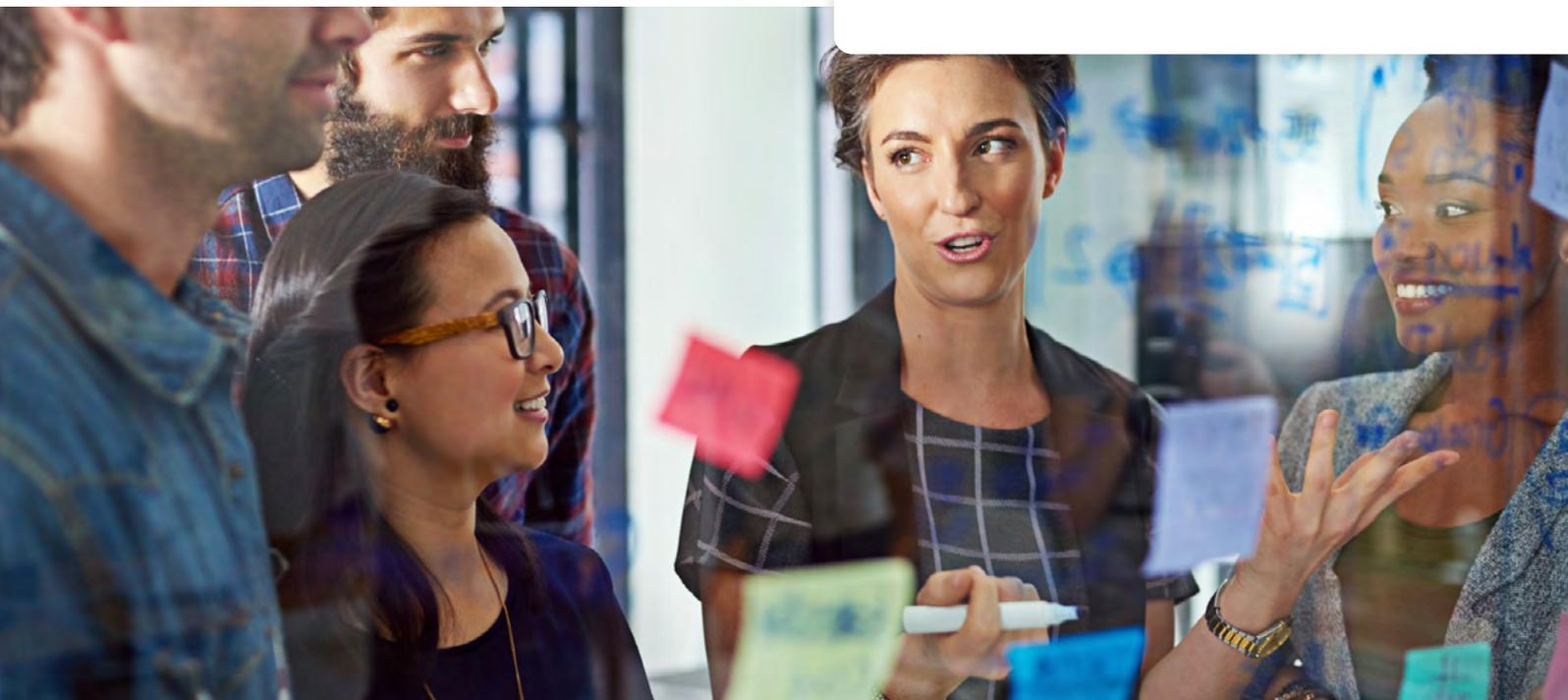
### OUR TOP TIPS:

#### ✓ **Combine Multiple Data Sources**

Having a CX program which consolidates all types of data in one place allows organizations to improve the business performance in multiple areas, reducing manual intervention, easily accessing new data, and the knowledge to resolve customer issues and prevent them from happening in the future.

#### ✓ **Gain a Holistic View**

To get the clearest possible picture of the customer and their experience, it makes the most sense to take a holistic approach rather than a segmented approach. A holistic view of customer data via visual dashboards is an irreplaceable component of a unified platform, as they give users an overview of relevant insights that can easily be shared in meetings or exported.



# Build Trustworthy Relationships

Engaged customers are more satisfied, more loyal, and more likely to promote your company than unengaged customers. They go out of their way to show their association with your company. Gaining a true personal understanding of your customers allows you to understand their priorities and challenges so you can communicate with them on a human level and provide help where needed.

Knowing your customer and knowing when to engage with them is fundamental to the customer. Once you know your customer's situation you will be able to use your knowledge to help them with what they want to achieve and in turn they will trust you to help them in the future and know that they can rely on you.

Typically in B2B, the account manager will deal with their customers on their own and know the ins-and-outs of their accounts. This is great for building personal relationships, however, by getting to know more than one person in the organization and forming multiple relationships, the account has more of a chance to grow and expand.



## OUR TOP TIPS:

### ✓ Know When to Engage with Your Customer

Providing relevant suggestions based on your understanding and knowledge provides value driven cross-sell and upsell opportunities which can increase order value. By taking a look at your customer data you will be able to see what products they have purchased in the past, if they were happy or not, and the reasoning behind their experience and predict what they will need in the future.

### ✓ Be Human in Your Responses

Be acutely responsive to customer questions, comments, and complaints. Often, these are your most loyal customers. If you resolve a complaint quickly, you can actually grow loyalty.

### ✓ Analyze Emotions

Sentiment analysis is the next big thing when you're moving from "managing" experiences, to actually improving them. Overlay emotion analysis like "annoyed" or "happy" to understand what customers are really feeling.

## Continually Improve

Last, but definitely the most important step, is to keep up with all of the above and use your knowledge of the customer and feed it back into your business to continually improve not only your customer-centric culture but also improve your customers' experiences.

For true business transformation, a [continuous improvement framework is key](#). The key to taking an experience program past metrics is to move beyond monitoring customer feedback and stories and focus on the formation of actionable plans for improvement. Customer narratives contain meaning that companies can use to diagnose both superficial and deep-seated problems, define remedies to those problems, positively impact the bottom line, and create more meaningful experiences.

By knowing where your business is, you will be able to see where you sit within the market and where your competitors are.



### OUR TOP TIPS:

#### ✓ Learn From Your Data

Use your data to search through comments on common trends and recurring themes so you can start to map out frequent topics and put action plans in place accordingly. You can also compare your data within different locations of your business. If one particular site is overachieving and one is underperforming, use this knowledge to create training plans to get every location up to a consistent performance.

#### ✓ Learn From The Market

Keep up with the latest news and current affairs so you can speak with your customers on what matters to them and learn about how your business can help, this will also strengthen your relationships as it shows you are knowledgeable and invested in their business.



## Improving B2B Experiences with InMoment

The right data. The right technology. The right people and expertise. Which moments matter most to your organization? Get in touch to learn more on how we can help your organization build a purpose-built, outcome-oriented, leading indicator machine focused on acquiring new customers, retaining them longer, increasing their value, and making them less expensive to serve.

### To request additional information, contact

NORTH AMERICA  
1 800 530 4251

APAC  
61 (2) 8397 8131

UK & IRELAND  
+44 (0) 1494 590 600

GERMANY  
+49 (0) 40 369 833 0

Learn more at [inmoment.com](https://inmoment.com) or email us at [sales@inmoment.com](mailto:sales@inmoment.com)