

ARCHITECTING

THE ULTIMATE B2B CUSTOMER EXPERIENCE

INTRODUCING

THE 4 BRAND SUPERPOWERS
THAT MAKE IT HAPPEN



MERKLE
— B2B —

gyro
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Foreword

Business-to-business marketers find themselves at a critical juncture. At a moment when they should be empowering salespeople, leading the sustainability agenda, and communicating never-before innovations, many B2B companies present a frustrated – perhaps ostracized – marketing function, short on C-level influence and straitjacketed into a tactical promotional role.

Across 5,000 B2B studies spanning 22 years, we have seen that many companies lack the risk appetite of their B2C counterparts when seeking to meet customer needs. Where online retailers and fast-moving consumer goods (FMCG) manufacturers frequently drive continuous improvement, adapt at scale and speed, and develop emotionally engaging brands, B2B suppliers have a tendency to satisfice. Customer expectations are too often assumed to be static; brands are seen as peripheral to day-to-day operations.

B2B International and our colleagues at Merkle B2B are passionate about ensuring that customers of B2B suppliers receive the world-class solutions they deserve. We partner with our clients to architect the ultimate B2B customer experience. Buyers of B2B solutions are remarkably demanding, highly sophisticated, and dynamic. We have uncovered four “Superpowers” that will help marketers meet the needs of these decision makers and deliver the ultimate B2B customer experience.



Tailored insights are the only way to truly understand a specific B2B audience. However, it is informative, as a starting point, to understand the B2B buyer as a typology. The study featured below is one of the most robust explorations ever conducted into the B2B customer. Based on thousands of interviews with senior B2B decision makers, we set out to answer the most crucial question for every B2B marketer: How do we architect the ultimate B2B customer experience? We begin with the overall picture before drilling down into specific types of customers.

The findings of our study are striking in their characterization of B2B customers as sophisticated, emotional, dynamic, and thirsty for partnership with suppliers. Crucially, there is a blend of “business value-add” and “personal value-add” needs that must be met. The implications for B2B marketers are profound: the customer of today seeks a B2B partner, yes, but just as importantly a colleague, advocate, and thought partner enabling the decision maker to improve and progress as an individual.

About this study

B2B International and gyro are both part of Merkle B2B, a collective of five leading B2B agencies offering end-to-end global customer experiences for B2B brands.

Our teams identified the issues driving customer experience across a representative range of past studies. B2B International then distilled this list statistically using factor and cluster analysis to isolate the key drivers of customer experience. They then conducted 3,094 interviews with buyers and key decision-making influencers.

These interviews explored 5,622 B2B brand experiences relating to the purchase and use of financial services, manufactured goods, professional services, and technology solutions. They explored these brand experiences along every touchpoint of the customer journey – cognizant that different factors affect the customer experience at different stages (Figure 2). In order to architect the ultimate B2B customer experience, it is important to assess which issues impact the experience, where in the customer journey they have an impact, and how well (if at all) these experiences are being delivered.

Figure 1 - Summarizing the Data Collected

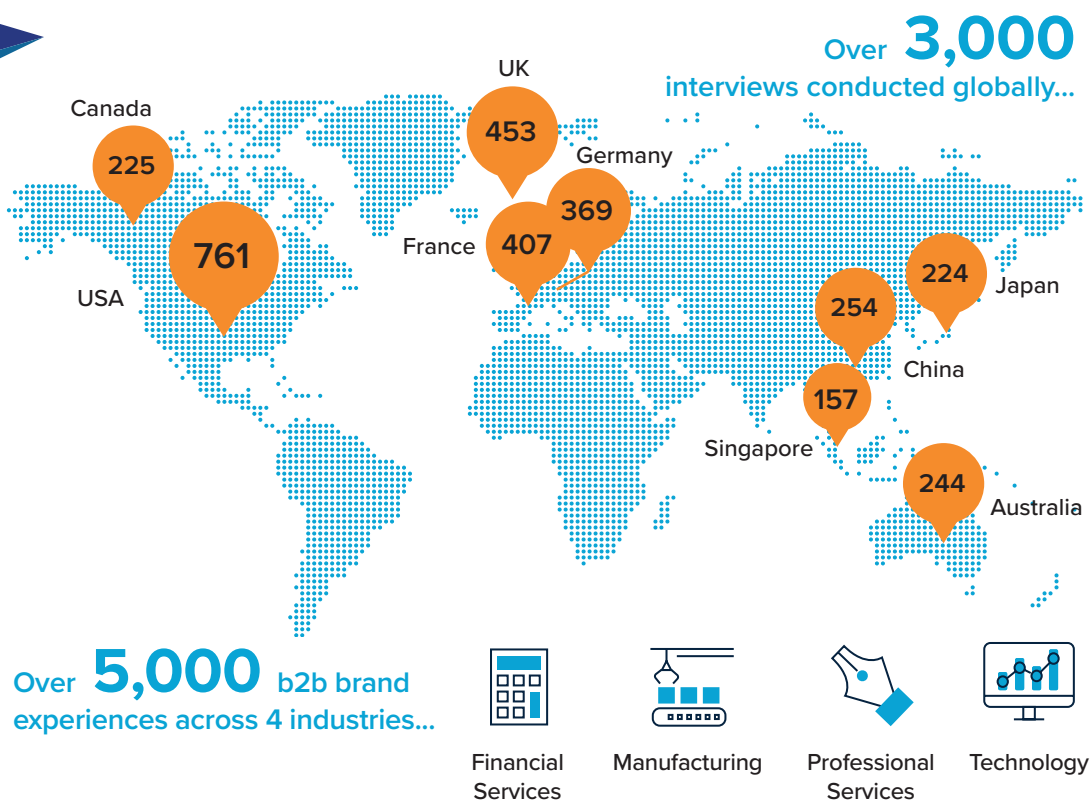
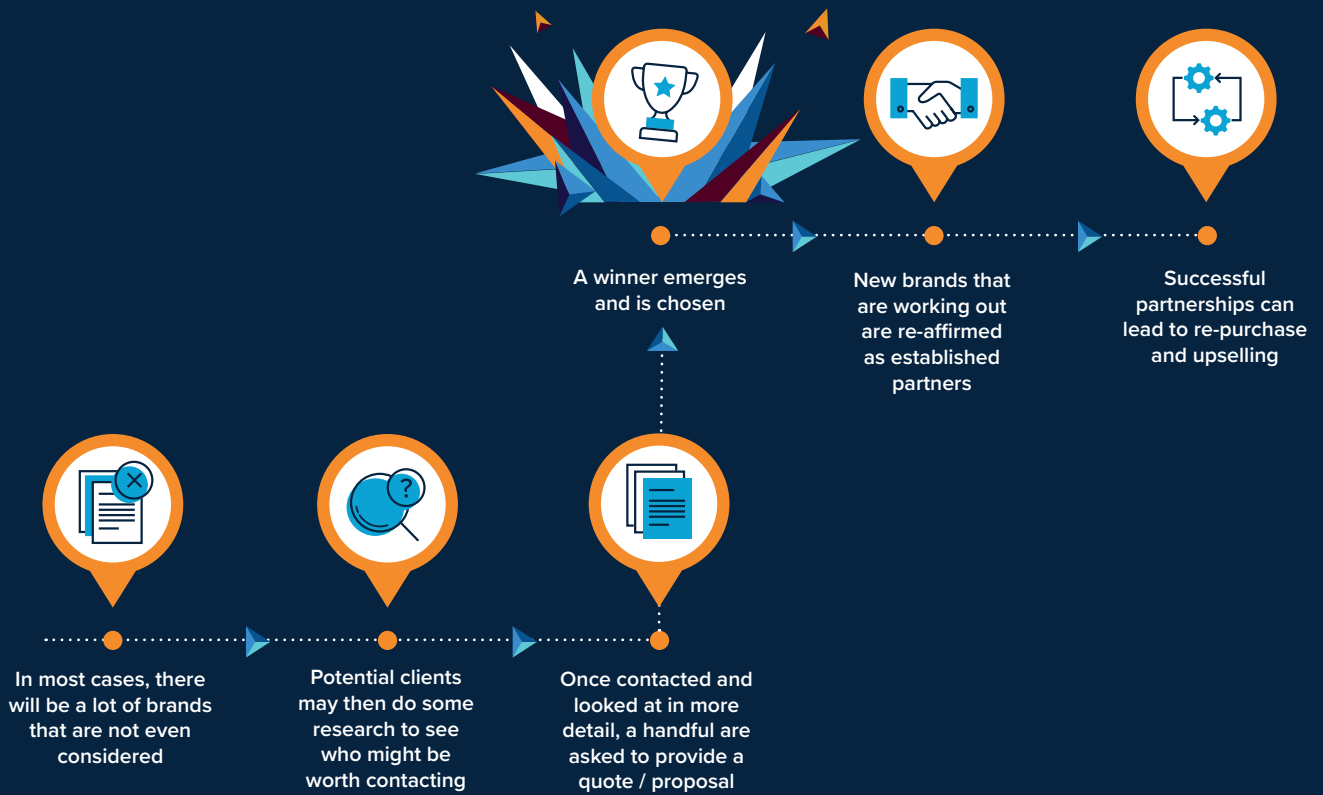



Figure 2 - Important Touchpoints Across The Buyer Journey





The Overall B2B Customer Experience

It is notable that we conducted this study during the 2020 COVID-induced lockdowns that were imposed across much of the world. At a time when brands such as Amazon and Tesco were being widely congratulated for adapting at speed and scale to the new needs of consumers, the business customers in our study pointed out that buying from B2B suppliers is often a painful ordeal. They were quick to point out the juxtaposition of game-changing experiences when making purchases in their B2C lives, alongside grueling attempts to return to business as usual in the B2B world.

35% of businesses employing 1,000+ employees state that making the final choice of B2B supplier is difficult.

Extraordinarily, it is large customers who feel most let down by B2B companies; over 35% of businesses employing 1,000 or more people state that making the final choice of B2B supplier is difficult. A similar proportion see difficulty earlier in the decision-making process, when researching and developing a shortlist of suppliers. Like it or not, the onus is on us as B2B solution providers to help buyers through the decision-

making process. The fact that they find the process troublesome is our problem. Currently, many B2B buyers do not feel they receive the information, interest, clarity, or compelling benefits necessary to make an effective decision.

Just as buying from B2B suppliers is typically arduous, so the resulting customer experience is frequently mediocre. Analysis of Net Promoter Scores (NPS) shows that two thirds of B2B customers have a passive or negative customer experience. Again, suppliers are particularly prone to disappoint when the prize is largest; they are no more impressive when selling to large companies than they are when selling to smaller businesses.



A majority of low and mid-value purchases made by B2B buyers across all sizes of business are either “detractors” or “passive” in their likelihood to recommend a brand.

Innovation and disruption are commonly led by brands that have high exposure to consumers as well as businesses. Jeff Bezos remarked in 2019 that, “Customers are divinely discontent. Their expectations are never static ... yesterday’s ‘wow’ quickly becomes today’s ordinary.” The key point? Business decision makers are consumers too, and their consumer experiences influence their expectations as a business buyer. And consumers are ruthless; they will ditch you before you even know about it. Our study showed that in the industries with the highest direct

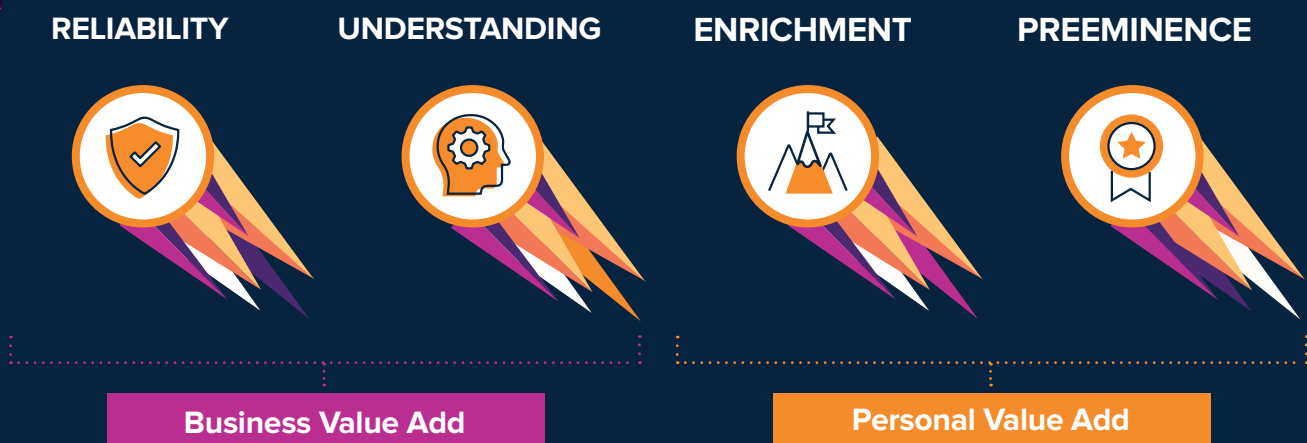
exposure to consumers (tech and finance), the role of the “[Zero Moment Of Truth](#)” is profound: a majority of brand experiences were ended before the target customer even asked for a quote. People are used to slick B2C experiences in tech and finance, and they won’t tolerate any less just because they are buying for their business.

Identifying the B2B Brand Superpowers

We have established that the process of identifying, researching, choosing, and using a B2B supplier is rarely impressive, often ordinary, and frequently suboptimal. How, therefore, can B2B brands disrupt the status quo and architect the ultimate B2B customer experience?

Our analysis showed that there are four overriding Superpowers that together have the potential to deliver the ultimate B2B experience and the never-before seen. Crucially, these Superpowers can be grouped into two pairs, based on the type of value they add: first, features that provide business value-add, and second, features (usually less explicitly requested) that provide personal value-add. The latter benefit the individual decision maker; they may or may not benefit the business in addition.

Figure 3 - The B2B Brand Superpowers





Business value-add 1 – Reliability

We have termed the first Business Value-Add Superpower “Reliability.” Attributes within this Superpower determine whether the brand is one that can be trusted and relied upon. A substantial number of Reliability requirements must be met for a brand to enter the consideration set. Such requirements are likely to be obvious to a serious supplier, and many would be defined in a tender document. These requirements could be placed at the base of a hierarchy of needs; they must be fulfilled if your business is to survive.

Quality must be strong and defects kept to a minimum. Promises must be kept; prices must be appropriate; regulations must be adhered to. These requirements apply equally to services as to products and, it should be noted, go further than simply “not messing up.” Business-to-business buyers expect a tangible value-added contribution in the form of gains to performance metrics, such as productivity, profitability, or revenue. A key challenge for suppliers is effectively communicating the tangible, measurable benefits of these “basic” requirements.


Business value-add 2 – Understanding

The “Understanding” Superpower refers to the tailoring, adaptability, service, and business philosophies that say, “we understand you – we’re on the same wavelength.” Supplier and buyer cultures should be sufficiently aligned for day-to-day objectives to be implicitly understood. Where the Reliability Superpower is about meeting expectations, the Understanding Superpower is about anticipating them. Product ranges should be sufficient for tomorrow’s needs as well as today’s, problems solved before they occur, and service capabilities transparently communicated and understood by everybody. Where Reliability speaks to performance, Understanding is concerned with experience – the whole business-to-business customer journey must work in a seamless and integrated way.



Personal value-add 1 – Enrichment

The Personal Value-Add Superpowers are distinct from the Business Value-Add Superpowers for a clear reason: their benefits are felt primarily by the individual decision makers themselves, rather than by the organization for whom they work. Nevertheless, “Enrichment,” which refers to the brand’s ability to make the consumer’s work life easier and better, is in some ways a progression of the Understanding Superpower, as both have relationship at their core. Where Understanding is the business manifestation of relationship (proactivity, responsiveness, etc), Enrichment nods to the individual’s need for belonging, connectedness, and recognition referred to by Maslow’s hierarchy of needs. Individual decision makers want someone to make their work more enjoyable.



They want someone to connect with. They want a supplier that educates them, challenges them and improves them professionally and personally – whether or not it benefits their employer.

Personal value-add 2 – Preeminence

A business-to-business brand that delivers on the “Preeminence” Superpower is likely to be sophisticated, modern, and a leader within its field. These are the brands we are proud to buy from, whose reflected glory we bask in, whose stardust rubs off on our professional reputations. Their offer is likely to be strategically important and high profile within our business. Where they are thought leaders or innovators, we, as decision makers, are congratulated by colleagues for developing our company’s thinking or improving its processes. Where they are enlightened brands or sustainability leaders, we are thanked for building the company’s employer brand. Where they are quality leaders, we are credited with improving client satisfaction. Our decision-making prowess and impeccable taste are there for our colleagues and bosses to see.

We have presented the four Brand Superpowers in order of increasing complexity. The more complex the Superpower – and the more detached it is from basic business needs – the worse B2B suppliers are at providing a good experience. Our study showed Reliability brand experiences were generally seen as well delivered by B2B decision makers and Understanding brand experiences were no more than satisfactory. Almost every aspect of the two Personal Value-Add Superpowers was seen as unsatisfactory.



Which B2B Brand Superpowers Dominate at Each Stage of the Customer Journey?

We have defined the requirements that make up the four B2B Brand Superpowers and summarized how well – or badly – brands deliver against these needs. Architecting the ultimate B2B customer experience requires precision rather than broad brush recommendations; however, keyhole surgery needs to be performed at every step of the customer journey.

Aspects of the Reliability & Preeminence Superpowers are important across the customer journey

We have described the role of the Reliability Superpower in setting the minimum bar for supplier acceptability. Tracking the importance of issues such as quality, price, and adherence to regulations confirms that these requirements must be met at every stage of the customer journey – from initial consideration to service delivery and beyond. Generally, suppliers meet this expectation.

In parallel, aspects of the Preeminence Superpower also impact perceptions of supplier performance from the first buyer-supplier interaction to the last. Business-to-business customers are put off by brands that articulate their vision badly and are drawn to those with thought leadership positions. Thought leadership is unquestionably a source of differentiation that many B2B suppliers are rightly focusing on. Articulating a clear vision is, for the most part, an untapped opportunity (Figure 4).




Figure 4 - Important Influences Throughout the Relationship



This finding should shock most B2B suppliers into action. Thought leadership tends to be seen as a promotional tactic, to be delivered principally at the marketing and sales stage of customer relationships before evaporating once the customer has signed on the dotted line. But customers are clear that this is not close to enough. They seek long-term partnerships and value exchange; thought leadership is the glue that keeps B2B partnerships together. It provides reassurance that the supplier remains at the top of its game, keeps the decision maker interested, and ensures that the credibility of the decision maker continues to be paraded in front of colleagues.

Preeminence, like Reliability, matters throughout the whole customer journey.

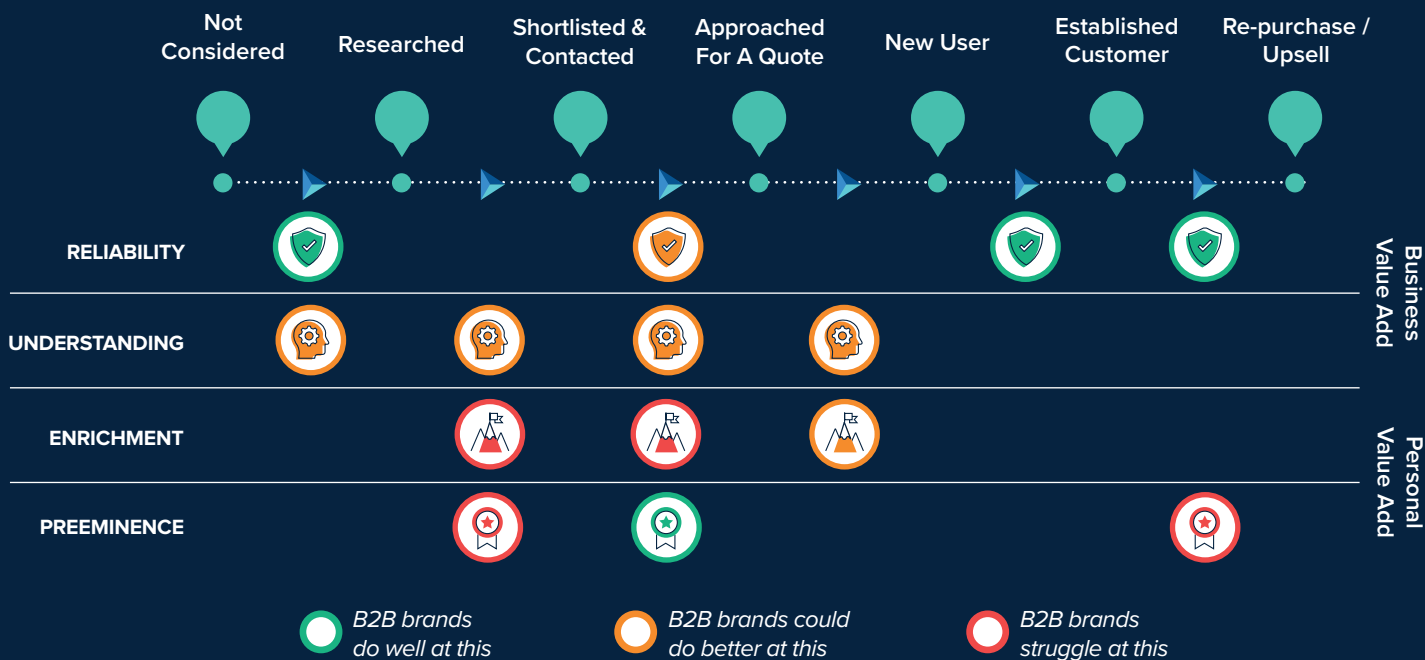
The Understanding and Enrichment Superpowers are most influential before the purchase is made.

Both the Understanding and Enrichment Superpowers revolve around relationship: Understanding is about a meeting of business philosophies, Enrichment is about interpersonal chemistry and value exchange. Both of these Superpowers are highly influential as the buyer narrows the consideration set down to the chosen supplier. As decision day approaches, buyer and supplier engage in a kind of professional courtship, in which business and personal interests elide.

On Understanding, B2B suppliers are seen to lack both transparency and tailoring. As we have established, buying in B2B markets is hard work! But it is on Enrichment that suppliers really underperform. B2B buying is rarely fun, and little value exchange takes place (Figure 5).

B2B suppliers need to regard the sales process as a value exchange, not a transaction.

Figure 5 - Dominance Of The Understanding & Enrichment Superpowers Pre-Purchase



Businesses that architect the ultimate B2B customer experience are usually tech firms.

As a group, tech firms attract some criticism; they are often seen as insufficiently progressive in their business outlook and absent from the Personal Value-Add Superpowers. But a number of tech firms are seen to be architecting the ultimate B2B customer experience. Microsoft, Dell, and IBM are viewed as providing business value-add and personal value-add throughout the customer journey. Great products are often delivered through a customizable self-service model by brands that confer a halo effect on whoever brings them into the business. Outside the tech sector, brands like PayPal in the finance sector or CAT in the manufacturing sector are similarly seen as architecting the ultimate B2B customer experience. One thing that is evident is the absence of any professional services brands in the top-performing category.

6 out of the top 10 highest performing brands we covered were technology brands.

A tech-oriented offer allows B2B companies to tailor and engage with customers at scale, and in doing so, architect the ultimate B2B customer experience.

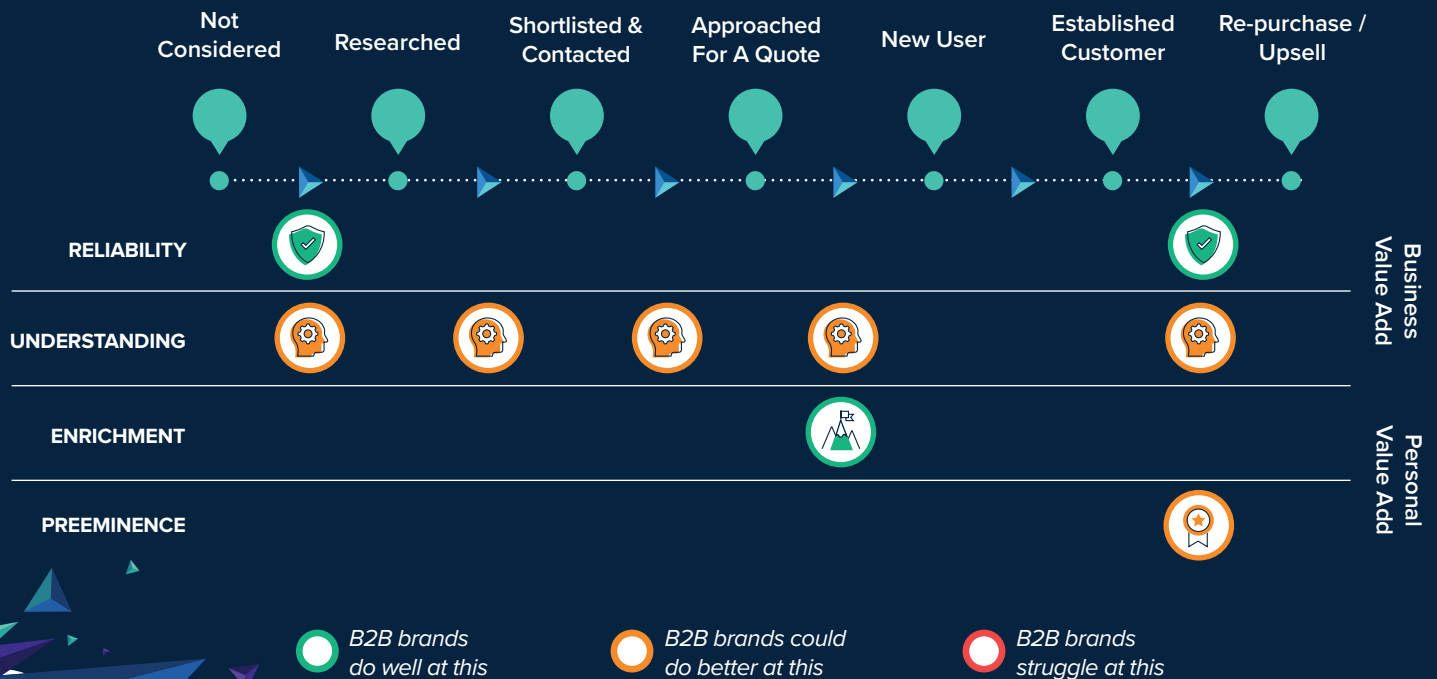
Very senior decision makers are chronically underserved.


Across all industries and company sizes, the most senior decision makers are underserved on all of the Understanding and Pre-Eminence issues. These decision makers are looking for better thought leadership and are more likely to continue buying if they get it. But, essentially, many providers are invisible to them; they are not seen to be providing any customer experience.

Brands are performing well on only 1 of the 12 personal value-add attributes among senior decision-makers.

B2B suppliers have an opportunity to engage with senior budget holders; before doing so they must have a clear plan on how to engage appropriately with this audience.

Figure 6 - How the Most Senior Decision Makers are Underserved by B2B Brands





Millennials and The Personal Value-Add Superpowers

Architecting the ultimate B2B experience to millennial customers requires us to fine-tune the Brand Superpowers. As a tech-savvy group with less pre-existing knowledge of potential purchases than older groups, millennials are inclined and able to be deliberative when considering whom to buy from. Our studies repeatedly show that millennials look at a greater range of information sources than those in older age groups, with resources such as thought leadership pieces, live chat, social media, and price comparison websites particularly influential. The diverse and informal nature of many of these channels makes controlling the quality of the message to millennials a real challenge.

In contrast with this deliberation, millennials are notably ruthless at key moments in the journey: they are more likely to reject brands at the zero moment of truth; more likely to give a low Net Promoter Score; more likely to leave a scathing public review. This is a real reputation risk for B2B brands, who are even poorer at helping millennials through the decision-making process than they are other age groups.

Millennial and Gen-Z customers reject a far larger proportion of brands considered before contacting them. 70% of brands considered were rejected before the proposal stage compared to only 58% for older respondents.



Implications for Businesses

This comprehensive, empirical study has established that four Brand Superpowers must be met if your brand is to architect the ultimate B2B experience. The Superpowers demonstrate that B2B brands need to go well beyond the business basics of reliability, by demonstrating a service orientation throughout the customer journey and delivering personal value-add. On the Brand Superpowers of Enrichment and Preeminence, there are huge opportunities to differentiate; most businesses are either underperforming or not performing at all.

To architect the ultimate customer experience, we recommend the following steps:

- 1. HYPOTHESIS** – Brainstorm internally to hypothesize how your business performs against the four Brand Superpowers.
- 2. MEASURE** – Conduct a survey to establish the full, unvarnished picture.
- 3. GAP ANALYSIS** – Identify the gaps between the ultimate B2B customer experience, your business’s hypothesis, and your business’s performance.
- 4. OPTIMIZATION** – Deliver specific improvements on every component of the customer experience, ensuring smooth transitions between steps of the journey.
- 5. STEP-CHANGE** – Consider what to do with the “white space.” Every interaction with a company is an experience; every step an opportunity to make a difference. What we have seen is that B2B companies have not even started on the road to delighting their customers and providing them with the enrichment and preeminence they crave.

For further information on the four B2B Brand Superpowers, and to find out where your business stands, get in touch:

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