



The quick-start guide to transforming B2B experiences.

Best practices for building personalized customer journeys that fuel lasting growth.



B2B Personalization



Data insights and activation



Content management and collaboration



Journey automation



Digital commerce

It's official. Virtually all B2B buyers want personalized experiences when they research and purchase products for their businesses.

According to the 2023 *Trust Radius Buyer Disconnect* study, a whopping 94% of B2B tech buyers said that demos tailored to their specific use cases and preferences are important when evaluating different products. And virtually 100% use Google to search for product information and reviews.

However, while personalization is a well-known B2B selling strategy, Adobe's 2023 *B2B Commerce Growth Strategies Survey* found that over a third (37%) of companies are not investing in it. According to Kristen Lease, Marketo Consulting, Adobe Professional Services, "If they don't act fast, these businesses find themselves at a major disadvantage."



“ Consider the email channel alone. Personalized nurture campaigns perform dramatically better than the old, one-size-fits-all approach. And they can be amplified with personalized offers targeting accounts and individuals.

Kristen Lease

Marketo Consulting, Adobe Professional Services

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This playbook covers best practices for personalizing the B2B buying experience based on Adobe Professional Services' work with hundreds of B2B companies of all sizes. You will learn how to:



Optimize a buyer's journey for an end-to-end personalized experience with real-time first-party and account-affiliated data, insights, activation, and centralized governance.



Navigate the business and digital challenges faced when B2B buyers expect a personalized experience and how to tackle it with an integrated, modern approach.



Streamline campaign content creation, operations, and collaboration for the fastest time to market customer experiences.



A technology foundation for personalized B2B experiences.



Data insights and activation



Content management
and collaboration







Journey automation



Digital commerce

Personalizing the end-to-end buyer's journey requires a technology ecosystem that offers four core capabilities:



Capability	Description	Adobe solutions
 Data insights and activation	Collect and analyze real-time first-party and account-affiliated data, so you can understand what kind of experience your customers need in any given moment.	Adobe Real-Time Customer Data Platform (CDP) for B2B
 Content management and collaboration	Add rich metadata to content, store it in a central repository, and serve it up to the right people at the right time.	Adobe GenStudio Adobe Experience Manager Assets and Sites Adobe Workfront
 Journey automation	Offer guided, self-serve experiences that are appropriate for every persona within every account.	Adobe Marketo Engage
 Digital commerce	Allow buyers to see account-specific pricing, configure products, secure approvals for purchases, and easily make purchases online.	Adobe Commerce

Data insights and activation.

“Real-time data is the lifeblood of personalized experiences,” said Dustin Hogan, a Senior Enterprise Architect for Adobe Professional Services. But collecting this data and combining it into customer profiles as part of a customer data platform (CDP) isn’t always easy.

Because the typical buyer’s journey now spans many channels and interactions with both marketing and sales, customer and account data are typically scattered across multiple systems, including your Customer Relationship Management, Content Management System, marketing automation platform, and more. “You need a CDP that can easily integrate with all these systems,” explained Hogan. “That’s why Adobe Real-Time CDP is designed to work with virtually any data source.

Amish Gilani, a Principal Enterprise Architect for Adobe Professional Services, added that managing customer and account profiles requires some kind of centralized governance. “If your customer opts out of, say, receiving marketing emails, that information should be reflected in their CDP, so that everyone who uses that data knows how they can and cannot connect with that customer,” he said. “This kind of governance is also important to ensuring that your organization is fully compliant with relevant data privacy statutes and standards.”

Adobe Real-Time CDP takes advantage of Adobe Experience Platform Data Governance. You can easily define usage policies, categorize your data based on those policies, and check for policy violations when performing certain marketing actions.

To connect and activate customer data, begin by:

- Identifying key sources of customer data and where they reside in your tech stack
- Prioritizing which data is most important to personalizing experiences
- Establishing customer data profiles and connecting them to data sources



Western Digital powers personalized marketing with connected data.

When Western Digital—a leading producer of hard drives, solid state drives, USB storage devices, and cloud services—was ready to personalize the customer journey, they started with data. With the help of an Adobe-centric martech stack, the company has eliminated data silos and connected a myriad of data points, leading to improved customer insights, lower costs, and higher sales on both the B2B and B2C sides of the business.

[Learn how they did it](#)

Content management and collaboration.

With unified customer profiles, it then becomes possible to understand the content needs of different personas and accounts at each stage of their journey. “Data and insights from your CDP can inform your content planning efforts, so you’re building the right content for every audience,” explained Douglas Kincade, a Principal Digital Strategist for content with Adobe Professional Services. Similarly, data from your CDP can ensure you serve this content to the right people at the right time.

However, a challenge many B2B organizations will face is actually building all the content in their plan. To do this, they need cross-functional content production processes that connect marketers with creative teams as well as subject matter experts and other key stakeholders. They also need a work automation platform, like Adobe Workfront, to make these processes easy to manage and a digital asset management (DAM) platform, like Adobe Experience Manager, to make assets easily accessible to marketers and demand generation teams throughout your organization.

A content supply chain brings together people, tools, and work streams to effectively plan, create, produce, deliver, and measure content. “When you have an operational content supply chain,” said Kincade, “you can produce enough assets to support multiple campaigns that help buyers engage deeply with your product in ways that are relevant to them and their role in the buyers’ group.”

To create relevant content and collaborate better, begin by:

- Mapping your content creation process and where it bogs down
- Identifying key stakeholders in the content creation process
- Considering how your content production tech could be better integrated
- Exploring how GenAI capabilities can increase creative capacity and enhance workflows



Cisco built a content supply chain to power personalization at scale.

Cisco is a leading provider of networking, security, collaboration, and cloud management to businesses around the world. By adopting nearly the full suite of Adobe data, content, and journey solutions, Cisco has developed a highly efficient content supply chain to power their website—and laid the foundation for B2B personalization at scale. Now they can easily deploy messaging and other content tailored for each individual customer.

[Learn how they did it](#)

Journey automation.

Today's B2B buyers' groups are often made up of seven or more people, each having a different role. "Customer journeys need to be personalized both for personas and accounts," explained Lease.

"Because B2B buyers prefer to self-serve all or some of their journeys, it's important that these journeys are automated," she added. Ideally, journeys should span all your channels, including emails, the website, the mobile app, etc.—and be informed by unified customer profiles that are updated in real time. Each customer action should automatically trigger an appropriate response.

However, she noted, B2B companies can still provide personalized and automated journeys, even if they don't yet have a CDP in place. "An easy place to start is email marketing with Marketo Engage," she explained. "Smart campaigns let you create automated email sequences for different customer segments that are activated when customers take a particular action, like downloading a report or clicking on a button."

To automate the customer journey, begin by:

- Mapping the customer journey for personas and accounts, including the events that trigger movement from one stage of the journey to the next
- Identifying the systems and content that customers interact with at each stage of their journey
- Determining if you want to start by automating journeys in a single channel or for a single stage of the customer journey



Commvault wins with automated—and personalized—customer journeys.

Commvault, a global leader in enterprise data management software, is using intelligent campaigns in Adobe Marketo Engage to automate and personalize the end-to-end customer journey. For example, if a potential lead participates in a webinar about ransomware recovery, they are automatically added to a nurture program focused on the same issues. Since Commvault started working with Marketo Engage, the marketing team has delivered more than 15,000 programs with over 1,700 global active trigger campaigns.

[Learn how they did it](#)

Digital commerce.

Creating great, personalized commerce experiences is generally more challenging for B2B companies than for B2C. “B2B companies often sell complex products that must be configured for each customer, and they may have account-specific price lists,” explained Marion Freijssen, the EMEA Customer Experience Architect for Adobe Professional Services. “Plus, the B2B buying process often involves multiple reviews and approvals—and each company has its own unique processes.”

For B2B companies that want to provide personalized digital commerce, it’s important to start with a commerce platform that has B2B logic built in. “When B2B companies try to modify a B2C system, it’s usually very costly and time-consuming,” said Freijssen. “If you choose a solution like Adobe Commerce that comes with a solid foundation of B2B functionality and flexible APIs, you can get up and running much faster.”

In addition to adopting the right technology, it’s also important to ensure key stakeholders agree on key functionality long before implementation begins. “Digital commerce touches many different organizations—marketing, sales, finance, and more. You need to make sure all these teams have a voice in the planning process,” she said.

To personalize commerce, begin by:

- Identifying stakeholders who will be impacted by digital commerce
- Mapping what the buying process looks like for each account—and what onboarding looks like for new customers
- Choosing a commerce platform that can support your customers’ buying processes without extensive custom development



Covento makes it easier to buy and sell renewable energy parts with Adobe Commerce.

Covento is a subsidiary of Vestas, the largest manufacturer and operator of wind turbines in the world. Their mission is to digitize the way businesses buy spare parts for wind turbines and other renewable energy technologies through a single digital platform that brings buyers and sellers together. By partnering with Adobe Professional Services to build a digital marketplace based on [Adobe Commerce](#), Covento was able to reduce the average purchasing time from 21 days to 60 seconds.

[Learn how they did it](#)



Take the next step.



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When businesses offer more self-served, personalized experiences, sales representatives can be more consultative and customer-centric—and marketing can be more data-driven.

Sravan Kudithipudi

Principal Digital Strategist

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Personalizing the B2B customer experience isn't always easy, but it's almost always worth it. The impact on the bottom line is virtually always very positive.

Moreover, you can still benefit from personalizing the customer experience—even if you start small. “You can begin by personalizing a single channel, like email, or focusing on a particular stage of the journey,” emphasized Lease. “You can use your results to get buy-in for bigger changes.”

No matter where you are today, [Adobe Professional Services](#) experts can help you take the next step. If you're ready to personalize your B2B customer experience, let's talk about your unique priorities and requirements.

Let's chat



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Sources

[2023 B2B Commerce Growth Strategies Survey and Report](#), Adobe, 2023.

Megan Headley, [2023 B2B Buying Disconnect: The Self-Serve Economy Is Prove It or Lose It](#), Trust Radius, June 13, 2023.



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