

2020

CUSTOMER EXPERIENCE
OUTLOOK GUIDE

REINVENTING THE MARTECH STACK FOR THE NEW YEAR & BEYOND

DEMAND  GEN[®]
REPORT

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REINVENTING THE MARTECH STACK FOR THE NEW YEAR & BEYOND

Customer centricity — and, ultimately, customer experience — have become the core of all B2B marketing and sales strategies in the last couple of years. It's no longer about spamming buyers with product-centric messaging, pushing them through their buying journey with irrelevant content and tossing them over to customer success after they've signed on the dotted line.

The foundations of marketing and sales automation have positioned B2B businesses to scale for growth, leading to a newer focus on better experience management to personalize messaging and build authentic relationships. Marketing and sales teams, as well as the solution providers that enable them, have been pivoting extensively to move to the next stage of marketing automation — ultimately going beyond individual leads to having a holistic, 360-degree view of the customer that empowers them to make better business decisions. This shift has also led to a higher focus on tools and tactics such as intent data, conversational marketing, AI and more — to further refine and customize the buying journey.

To gain a clearer picture of the tools, tactics and strategies that will amplify the customer experience in 2020 and beyond, *Demand Gen Report* reached out to leading industry influencers to share their thoughts on:

- The current state of customer experience in the B2B marketplace and how they see companies evolving their go-to-market efforts over the next couple of years;
- How customer intelligence will impact sales and marketing teams;
- The new role marketing automation and CRM solutions will play in a customer-driven world; and
- The technologies that will have the greatest impact on B2B companies and their ability to offer customer-centric experiences.

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MICHAEL KOSTOW

**SVP & GM, SALESFORCE
PARDOT**

EMBRACING ARTIFICIAL INTELLIGENCE FOR GREATER PERSONALIZATION

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

The current state of customer experience in the B2B marketplace varies depending on the brand, but in general, it's getting better all the time. We're seeing a positive evolution as more B2B companies embrace new strategies and technologies to help create the B2C-style experiences today's customers crave.

For example, account-based marketing (ABM) has allowed many companies to achieve new levels of success by tailoring marketing efforts to the needs and expectations of key accounts. This means individual stakeholders across an organization are getting personalized communications based on their role and contribution to the buying process.

While some companies and industries have a long way to go, we're confident that the positive ways B2B leaders are evolving their go-to-market trends will have a lasting impact on the entire marketplace.

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

In marketing and sales, the more data you have, the better — but only if it's organized properly and used strategically. Today's advancements in marketing automation and artificial intelligence platforms are giving marketers and salespeople the unprecedented opportunity to really know customers through data.

Through a shared view of their customers, previously disconnected departments like marketing, sales and service can come together and collaborate to create seamless account-based experiences. This is not easy, as today, the average marketing department globally is using 15 different data sources to run their operations, which is up 50% from just two years ago. This imperative demands for increased data unification, across both technology and the workflows between marketing and sales, to deliver the compelling B2B experiences needed for success in 2020 and beyond.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

Marketers have three strategic mandates to deliver business growth and premium customer experiences in the new decade ahead:

1. Build Trust
2. Connect Data
3. Transform Engagement/Experiences

Customers are in control, and 65% said they have stopped buying from brands that did something distrustful. So, the various marketing automation and CRM solutions in a company's tech stack no longer benefit the marketer or salesperson alone. Instead, these technologies exist to serve the customer first.

This idea requires a huge shift in strategic thinking. Business leaders must ask themselves tough questions, such as: How will this new technology provide a customer or prospect with exactly what they need, at exactly the right time, in exactly the right place — while maintaining transparency, security and trust?

We're seeing far-reaching impacts on the way companies are building relationships with customers. Customer expectations drive companies to implement more innovative marketing automation and CRM platforms. In turn, forward-thinking companies are restructuring their teams to use that technology in a customer-first way. Marketing, sales and service teams are effectively the stewards of customer data and customer trust.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

Without a doubt, marketing automation and artificial intelligence are paving the way to the future of customer-centric experiences. It's never been easier for B2B companies to understand and connect with customers.

According to the *5th Annual State of Marketing* report, the top three AI use cases for marketers are:

1. Personalizing the overall customer journey
2. Driving next best offers in real time
3. Personalizing channel experiences

We're seeing B2B marketers embrace artificial intelligence at an unprecedented rate. In fact, between 2018 and 2019, we saw a 152% increase in marketers who are currently using or who plan to use AI in the next two years.

Of course, these technologies don't just run all by themselves — they run on data. The customer-centric experiences of the future really happen when B2B companies collect and manage data intelligently, and then use this data to create a 360-degree view of their customer. With data at the heart of everything and a connected platform that provides a single source of truth, B2B companies can deliver everything customers want and drive bigger business results in 2020 and beyond.

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KELLIE DE LEON

**VP OF MARKETING & STRATEGY,
THE MX GROUP**

ANALYZING, BUILDING & EXECUTING STRATEGIES WITH MACHINE LEARNING

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

The gap is certainly closing between customer expectations and the experiences that B2B companies have invested in, but there's still room for improvement. Customers continue to leverage the power at their fingertips to explore the marketplace, compare solutions and make educated decisions before ever talking to sales. With added expectations for a personalized experience based on where they have put themselves in the buyer's journey and an organization's use of their preferred communication platform (or lack thereof), companies not delivering customer-focused experiences are putting themselves at risk.

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

Customer intelligence is an area mature sales and marketing teams have utilized for some time. But over the last year, we've had more frequent requests from non-mature teams asking questions in this space. With the number of vendors/platforms/tools that allow for data enrichment, it's much easier to augment data without a heavy programming or data analysis effort. If it's not a standard yet, it will be soon. However, the important thing for sales and marketing to keep in mind is with all this data brings increased organizational risk and the potential for misuse. Smart people, with a responsibility to serve their customers, need to be managing the customer intelligence process for any organization.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

Customers expect brands to interact on their terms and as such, capturing, storing and leveraging profile data is more important than ever. For an organization that hopes to grow (or frankly, just maintain their current market position), gone are the days of sales reps using individual spreadsheets to keep their contacts or marketers who can send batch n' blast communications in hopes of having success. Technology has vastly improved the collection and storage of information while allowing for more advanced execution based on that data. MAP and CRM are major technologies that should be in place for all B2B organizations. They enable the opportunity to build relationships with prospects and customers and transact in the way those user types want.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

Technologies with both the greatest potential impact and where we're seeing vendors and our clients express interest are: customer data platforms (CDP) and machine learning (ML). CDPs have gained popularity due to the differences between data that marketing and sales teams want. While CRMs are very good at storing and exposing the business relationship between organizations and their customers and thus serve sales, they lack the ability (without major backend work) to work in the universe of customer engagement across the entire lifecycle, which can limit marketing. Machine learning as a concept continues to be explored, but most organizations don't recognize its power beyond a buzzword. With the amount of data that is acquired in this day and age, the only way to realistically analyze, build strategies and execute based on that data is through the help of machines that are far better at unearthing patterns and trends than humans.

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MASHA FINKELSTEIN

**HEAD OF MARKETING
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DELIVERING RELIVANCY THROUGH AI-DRIVEN CONTENT PLATFORMS, AD SERVERS

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

There is a shift happening from thinking about lead-to-customer-journey as a funnel to supporting the prospect in their journey to becoming a customer wherever they are with content personalized for them, regardless of which “stage” they are in. Each customer’s experience is different. We as marketers should think about making it easy for our potential customers to find answers to their questions across the channels that they spend their time in — be it social media, company blog, events or any other channel.

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

The more we know about the customer, the more relevant our messaging could be. AI-driven content platforms and ad servers will continue to help marketing and sales teams reach the customer with the most relevant

information. We need to decipher our potential customers’ intent from their online imprint and offline behavior and use that data in real time to optimize the customer experience across marketing channels and during sales interactions to make those interactions useful for the customer.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

Marketing automation and CRM solutions are the backbone of any marketing and sales technology stack. They need to be able to support personalized campaigns across the slew of online, offline and out-of-home channels in a way that’s easy for the marketers and the sales teams to use and optimize. Integration with various apps and point solutions is important, as well. There are over 7,000 marketing vendors and a lot of them are point solutions supporting very specific capabilities that often need to enable the data to flow to and from the CRM and marketing automation system.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

Some of the top capabilities that marketers in the B2B space need are robust lead-to-revenue management, a holistic view of the customer and customer journey, an ability to use the data about the customer to continuously optimize customer interactions and offer messaging in real time. They must comply with GDPR and other policies while doing all of that. Solutions that provide these kinds of capabilities will have a lot of impact in the martech space.

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REBECCA KAIN

**SENIOR CONSULTANT,
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QUARRY**

LOOKING AT DATA FROM AN EXPLORATIVE & EXPLANATORY LENS

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

There are two huge CX problems in many companies. One is that too few CX designs are grounded in a real understanding of the customer — and they're not vetted by customers either. Instead, they're underpinned by assumptions and generalizations.

The second problem is that, in many companies, CX is compartmentalized in ways that don't match customer expectations. Marketing, sales, onboarding, product, support — this is how companies think, but customers experience your brand much more holistically.

It takes deep acts of empathy to better understand where the value is for customers. Only then can you move into designing how you go to market. Don't fear what you might learn, rather, see it as the invitation for the customer to join you in conversation and contribute to industry leadership.

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

Customer intelligence (CI) isn't a thing or a technology — it's a process for gathering qualitative (conversations, interviews, empathy maps, etc.) and quantitative (behavioral and intent data, segmentation, product utilization, CRM data, etc.) inputs and developing insight through analyses.

The trick to a successful CI process is to look at data from two perspectives: explorative (what new questions might we find?) and explanatory (what can we learn from testing our hypothesis?).

Customer intelligence can support sales and marketing teams by providing powerful insight into the explicit and implicit needs, wants and assumptions of customers. It's also important to note that sales and marketing teams aren't just recipients of CI output, but vital contributors to it, as their vast and varied knowledge often goes untapped and unshared.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

To facilitate an intuitive experience. CRM and MA solutions enable us to capture meaningful data that helps us deliver ideal customer experiences. We can do this through personalization and intent matching so that ultimately, the experience feels intuitive to users.

The added bonus of capturing this information is that it may include hints into some of the customer desires or needs that they (or you) may not have known they have. Continuously evaluating your MA programs and CRM data (perhaps even with appended data sets) allows you to gain feedback and insight into many areas of opportunity.

Don't lead with technology, but with the goal of creating value for the customer. Be intentional about the experience you're creating. Have goals. Track progress. You risk CX inertia – or analysis paralysis – if you aren't clear on what you're measuring and why.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

The biggest impact comes from the consumer technology our customers use in their daily lives. Before we're B2B customers or employees — we're people. And, as consumers, we begin to form expectations for screens, for phones, for speed-to-service and independence of context.

Uber, Spotify, Google Home, Apple Watches, Amazon, Snapchat and many other widely adopted tools and platforms are shaping the interaction patterns, customer support expectations, brand conversations and more that set the backdrop for our B2B experiences.

Before you consider purchasing technology as a B2B organization, explore the problem you're trying to solve. Do you have it framed correctly? Are you trying to add a chat bot to your website because it's solving a true customer need — or, are you trying to capture more data points that you aren't quite sure how you might use? Customer-centricity is all about validation and ensuring you're solving the right problem. Ultimately, it's not a technology — it's a mindset and a shared culture of putting the customer first.

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MICHELLE LIRO

VP OF DEMAND GENERATION,
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ADDRESSING DATA ISSUES BEFORE INVESTING IN NEW TOOLS

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

B2B companies are starting to recognize that the customer experience is just as important as their product or solution. Second, they're still trying to catch up with the B2C customer experience that's probably about seven to eight years ahead in terms of maturity. Consumers have come to expect the seamless multi-channel experiences they get with companies like Amazon and Apple and are frustrated when they don't have that same experience in B2B.

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

First, the good news: Sophisticated AI and machine learning technology is already here and it's relatively easy to use without needing specialized coding experience. B2B companies

can gather and analyze just about any aspect of customer intelligence to improve sales and marketing.

Now the bad news: Most B2B companies have little to no customer data governance, and their dataset is a mess. Companies must address the underlying data issues first before they can take advantage of these new tools. Solving these problems will slow down the overall progress in this area.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

We're finally on the verge of fulfilling the promise of CRM systems that were always meant to be about Customer Relationship Management but ended up being expensive data repositories. If implemented correctly, CRM tools can be used in a more proactive, predictive way, to anticipate things like risk of customer churn, opportunities for cross-selling and upselling, as well as tech support and service.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

Customers simply want the fastest, most accurate answers to their questions, in the shortest amount of time as possible. Answers to basic questions should be self-service and automated, with more complex questions escalated to a human being automatically. Technologies having the biggest impact in this area are AI- and data-driven tools, such as chat bots, mobile apps, self-service customer centers, as well as online communities where customers can interact with each other.

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DAVID
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CEO,
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MAKING THE BUYING PROCESS FRICTIONLESS TO COMPETE

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

B2B business leaders are too slowly catching up to their B2C counterparts, who for decades have understood the significant impact that an outstanding customer experience can have on growth and retention. Consumers have more buying options than ever before and are empowered with “in the palm of their hand” access to reviews. Therefore, it’s essential your brand has positive online product reviews and a thriving customer community to support your customer’s highly digital, frictionless buying process. Smart companies understand that delighted customers become influencers to other buyers and help amplify a company’s sales and marketing efforts. Despite these obvious benefits, B2B companies are way behind when it comes to making customer experience their top initiative.

Over the next few years, B2B companies will need to make their buying process frictionless to compete. Customer success will go from a departmental initiative to a widespread, cross-functional priority. We will see more B2C companies rise up the Fortune 1000 list, while many of the Fortune 500 will fall off the chart. Need proof? Fewer than 12% of the Fortune 500 companies included in 1955 were still on the list 62 years later in 2017.

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

The metadata you can collect about your customers today is one of your most powerful assets when put to good use. Netflix was a pioneer in creating predictive algorithms to improve customer experience and make decisions on content investments. Online retailers like Amazon and concierge-style fashion companies like Stich Fix, along with other leading B2C companies use data models,

machine learning and customer intelligence to assist their buyers and sellers when it comes to product recommendations and inventory planning. B2B companies need to catch up and use customer intelligence for better onboarding experiences, product adoption, training and customer experience. The companies that will thrive in the digital economy are both data-driven and passionate about customer experience.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

These platforms are all about engagement orchestration. Marketing automation is the workhorse for demand creation, demand management and demand expansion. On its own, however, it doesn't have the data needed to properly engage with your prospects and customers the right way at the right time. If we turned back time, these two systems should have been designed as one integrated platform. While some newer companies have this one-

platform mindset, the leading brands that gave birth to sales and marketing automation only came together from acquisitions forcing their clients to figure out how to make 1+1=3.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

Your website, mobile app, marketing automation and CRM system are the four essential ingredients for creating customer-centric experiences. Companies that are selling online need to add e-commerce to that. If you're running a service business or large customer support center, then tack on a ticking platform. For marketing, you'll also need toolsets for content management, ABM, video, events, direct mail and inbound marketing. For sales mastery, you'll need highly adopted (and tuned) sales enablement tools. Behind the scenes, data management platforms and analytics tools are needed to ensure you can operate your "Demand Factory" at scale.



Over the next few years, B2B companies will need to make their buying process frictionless to compete. Customer success will go from a departmental initiative to a widespread, cross-functional priority.





ALLISON MACLEOD

**EVP OF GLOBAL MARKETING,
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SHIFTING TO CUSTOMER ADVOCACY & CUSTOMER MARKETING

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

It is certainly evolving, but there is still more to do to ensure B2B companies put the customer even more at the forefront of their go-to-market and business operations. Many B2B organizations are still very focused on the prospecting side and acquiring new business. In the next couple of years, we are going to see a shift to drive more customer advocacy and customer marketing, as well voice of the customer programs in go-to-market (i.e., customer design programs, more of a focus on customer experience and business outcomes driven by the customer's success).

Today's customer demands a frictionless experience and they want to work with companies that understand them, understand their pain points and understand how to help them solve for them.

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

As consumers and buyers, we want what is relevant to us ... and that is no different in B2B. Customer intelligence is and will continue to be a strategic lever for sales and marketing. It's all about understanding how your customer's behavior and adoption of products and services impacts their success and knowing when and what to offer based on how your customers prefer their communications — whether it be email, chat or phone.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

I see it as evolving the ability to have deeper insight and metrics on your customers and their behavior — who they are, how they experience your products and offerings, being able to give them what is relevant to them and what they need to be successful. Additionally, in a SaaS world, we must understand how our customers interact with our product and continue to put the customer first in product roadmap and design.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

We've seen great success in technology that gives the customer the ability to be in control, as well as serve up and give the customer what they want in real time. Take chat (one of my favorite mediums), for example. That gives the customer the control to have a real-time conversation and get answers to what they need. Drift has done phenomenal work with conversational marketing. It goes beyond just a piece in your tech stack and really evolves the way you market, sell and talk with your customers and how your customers experience your brand and company.

You also cannot undervalue the power of peer review sites. B2B customers have more power than ever and often, we as buyers are seeking out information from our peers. It is a place that your marketing, sales and customer experience and success teams should be learning, listening and acting on customer feedback. Lastly, personal touch goes such a long way. You can have all the tech in the world, but sometimes a personal note, a phone call and a token of appreciation can mean so much more.

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LAUREN GOLDSTEIN

CRO, ANNUITAS

TAKING AN OUTSIDE-IN VIEW OF THE CUSTOMER EXPERIENCE

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

The current state of customer experience in the B2B marketplace is filled with opportunity! In my 23+ years in B2B marketing, I've never seen so many tools and buzzwords promising to be the silver bullet. There is no silver bullet.

And yet, the companies that are really transforming their go-to-market approach are doing so by taking an outside-in view of the customer experience. They are starting with a deep understanding of customer needs and the nuances of how customers want to engage with a brand to solve their challenges. Technology is not a strategy. Best-in-class organizations are taking the time to understand their buyers, then methodically aligning the entire organization's communications, processes and tech stack to deliver value at every engagement. And, best-in-class organizations are hyper focused on delivering outcomes (e.g. sales) – not vanity metrics like click throughs.

We see companies like Tricentis delivering on this promise – and personalizing the customer experience across every touchpoint. Tricentis is a great example of an organization that has made their Digital Demand Transformation a priority. And, their growth/success shows!

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

Context is QUEEN. And having context (around a buyer's needs and pain points) enables both sales and marketing to connect and engage in a more relevant fashion.

When the tech stack is purposefully integrated (web, engagement platform, CRM, sales enablement platform, analytics, etc.), those insights are delivering great value — ranging from a seller that can have a more focused and impactful sales call to an executive team being able to predictably model their pipeline, show ROI and deliver growth to the organization.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

Marketing automation and CRM are simple “enablers.” Period.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

We can't look at technologies in isolation. Rather, it's the integration of the tech stack and its ability to:

- Orchestrate conversations at the right time, right place and with the right insights;
- Deliver intelligence and ROI to the business; and
- Measure and optimize demand marketing to drive a predictable, scalable and perpetual sales to the business.

Getting to this state of demand marketing maturity is NOT for the faint of heart! Yes, we warn our clients — because delivering upon great customer experiences starts with alignment throughout the organization. Customer experience is not a marketing initiative. It needs to be a priority for the entire organization — with a set of KPI's that EVERYONE is working toward.

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DELIVERING CONSUMER-LIKE EXPERIENCES BUYERS EXPECT

What is the current state of customer experience in the B2B marketplace? How do you see companies evolving their go-to-market efforts over the next couple of years?

In many ways, B2B companies are starting to behave more like B2C companies when it comes to delivering the type of customer experience that buyers expect. There's a long way to go, but the best B2B brands are focused on really knowing their customers and delivering the kind of personalized, responsive and on-demand experience that buyers routinely have in their B2C lives. Deeper, more reliable customer insights, granular product and intent signals and better informed customer segmentation strategies are among the trends in B2B marketing that are powering a more relevant, personalized customer experience.

How do you see customer intelligence impacting sales and marketing teams in 2020 and beyond?

Reliable customer intelligence should inform so much of what marketing and sales is trying to accomplish. Whether it's understanding product adoption and usage to create

customer retention plays or knowing how existing customers are reflected in the larger TAM for account based marketing and acquisition strategies - it all begins with a deep understanding of customer needs and how they derive value from the products they use.

What is the new role marketing automation and CRM solutions play in a customer-driven world?

Marketing automation and CRM are purpose built to be systems of record for important customer attributes. We're seeing a rise in the adoption of CDPs to provide a more comprehensive view of the customer but I think that MAPs and CRM systems can go a long way if they're used with customer intelligence needs in mind. The marketing automation platform is an action oriented environment but it needs the right customer data to power it. CRM is mostly an empty vessel so it's really about make sure these systems have the right data to pull on and that marketing and sales motions are aligned to delivering the best customer experience.

What technologies are having the biggest impact on B2B companies and their ability to offer customer-centric experiences?

I think intent data is really having a moment as an augmentation strategy that provides a much more complete view of the customer. All the personalization and targeting tools are also a key piece in how B2B is working to deliver a more B2C experience. And no list would be complete without conversational marketing - both in app and on the corporate website - as a way for customers to engage and interact with brands on their own terms and their own schedule.

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Salesforce Pardot is B2B marketing automation on the world's #1 CRM. With Salesforce Pardot you can engage buyers, close deals, and grow relationships. You have the power to engage with quality leads at every stage in the sales cycle, easily build intelligent nurture campaigns, and smoothly pass leads between marketing and sales. With native data analytics dashboards you'll always know the ROI of marketing campaigns and how marketing impacts your business.



Demand Gen Report is a targeted online publication that uncovers the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multi-channel demand generation efforts.

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