

A background image showing two men walking through a complex industrial facility, likely a factory or warehouse. The man on the left is wearing a light blue polo shirt and dark trousers, while the man on the right is wearing a light blue button-down shirt and dark trousers. They are walking on a metal walkway with railings. The background is filled with industrial machinery, pipes, and structural elements, creating a sense of a complex environment.

# How to Conquer Complex Customer Journeys through B2B Personalization





Personalized experiences are the new digital imperative. This is true in our experiences as consumers, and those expectations are also influencing the needs of B2B customers.

Features like one-click ordering and immersive product content are no longer exclusive to retail giants or niche, experience-rich brands – they are expected across B2B. Your buyers expect you to know them and their needs, and provide experiences relevant to their roles. But delivering on this expectation is an entirely different beast.

**In this guide, we'll explore:**

- Why personalization is a must for any B2B business
- How B2B personalization is different than B2C personalization
- What you can do to implement personalization in your organization



# The Case for B2B Personalization

B2B buyers are demanding personalized experiences, and they're backing it up with their business spend.<sup>1</sup>

- 75% of business buyers expect companies to send their company personalized offers
- 74% agree that receiving these personalized offers has a major or moderate influence on their loyalty
- 65% of business buyers say they'd likely switch brands if a company didn't make an effort to personalize communications with their business

Meeting these personalization expectations in B2B will have major revenue impacts. It's predicted that B2B commerce sales will reach \$6.6 trillion by 2020, overtaking the B2C commerce sales forecast of \$3.2 trillion. The B2B market in the US alone is projected to hit \$1.2 trillion in sales.<sup>2</sup> Personalization will be crucial for any company that wants a piece of that.

But while the need for B2B personalization is clear, execution can be much more difficult than with a typical consumer experience.

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# How B2B Personalization Is Different

As consumers, we know what we expect from a personalized experience. We might see this put into action by our favorite retailers, through online ads and email marketing promotions created around our past behavior or buying decisions. But those same tactics and approaches don't apply to B2B marketing. There are several differences in the B2C and B2B buyer journeys that make personalization harder to deliver.

## The Purchase Decision is More Complex

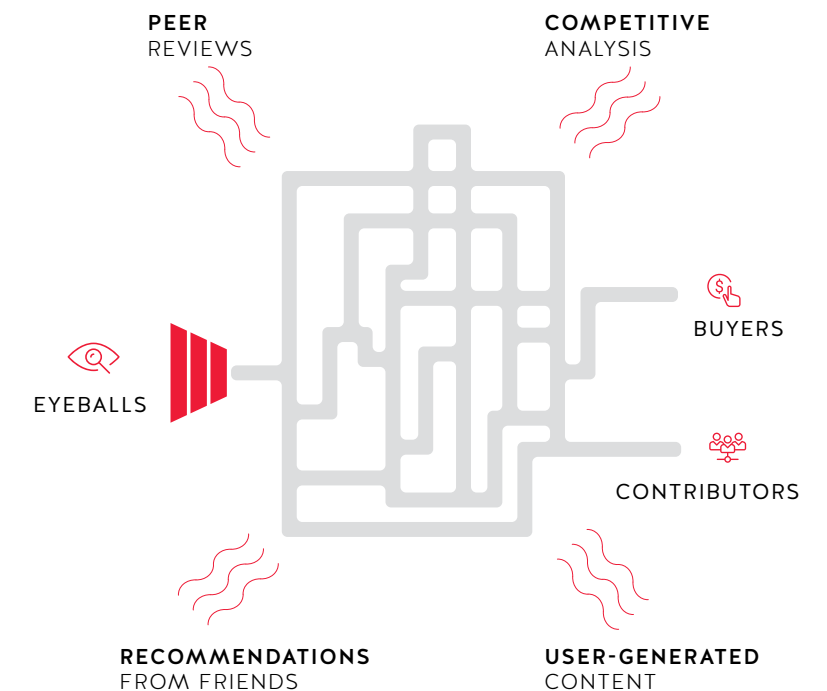
Unlike the B2C marketing funnel (Figure 1.1), you're not just talking to and providing an experience to a single individual buying something for themselves. In the B2B marketing funnel (Figure 1.2), the customer journey is fragmented, and there are typically several decision makers in different roles involved in the procurement of an item.

Single-decision-maker personalization is hard enough to execute on its own, but add in a handful of decision makers, all with different roles, priorities, and preferences, and that's a lot of different touchpoints to get right.

## 1.1 The Traditional Marketing Funnel



## 1.2 The B2B Marketing Funnel







### Personalization is More than Messaging

While messaging that speaks to each of these roles is important, it might not be enough. Personalization in a B2B journey may also mean implementing new applications and functionality that are tailored for a role. A buyer may want a spreadsheet-type view to input values, but a business owner is more likely to respond to a B2C-like product and checkout experience. The journey and means to purchase must be focused by role and where they are in the decision process.

### Ease of Experience in Place of Promotions

Fifty-percent-off flash sales and BOGOs are common in B2C, but in B2B it's the experience and the information you provide, not promotions, that keep customers coming back. Prices are often fixed based on contractual agreements, so there's no competing on price, so you have to find other, more compelling ways to influence buying behavior. Aim to provide the right content around products and maximize self-sufficiency so customers can do enough research to compel them to do business. This might entail connections to your back-end systems to provide the information that a decision maker may need along the purchase journey (lead times, specifications, etc.).

### The Journey May Not End Online

Unlike B2C, the purchase journey may not end online. And that's OK. Because of the complexities and various roles involved, the final call to action may very well be a call to the distributor or manufacturer. As long as you're providing the personalized content and information needed to compel them to make that call, you are executing on your personalization strategy.

#### Success Stories

We worked with Watsco to provide personalized product information across the continent: [Read More](#)

We worked with Regis Corporation to provide role-based experiences across its franchise sites: [Read More](#)

# Getting Started with Personalization

The need for B2B personalization is clear, but getting started on delivering it can be as complex as the buyer journey itself. What steps should you take to implement personalization?

## 1. Understand Your Customer's Buying Journey

### Connect with Your Customers

In B2B, strategies are often created without ever talking to the customer. Many companies rely on the experiences of their sales teams or marketers to tell them what's working, what's selling, and what the customer wants.

But by speaking with your customers – actually sitting down and interviewing them – you may find that you don't know the process they actually go through. You need to understand who the customer is and what kind of experience they want. User research will help you understand the impact of your changes on your audience and focuses on understanding behaviors, needs, and motivations. From a solid understanding of your users, you can begin to plan your strategic direction.

### Create Customer Journey Maps

Once you understand your customers' needs, processes, and the people involved, create customer journeys for each. A customer journey map tells the story of the customer's experience from initial contact, through the process of engagement, and into a long-term relationship. It helps identify gaps and points in the customer experience that are disjointed or painful.

A good customer journey map illustrates every interaction a customer makes while completing a transaction. A best-in-class map incorporates data and customer input to identify pain points and the best ways to eliminate them.

## Can You Answer These Questions About Your Customers?

1. How many people are involved in the procurement process?
2. How many touchpoints are involved for each one?

If you don't know the answers to these questions, you need to gather customer insights using research and data before moving further in your personalization journey.

## 2. Prioritize Your Efforts

Consider the Financial and Customer Impact

Because of the complexity of the B2B buyer journey, you won't be able to serve each of your customer's individual needs. The journey will look different for different companies, and it's not realistic or cost effective for you to meet every need of every one.

Take a handful of your top customers, your bread and butter, and focus on improving their customer journey. Ideally, and more than likely, their needs will overlap with other customers.

## 3. Develop Strategies to Digitally Transform Your Experience

Act on Your Insights

An effective personalization strategy must be driven by the customer needs and journeys you've identified. It will establish your personalization vision, but the benefits won't be realized until the strategy is executed. With this in mind, the strategy must also include a roadmap to guide the executional effort and a budget to effectively fund the required investments.

The best personalization strategy will fall short unless you invest in the proper infrastructure and processes. To deliver on these experiences, you must have an effective combination of technology, operational processes, and measurement in place.





# What's Next?

The steps outlined in this guide are critical to developing a customer-first personalization strategy, but you don't have to go at it alone. If you need help understanding your customers, your company's capabilities, and how you can offer personalized experiences, we can help.

## A Lighter Start

Are you looking for quick wins to improve your conversions? Contact us about **Conversion IQ**. We'll look at qualitative and quantitative data and user research to uncover conversion blockers that may be affecting you. Plus, we'll give you a roadmap for future growth.

## A Deep Dive

If you're looking for a more in-depth look at your company's effectiveness in creating, delivering, and sustaining a compelling customer experience, contact us about **CX IQ**. We'll help unite your management team, create alignment, and guide decisions about where and how to improve CX.





# Authors

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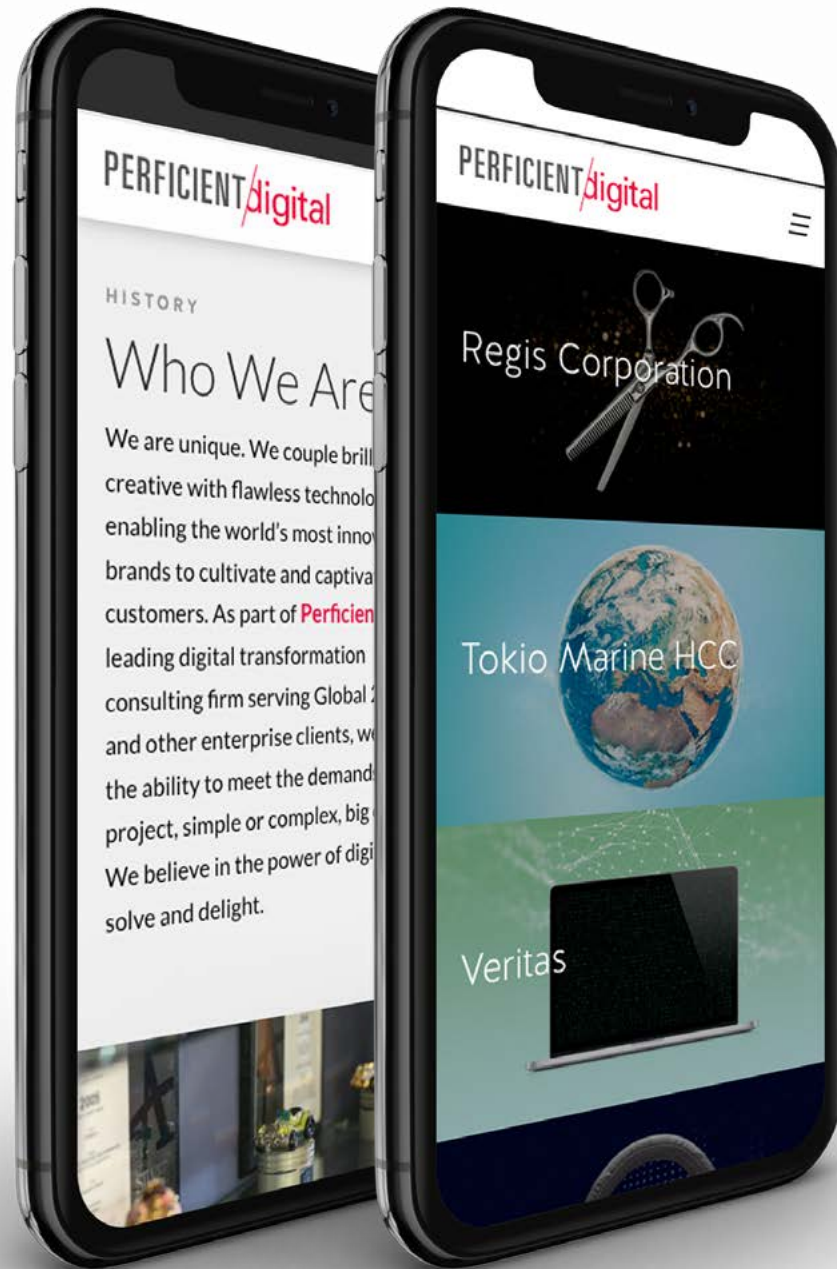
As the chief strategist for commerce at Perficient Digital, Mike is dedicated to and passionate about innovations that matter in the real world. He uses creativity and experience to think outside the box and find new ways to help our clients realize success.

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<sup>1</sup> [State of the Connected Consumer](#)

<sup>2</sup> [U.S. B2B eCommerce Platform Market, Forecast to 2023](#)





# About Perficient Digital

We are what happens when more than 400 of the most talented digital strategists, design pros, brand shapers, digital marketers, data scientists and creative coders all believe one thing to be true – exceptional customer experiences always translate to positive ROI for our clients.

Perficient Digital blends the strategic imagination of an agency with the deep technical acumen of Perficient's established consultancy to deliver exceptional customer experiences for the world's biggest brands.

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