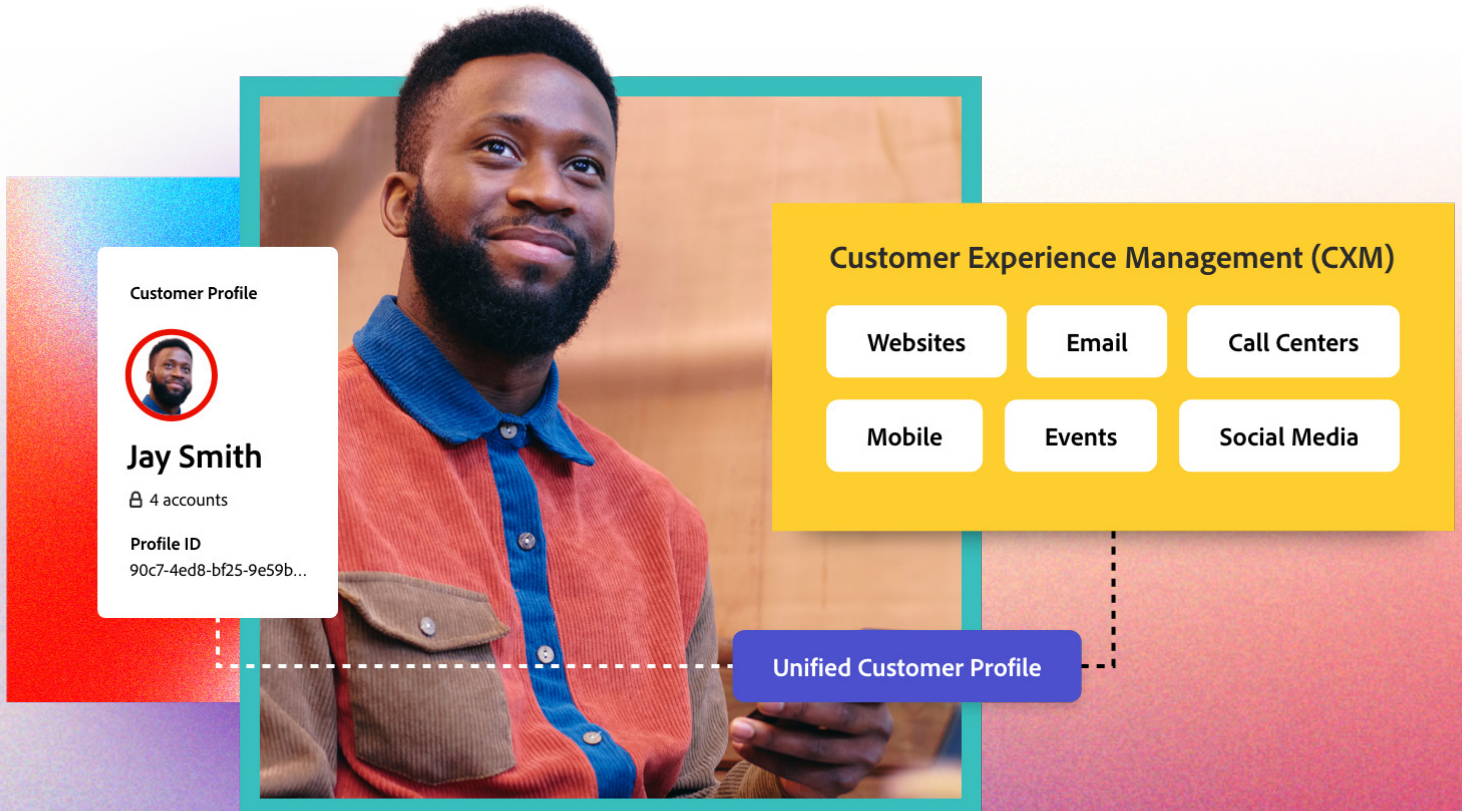# From CRM to CXM. How high tech can evolve B2B marketing.

Upgrade your marketing from relying on a CRM to creating next-gen experiences.

Let's start by setting the record straight. A customer relationship management (CRM) platform is not all that goes into customer experience management (CXM). While a CRM is an important tool for tech companies to learn more about their buyers, it's merely that—one part of the complete data story that makes up a strong CXM strategy. That data story is what turns insights into next-gen customer experiences.

Customer experiences look very different now—and that includes B2B experiences. Businesses have come to expect the same relevant and memorable experiences that B2C customers have had for years. But this is no easy task. Our *2023 Digital Trends—B2B High Tech in Focus* report found that only 13% of senior executives believe their digital customer experience is exceptional and can surprise and delight customers. Still, B2B tech companies are taking on the challenge to do more with their data and deliver innovative experiences to buyers.

As customer expectations continue to evolve, tech firms need to evolve with them. For example, when marketers use a CRM to understand customers and respond with content and messages, those experiences may or may not end up being relevant. Tech leaders are now positioning themselves to push their marketing further than ever before, while companies that don't solidify their CXM strategy are at risk of losing out to competitors.

"Customer expectations, even subconscious expectations, are sky-high and only going higher," says Matt Howard, senior product marketing manager with Adobe. "Your brand can only be strong and trusted when you build meaningful connections with customers. Companies that thrive will get to work on creating and personalizing customer experiences, on any channel, at massive scale. Those that don't will simply be left behind."

To stand out, tech companies need to adopt a customer-centric approach. That means evolving their strategy from using historical customer data to create account-based messages to using unified real-time data to deliver next-gen experiences for their B2B customers.
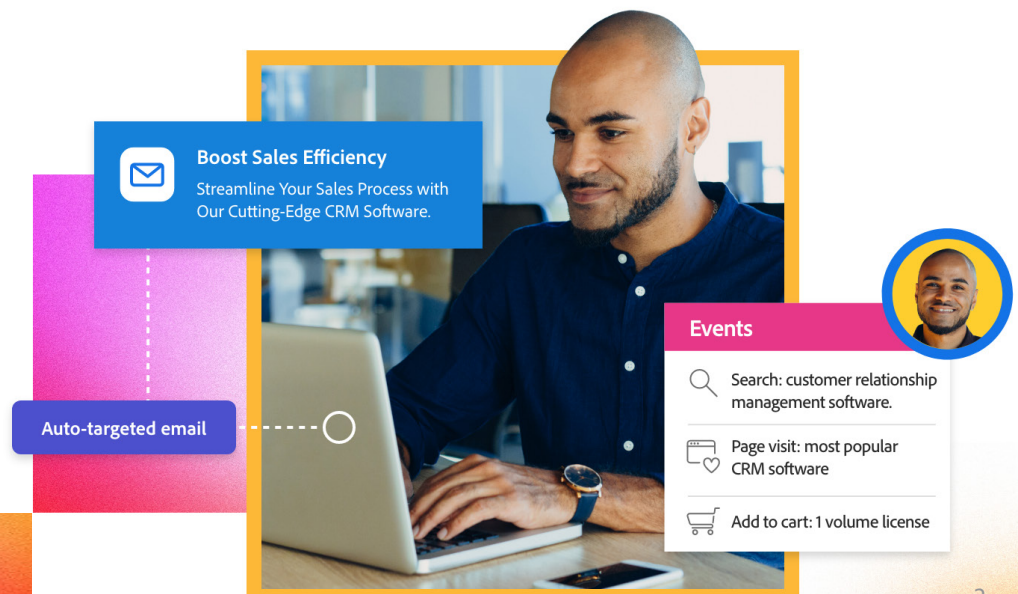
That's where a strong CXM strategy comes in. B2B customers want real-time responses, communication, outreach, and support that match their needs, interests, and stage in the buying journey. A CRM alone can't do this. Instead, a CXM approach uses a CRM as one data source and takes it to the next level. It allows tech companies to elevate customer experiences in a way that spans across multiple channels, creating actionable insights and giving a holistic view of your customers. Pushing these boundaries of B2B experiences will not only give tech companies an advantage over competitors, but it will set trends for other industries to follow.

A CRM is one data source within a complete CXM strategy.

In this guide, we'll explore the benefits of how data can help tech companies transform their marketing from relying on only CRM data to creating a strong CXM strategy.

Customer Experience Management (CXM)

CRM
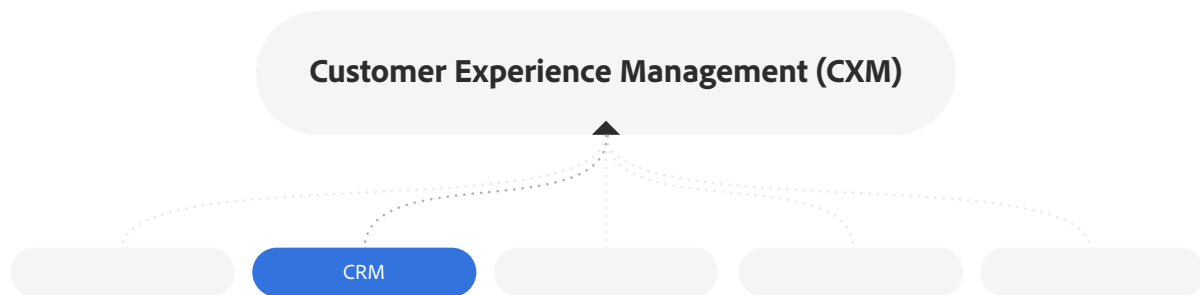
" From B2C consumers in mobile phone stores to B2B accounts at multinational software corporations, every customer expects to not only be known, but to get an experience that is easy, natural, and sometimes even amazing. It's no longer good enough to know what your customer wants—it's evolved now into anticipating what they want (sometimes before they even know it) and then creating a relevant, timely experience that aligns to that need while simultaneously protecting their privacy and trust.

Matt Howard
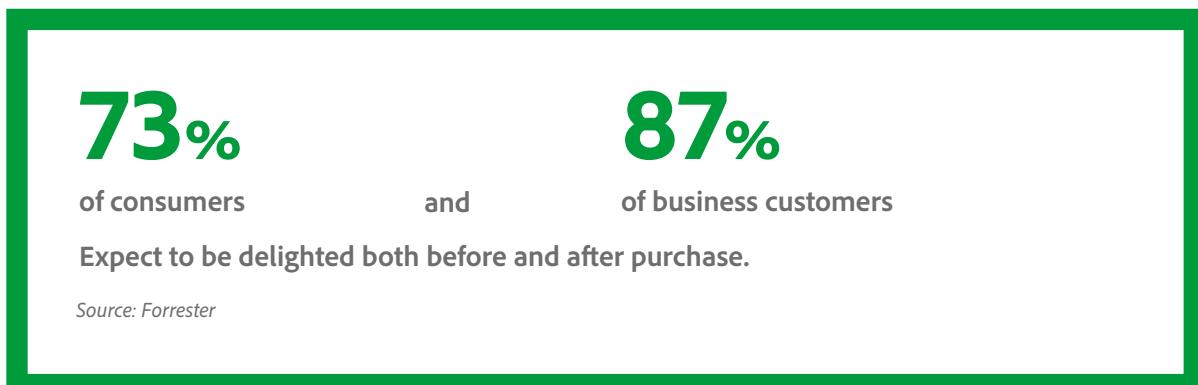Senior Product Marketing Manager,
Adobe

Push your CRM data further.

Knowing your customers through their data is not a new concept. But the ways in which tech companies can use that data to create and deliver exceptional experiences are constantly evolving. In our _2023 Digital Trends_ report, we found that 48% of senior executives plan to change the way they use existing marketing or data technology to maximize its impact in response to macroeconomic issues. But for many in high tech, the path ahead is not clear. According to the _2023 Digital Trends—B2B High Tech in Focus_ report, 74% of senior executives in this industry admit that the interplay between offline and online experiences makes customer journeys harder to track.

Because CRMs use historical data, they help tech companies to get an initial understanding of their customers. They are built to capture and manage human-input data regarding interactions between salespeople and their prospects once those prospects have identified themselves and entered the selling funnel. While this data is relevant and important, it's not enough to fully enable CXM. "It's really good for the basics," says Howard. "Anything beyond that, CRM starts to show its cracks."

Brands that don't embrace and implement a CXM strategy are at risk of getting left behind. All customers—including B2B—expect engaging, personalized digital experiences delivered in real time, and they expect those experiences to be delivered in a way that respects their privacy and preferences and adds value. In fact, our recently commissioned Forrester Consulting research, _Personalization at Scale: Bring Forth the Customer and Business Benefits of Experience Excellence_, showed that 73% of consumers and 87% of business customers expect to be delighted both before and after purchase. That means that B2B customers now have even higher expectations than B2C consumers. By integrating your CRM into a CXM strategy, you can reveal blind spots in the sales funnel across different channels and devices—and then use artificial intelligence (AI) to identify patterns in the data that you can turn into useful insights and better experiences.

Adopting a CXM strategy is no longer a nice-to-have—it's critical for business growth. Forrester Consulting also found that businesses that prioritize customer experience do significantly better across a range of key metrics like customer acquisition and lifetime value, with a payoff of higher revenue and ROI, than those that do not.

73% of consumers and 87% of business customers

Expect to be delighted both before and after purchase.

Source: Forrester

Combine data under one roof.

Now that data is available in real time, it has become an important part of the overall enterprise intelligence strategy. Companies need to use it to collect and create actionable insights. A strong CXM strategy uses data from all sources—not just the sales funnel—to create great customer experiences. But to make the most of it, tech companies need to know where these different types of data are coming from, what it can tell them, and how it can be useful.
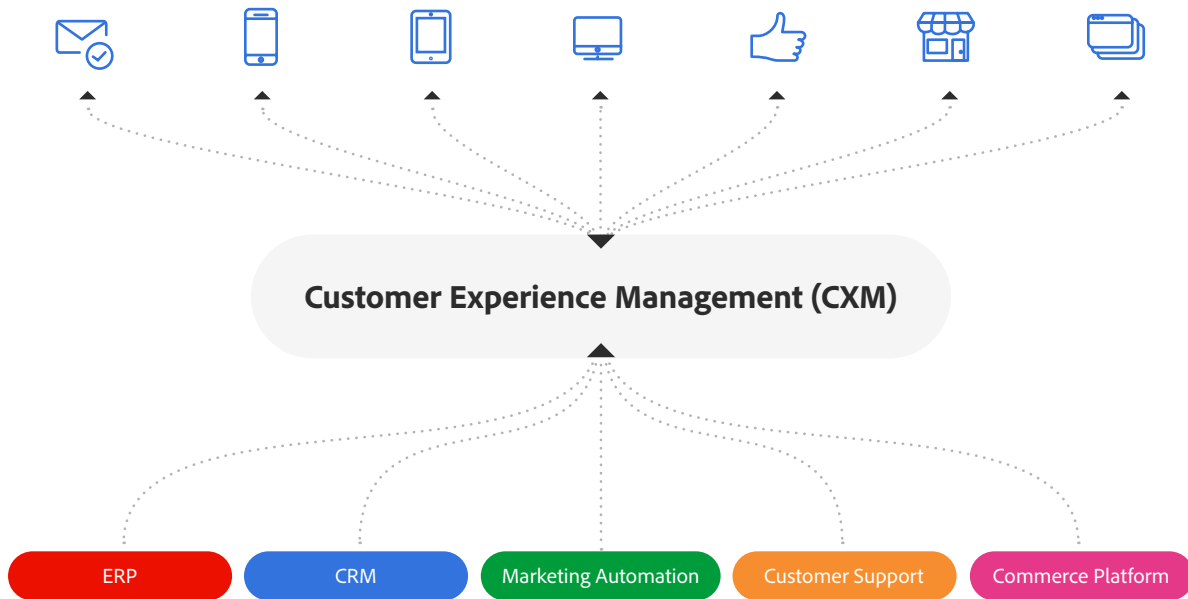
Multiple devices and channels send important data that tells tech companies who their B2B customers are, their interests, their buying preferences, and more. A CXM strategy allows tech firms to harness all relevant data generated from internal and external sources and make the data actionable in real time. This strategy includes using data from multiple systems such as a CRM, enterprise resource planning (ERP), marketing automation, and commerce platforms—as well as data that comes from behavioral interactions.

All these sources are made more valuable by being used together. "By combining CRM with ERP, customer support or call center, and commerce platform data, brands can gain a more complete picture of the customer and deliver the types of experiences that yield the best results," says Howard. "All data is important, relevant, and useful, but in isolation, each one lacks the full context that only a unified profile can provide."

Behavioral data is an important piece of a CXM strategy. Because it's collected in real time, it gives marketers a view of what customers are doing right now. That way, it can help tech companies create personalized experiences that meet the immediate needs and expectations of their customers. In fact, the *2023 Digital Trends* report found that 89% of senior executives believe customers are constantly resetting their expectations to match their best omnichannel experiences.

⊕ Tracking

Cross-sell campaign

2,104 engagements

Active campaigns

✉ Email

💬 Social

🖥 Display

203 event registrations

Build a strong CXM strategy.

Customer Experience Management (CXM)

ERP   CRM   Marketing Automation   Customer Support   Commerce Platform

A strong CXM strategy captures, manages, and unifies behavioral data from customer interactions across every touchpoint, including offline and online digital experiences like display ads, website and mobile app interactions, email campaigns, and more. These interactions are measured and managed across the entire customer journey, from awareness through conversion to loyalty. While a CRM only uses historical data for identified customers, a CXM strategy captures real-time data about customers earlier in the journey than when a sales opportunity would be opened in a CRM. By knowing more about prospects earlier, marketers and sales teams can tailor their customer engagement and build relationships more efficiently.

Real-time data

Website   Call center   CRM
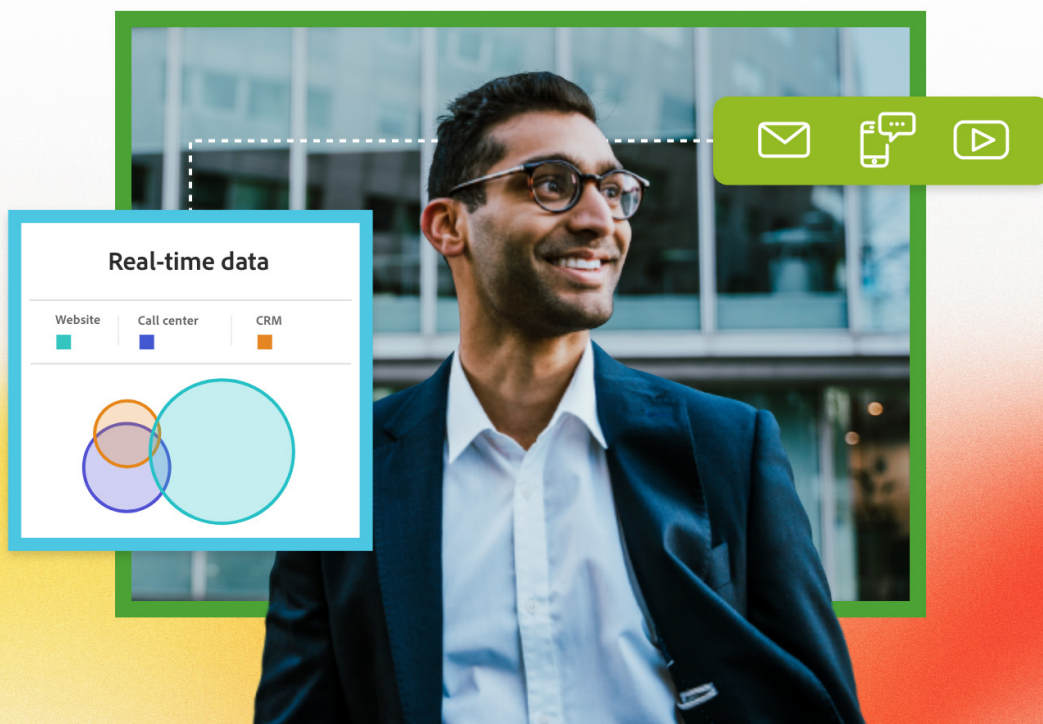
Use insights to see the full picture.

To develop a unified view of customers, tech companies should use both individual and buyer group data. Buyer groups are important because the B2B buying process is often complex and includes multiple decision-makers within an organization. It's important to understand the needs of both the individual and buyer group they may be a part of to better tailor their experiences.

A traditional CRM gives marketers and sales teams a starting point for understanding customers in these contexts, but they can't reveal the full picture. A CXM strategy stitches together data from multiple sources to create actionable profiles. These profiles are constantly updated as real-time data flows in, meaning tech teams can deliver experiences that are better tailored to the buyer's needs across the customer lifecycle.

A CXM approach gives high-tech companies the opportunity to maximize account-based marketing strategies that were once difficult using a traditional CRM alone. "Because B2B customers now expect buying experiences similar to B2C, employing a CXM strategy is the best way to tackle account-based marketing," says Howard. "Knowing and understanding your individual lead isn't enough. A CXM strategy offers insights into understanding the larger account and opportunity in context by enabling tech companies to know each individual's role within a buying group."

For example, three customers from one business may all be interacting with the same semiconductor company. One reached out for a product demo, while another scheduled a meeting with a member of the sales team. The third has not been identified in a sales funnel, and instead they've been exploring silicon chips on the company's website. A CRM would treat each of these customers separately based on their individual interactions. A CXM strategy looks at all the data signals the semiconductor company is receiving and provides a collective context across their customers' entire business. That way, they can interpret what it is that the business needs—in this case, silicon chips—and present them with relevant offers and experiences.

> " Knowing and understanding your individual lead isn't enough. A CXM strategy offers insights into understanding the larger account and opportunity in context by enabling tech companies to know each individual's role within a buying group.
>
> **Matt Howard**
> Senior Product Marketing Manager,
> Adobe

A CXM strategy also uses customer data to segment audiences based on demographic, firmographic behaviors, and preferences. Integrating real-time data enables high-tech companies to get insights into a customer's interactions, needs, purchase history, and opinions of products and solutions. By adding machine learning and AI tools, teams can analyze this data and identify patterns and insights that can uncover new opportunities and outline new trends to help brands evolve with their customers. That way, they can not only predict that customer's next steps but guide multiple experiences for customers across every stage of the journey.

These insights all come from breaking down data silos and stitching together customer data from across systems and departments. "Modern account-based experiences help your brand stand out by making all of your interactions relevant and valuable," says Howard. **"Because a CXM strategy uses unified data, AI-powered insights, and content automation, you can scale marketing and boost your revenue by creating assisted and self-service buying journeys."**
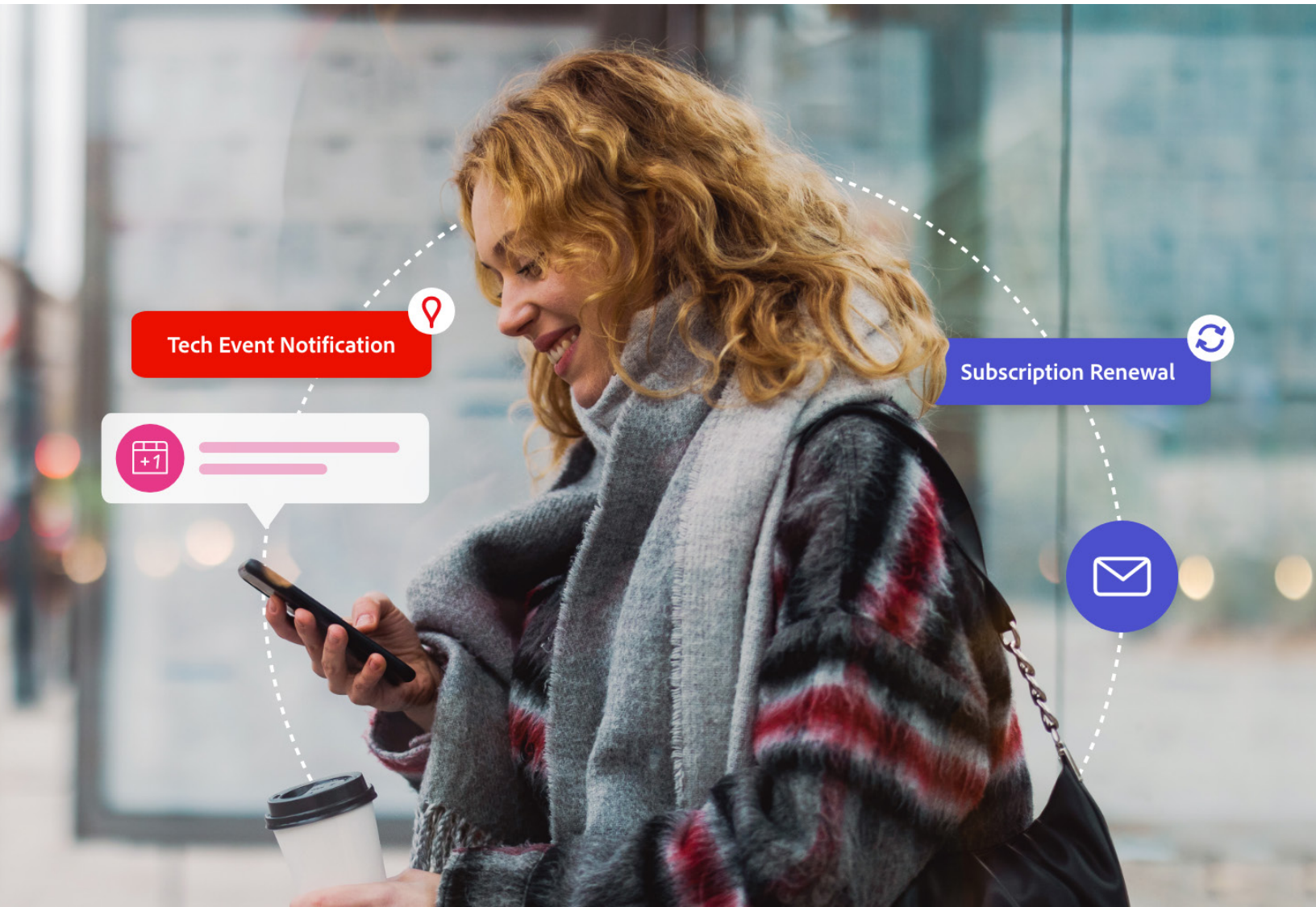
Show what you know through experiences.

High-tech firms realize the challenge of staying ahead of competitors by building and maintaining customer relationships. In fact, Harvard Business Review found that 88% of executives feel customer engagement has a significant impact on their organization's bottom line. But building this engagement is no small task. B2B journeys are not linear, so high-tech companies need to have a complete understanding of their customers to keep up with their evolving expectations. When they get these experiences right, however, they make a lasting impression that impacts lifetime relationships with customers.

A tech company's solutions, including its CRM platform, are all important for gathering and storing customer data. But a CRM platform alone won't get you from data to activation. Though it can power some campaigns and experiences, it doesn't allow for the flexibility to evolve with the customer's needs or as they progress through a journey—which can lead to experiences that are no longer relevant to a buyer. Instead, think of your CRM as one lens into what you know about your customers.

Unified platforms that focus on CXM contain significantly more information than a CRM alone and deliver a much broader and more useful view of the buyer. This enables brands to not only orchestrate contextual campaigns across channels but also to distribute them in real time and at scale.

Western Digital.

[Western Digital](#) wanted to unify its data and make insights accessible to teams across the organization, including marketing, web analytics, commerce, and finance. By integrating its various technologies within a CXM strategy, the data storage company now has a series of dashboards that connect critical data sources and provide actionable insights.

"The goal was to bring together information sources and websites to act in a more coordinated way," says Akshay Sharma, senior director of IT-web technologies and advanced services at Western Digital. "We finally had a single solution to tie all the products, brands, and business requirements together."

As a result, Western Digital now delivers customized emails and highly targeted web page experiences that have produced a 15% increase in supplemental purchases and 100% overall ecommerce transaction growth.

Seek the CXM benefits.

By adopting a CXM strategy, you can personalize and power experiences across channels and at scale while delivering tangible, measurable business impact. For example, according to an Adobe-commissioned Forrester Consulting study *The Total Economic Impact of Adobe Experience Cloud*, the average three-year ROI for investing in CXM—and using Adobe Experience Cloud to do so—is 250%. These businesses also perform twice as well across all awareness and consideration metrics, acquire customers at nearly twice the growth rate of businesses who don't focus on CXM, and have three times the growth rate in repeat visitors. The reward for getting CXM right is massive ROI and lifetime relationships with customers that lead to an increase of retention, purchasing, and loyalty.

Benefits for businesses that invest in CXM:

2.5x
average ROI over three years

2x
performance across awareness and consideration metrics

2x
growth rate of customer acquisition

3x
growth rate in repeat visitors

Relevance by behavior

B2B attribute ranking

Industry	33%
Role	24%
Lead Score	18%
Account Score	15%
Event Attendance	10%

Upgrade your data.

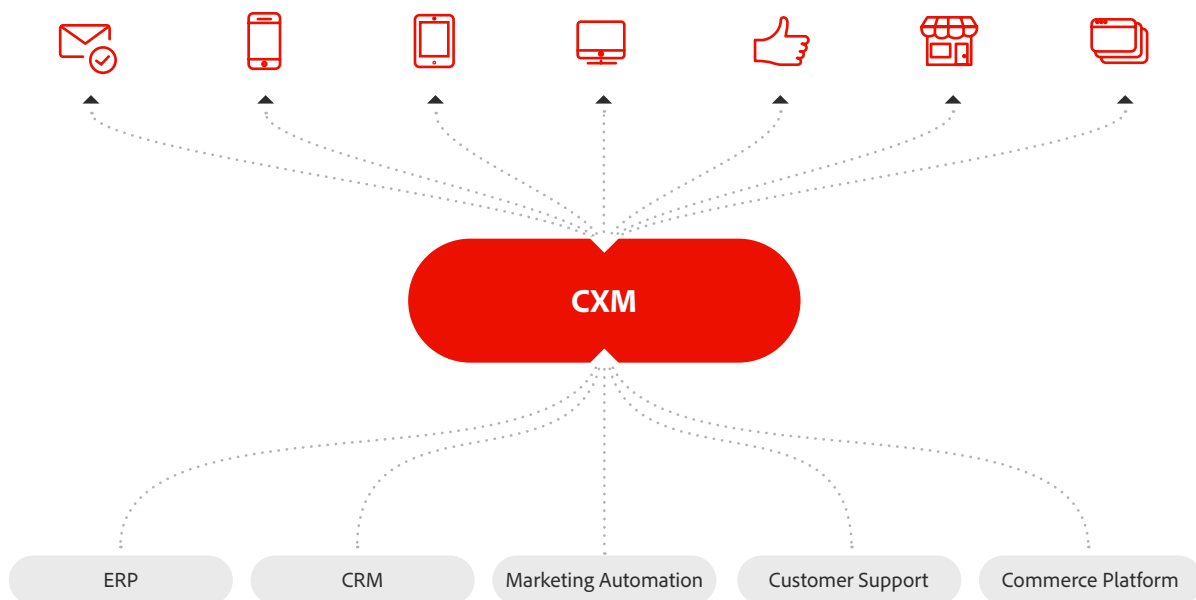| CRM	CXM strategy
• Is a single marketing solution	• Is a strategy using many powerful marketing solutions
• Acts as one source of customer data	• Unifies all customer data sources
• Uses historical data stored in batches	• Updates data in real time
• Manages data for identified customers	• Captures data for both identified and unidentified customers
• Keeps track of B2B customer relationships	• Guides a customer or enterprise relationship across the entire lifecycle
• Acts as a starting point for understanding customers	• Provides a complete view of the customer

Choose the right technology for your CXM strategy.

Implementing a strong CXM strategy may not be easy, but it is incredibly important. The concept of a CXM strategy is vast, and no single vendor will deliver every piece of software or functionality required to enable great customer experiences. Some vendors may be helpful for a specific data source, like CRM. But because CXM doesn't just happen with a single data source, Adobe Experience Platform was built to unify and analyze the whole spectrum of CXM data. And with all your data connected, you'll have the insights you need to create a strong marketing strategy.

Embrace these CXM principles:

- **Have actionable experience data**. Consolidate disparate data to identify signal-rich sources for experiences, establish governance, and create singular customer profiles that can be updated and actioned in real time.

- **Create dynamic content**. Take experiences from general to hyper-personalized with accessible, componentized content and content fragments that can be assembled (and in some cases, automatically curated) to address a buyer in their immediate context.

- **Build seamless customer journeys**. Personalize beyond a single point of interaction. Building next-gen B2B experiences requires an orchestrated set of relevant customer touchpoints to meet customer needs no matter when or how they present themselves. Aim to equip buyers with what they need to lead their own buying journeys as they explore and evaluate your products and services.

- **Harness real-time decisioning and optimization.** Use real-time customer profiles and intelligent decisioning to deliver the optimal experience for every customer, every time.

- **Collaborate efficiently.** Align people and processes around business goals to make the most of the right technology.

Sky-high expectations for B2B experiences mean relying on a CRM alone won't cut it. Instead, think of your CRM as one important data source within a larger CXM strategy. That way, you can use real-time, unified data to understand your customers individually—and within the context of their organizations—to build relevant, next-gen experiences.

Ready to build a CXM strategy for your high-tech organization?

Learn about Adobe for high tech

Explore Adobe Experience Platform

Customer Profile

Jay Smith

🔒 4 accounts

Profile ID
90c7-4ed8-bf25-9e59b...

Customer Experience Management (CXM)

| Websites | Email | Call Centers |
| Mobile | Events | Social Media |

Unified Customer Profile

Sources

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