2022 Digital Trends

B2B in Focus

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With nearly 10,000 participants in the 2022 study, more than 95,000 businesspeople from every continent (including Antarctica) have contributed their time and insights to this research since its inception in 2010. Their contributions make this the largest and most durable international study of how digital trends are changing the marketing discipline.

Adobe and Econsultancy would like to thank everyone for their effort and insight.
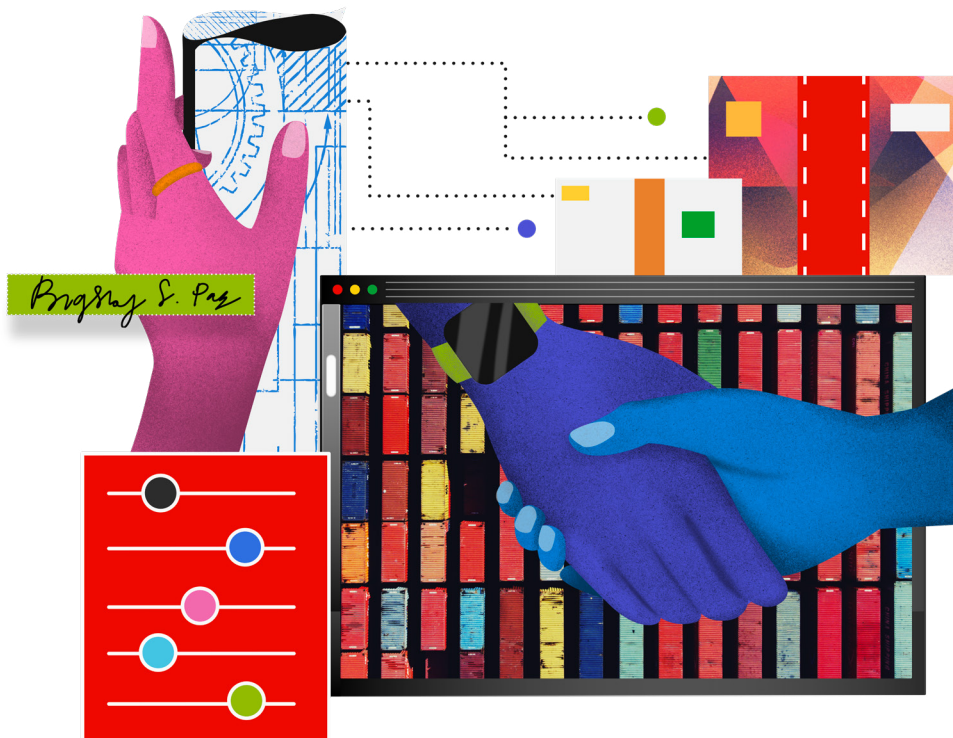
Foreword

Welcome to the 2022 Digital Trends – B2B in Focus! Based on Adobe's annual survey, produced in collaboration with Econsultancy, the report captures the insights of over 800 executives working in the Technology (442) and Manufacturing (372) sectors. It's enabled us to map the evolution of B2B customer experience trends and identify opportunities for companies to refine their digital strategies and drive sustained growth in the new year and beyond.

There's no doubt that the global events of the past two years have accelerated the digital transformation for companies in the sector, and it won't be letting up. Indeed, the majority (94%) of those we surveyed either 'agree' or 'strongly agree' that the pace of change will persist for the foreseeable future.

Perhaps unsurprisingly, businesses are rethinking how they engage with buyers. The pandemic raised the bar on the need for firms to be more agile, collaborative and speed up the time-to-value. It prompted companies to turn to real-time data and insights to handle the unexpected. It also forced them to bridge functional silos – across sales, marketing, product, IT, finance and support – to understand how to run a digital business end to end. As customers fluidly switched between channels of interaction, the need for omnichannel personalisation, automation and scalability took on greater urgency.

Companies that overcame organisational and technology silos and worked across functions to quickly move as one came out in front. Throughout 2021, we saw a widening gap between those that were able to pivot and capitalise on the shift to digital and those who were caught flat-footed.

The challenge that many B2B organisations face today is how to incorporate the agile methodologies developed in the crisis 'war-rooms' of the pandemic into ongoing business operations. The study shows that many companies are struggling with implementing ▶

Jill Steinhour,
Director Industry Strategy, High Tech and B2B, Adobe

> **"Companies that overcame organisational and technology silos and worked across functions to quickly move as one came out in front. Throughout 2021, we saw a widening gap between those that were able to pivot and capitalise on the shift to digital and those who were caught flat-footed."**
>
> *2022 Adobe Digital Trends – B2B in Focus*

the necessary cultural and operational changes to stay nimble and respond to rapidly evolving market dynamics.

With customer expectations continuing to rise and with the deprecation of third-party cookies, the importance of developing and nurturing direct relationships has never been more important. How companies gather and extract insights from customer data will become more critical, especially as marketers shift from relying on third-party data and embrace first-party strategies. Our findings suggest that there is much work to be done here: significant rates of practitioners see their organisation as ill-prepared for the deprecation of third-party cookies and shift to first-party data to personalise their customer experiences.

Artificial intelligence (AI) is a crucial area of opportunity that more organisations should take advantage of to drive real-time business decisions and customer experiences.

As Technology and Manufacturing firms move from one moment of uncertainty to the next, grappling with inflation, global supply chain problems, a tight labour market and shifting pandemic conditions, data-driven customer insights and the ability to quickly adjust strategies will be more important than ever. Companies that can successfully operationalise rapid decision making and act on customer insights will be better placed to achieve customer-centric experience innovation – and sustain business growth.

The 2022 Digital Trends – B2B in Focus report explores a wide range of trends impacting companies' ability to successfully navigate the highly dynamic global environment, including changing customer expectations, escalating complexity and competition, training and development and the realities of hybrid work environments.

With the world in a constant state of flux, this year's report offers timely insights to help marketers and business leaders reflect on their strategies to drive sustained success in 2022 and beyond.
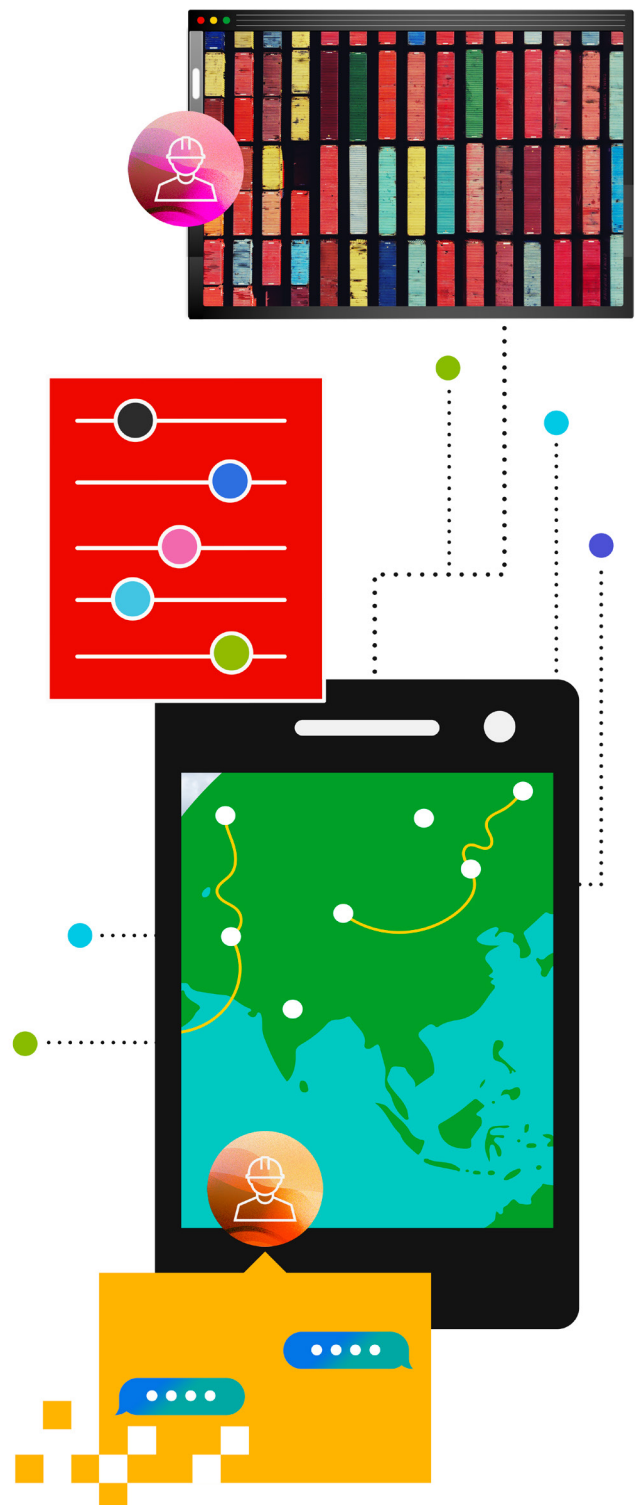
1. Executive Summary

The B2B customer is changing. Technologically savvy, demanding, agile – the benchmark in DX isn't the best of B2B. It's the best of the best, period.

A SINGLE DIRECTION OF TRAVEL

The pace of change, innovation, attitudes – survey respondents agree almost unanimously that customer journeys have changed, and the flight to digital has been dramatic. Similarly, 94% of senior executives think this pace will persist for the foreseeable future. Will B2B life be lived wholly online? Of course not, but the challenge will now be to work out how manufacturers and technology companies can not only retain the best DX but integrate it successfully across the whole customer experience (CX) – wherever the customer chooses to be.

KEEPING UP ISN'T ENOUGH

Most practitioners (60% of Manufacturers, 58% of Technologists) think they are keeping up with customer expectations. Far from reassuring, the last 24 months have illustrated how quickly circumstances can change. Continually evolving customer expectations in 2022 and beyond will prove almost as disruptive. Nor is it enough to say. 'but it's not B2C'. Executives' experiences in their personal lives inform those in their professional ones. A high bar has been set.

GETTING TO KNOW YOU

Traditional B2B experience has been built offline. It has been in-depth and highly personal – but insights gleaned from the lunches and golf days of old don't translate to modern DX, nor are they scalable. Fortunately, senior B2B executives are alive to this: gathering data and gaining insights are their top technology priority for 2022 (64% Manufacturing, 59% Technologists). Naturally, executives are aware that data on its own serves little purpose, and they are nearly as keen to drive it into content production, their next highest priority. This has been identified by many studies, including our own, to be a key point of value creation in building B2B relationships. With one caveat – not any old content will do. Quality and innovation matter.

THE RISE OF THE MACHINES

Scale and agility are increasingly important, and many B2B executives are starting to recognise the value of automation in achieving their goals. However, it's not something that can be dropped on employees from out of the clear blue sky. Automation requires preparation. It may not be significant, but groundwork before implementation reaps substantial rewards in the form of a futureproof, agile B2B organisation.

2. Methodology

The *2022 Digital Trends − B2B In Focus* report is based on a survey of 814 B2B executives working in the Technology (442) and Manufacturing (372) industry sectors. The survey was launched on November 11th, 2021, and closed on January 6th, 2022.

EXECUTIVE DEMOGRAPHICS:

Technology respondents	• *25% were senior director level or above, with the remaining 75% at practitioner level.* • *By world region, the top three included North America (42% of respondents), Europe (39%) and Asia-Pacific (14%).*
Manufacturing respondents	• *20% were senior director level or above, with the remaining 80% at practitioner level.* • *By world region, the top three included Europe (47%), North America (39%) and Asia-Pacific (13%).*

3. Situation: All aboard the BETA wave

What does the word *Beta* mean to you? Alpha's not quite as famous sibling in the Greek alphabet? A high spec but ultimately doomed brand of video recorder?

But what if we were to say that Beta was the future of B2B digital experience (DX)? Coined in a piece of LinkedIn research by the B2B Research Institute, BETA refers to a 21–40-year-old demographic, the next generation of decision-makers that is about to shake up how the world does business. Standing for 'blurred work-life boundaries, evolving mindset, tech native, activist', this group is "the first cohort of digital natives to assume positions of seniority in business."[1]

The BETA cohort and their digital-first perspective are a valuable reminder that the recent steps toward business transformation and digitisation aren't just the result of the current pandemic. They're the strategy of companies that are setting themselves up for future success.

Fortunately, our research indicates that the overwhelming majority (94%) of manufacturing and technology senior executives either 'agree' or 'strongly agree' that the pace of change experienced in 2020/2021 will persist for the foreseeable future.

Indeed, as we'll find in the research, this change is now blurring the traditional lines between manufacturing and technology industry sectors as they seek to fundamentally rethink how their businesses operate to align with changing customer needs.

General Motors is a case in point with its plans to hire 8,000 tech employees in 2022, which it regards as an "exciting sign of G.M.'s momentum, our quest to innovate technology with impact, and our focus on helping people find their purpose in the workplace" by the company.[2]

Increasingly digitally native executives' 'needs' go beyond smartphones to cloud collaboration, AI and 'consumerised' business tech – and these needs will continue to evolve and change. Those companies that embrace the BETA way of thinking will be able to keep up and prosper, and those that don't may find themselves eating BETA's dust.

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1 https://business.linkedin.com/content/dam/me/business/en-us/ marketing-solutions/case-studies/images/namer-pdf/final-be- ta-whitepaper.pdf?__ hstc=93079362.92fd2f625aa56182340a79aa b809e469.1642928617880.1642928617880.1642928617880.1&__ hssc=93079362.1.1642928617880&__hsfp=3528923260
2 https://www.nytimes.com/live/2022/01/26/business/fed-rate-decision-stocks- inflation#general-motors-plans-8000-hires-this-year-in-high-tech-jobs

I. The only way is forward

Figure 1, below, provides solid evidence of this assertion; few expect that the emphasis on the digital experience will lessen anytime soon. Even more so, as you might expect, half of the technology sector respondents expect to actually speed up their DX efforts, even if customers can return to using offline channels.

By comparison, manufacturers appear less bullish on this statement – being 12 percentage points less likely to agree. Indeed, much has been written about the challenges of digitally replicating the personalized touch of physical meetings in this industry sector. One study quotes a steel factor owner saying, "listen, my friend, I will not buy anything until I see it. Seeing is believing, especially as we are talking about new technology."[3]

That said, as we can see in *Figure 1*, nearly two-thirds of manufacturers (59%) look set to maintain the current emphasis on DX, suggesting they recognize its benefits. But they will have to be vigilant: it won't take a pandemic-led wholesale change to cause disruption. The difference will be much more subtle, more insidious.
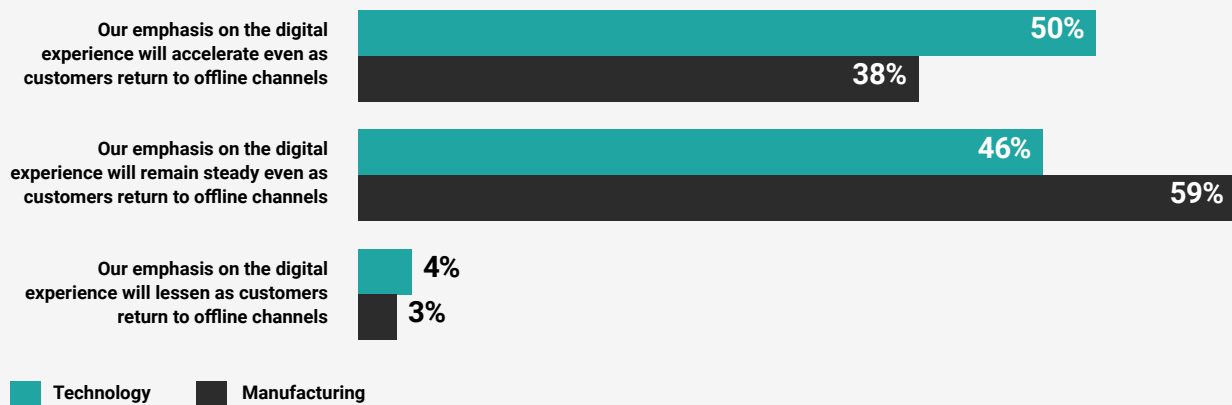
> **"Half of the technology sector respondents expect to actually speed up their DX efforts, even if customers can return to using offline channels, 12 percentage points more than manufacturers."**
>
> ***2022 Digital Trends – B2B in Focus, Adobe***

3 https://www.emerald.com/insight/content/doi/10.1108/IJOA-04-2021-2719/full/html#sec006

FIGURE 1

How does your organisation expect the demands on its digital experience (DX) to evolve?

	Technology	Manufacturing
Our emphasis on the digital experience will accelerate even as customers return to offline channels	50%	38%
Our emphasis on the digital experience will remain steady even as customers return to offline channels	46%	59%
Our emphasis on the digital experience will lessen as customers return to offline channels	4%	3%

Sample size = 471. (Technology respondents = 250; Manufacturing respondents = 221)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

For example, there will be cost efficiencies, both in production and cost to serve. Those who invested will already have the advantage of cost and scale and can generate new revenues from those investments. Manufacturers without an active approach to developing DX could suddenly find themselves slipping further and further behind the rest of the field.

Another critical characteristic of the BETA cohort is the blending of their professional and personal lives. They follow business leaders on their personal social feeds, don't turn off work emails at 5 pm sharp, but equally take personal time during a working day. This reflects the wider business community's attitude to B2B marketing and DX. Why should it be different from their experience with their grocer, travel agent, or hairstylist?

"We've just provided self-service to consumers, so why shouldn't we do the same for business customers? They are also humans. In the end, there is no difference between B2B and B2C, we just have human relations that we are managing, and technology will help us to provide the best user experience," says Nils Stamm, Chief Digital Officer for Deutsche Telekom told *Raconteur* in December 2021.[4]

This can make it sound like providing this kind of experience is as easy as flicking a switch, but we know that bringing a company round to a CX/DX-first way of thinking can involve change at a most foundational level.

> **"Megatrends are reshaping the dynamics of our industry. Content, community, and offerings have to be personalised. The consumer as a customer must have the same experience along the various touchpoints with you no matter if it's online or offline. Digital, very important, is a unity of effort. You have to be able to master the complexity of technology but, even more important, is that you manage the cultural transformation which is coming with the digital transformation."**
>
> **Michael Nilles,**
> *Chief Digital and Transformational Officer, Henkel*

Few practitioners would claim to be excelling at DX, with most respondents to our survey claiming that their DX is merely keeping pace with customer expectations (see *Figure 2*). This is a challenge in itself, as these expectations are constantly changing and ever-increasing.

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4 https://www.raconteur.net/commercial-feature/b2b-customer-experience-now-vital-in-telecoms/

FIGURE 2

How would you describe your organisation's digital customer experience?
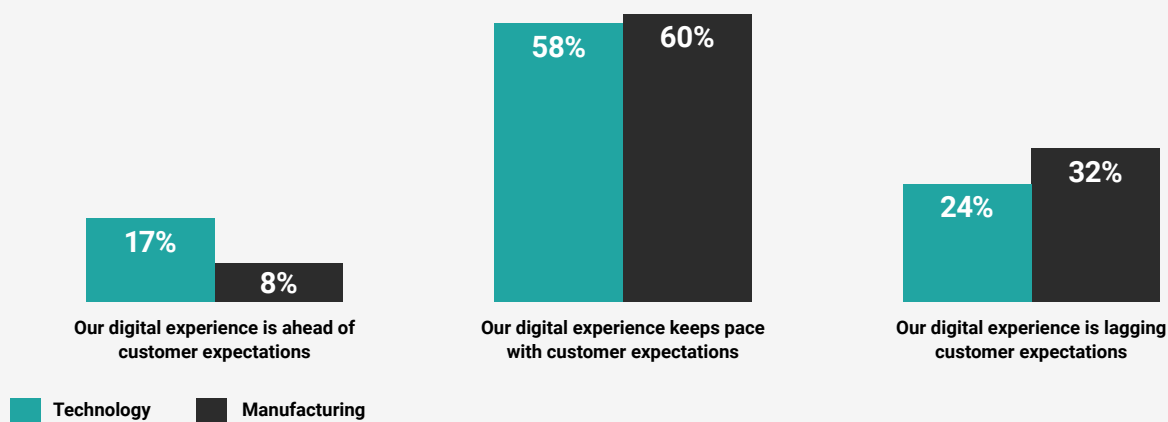
Sample size = 560. (Technology respondents = 298; Manufacturing respondents = 262)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

In the field of buyer information alone, B2B companies are failing to meet customer expectations. Recent research suggests that 90% of B2B customers want vendors to prove ROI and show they understand the market. Still, two-thirds of buyers also say that the information B2B companies put out is focused on the vendor's own needs or represents a triumph of style over substance. There's clearly a lot of work to do to bridge the expectation gap.[5]

It's particularly surprising only 17% of technology practitioners claim their DX is ahead of customers' expectations and, more disturbingly, about a quarter (24%) state that their DX lags customer expectations.

Considering their industry, you would assume this (of all groups) would have a head-start in DX. It is possible processes that appeared seamless at the start of the pandemic were revealed to be less so when dealing with rising volumes of digital interactions across remote teams. As evidenced by the many ' please bear with us while our staff work from home' messages played on call hold systems, or IVRs (Interactive Voice Response), the pandemic stretched existing DX to the limit.

As companies emerge from the pandemic, they don't just have to deal with the remedial work required to bring existing solutions up to par. Customer expectations have been altered. Consumers are more exacting, B2B consumers perhaps doubly so as they seek not only a seamless but also a more 'consumerised' experience. B2B companies are in a race not just to catch up with today's status quo but simultaneously prepare for tomorrow while anticipating what's next.

II. Become part of the DX virtuous circle

It is already clear that organisations that benefit from the digitally native, go-getting attitude of its BETA executives are likely to be natural leaders in DX. Does it then follow that companies that lead in DX are also likely to lead in marketing and business performance overall?

> "There are huge levels of remediation to be done during the pandemic a huge mirror was held up to organisations. When contact centers were shut down and people were sent home, it was a very true reflection of an organisation's capability. Customers experienced how good, bad, or indifferent a company's self-service and digital experiences were and how agile their operations were."
>
> **Rob Allman,**
> *Vice President for Customer Experience at NTT Ltd.*

> "When it comes to thinking about the future, we are thinking five years ahead. The world is changing so dramatically and some of the things that we need to do take so much time that you don't have a choice. You got to think long term, but then execute short term – and that's what we are trying to figure out."
>
> **Ajit Sivadasan,**
> *Vice President, Lenovo*

5 https://www.forrester.com/blogs/will-your-b2b-content-meet-buyer-expectations-in-2022/

The answer, quite simply, is yes.

To understand what exactly separates leading B2B companies from static or lagging organisations, we have created a Performance Scorecard (see *Figure 3a, and 3b* below) which doesn't just help companies benchmark their current progress, it is also a roadmap of where they are likely to be in the future.

We first asked respondents how they would describe their company's digital customer experience: lagging customer expectations, keeping pace, or ahead.

We then asked them to gauge the overall health of their business by rating it on a 10-point scale on each of five criteria:

- Agility in responding to opportunities and disruptions that may arise
- Innovation within their marketing organisation
- Collaboration from the technology/IT group
- Talent development and education
- Ensuring a diversity of backgrounds and opinions

Finally, we cross-tabulated the responses to these two sets of questions. The results are displayed in *Figure 3a* and *Figure 3b* below. The figures in the cells represent the average score of each of the five dimensions we've described based on a scale where 10 would be the maximum possible score. For example, in the Technology sector, those whose CX is ahead of customer expectations have an average Collaboration score of 7.8, well ahead of those whose CX lags customer expectations, where the average Collaboration score is only 6.2.

Both figures clearly show that companies that exceed their customers' expectations on their DX have universally higher scores across each of the five criteria from *Agility* to *Diversity*, than those that lag those expectations. There are no outliers. The pattern is the same whether it is a Technology or Manufacturing company. The message is clear – if you excel in DX, your marketing performance is as likely to thrive and vice versa. Improve one, and the others may well follow.

FIGURE 3A AND 3B

Digital Customer Experience Proficiency versus Organisational Performance against Key Dimensions Including Agility, Innovation, Collaboration, Talent, and Diversity – Technology vs Manufacturing

Figure 3a:

TECHNOLOGY

	Lags	Keeps Pace	Ahead
Agility	5.8	6.7	7.6
Innovation	5.6	6.9	7.7
Collaboration	6.2	6.8	7.8
Talent	5.6	6.5	7.7
Diversity	5.9	6.9	7.7

Sample size = 250

Figure 3b:

MANUFACTURING

	Lags	Keeps Pace	Ahead
Agility	4.9	6.2	7.5
Innovation	4.8	6.2	7.8
Collaboration	5.2	6.3	8.0
Talent	4.7	5.9	7.2
Diversity	5.2	6.3	8.0

Sample size = 215

Q: How would you describe your organisation's digital customer experience. Our digital experience...[lagging / keeps pace / is ahead of] customer expectations].

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

Another takeaway is that Technology respondents (*Figure 3a*) almost always rate themselves higher than Manufacturers (*Figure 3b*) on the five measures (e.g., Agility) within each of the three segments. For example, the average score on Agility is higher for Technologists than for Manufacturers, whether we look at their respective DX laggards, mainstream, or leaders.

While correlation does not prove causation, it is not unreasonable to look at the data in both figures and seek to improve organisations' performance on each of the five dimensions in the quest to exceed customers' DX expectations. It would be natural to assume that, to make faster DX progress, Manufacturers clearly need to look to Technologists for inspiration.

The implications of *Figures 3a* and *3b* are far-reaching. Often, when presented with a 'status update' like this, there can be a sense of futility – "where are we going wrong," followed by "where do we start." By breaking the performance indicators into specific sections, it is possible to see where improvements need to be made and how much work is required to close the gap on the leaders.

For example, in the Technology sector, laggards have the least distance to make up in *Collaboration* (where the current gap between leaders (average score of 7.8) and laggards (average score of 6.2) is 1.6 points) but, surprisingly, the most in Innovation (a gap of 2.1 points). You could argue that this is expected in a sector where innovation is its lifeblood.

The story is the same in the Manufacturing sector (*Figure 3b*), where the most significant gap between leaders and laggards is in Innovation (a difference of 3.0 points), while *Agility* and *Talent* require less ground to cover (differences of, respectively, 2.6 and 2.5 points). On an individual level, findings like this can help businesses assess and benchmark their own performance against the sector to move forward.
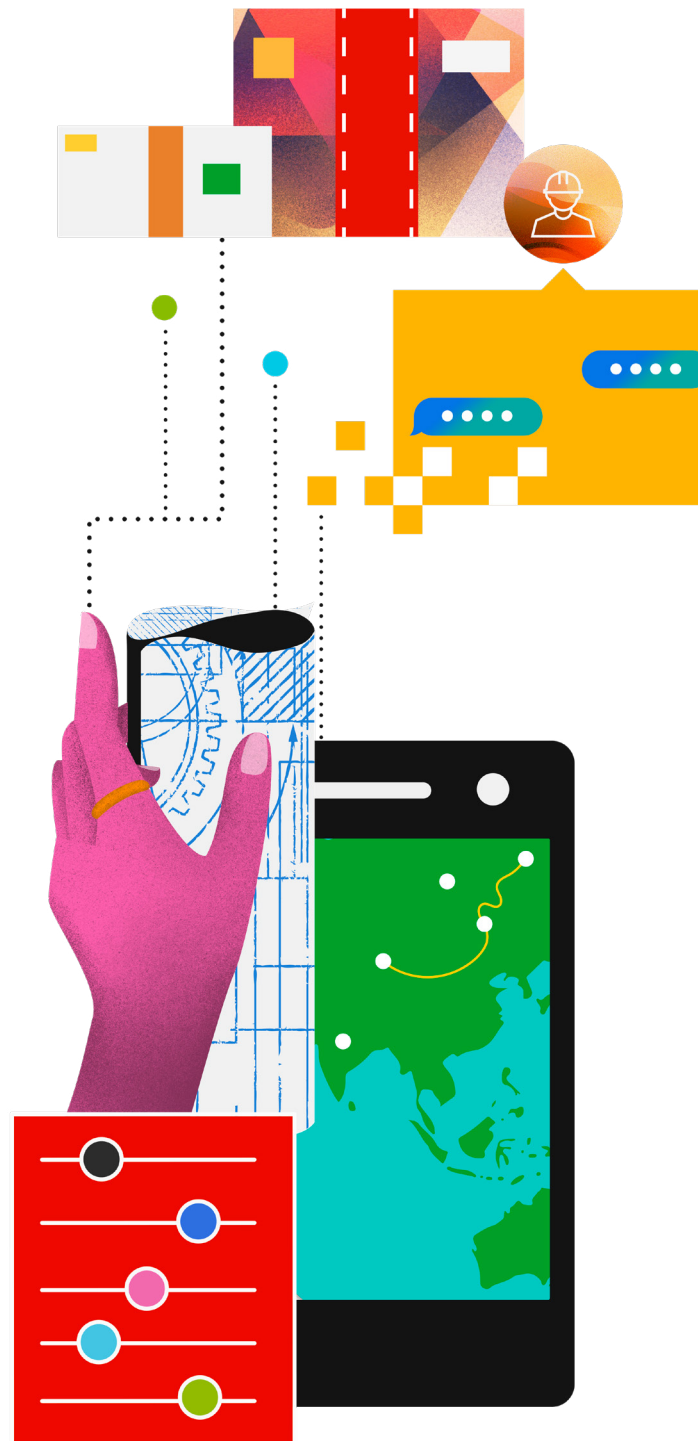
4. Complication: The Long and Winding Road

As you can see from *Figure 4,* most manufacturers and technology providers see a surge in existing and new customers using digital channels. They also report experiencing new and changing customer journeys. All of which underlines why businesses have had to work out how to conduct, recreate, or translate in-person experiences online on an ongoing basis.

Conducting an omnichannel customer experience means curating channels to do a job. Whether it's transacting and providing service options for the long tail of small customers online or delivering in-person experiences to resolve a customer repair, such orchestration can be complex and can risk channel conflict.

Indeed, the average B2B buying journey is neither linear nor individualistic. There can be 10, sometimes more, stakeholders (all with different needs) involved in the

purchase, and B2B brands somehow must find a way to inform and appeal to all of them[6].

> **"We've always taken a pretty broad approach because of the scope of our business, but I think employees have a stronger voice, and so, yes, your IT buyer or your CEO or CMO is getting a lot more input from the end-users, who are becoming more vocal because of the challenges that are being exposed [to] based on these digital platforms."**
>
> **Corinne Sklar,**
> *Chief Marketing Officer, IBM iX[7]*

Given the complexity of the B2B purchase process, the move to digital now presents technology and manufacturing organisations with an opportunity to streamline digital processes for customers and employees alike.

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6 https://www.gartner.co.uk/en/sales/insights/b2b-buying-journey
7 https://content.ascential.com/rs/897-MBC-207/images/Changing_Channels_in%20B2B_Spotify_%20WARC.pdf

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FIGURE 4

Thinking about the last 18 months, were the following true or false for your organisation?

	Technology	Manufacturing
We experienced a surge in existing customers using digital channels	72%	62%
We experienced a surge in new customers through digital channels	65%	59%
We experienced new and changing customer journeys	81%	67%
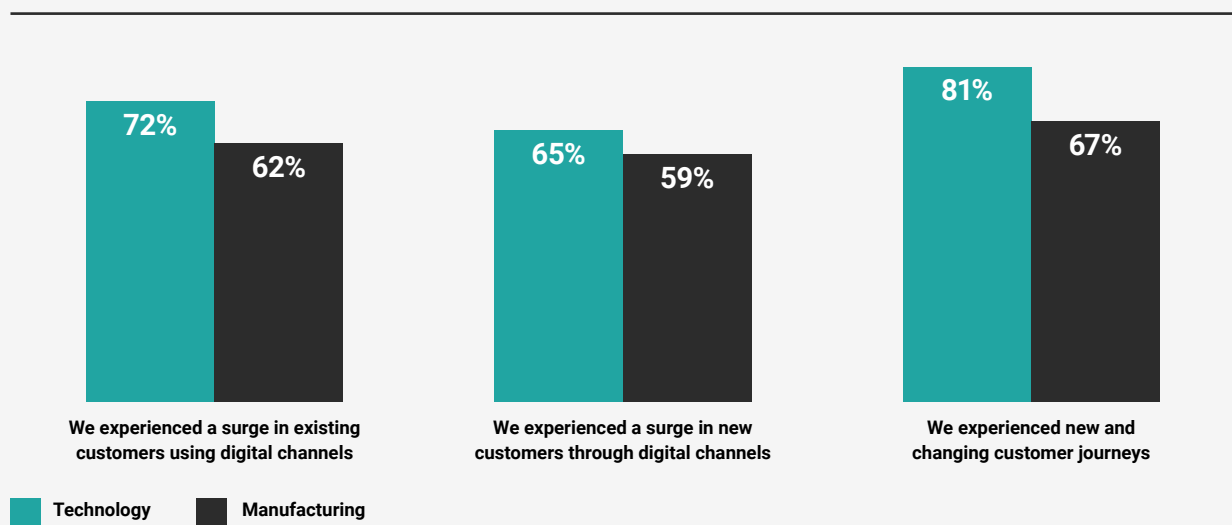
Note: The figure shows the percent responding 'true'. Sample size = 410 (Technology respondents = 218; Manufacturing respondents = 192)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

Of course, achieving this depends on how data is structured and accessed. As explored in the following section, it's evident this is on the radar for senior executives who are most likely to be concentrating on corralling and centralising data to achieve a more unified customer view.

I. Navigating the customer journey

Getting to the root of the B2B buyers' needs starts and ends with data. Data is undoubtedly the key to unlocking the insights B2B marketers need to make those all-important connections with customers.

Still, in companies that have been frantically trying to keep up with the pace of change, it can feel like they're getting further and further away from their goals
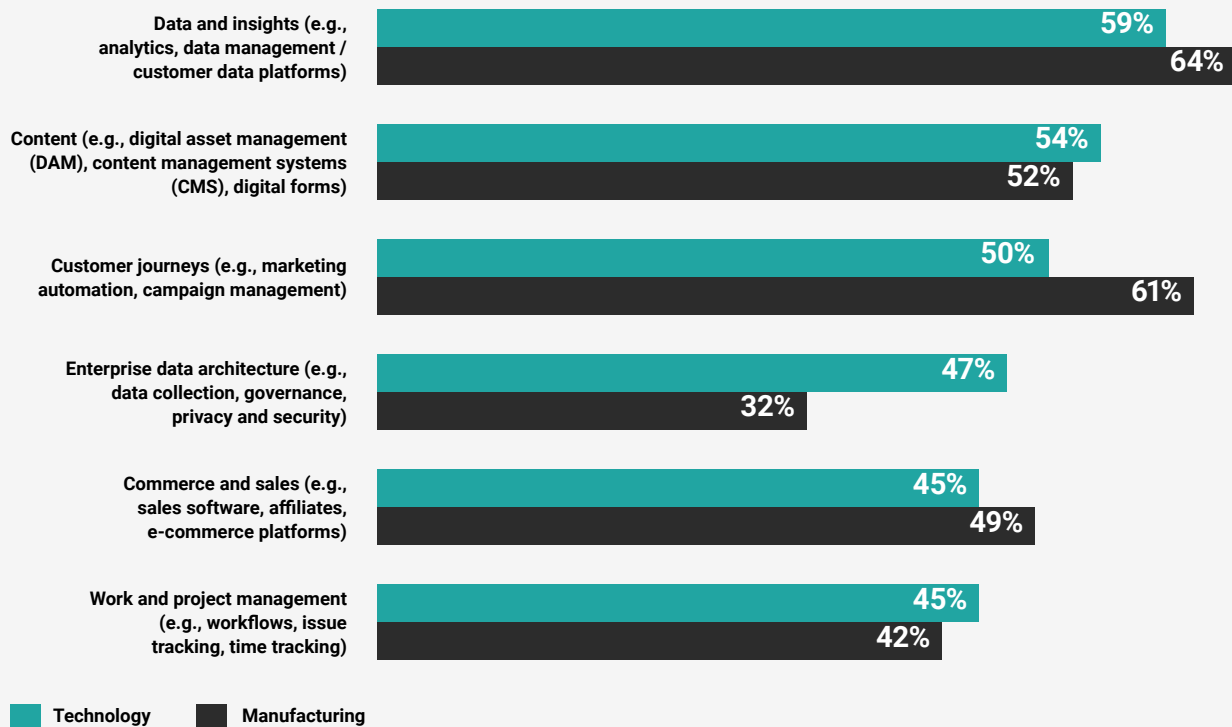
instead of getting closer. And that's despite absolutely swimming in data. In *Figure 5,* we can see how senior executives plan to tackle these challenges over the next year.

Unsurprisingly, given their experiences over the past 24 months, technology to manage data and insights is the top priority for both Manufacturing and Technology executives.

Analytics tools and customer data platforms are the critical building blocks of any omnichannel business, and B2B executives recognise this. Data on its own has little or no business value. Too much disjointed information doesn't just fail to add value; it costs the organisation in terms of duplicated processes and disconnected workflows.

FIGURE 5

Please rank the top technology priorities for your organisation in the next year

	Technology	Manufacturing
Data and insights (e.g., analytics, data management / customer data platforms)	59%	64%
Content (e.g., digital asset management (DAM), content management systems (CMS), digital forms)	54%	52%
Customer journeys (e.g., marketing automation, campaign management)	50%	61%
Enterprise data architecture (e.g., data collection, governance, privacy and security)	47%	32%
Commerce and sales (e.g., sales software, affiliates, e-commerce platforms)	45%	49%
Work and project management (e.g., workflows, issue tracking, time tracking)	45%	42%

■ Technology   ■ Manufacturing

Note: The percentages reported in this figure represent the respondents' combined 1st, 2nd, and 3rd priorities for 2022.
Sample size = 171 (Technology respondents = 102; Manufacturing respondents = 69)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021
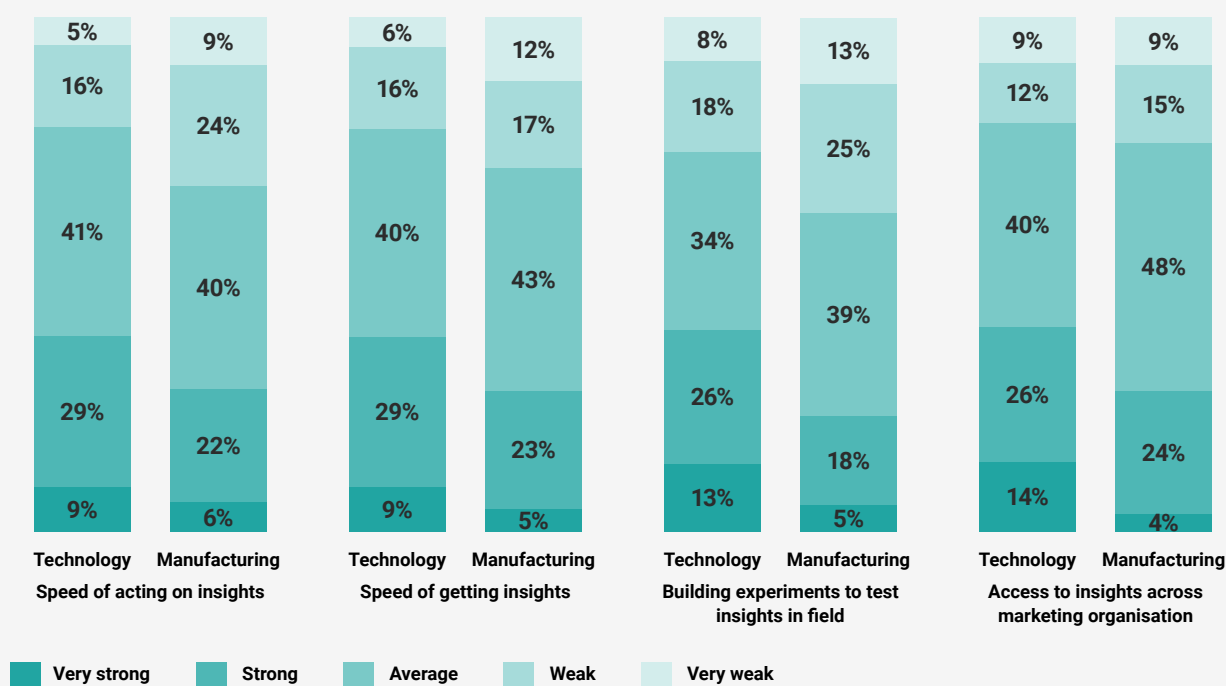
II. Speed is of the essence

As organisations move from one moment of uncertainty to the next, grappling with inflation, global supply chain problems, a tight labour market and shifting pandemic conditions, data-driven customer insights and the ability to quickly adjust strategies will be more important than ever.

In this respect, artificial intelligence (AI) is a crucial area of opportunity to enable organisations to take advantage of real-time business decisions and customer experiences. However, *Figure 6* indicates this is a work-in-progress for many firms in our study.

8 https://business.adobe.com/blog/the-latest/adobe-introduces-real-time-cdp-for-b2b

FIGURE 6

Thinking about key marketing insights in your organisation, how would you rate the following?

Speed of acting on insights

	Technology	Manufacturing
Very weak	5%	9%
Weak	16%	24%
Average	41%	40%
Strong	29%	22%
Very strong	9%	6%

Speed of getting insights

	Technology	Manufacturing
Very weak	6%	12%
Weak	16%	17%
Average	40%	43%
Strong	29%	23%
Very strong	9%	5%

Building experiments to test insights in field

	Technology	Manufacturing
Very weak	8%	13%
Weak	18%	25%
Average	34%	39%
Strong	26%	18%
Very strong	13%	5%

Access to insights across marketing organisation

	Technology	Manufacturing
Very weak	9%	9%
Weak	12%	15%
Average	40%	48%
Strong	26%	24%
Very strong	14%	4%

Legend: ■ Very strong ■ Strong ■ Average ■ Weak ■ Very weak

Sample size: 436 (Technology respondents = 243; Manufacturing respondents = 193)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

> **"We had a lot of isolated systems, such as ERP platforms, that are now being centralised. The company has been investing heavily in making centralised data available for all of our SBUs [strategic business units] and corporate functions by giving them access to the same platform."**
>
> **Jorge Osuna Mateus,**
> *General Manager and Business Director*
> *for the Americas region, Honeywell[9]*

It's clear that as layers of insight complexity increase, respondents' capabilities decrease – from performing strongest in accessing insights, followed by speed of getting the insights and acting on them. The lowest-rated capability was building experiments to test those insights in the field.

Gartner expects 75% of B2B sales organisations to augment their sales strategies with AI-guided selling solutions by 2025 – a mere three years away at the time of writing. And yet, the company also admits that adoption rates are currently low.[10]

There is recognition that companies must take that leap into the future with more advanced technologies, using technology as a platform to reimagine the products and services. For example, according to Shaun Braun, Senior Vice President, Digital Transformation at 3M, "we must level up our interactions there – and that will mean technology." Says Braun, "if we don't start to lean in and improve in that space, customers will leave us behind."

One recent study suggests this means scaling digital proof of concepts (POCs) and driving higher returns on digital investments (RODI) – although few are in a position to accomplish that. Out of 122 high-tech companies analysed, just one in five successfully scaled more than half their POCs and earned higher than average returns.[11]

Clues as to why this is the case are in the hurdles identified earlier by executives. Not least of which has been the need to keep up with the constant pace of change. This results in a 'blooming' of sub-units and sub-technologies trying to solve a new and different problem. With specific investments in unifying technologies coupled with the potential to use AI to automate data ingestion and insight sharing, this fragmentation may well be reversed.

> **"We must level up our interactions there – and that will mean technology. If we don't start to lean in and improve in that space, customers will leave us behind."**
>
> **Shaun Braun,**
> *Senior Vice President, Digital*
> *Transformation at 3M*

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9 https://hbr.org/resources/pdfs/comm/salesforce/
   TheFutureofCustomerExperienceinManufacturing.pdfe
10 https://www.gartner.com/en/newsroom/press-releases/gartner-predicts-75--of-
   b2b-sales-organisations-will-augment-tra
11 https://www.accenture.com/gb-en/insights/industry-x-0/high-tech

III. That's the way the cookie crumbles

> **"We spend hundreds of millions of dollars on advertising. If we had the wrong creative, you could have several weeks where we would lose millions of dollars in revenue."**
>
> **Ajit Sivadasan,**
> *Vice President, Lenovo*

Understanding what attracts the customer in B2B is no different from B2C. The demands on data may vary, but ultimately it comes down to being in the right place, at the right time, with the right message.

For many years, third-party cookies have enabled this to a degree. They have provided brands with essential insights into what their customers or potential customers might be doing when they are otherw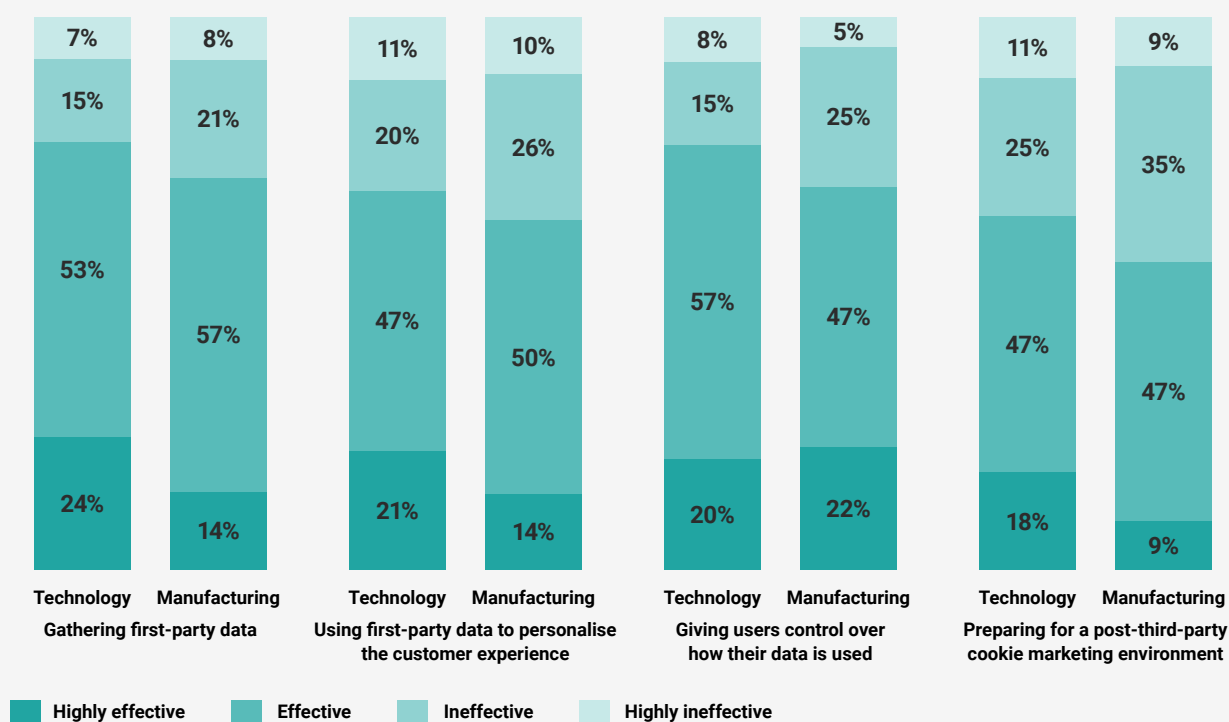ise traveling the net anonymously, i.e., not via any form of site login or linked site. However, their probabilistic nature still made these insights a guess, at best.

But a decision by Google in 2020 to phase out third-party cookies in two years (subsequently extended for a further year to April 2022) left advertisers with a black hole in understanding their customer journeys. The announcement was met with much handwringing, as was the implementation of GDPR in Europe in 2016. But more forward-thinking practitioners already realised that being bound up in regulation was the opportunity to be better.

In *Figure 7,* our research shows that most of these practitioners feel they are not quite ready to deploy first-party data in a post-third-party cookie environment. This, despite stating they are either effective or highly effective at gathering it.

FIGURE 7

How would you rate your organisation in the following areas?

	Gathering first-party data		Using first-party data to personalise the customer experience		Giving users control over how their data is used		Preparing for a post-third-party cookie marketing environment	
	Technology	Manufacturing	Technology	Manufacturing	Technology	Manufacturing	Technology	Manufacturing
Highly ineffective	7%	8%	11%	10%	8%	5%	11%	9%
Ineffective	15%	21%	20%	26%	15%	25%	25%	35%
Effective	53%	57%	47%	50%	57%	47%	47%	47%
Highly effective	24%	14%	21%	14%	20%	22%	18%	9%

Legend: ■ Highly effective ■ Effective ■ Ineffective ■ Highly ineffective

Sample size: 436 (Technology respondents = 243; Manufacturing respondents = 193)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

It may be a steep learning curve, but respondents agree that it's for the best. In our research, 92% of technology executives and 89% of manufacturing executives agree that sunsetting of the third-party cookie is pushing them to create first-party relationships. Removing third parties removes the often-unreliable proxies that marketers are using to understand true customer behaviour.

The most obvious is the pair of shoes that follows customers around the internet for six months after they bought them. B2B customers are far from immune from this sort of cookie-driven, senseless retargeting.

> **"The regulations on privacy, especially driven by GDPR, in Europe have been eye-opening. And I think that everybody's taking a cue that we want to protect privacy. The move towards cookieless is going to only accelerate. Pretty much everybody has a mandate now to go in that direction. The problem is, everything that we have done over the last 10-15 years in terms of web has been based on cookies."**
>
> **Ajit Sivadasan,**
> *Vice President, Lenovo*

Instead, B2B marketers will have to get more creative about where they source data and how best to acquire it.

> **"Marketers will be forced to befriend publishers who have been able to create the audience insights they lack. As the pendulum in the power dynamic swings towards publishers, marketers must lean in and more collaboratively engage with the content their consumers are consuming."**
>
> **Mark Wagman,**
> *Managing Director at MediaLink[12]*

As we noted earlier, *Figure 5* illustrates senior executives' top technology priorities segmented by manufacturing and technology companies. Combined (not shown in the chart) data and insight platforms (61%) are followed by marketing automation (54%) and content (53%) in order of priority.

Content is a long way from the website brochureware of bygone times. Modern websites act as a brand space, transaction portal, information destination,

and data gathering portal. Because the website is the number one destination for buyers, brands can collect more information and engage the buyer in an increasingly personalised way.

CASE STUDY:

HPE

In 2015, Hewlett Packard split into two separate companies. And Hewlett Packard Enterprise – HPE – was formed as an edge-to-cloud platform-as-a-service company. While it benefitted from more than 75 years of strong brand heritage, it was essentially a new entity and had the opportunity to create the brand and rebuild a truly customer-first DX.

It was also critical that its website – the central point of customer engagement – be built with customer needs in mind, not just for today but also for tomorrow.

"As we were building for our Day One launch, we knew we had to take the future into account. We wanted to have a system in place that could support anything, from targeting audiences to rolling out new countries to language localisation to providing analytics and tracking engagement — even if we weren't going to use it right away," said HPE Senior Manager, Systems and Platform Management, Keith Orchard.

Since 2015, the site has driven deep customer engagement, improved personalisation capabilities, and contributed to strong revenues, reaching $29.1bn in 2019.

"Ultimately, what we want to do through our touchpoints is develop ongoing engagements, communication, and sales with our customers." Orchard said.[13]

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12 https://content.ascential.com/rs/897-MBC-207/images/Changing_Channels_in%20B2B_Spotify_%20WARC.pdf
13 https://business.adobe.com/customer-success-stories/hewlett-packard-enterprise-case-study.html

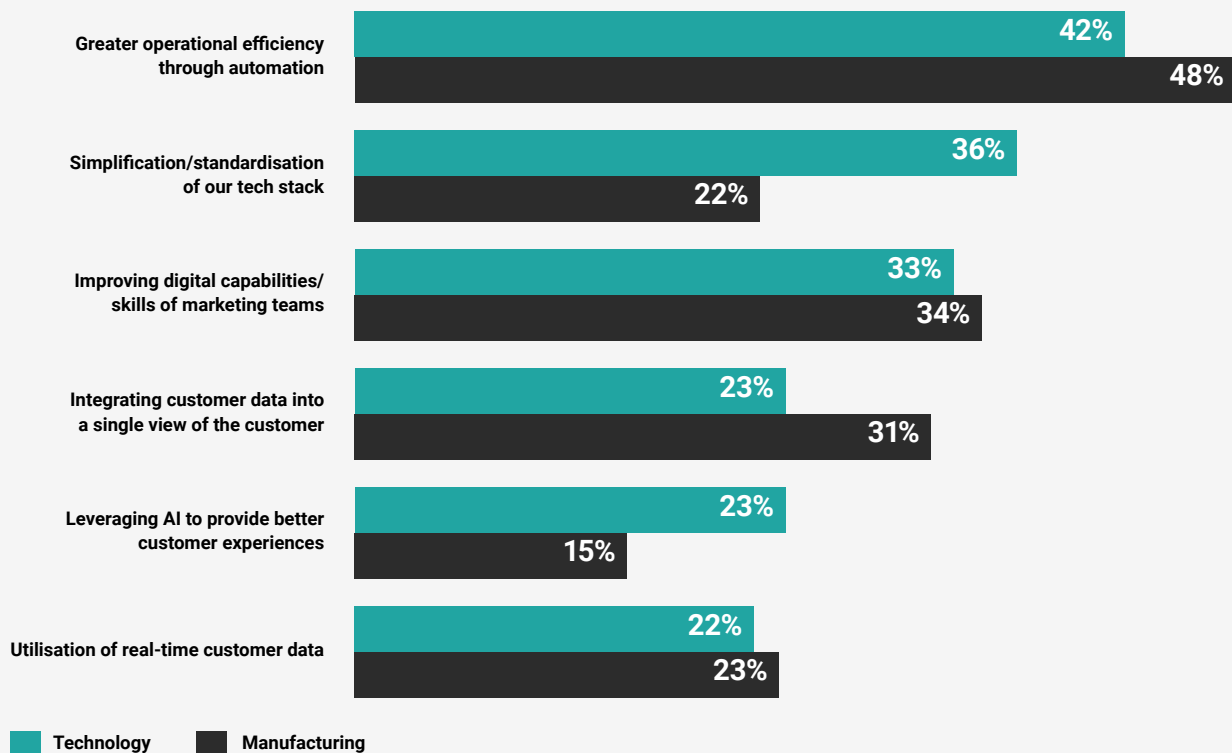# 5. Resolution: There's nothing artificial about today's intelligence

Figure 8 illustrates the results we obtained when we asked respondents their top operational priorities for improving customer experience in the coming year.

Out front, with 48% of manufacturers and 42% of technologists, is creating better operational efficiency through automation. Coupled with the need for speed and to get projects up and running, as seen earlier, it makes sense for time and cash-squeezed organisations to get machines to take the strain.

By cutting the time to perform a task as well as the cost, there are a host of benefits. These can range from more willingness to test and learn to a greater appetite for risk-fostering innovation (something we saw was lacking earlier), more agility (ditto), and the potential to deploy skilled staff into other areas.

FIGURE 8

What are your organisation's top operational priorities for improving the customer experience in 2022?

Greater operational efficiency through automation — Technology 42%, Manufacturing 48%

Simplification/standardisation of our tech stack — Technology 36%, Manufacturing 22%

Improving digital capabilities/ skills of marketing teams — Technology 33%, Manufacturing 34%

Integrating customer data into a single view of the customer — Technology 23%, Manufacturing 31%

Leveraging AI to provide better customer experiences — Technology 23%, Manufacturing 15%

Utilisation of real-time customer data — Technology 22%, Manufacturing 23%

■ Technology ■ Manufacturing

Sample size = 263 (Technology respondents = 136; Manufacturing respondents = 127)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

But there appears to be an anomaly in the data. While automation gained the lion's share of responses, leveraging AI took the least, with only 15% of manufacturers exploring the option. How could this be?

Researchers have identified that, although marketing automation tools can dramatically improve sales leads and personalisation, they have suffered from poor implementation in the past, damaging their reputation as a forward-looking technology. In particular, the research identified that companies without adequate groundwork to onboard these solutions created "implications for employees that often go beyond the simple automation platform adopted." The understanding is that these solutions impact training, workflows, job descriptions, and more which can cause problems if not anticipated and built into the implementation process.[14]

There needn't be significant "implications for employees." Many newer technologies have either incorporated intuitive dashboards, allowing employees with a varying range of skills to manipulate insights while the AI-powered technology performs some of the 'trickier' computations in the background (such as identity matching or propensity modeling).

Previous attempts at using AI may well have come unstuck due to insufficiencies in the underlying data. As we have seen via the B2B executives quoted in this report, eliminating silos and joining up data sources and tech stacks has been an essential precursor to deploying sophisticated, omnichannel DX/CX. Strong data foundations are critical to AI adoption.

> **"As our products and brands expand year to year, and the expectation by consumers and customers increases to see and learn more, it's essential to organise, automate and utilise all of our assets so that we have more time to focus on creative quality versus administration."**
>
> **Brennan Swing,**
> *VP of Creative Media and Creative Director –*
> *Mohawk Industries[15]*

AI and ML are already present and working away behind the scenes of many technologies currently in use in the service of DX/CX. According to the Martech Alliance, AI augmentation is predicted to have created $2Tn of business value by 2021, with 80% of business leaders saying AI already boosts productivity[16]. However, lack of understanding of current systems and a misguided belief that AI is more about autonomous robots and less about data organisation could well be behind the suspiciously low commitment reported in the research.

Indeed, according to the same Marketing Alliance research, 37% of executives say they don't understand cognitive technologies. In comparison, only 13% of B2B marketers are very confident in their knowledge of AI, and a whopping 65% of companies can't explain how their AI systems make decisions and predictions[17].

AI will become an ever-more important part of the DX mix in B2B. Especially when it comes to understanding and deploying data – if for no other reason than data scientists are already a rare enough breed (a shortage of 140,000 in the US alone, according to McKinsey[18]).

I. What's in it for me?

Building a richer understanding of the customer means B2B companies can deliver the best experiences and products (only one of which will be the 'end product') that capture and keep the customer's interest. It's all about delivering value.

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14 https://link.springer.com/article/10.1007/s43039-021-00024-x
15 https://blog.adobe.com/en/publish/2021/04/23/how-mohawk-industries-partnered-with-adobe-to-accelerate-their-digital-transformation#gs.gzemad
16 https://www.martechalliance.com/stories/ai-and-ml-in-b2b-stats-and-trends-for-2022
17 https://www.martechalliance.com/stories/ai-and-ml-in-b2b-stats-and-trends-for-2022
18 https://www.datasciencecentral.com/why-is-there-a-shortage-of-data-scientists-1/e

What that value looks like inevitably varies from customer to customer, sector to sector, even day-to-day. But the need to offer the customer something in return for their data is a constant.

Take the humble webinar, for example. Considered by many to be a central pillar of data acquisition and an opportunity for storytelling, building brand recognition, educating, and engaging.

> **"We have a huge calendar of webinars. We played with all kinds of incentives to get people to register – things like sending free lunches – but we found that by far the best way to drive audiences is with the right topic. We recently won a big contract with Ford to use our smartwatches for social distancing measures in their manufacturing centers, and our webinars about it have been attended by tons of people."**
>
> **Julie Godfrey Sr.**
> *Manager, Product Marketing B2B,*
> *Samsung Electronics America[19]*

But it's not just a topic you need to get right. Not everyone loves a webinar – as they currently stand. Just as the BETAs mentioned at the top of the report are reframing their working world, this group is taking a long, hard look at the content that potential suppliers see fit to throw their way.

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19 https://content.ascential.com/changing-channels-in-b2b-thankyou.html
20 https://business.adobe.com/customer-success-stories/esri-case-study.html

CASE STUDY:

Esri

Esri uses Customer AI, part of Adobe's Intelligent Services, in combination with Adobe Analytics to gain predictive insights based on past and real-time events. This benefits Esri in two ways: First, they can use Customer AI with Adobe Audience Manager to target prospects based on their purchase propensity. "We've learned that customers in the propensity score range of 90 to 100 converted three times higher than average — that's a 3x higher conversion rate," said Steve Schultz, Head of Marketing Technology, Esri. Secondly, they can deliver personalised web experiences that intelligently nudge prospects down the sales funnel.[20]

According to Schultz, "We're building out two separate campaigns to target visitors with a high propensity to buy two key products on our e-commerce platform. We've narrowed down the audience size to visitors with a propensity score of 95 plus." With more precise targeting, Esri can connect with customers based on their real-time needs and truly streamline the path to purchase.

Research has shown that, while 50% of BETAs join webinars, only a third of this group worldwide say they are useful, and even fewer (less than a quarter) in Germany, Singapore, Brazil, and France.[21] The same study indicates BETAs are very actively engaged in online learning, suggesting that brands could drive further engagement by 'repackaging' webinars into "learning events" to bring the concept bang up to date.

> **"That's the answer — creating a relevant customer journey. It's like a light bulb turns on when our customers realise that we really care about them. And when our message resonates with customers, they care about what we're doing, too."**
>
> **Steve Schultz,**
> *Head of Marketing Technology, Esri*[22]

Social media, too, should not be ignored. Intuit QuickBooks' Ask the Expert involves live Q&A sessions with content that is "platform-first and customer-driven", reaching over 6.5m customers and gaining engagement that is 11.7 times the typical rate.[23]

But in this era of hyper-personalisation, it is tempting to make a detailed, personalised experience the norm from the get-go. Still, there are a couple of examples where applying broader personalisation tactics is equally successful.

Ultimately, even in the post-pandemic world, there are some enduring constants in the DX in the B2B sector. Trust and respect in business relationships will always be critical. How those are established and maintained in the digital sphere will come down to companies' due diligence – not just around data, but in maintaining the technologies and cultures that allow them to act and react to customer trends. With those in place – alongside transparency and compliance – B2B companies can seamlessly translate relationships into a new omnichannel environment and foster the agility to keep pace with whatever comes next.

21 https://business.linkedin.com/content/dam/me/business/en-us/marketing-solutions/case-studies/images/namer-pdf/final-beta-whitepaper.pdf?__hstc=93079362.92fd2f625aa56182340a79aab809e469.1642928617880.1642928617880.1642928617880.1&__hssc=93079362.1.1642928617880&__hsfp=3528923260
22 https://business.adobe.com/customer-success-stories/esri-case-study.html
23 https://www.essenceglobal.com/article/getting-ahead-of-the-curve-amid-the-consumerisation-of-b2b-marketing
24 https://business.adobe.com/customer-success-stories/asus-case-study.html

CASE STUDY:

ASUS

With both B2B and B2C customers, ASUS has latched onto the 'B2B is B2C' concept with a single site meeting both customers' needs. In this case, the resellers in its local stores and the host of gamers and consumer users represent the majority of their customers. The website was the best source of information for products but didn't allow online ordering. The company wanted to introduce ecommerce capabilities while still supporting resellers – and gave the gaming community the special experience it craves.

To do so, the company introduced a wide range of functionalities, from allowing end-users to build their dream computer to helping resellers benefit from partner programs and customer support. Business users could also access industry discounts and unique selling terms. The new, multifunctional site appears to have overcome the threat of being 'jack of all trades, master of none' with a 56% increase in PC and mobile revenue, 59% growth in transactions, and a 32% increase in web sessions.[24]

6. Recommendations

THE BUSINESS BUYER IS CHANGING AND WILL CONTINUE TO CHANGE

While technology is increasingly used to enhance DX to deliver the best CX, it's important to remember the human being involved in the process. Today's business buyer is evolving, epitomised by the BETA cohort. Understanding this group's needs and motivations is key to building the best experience to engage and ultimately sell, inside and outside a corporate context.

THE GAME IS BEING RAISED ACROSS THE BOARD

Marketing is full of buzzwords, digital marketing especially so. Conversations may fixate on one concept for a time, but the truth is that B2B marketers must elevate performance across the board to maintain competitiveness. So, while agility or diversity may be grabbing the headlines today or tomorrow, leading companies make sure they invest in each of the five key drivers of DX/CX that we identified. Agility, Innovation, Collaboration, Talent and Diversity all need equal attention.

DON'T BE AFRAID OF AI

The business buying journey is complex and almost always involves several stakeholders with differing needs. As the data landscape looks set to change with the demise of the cookie, tracking customer behaviour looks set to become even more challenging. At the same time, the time available to B2B marketers seems to do nothing but shrink. Using artificial intelligence to find connections between other data sources enhances your insights around your customer and helps you target your messaging to reach a range of different stakeholders. It can also boost efficiency and save costs, making the most of limited time and resources. Investments in foundational technologies that support customer experience must have AI services ingrained.

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