Econsultancy ✕ **A** Adobe

2023 Digital Trends

B2B High Tech in Focus

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Foreword

Welcome to Adobe's *2023 Digital Trends: B2B High Tech in Focus* report. Now in its 13th year, our annual global survey, produced in collaboration with Econsultancy, continues to be a constant in the customer experience landscape. And as today's digital economy evolves, driving growth for B2B tech businesses worldwide, this much is clear: Cutting-edge technologies are empowering individuals, transforming businesses, and connecting people more than ever. Above all, dynamic customer expectations continue to dominate the conversation.

In this report, we've charted a course through this shifting digital economy to help businesses uncover opportunity by delivering experiences that connect on a personal level. Against geopolitical and economic uncertainty, our study has found that B2B tech businesses continue to make tough choices. They're reevaluating what matters most, making strategic investments to set up their organization for future success while striving to deliver experiences that dazzle their customers.

As we look to the future, one thing is apparent— as customers continue to raise the bar for great experiences, it will be critical for B2B tech businesses to respond with creativity. They'll need to find ways to quickly solve both the problems of their businesses and their customers. And above all, they'll need to imagine creative ways to inspire their teams, boost efficiency, and improve workstreams. All by aligning their people, processes, and technology.

In short, the word of the year is creativity. As Adobe CEO Shantanu Narayen recently declared, "Everyone is creative and has the right to share their story." And you can help make that a reality.

Jill Steinhour, *Director, Industry Strategy, High Tech Adobe*

In short, the word of the year is creativity. As Adobe CEO Shantanu Narayen recently declared, "Everyone is creative and has the right to share their story."

Rather than jumping to quick fixes or short-term strategies, think of this as a chance to stop for a moment, take stock of your situation, get creative, and chart the course ahead for long-term and predictable growth in the digital economy. There is still much to do. Fewer than half (48%) of B2B marketing and CX executives claim to have a unified view or understanding of their customers and accounts, while 32% are still building that capability.

That understanding is critical. With it, you'll begin to identify current challenges. In turn, this will help you understand whether increased automation and improved workflow solutions might help overcome friction in the delivery process and meet customer expectations across channels.

One telling statistic from our survey is that 82% of those that employ an account-based marketing (ABM) strategy stated their priority was to develop personalized content more effectively, but half of practitioners feel their creativity is being held back by a lack of time. This is troubling, and it goes to show that there are huge opportunities to speed up content development and delivery through workflows and automation, use data to inform insight generation and personalization, and actively monitor engagement to optimize the experience in real-time. After all, as Shantanu pointed out, "At the heart of every great experience is an emotional connection. Great content plays a big part in making that happen."

You may also find that it's time to reimagine your data foundation. Our survey showed that although many B2B tech organizations can collect data, their ability to immediately enhance it with human insight and turn it into meaningful interactions comes up short. Notably, two-thirds of leaders in the B2B tech sector have a unifying platform, compared to barely half (51%) of mainstream companies.

The lack of a unifying platform limits brands' ability to seize the massive opportunity of the digital economy, which hinges on whether B2B tech businesses can deliver relevant, consistent interactions bursting with value. And doing it all in a way that proves they respect their customers' perspectives and privacy.

The lack of a unifying platform limits brands' abilities to seize the massive opportunity of the digital economy, which hinges on whether B2B tech businesses can deliver relevant, consistent interactions bursting with value.

Even during a period marked by economic and geopolitical challenges, we believe it's time to embrace the spirit of discovery. Success in the new frontier of experience won't come to those who lift and shift existing ideas and techniques into a different space. It will come to those who dare to reimagine how they operate to make the B2B tech sector personal. This means combining creativity with strong experiences and meaningful connections to stand out and retain customers.

This year's *2023 Digital Trends: B2B High Tech in Focus* report will give you all the insights you need to succeed in 2023 and beyond.

Jill Steinhour, *Director, Industry Strategy, High Tech Adobe*

Executive Summary

Expectations rise as performance lags

It's imperative that B2B brands act on their customer experience (CX) today. Instead of improving over time, marketing and CX professionals feel their sector is getting worse at delivering against expectations, let alone next-generation experiences. Nearly double the number of organizations in this year's survey believe their digital experiences lag customer needs compared to last year's survey (42% vs 22%).

Optimizing the customer experience is a challenge - data foundation is the key

Fewer than half (48%) of B2B tech marketing and CX professionals have a unified view or understanding of their customers and accounts, while nearly a third (32%) are still building towards it. This makes responding to the rapidly changing customer landscape difficult, particularly in catering to next generations of B2B buyers (Millennials and Gen Z).

New channels and platforms offer an opportunity

Those B2B tech organizations that outperformed their sector in 2022 (defined as leaders) are nearly twice as willing to embrace new channels as those of more mainstream brands (42% of leaders vs 23% mainstream). This will be important as more buyers interact via social media, messaging and 'dark social' or 'funnel blind spots.' Equally, the automation potential in these channels will be vital in helping B2B tech brands retain saliency among the large group of prospects who are yet to be actively in-market for a purchase.

Content will be key for improving CX

Personalized content isn't just a valuable resource for maintaining customer engagement through the funnel – it's a critical source of data and insight. Content creation and delivery is one of B2B tech companies' top two operational goals for improving their CX in 2023. Content is also highly valued for account-based marketing (ABM), with 82% stating they need to develop personalized content more efficiently to achieve objectives.

From on- and offline to authentically hybrid

Only 24% of respondents expect sales to come wholly or even predominantly from digital channels over the next two years. The dominant trend is offering digital tools to an offline setting to enhance the overall customer experience. And equally, where an offline interaction punctuates a digital experience, it adds value to the engagement.

Organizations face three roadblocks in this respect: lack of customer insight (50% of respondents), lack of time to be creative (50%), and lack of integration between tech systems (49%). One proven way to address these issues is to offer a unifying platform. We'll go into deeper detail later in this report, but for now, note that two-thirds of B2B tech sector leaders have some kind of unifying platform, compared to barely half (51%) of mainstream companies.

Introduction

For B2B tech buyers, purchasing journeys are rarely as simple as the B2C '1-Click to buy' equivalent. It's neither a linear journey nor a neat funnel but a crazed spaghetti of loops, double-backs, and multiple stakeholder involvement. Unsurprisingly, Gartner found that 77% of B2B buyers stated their last purchase was very complex or challenging[1].

New technologies, an increasing presence of digital natives on buying committees, and the evolution of B2C digital experiences across all sectors are driving fundamental shifts in buyer behavior. As a result, B2B technology vendors need to move from old-style demand generation to focus on experience-led growth to secure a sale.

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1. CX Expectations

It is often said that B2B buyers have B2C customer experience (CX) expectations. This is not surprising, given they take an Uber to work, order gifts via Amazon during their lunch break and listen to podcasts on the homeward journey. But they're also using these vendors to solve specific business needs too.

A good example is Amazon Business which offers tools to help B2B companies[2]. Launched in 2015, and now with $25b in annualized global sales, it helps businesses define what products to sell by analyzing what products are highly demanded by business customers but not sold on Amazon yet. At the same time, B2B executives can tap tools that enable them to create and automate VAT-exclusive pricing strategies – while delivering compliant invoices as customers require.
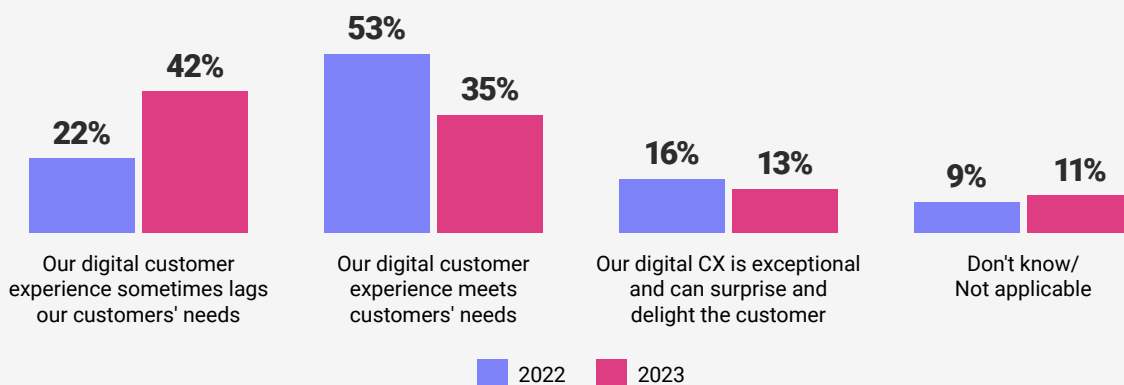
Amazon's success is the exception rather than the norm. This year, the number of organizations who believe their experience lags behind customer expectations has nearly doubled compared to our survey last year, with 42% of B2B tech brands admitting that the digital experiences they deliver 'sometimes lags our customer needs.' And a mere 13% of respondents report that their digital CX is 'exceptional and can surprise and delight the customer,' down from 16% (*Figure 1*).

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[1] https://www.gartner.co.uk/en/sales/insights/b2b-buying-journey
[2] https://sell.amazon.co.uk/programmes/amazon-business

FIGURE 1

How would you describe your organization's digital customer experience?

	2022	2023
Our digital customer experience sometimes lags our customers' needs	22%	42%
Our digital customer experience meets customers' needs	53%	35%
Our digital CX is exceptional and can surprise and delight the customer	16%	13%
Don't know/ Not applicable	9%	11%

Sample Size = 211 (2023) / 236 (2022). NB: Question wording 2022: lagging customer expectations/ keeps pace with customer expectations / ahead of customer expectations.

One of the reasons B2B brands have a hard time meeting expectations lies in the changing profile of the B2B tech buying cohort itself.

Into 2023, 65% of the B2B demographic is expected to be under 40 years old, encompassing Millennials and Gen Z[3]. Indeed, nearly three-quarters (73%) of B2B buying decisions are made by Millennials[4]. With the next generation of B2B buyers demanding flexible, fast and seamless digital-first experiences, buying experiences that lean more heavily on automation will be vital in enabling personalized relationships at scale.

Into the digital mix, this group expects engagement with more channels such as social media and social commerce, livestreaming, and short-form video. While it's a stretch to say they want to be spoken to only in terms of 'infotainment,' they expect a digitally superior experience and an emotionally superior one too.

1.1 Optimizing customer journeys

Delivering a vast array of new digital experiences while remaining close to the company's core

strategy requires teams to develop a culture where agility is vital. The first step in meeting new expectations is understanding and adjusting the B2B tech sector's approach to customer journeys.

B2B tech buyers interact across more channels and platforms than ever, with new ones constantly emerging. But it's not just the different channels that these organizations must contend with. The B2B tech buyer segment is made up of hugely diverse audiences. Different audiences demand different messaging and tone of voice, making customer journey orchestration more complex.

Figure 2 illustrates that fewer than half (48%) of B2B marketing and CX executives claim to have a unified view or understanding of their customers and accounts; 33% have had such a view for more than a year, while 15% have had it for less than a year. A third (32%) are still building that capability.

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[3] https://www.insiderintelligence.com/content/5-predictions-b2b-marketing-2023
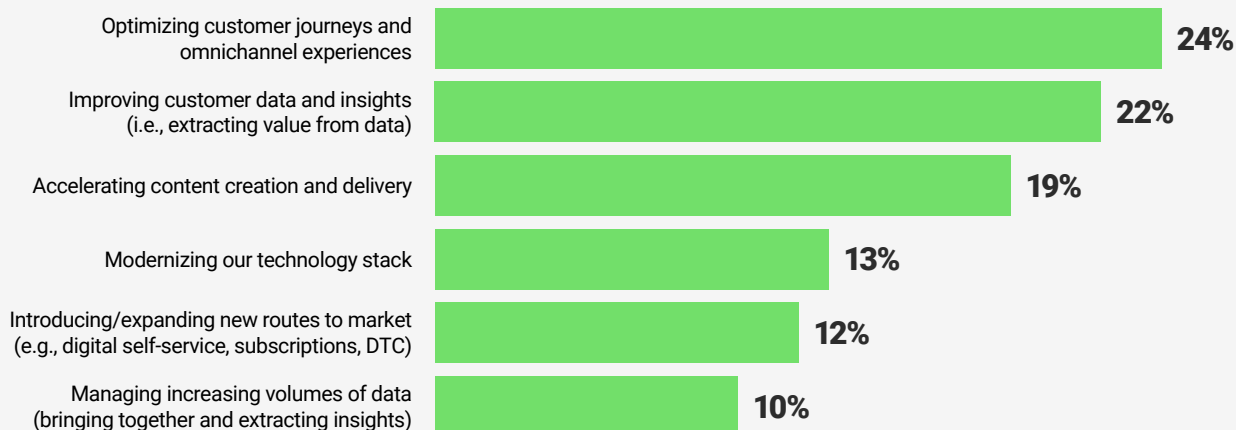[4] https://ceoworld.biz/2022/03/15/millennials-make-73-of-b2b-buying-decisions-heres-what-they-want-in-return/

FIGURE 2

Perceived organizational capabilities with regards to having a unified view/understanding of people and accounts.

- 33% — Had for more than one year
- 15% — Had for less than one year
- 32% — Building
- 20% — None
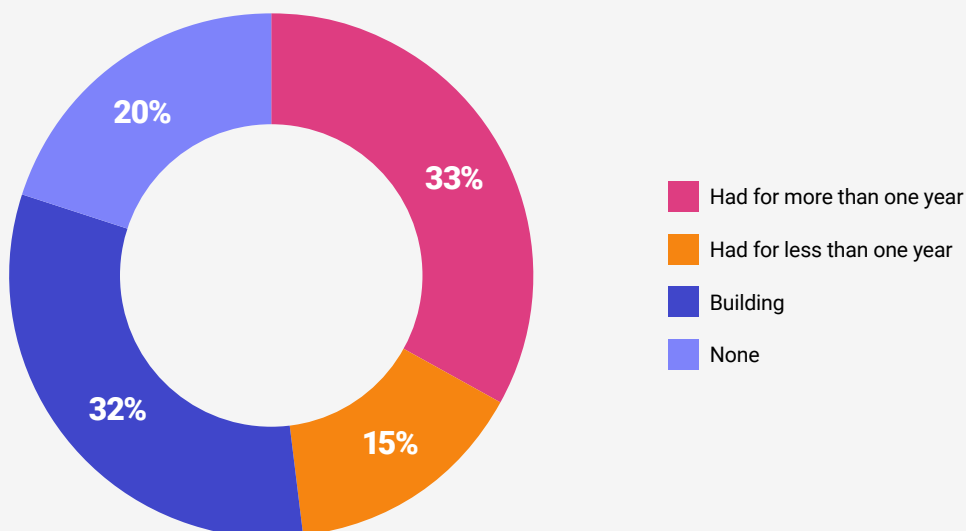
Sample size: 132

FIGURE 3

What one digital strategy will best enable your organization to meet its growth objective in 2023?

Strategy	Percentage
Optimizing customer journeys and omnichannel experiences	24%
Improving customer data and insights (i.e., extracting value from data)	22%
Accelerating content creation and delivery	19%
Modernizing our technology stack	13%
Introducing/expanding new routes to market (e.g., digital self-service, subscriptions, DTC)	12%
Managing increasing volumes of data (bringing together and extracting insights)	10%

Sample size: 147

Naturally, leaders in the B2B Tech sector (companies that outperformed the sector in 2022) are finding ways to streamline the customer journey and make meaningful connections between customer data:

- Nearly half (44%) of sector leaders whose companies significantly outperformed their peers in 2022 provide self-service capabilities such as ecommerce and partner portals, compared to only a quarter of mainstream counterparts in the sector.

- Similarly, 42% of sector leaders whose companies outperformed their peers in 2022 use chatbots to improve engagement and first-party data capture, compared to only 23% of mainstream brands.

Leaving aside for now the comparison of sector leaders vs mainstream responses, it's surprising that only 24% of all respondents cite optimizing customer journeys and omnichannel experiences as the digital strategy that will best enable them to grow. Even fewer (22%) will be prioritizing improving customer data and insights (see *Figure 3* above).

As we will see later in the report, journeys and insights are essential building blocks of B2B customer engagement. However, we will also see why there are barriers to progress that might be responsible for the low use of these strategies.

[5] https://business.adobe.com/customer-success-stories/lenovo-case-study.html

Case Study: Lenovo

Lenovo, a global technology leader, sought to improve its customer experience and engagement by streamlining its digital marketing efforts with Adobe Experience Manager. The result contributed to a saving of $11m in workflow efficiencies while strengthening its B2B engagement. Lenovo boosted content volumes by 53% and click-through-rates by 12.5%, using Adobe Advertising Cloud and Audience Manager to revolutionize customer journeys, discover data about their customers, and deliver the perfect marketing message[5].

While strong digital experiences are an expectation of the B2B tech buyer, vendors must also realize that digital channels are the key to accessing the essential customer data that can fuel market-leading experiences. And so, the cycle repeats. It's time to get that virtuous circle spinning.

1.2 Embrace new interactions via new channels

Some of the richest insights about customers come from direct conversations with them. Self-service channels such as chatbots and messaging apps are instrumental in this regard. As we saw earlier, sector leaders are nearly twice as likely than mainstream brands to use chatbots to improve engagement and first-party data capture.

Given only 5% of buyers are actively seeking new solutions at any given time[6], B2B tech brands need to be strategic in saving high-touch resources, including in-person sales interactions, for more developed targets. Self-service channels and chatbots enabled by generative AI will undoubtedly empower CX practitioners to create and maintain relationships, especially when closing a sale is not an immediate prospect.

Indeed, chatbots will play an increasingly central role as generative AI facilitates more nuanced requests. In a separate Adobe study of marketing and customer experience leaders, when asked about the impact of generative AI, most respondents agree it will help them better personalize customer experiences (89%) and create more and better content (89%)[7].

Some of the richest insights about customers come from direct conversations with them. Self-service channels such as chatbots and messaging apps are instrumental in this regard.

89%

Of marketing and customer experience leaders agree generative AI will help them better personalize customer experiences.

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[6] https://www.marketingweek.com/ehrenberg-bass-linkedin-b2b-buyers/
[7] https://blog.adobe.com/en/publish/2023/03/21/research-genera-
tive-ai-will-play-starring-role-in-customer-experiences

"Unlike prior chatbots, whose scope of knowledge was narrow, large language models like ChatGPT have been trained on vast stores of information, both curated and scraped from the Internet. This gives it a baseline of knowledge out-of-the-box. Its free-to-low-cost status and built-in scalable infrastructure also eliminate adoption barriers in a very disruptive way." Andrew Frank, Distinguished VP Analyst in the Gartner Marketing Practice[8].

Other channels for generating new leads include engaging with potential buyers who are looking for opinions and advice on LinkedIn and YouTube (often referred to as 'dark funnel' or 'dark social')[9]. As a case in point, having been recommended in the comments section of a LinkedIn post discussing sales strategy, an outsourced sales and lead development company (Phone Ready Leads) saw a 10-fold surge in traffic to its website[10].

This was despite the original post receiving just 22 engagements (measurable likes, comments, and so on). It means that the company's activity on LinkedIn had generated far wider influence than initially apparent from the typical metrics usually associated with social engagement.

Perhaps unsurprisingly, some industry experts argue that B2B tech marketers and CX executives "should be on dark social and dark funnel channels." In this context, "interacting with the 95% of potential customers who are not yet ready to buy but are … learning, collaborating and evaluating with peers[11]."

48%
Have a unified view of the customer on a personal or account level.

Despite the inherent challenges of measuring this activity, it not only presents a unique window of insight into the customer but also opportunities to move discussions back to marketers' branded properties to better manage prospects along the lead nurturing process.

1.3 Content delivery that drives consideration and conversion

For marketers focused on tracking customer journeys to serve the right content every time, operating in the dark funnel may feel uncomfortable. After all, isn't the whole point of 'dark' that it's untraceable? The answer is: not necessarily.

Content can have a more profound impact than B2B tech brands may appreciate. But to do so, it must be tailored to the customer's role, interests, and where they are on the journey. All of which demands a data-driven single-customer view (SCV). But as we've already seen, only 48% have a unified view of the customer on a personal or account level. A fifth of respondents aren't even in the process of building such a capability, let alone ready to deploy it (see *Figure 2* on page 7).

[8] https://www.demandgenreport.com/blog/a/how-chatgpt-will-influence-modern-b2b-marketing-strategies

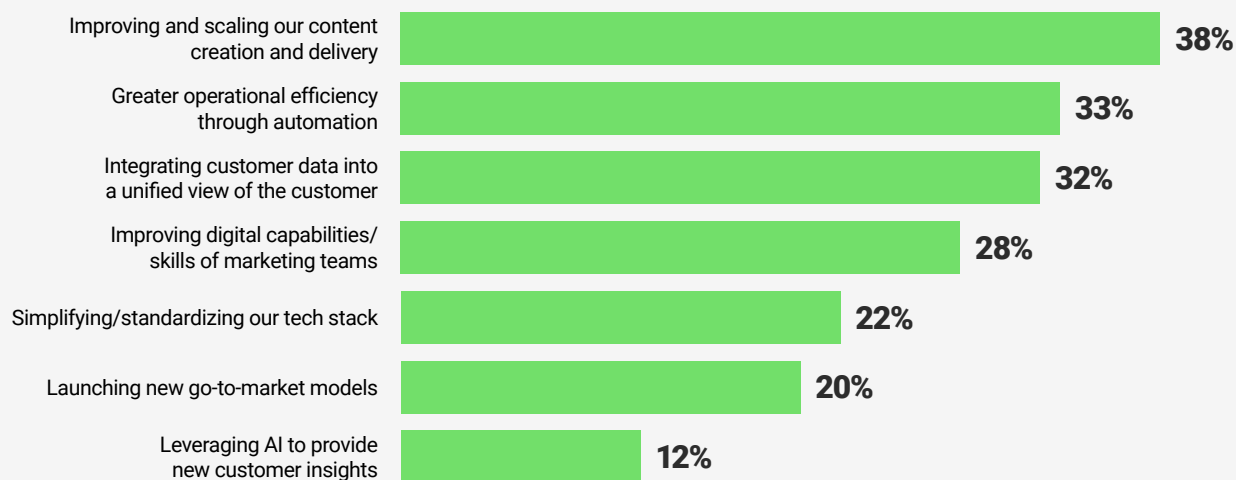[9] https://everyonesocial.com/blog/what-is-dark-social/

[10] https://www.linkedin.com/feed/update/urn:li:activity:6984517363140358145/?updateEntityUrn=urn%3Ali%3Afs_feedUpdate%3A%28V2%2Curn%3Ali%3Aactivity%3A6984517363140358145%29

[11] https://www.cmswire.com/digital-marketing/3-questions-b2b-marketers-should-ask-about-the-dark-funnel-in-2023/

FIGURE 4

What are your organization's top two operational goals for improving the customer experience in 2023?

Improving and scaling our content creation and delivery	38%
Greater operational efficiency through automation	33%
Integrating customer data into a unified view of the customer	32%
Improving digital capabilities/ skills of marketing teams	28%
Simplifying/standardizing our tech stack	22%
Launching new go-to-market models	20%
Leveraging AI to provide new customer insights	12%

Sample size: 147

B2B brands' top operational goals for improving their CX demonstrate how content, automation, and unified customer data are all inextricably linked if they're to deliver exemplary CX (*Figure 4* above). In particular, brands understand the importance of content in creating compelling CX, as reflected in the prioritization of content creation and delivery.

Although engaging potential B2B buyers (including those not currently in a buying mode) is about playing the long game, delivering experiences in real-time and tracking engagement is essential. While challenging to accomplish, doing so would put those organizations that can align all moving parts of the customer journey – data, channels, content, creativity, and employees – at a natural advantage over the competition.

[12] https://business.adobe.com/customer-success-stories/f5-case-study.html

Case Study: F5

When F5, a technology company specializing in application security and delivery, started its transformation from selling hardware to software and software-as-a-service (SaaS) solutions, it was challenged to build a digital revenue engine up to the task.

By using Adobe Marketo Engage and Adobe Marketo Measure, the business fully understood customers' digital behaviors and preferences. The result empowered the team to develop a more streamlined, easier-to-navigate web interface that targets customers with content most relevant to their personas and interests across products and services — saving them the effort of searching through isolated landing pages.

According to Jaclyn Driver, Senior Manager, Global Marketing Operations, the website now inspires customers to "move faster through the discovery stage of engagement toward wanting to purchase our solutions." Indeed, F5 found that leads converted 39% faster, with an overall 16:1 booking returns on marketing programs[12].

2. The Future is an Authentically Hybrid Experience

2.1 Digital Delivers but Offline Still Matters

B2B buyers expect a digital element to their purchasing journey, with many actively preferring it, as we saw in Section 1. However, there is still a clear demand for offline interaction, setting up a B2B tech buying process that, in the future, will be genuinely hybrid – seamless interaction across on- and offline channels while maintaining the key advantages of both.

According to our survey, more than three-quarters (76%) of B2B tech marketers and CX professionals believe customers want to replace historically offline experiences with digital ones. But B2B brands should be wary of interpreting this as 'everything digital, today.'

For example, *Figure 5* (below) illustrates that most respondents think sales will come from offline or hybrid channels when asked to gaze two years into the future. By comparison, just under a quarter (24%) expect sales to come mainly from digital.

It's a view supported by leading B2B experts:

"Today, people are actually buying Teslas through the app. And guess what? It's much cheaper for Tesla than to have an army of salespeople. I think B2B needs to do the same. With basic stuff: I want to learn, I want to do it myself, I want to master that. And when I have questions, I value the human touch." **Mickey Alon, founder, Gainsight PX**[13]

Wherever buyers engage, there needs to be a sense of continuity. Digital content should set the stage for offline engagements. At the same time, in-person interactions need some kind of data and insight-gathering element to ensure they can shape the narrative that follows, whether on- or offline.

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[13] https://www.intercom.com/blog/podcasts/gainsight-px-founder-mickey-alon-on-product-growth/

FIGURE 5

Thinking ahead, approximately what percentage of your organization's sales will come from digital channels?

39%	37%	24%

- ■ Offine (<25% online)
- ■ Hybrid (25-75% online)
- ■ Online (75%+ online)
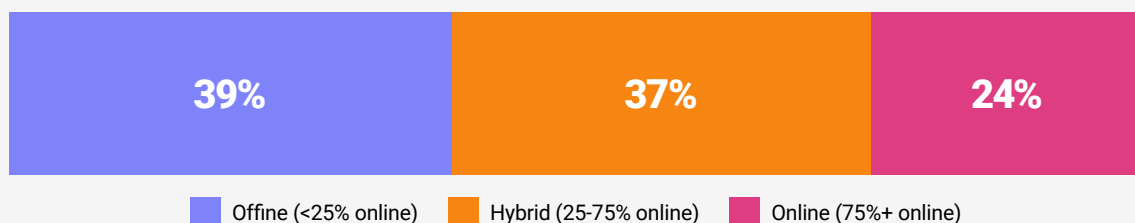
Sample size: 119

Case Study: Adobe and RainFocus

Adobe Summit in Las Vegas in March 2023 launched a partnership between Adobe Experience Platform and event marketing services vendor, RainFocus. The partnership allows B2B vendors to track user data online or at in-person events. RainFocus tracks attendees' engagement and aggregates the data, which the Experience Platform then organizes, using it to help create more personalized experiences.

The partnership was deployed in practice at Summit, providing personalized experiences for more than 10,000 in-person and virtual attendees across 200 sessions with more than 170 sponsors.

By harnessing digital tools to enhance in-person experiences, brands can achieve the level of data capture and personalization that some might assume is only the preserve of digital-only interactions[14].

Encouragingly, B2B tech brands are picking up the baton. Our survey found nearly every respondent (94%) agrees they must deliver consistent, personalized content to more channels. However, 74% admit that the interplay between offline and online experiences makes customer journeys harder to track.

Perhaps unsurprisingly, nearly three-quarter (73%) of respondents use marketing automation (see *Figure 6* on the next page). Whether making sense of streams of unstructured information from comments and reviews, or from in-person events, or managing, nurturing, and scoring leads in the process of routing them to appropriate channels, automation is a vital piece of the puzzle.

But in a business climate where digital CX is increasingly vital to driving growth and retaining valuable new business, acquiring new technology is just part of the solution.

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[14] https://www.techtarget.com/searchcustomerexperience/news/365532974/Adobe-and-RainFocus-pair-for-more-data-insight-at-events

Indeed, according to one Deloitte study, digitally mature companies that effectively cultivate human capital and refine processes to support investments are 3x more likely than less mature companies to report revenue growth significantly above their industry average[15].

This mixture of face-to-face and digital highlights the importance of using account-based marketing (ABM) strategies. As shown in *Figure 6*, half of the respondents already have an ABM strategy, and 25% are building one. But for this strategy to truly deliver, B2B tech brands must deploy marketing automation solutions, making them a foundational part of digital marketers' tech stacks today.
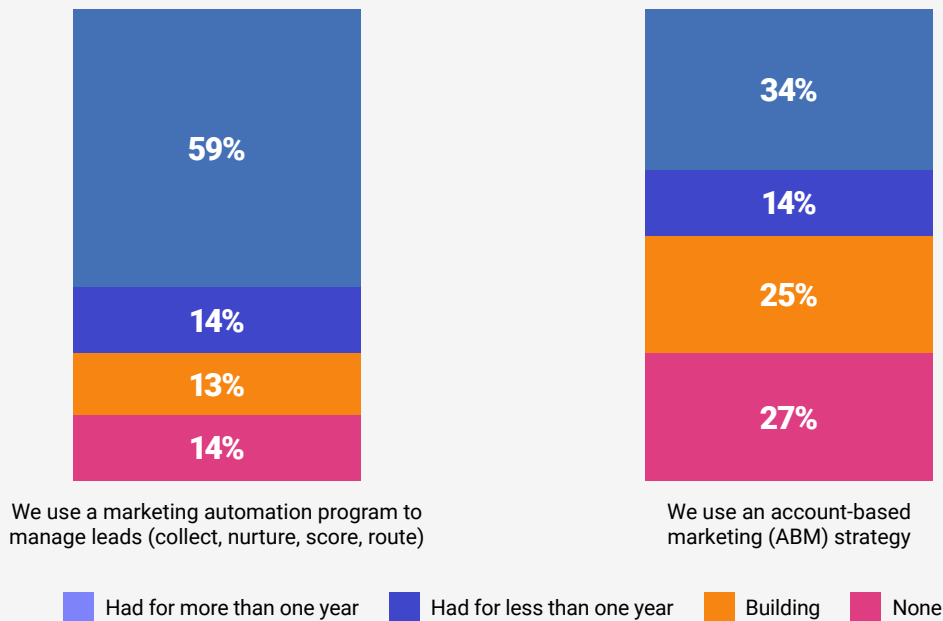
[15] https://www2.deloitte.com/content/dam/insights/us/articles/6561_digital-transformation/DI_Digital-transformation.pdf

48%
Of respondents already have an ABM strategy, and 25% are building one.

FIGURE 6

Please indicate your organization's capabilities in the following areas when it comes to optimizing the customer experience.

We use a marketing automation program to manage leads (collect, nurture, score, route)
- 59%
- 14%
- 13%
- 14%

We use an account-based marketing (ABM) strategy
- 34%
- 14%
- 25%
- 27%

Legend:
- Had for more than one year
- Had for less than one year
- Building
- None

Sample size: 134

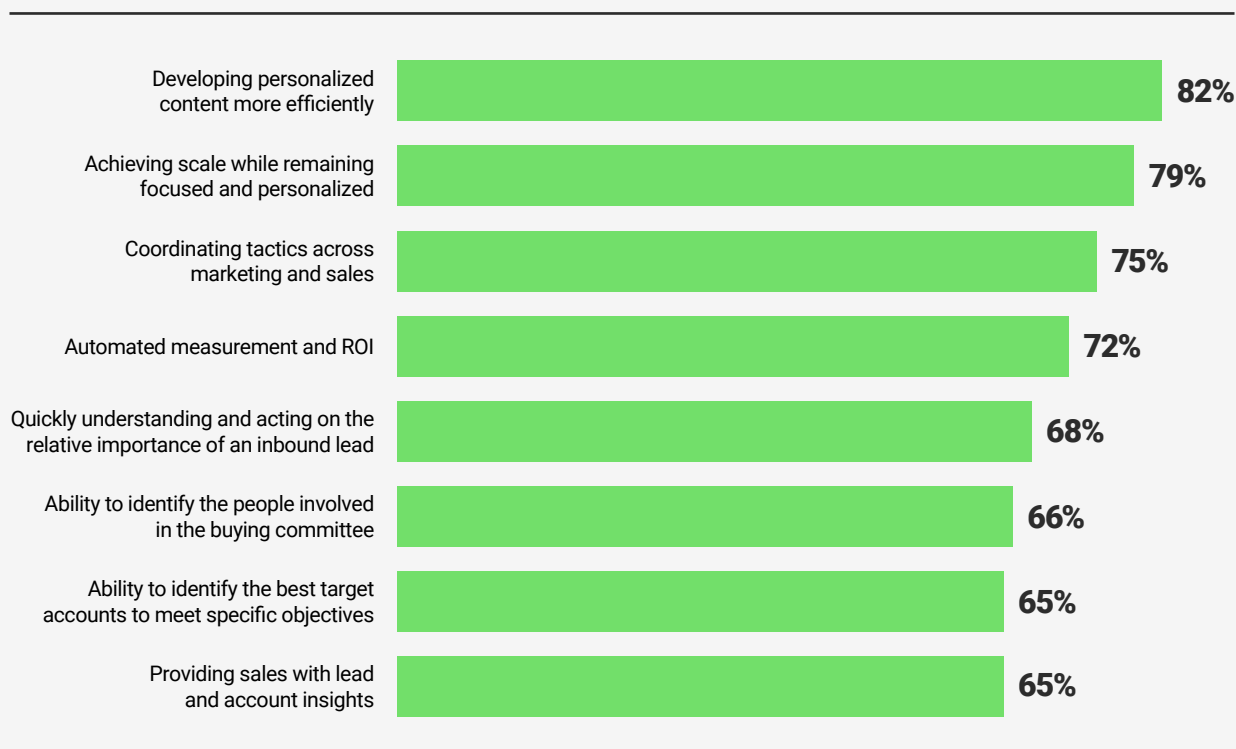## 2.2 Content is the linchpin of an ABM strategy

It's evident when looking at *Figure 7* that users of an ABM strategy think they need to up their game, with their biggest priority being to develop personalized content more efficiently (82%). Showing once more that using content to build salience is the linchpin of successful B2B engagement. Personalization at scale is the next highest priority (79%), followed by coordinating tactics across marketing and sales (75%).

82%

Of those using an ABM strategy think their organization needs to develop content more efficiently.

FIGURE 7

To achieve your account-based marketing (ABM) objectives, how much improvement do you need to make in each of the following areas? (Percent 'significant' and 'some improvement')

Developing personalized content more efficiently	82%
Achieving scale while remaining focused and personalized	79%
Coordinating tactics across marketing and sales	75%
Automated measurement and ROI	72%
Quickly understanding and acting on the relative importance of an inbound lead	68%
Ability to identify the people involved in the buying committee	66%
Ability to identify the best target accounts to meet specific objectives	65%
Providing sales with lead and account insights	65%

Sample size: 97. Base: Organizations that have an ABM strategy.

Case Study: Commvault

If anyone understands the importance of managing data, it's a leader in enterprise data management software. Automation is at the heart of Commvault's marketing capability, using it to build nurture programs, segment audiences, and develop a journey that engages its customers throughout their lifecycle.

Using intelligent campaigns in Adobe Marketo Engage, the company can create smart lists to define audiences and create targeted

communications, measuring intent signals such as chat participation. The company has created an automated feedback loop to measure engagement with leads and can adjust communications based on interest level. Commvault is now running an average of 150 programs a month, with campaign creation time reduced from 90 minutes to just 20. The time saved is being put towards testing and improving campaigns for stronger engagement[16].

To succeed in developing the customer relationship, content must be relevant, agile and personalized. Achieving this when you add offline interactions to the mix has always been challenging.

In hybrid situations, content can facilitate data acquisition, reveal customer preferences, encourage further interaction via the abovementioned channels, and keep the brand relationship flourishing during that 95% 'out of market' period mentioned in Section 1.

But to succeed in developing the customer relationship, content must follow the rules of all other B2B tech engagement – be relevant, agile and personalized. Achieving this when you add offline interactions to the mix has always been challenging.

Indeed, the interplay between departments, and the breaking down of silos, is becoming increasingly crucial as complex customer journeys mean prospects can interact with a variety of company experts during their purchasing journey.

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[16] https://business.adobe.com/customer-success-stories/commvault-case-study.html

3. Assembling the B2B Customer Jigsaw

Collaboration and a single customer view across all departments are essential to delivering the next-generation experiences that customers expect.

Relying on internal customer relationship management (CRM) systems is insufficient to build this whole picture. CRM systems are built to capture and manage human-input data regarding human interactions between salespeople and their prospects once those prospects have entered the sales funnel (of course, this represents only a small portion of the customer journey).

While it is relevant and important, B2B tech companies need a more rounded view of their customers to enable customer experience management (CXM).
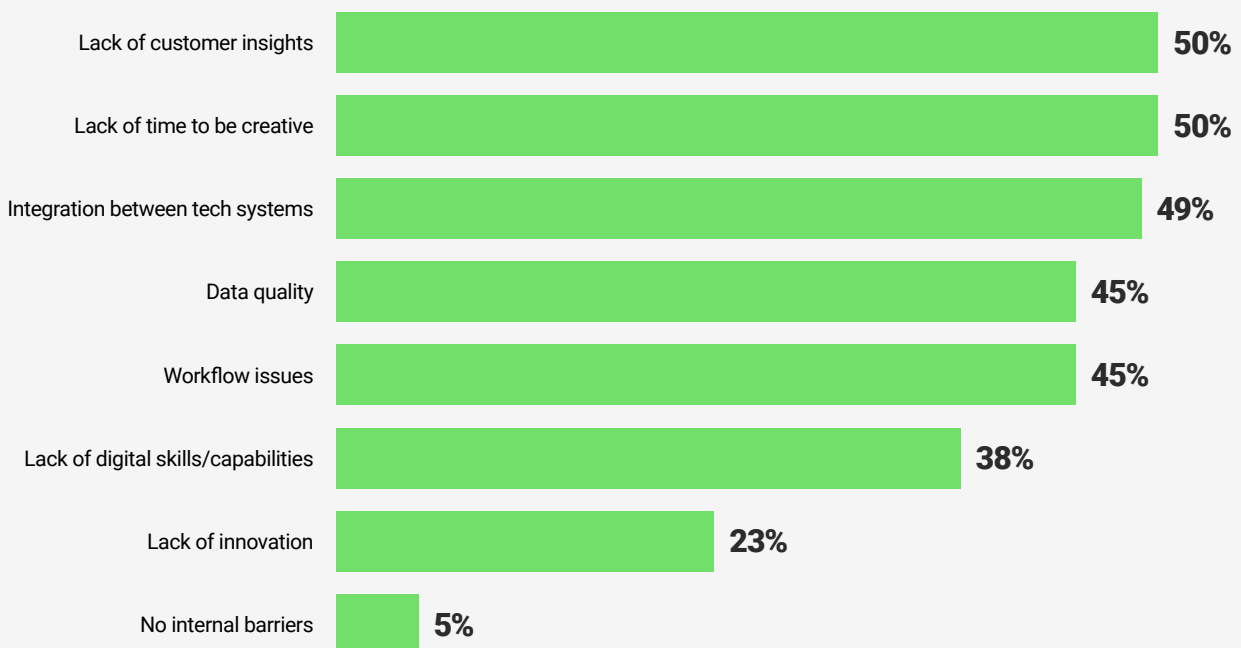
This means ensuring that organizations are positioned to orchestrate and optimize customers' entire experience from start to finish. This doesn't happen with just a single data source but with multiple sources via various channels (both on- and offline) across the whole spectrum of CXM data that can be collated into a unified, actionable customer profile.

3.1 Mining insights effectively

In fact, as illustrated in *Figure 8* below, half (50%) of B2B tech practitioners say that a lack of customer insights is actively holding their marketing and CX organization back – significantly higher than the cross-sector average of 34%. This is surprising given the traditionally intimate relationship B2B vendors supposedly have with their customer base.

FIGURE 8

What is holding your marketing/CX organization back, if anything?

Category	Percentage
Lack of customer insights	50%
Lack of time to be creative	50%
Integration between tech systems	49%
Data quality	45%
Workflow issues	45%
Lack of digital skills/capabilities	38%
Lack of innovation	23%
No internal barriers	5%

Sample Size = 142

One possibility is that as the number of potential points of engagement and the customer buying committee has grown, it has become harder for B2B tech vendors to know which might be the most potent insights and where to focus their efforts.

Data quality is also something respondents suggest holds them back, with 45% citing it as a significant internal barrier, compared to the cross-sector average of 35%.

This could be attributed to several factors, including unauthenticated engagement across the long buying cycle. Millennials – the largest purchasing cohort – are likelier to 'job hop' than any other generation[17]. Indeed, 21% have changed jobs in the last year, more than three times as non-Millennials. So, the likelihood that an initial contact has moved on makes it very hard to maintain a relationship. This is just one of the reasons that constant engagement, not just around the time of purchase, is so critical.

3.2 Maintaining quality of engagement

Today's target audiences expect quality assets that provide real insight and help them better understand technology. However, it would seem that customers are often on the receiving end of blogs, ebooks, or white papers – all to meet content targets prioritizing quantity over quality.

Perhaps under pressure to deliver volumes of work, they are resorting to tried and tested – or tired and testing – content methods. Our survey, for example, found the same number of executives that cited lack of customer insight as a challenge also claim a 'lack of time to be creative' is holding their marketing and CX organization back – 50% (see *Figure 8* on the previous page).

If B2B brands are to reach discerning customers, they must up their game in the creativity stakes. If executives are bogged down in broken

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Case Study: EY

With multiple clients interacting with teams in different offices across several global locations, each team only has a small piece of the customer insight puzzle. Each territory is also subject to a varying range of privacy regulations governing what can be shared, how, and where. By connecting its data into a single, real-time customer data platform (RTCDP) and journey analytics system, EY gains the visibility it needs to produce timely, custom communications in a privacy-first way.

"I've always had a vision of looking at marketing data more holistically from an account perspective — not an easy task when dealing with global clients and organizations. Account teams can clearly see the value marketing is providing through active engagements, which has encouraged even closer collaboration between EY teams." Karen Hopkins, Global CMO, EY[18]

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processes or doing lower-value, repetitive tasks instead of broadening their expertise, they will likely remain in this situation into 2024 and beyond.

There is no 'if' about it – if marketers are to serve the various audiences from C-suite to practitioners, partners, and more, then automation of content generation and delivery through harmonized workflows is critical. Our survey would reinforce this point, as 45% of executives admit that workflow issues are holding them back.

[17] https://www.gallup.com/workplace/231587/millennials-job-hopping-generation.aspx

[18] https://business.adobe.com/customer-success-stories/ey-case-study.html

Thinking about workflow and content management in your organization, how would you describe your ability to do the following:

	Very poor	Poor	Acceptable	Good	Very good
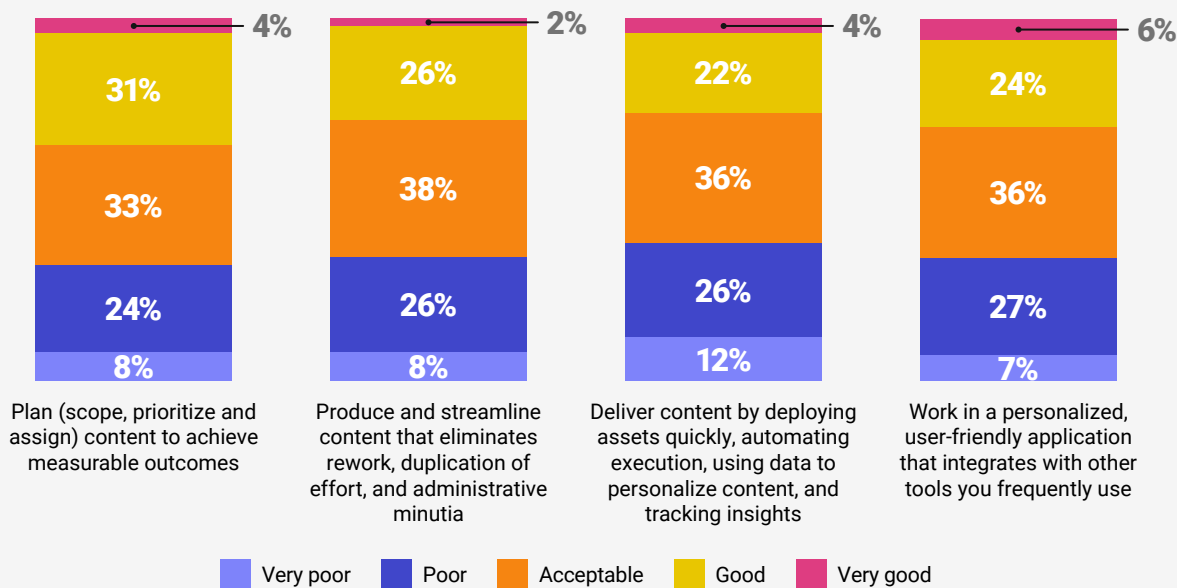
Sample Size = 140

At the same time, only 26% claim that their ability to "deliver content by deploying assets quickly, automating execution, using data to personalize content and tracking insights" is 'good' or 'very good' (see *Figure 9* above).

Devoting energy to improving workflows has clear benefits. In cases where we have seen companies improve workflow integration and automation, employees have been freed up to either improve existing campaigns (such as with Commvault) or devote resources to higher-value work and creativity – which is critical given the nature of buying decisions.

According to ad executive and author Rory Sutherland, "in B2B, avoiding catastrophe is more important than achieving perfection[19]." In this respect, decision-makers' desire to achieve personal and organizational success combined with a fear of failure can often result in preserving the status quo.

26%

Claim their ability to deliver content is 'good' or 'very good'.

[19] https://www.93x.agency/blog/b2b-marketing/rory-sutherland-on-the-psychology-of-b2b-decision-making/

Case Study: Esri

Esri can lay no greater claim to fame than being the location technology behind 90 of the Fortune 100, being in all 50 US state governments, and 87 of the Forbes Top 100 colleges in the United States.

Automated workflows are at the heart of the company's success. Using Adobe Workfront, Esri's marketing team can see the connections between projects and understand precisely what the next steps are. Inbound emails are automatically integrated into Workfront as tasks and project updates so jobs can be completed quickly.

Cutting down on lengthy meetings and phone calls for status updates is as essential as automated task completion or project templates allowing the company to scale its planning efforts.

"Our campaign teams now have full visibility to all aspects of their campaign, including the asset development and channel team's work, via Workfront. This allows campaign owners to focus on the strategic and creative aspects of their campaign to drive a bigger impact," says Christina Sullivan, Marketing Leader, Esri

In cases where we have seen companies improve workflow integration and automation, employees have been freed up to either improve existing campaigns or devote resources to higher-value work and creativity – which is critical given the nature of buying decisions.

Brands need to understand what moves audiences on an emotional level to help them visualize themselves succeeding in their roles. It means moving away from high-level statements to content and experiences with substance (providing the necessary sense of safety and validation where required). But it requires data and time to be creative.

3.3 The final piece of the puzzle

Due to the complex and interconnected B2B customer journey, we have already argued for departments like marketing and sales to collaborate. But even within marketing and CX, the different functions can be disconnected, both physically and technologically. Using different systems to share assets risks potential errors and project delays.

Nearly half (49%) of our respondents confess that a lack of integration between tech systems is holding them back.

Plenty of proof exists that taking this relatively simple step can be transformative. *Figure 10* illustrates that two-thirds of sector leaders have some kind of unifying platform, allowing different stakeholders to work across projects, manage workflows automatically and share assets safely. This compares to barely half (51%) of mainstream companies.

Similarly, 52% of leaders have a cloud-based platform, compared to only 39% of the mainstream. That means those leaders can scale up or down their operations as the business demands.

49%

of respondents agree that a lack of integration between tech systems is holding them back.

FIGURE 10

Which of the following best describes your organization's approach to customer experience technology?

	Sector Leaders	Mainstream
We exclusively use a cloud-based customer experience management platform	19%	16%
We use a cloud-based customer experience management platform in concert with other CX/data management systems	33%	23%
We manage customer experience with a management platform that we developed internally	14%	12%
We use multiple technologies/vendors for customer experience management without a unifying platform	34%	49%

SINGLE, UNIFIED CX PLATFORM ← → MULTIPLE TECHNOLOGIES, NO UNIFYING CX PLATFORM

Sample size: 216

Case Study: Cisco.com Reimagined

Even a technology company as sophisticated as Cisco needs the most agile and flexible solution possible. Cisco.com Reimagined was part of a transformation that began in August 2021 to modernize the business, making it more customer-friendly and integrating its 218 disparate acquisitions.

However, its on-premises, highly customized platform made adding integrations and functions difficult, and it couldn't deliver the personalized, one-to-one experiences at scale that the market demanded.

Moving to the hybrid cloud, the organization saw an immediate improvement in its website performance and time to market new initiatives. Putting in new prototype HTML experiences to track customer engagement saw a four-fold increase in daily visits to free trials, an 86% increase in how-to-buy traffic, and a 28% increase in clicks to activate products – all thanks to enhanced personalization. The company is still transforming, aiming to unify its experience across the customer lifecycle[20].

With prebuilt integrations, marketers can quickly derive or automate insights and activate them. This means teams can move quickly and are better able to respond to developing trends by adding new technologies without scaling up internal, hard-wired resources. Another advantage of cloud-based services is they are often also low-code, allowing for ease of implementation and minimal training.

Whatever the size of the buyer organization, the B2B decision-making process will always be complex. A unified platform is a gamechanger, delivering the right, personalized experience at the right time and in the right context. From broad, ongoing engagement initiatives to dedicated sales emails and all points in between, a single platform is the origin of a cascade of CX efforts that build a modern B2B tech business fit for the future.

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[20] https://business.adobe.com/customer-success-stories/cisco-case-study.html

Conclusion

Build the foundation of a responsive B2B tech organization

We're not just seeing the rise of more platforms and channels to engage. Customer behaviors are changing significantly and rapidly. As the digital native cohort becomes the key decision-maker within these businesses, B2B tech marketers must embrace the nuances and preferences of these new buyers. This means adapting workflows to be more responsive, finding ways of gathering deeper customer insight, and integrating that data across a business that is still, in many ways, fragmented and siloed.

Embrace a genuinely hybrid customer journey

Most B2B tech businesses have experience operating both online and offline. However, they have yet to create a seamless customer journey that integrates the two effectively. Incorporating digital tools into offline experiences in meaningful ways will enable more personalized experiences and unlock rich customer insights beyond standard transactional CRM data.

Customer experience management (CXM) data, which includes information on customer intent and interactions, is invaluable for understanding customer behavior. Even insights from the dark funnel, representing untracked customer touchpoints, can help bring customers closer to the brand by providing a deeper understanding of their preferences and motivations.

More time equals more differentiation

Even at a time when businesses can access a wide range of automated tools, they are still not capitalizing on the potential benefits. B2B tech businesses still report that the majority are hamstrung by systems that don't integrate, hampering collaboration and increasing time spent on tasks and frustration.
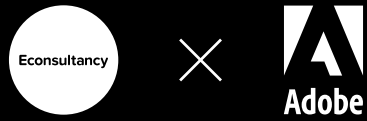
Making the most of automation, whether managing customer interactions or creating project templates for rapid campaign delivery, is vital if teams are going to regain time to complete higher-value work. Efficiency is just one part of the puzzle. Respondents cite a lack of time to be creative as one of the top roadblocks in their business. They recognize that a creative approach to brand building and customer engagement will likely unearth those unique insights that help them stand out against the competition.

Methodology

2023 Digital Trends – B2B High Tech in Focus is based on an online survey fielded to select Econsultancy and Adobe lists. The survey was launched on September 20th, 2022 and closed on November 30th, 2022 with 377 qualified client-side B2B respondents working in technology.

Demographics Profiles

- 21% of respondents are at the senior director level or above, 79% at the practitioner level.

- The most significant regions by sample size include North America (41%), Europe (38%), and Asia-Pacific (17%).