TRANSFORMING the B2B SALES FUNCTION

How sales teams win with commerce in the age of the connected customer.
CONTENTS

Introduction

Chapter 1: The Connected Customer
Goes to Work

Chapter 2: Customers Demand Personalized,
Intelligent Service

Chapter 3: Customers Call for Trust and Loyalty
in a Data-Driven World

Chapter 4: Top Sales Teams Respond to
Customer Expectations

Chapter 5: Implementing Ecommerce for
Immediate Impact on the Customer

Conclusion

I’m Astro, your trail guide
to Salesforce.

Astro and friends love showing Trailblazers
like you around Salesforce and its many
business solutions.
Companies have been talking about “putting the customer first” for decades, but the truth is, customers are putting themselves first in today’s digital marketplace. Technology has fundamentally changed what people expect from companies. If they can’t research, browse, and transact business wherever and whenever they want, better options are only a keystroke away.

In the age of innovative ecommerce sites, artificial intelligence (AI), and social media, any disappointing experience can quickly take on a life of its own.

None of this is news, of course. But a Salesforce Research report shows that this challenging trend has hardened into a new reality for B2B companies. In a recent survey of more than 6,700 consumers and business buyers, 81% of business buyers say that customer experience is as important to them as the products and services a company provides. Nearly seven in ten expect an “Amazon-like” buying experience from their business vendors and almost as many have switched vendors when the customer experience disappoints.

NEARLY 70% of business buyers say they expect an “Amazon-like” buying experience from their business vendors.
This is hard data showing that business customers have come to expect a commerce experience that is every bit as intuitive as what they get in the retail world. It also demonstrates that because business relationships are often more complicated than retail relationships, expectations can be even higher.

Business buyers increasingly want the best of both worlds – a seamless self-service option when that suits them and a trusted partner who can anticipate their needs when that makes sense. This elevates the critical role of an agile, responsive sales organization and transforms how the front line must interact with customers.

The connected customer, in other words, is changing the game for companies both inside and out.

This e-book examines how these developments are reshaping the relationship between sales organizations and customers. It also explores how the best-performing companies are turning this moment of transition into a major opportunity by marrying data, analytics, and cloud-based commerce tools to create a digitally enabled customer experience that is a distinct competitive advantage.

In the age of the customer, information is power. What’s critical is that companies learn how to serve each customer across their entire customer journey – from the first touchpoint with sales to the last touchpoint with service.

It’s time to commerce better.
Let’s commerce together.
Amazon and other virtuosos of the digital experience have conditioned all buyers – B2C or B2B – to expect an identical level of instantaneous, personalized, friction-free service. And business buyers see no need to compromise – 73% of them say their standards for a good customer experience have never been higher, and 79% say it’s never been easier to take their business elsewhere.

What does good look like? Three-quarters of business buyers surveyed said they expect vendors to have connected processes like providing seamless handoffs between the various departments they encounter. Rather than having to explain to service what they already told to sales, they expect contextualized engagement based on earlier interactions. At the same time, 76% of business buyers expect vendors to understand how they use different products and services in their business, and 73% say it’s important that the companies they do business with provide instant, on-demand engagement.

79% of business buyers say it’s never been easier to take their business elsewhere.

76% of business buyers expect vendors to understand how they use different products and services in their business.

73% of business buyers say it’s important that companies they do business with provide instant, on-demand engagement.
At every stage of the customer journey, business buyers – especially younger ones – have come to expect an array of digital tools and features from the companies they work with. Mobile apps, product comparison tools, personalized recommendations, real-time messaging, and proactive service are all becoming table stakes for B2B vendors hoping to retain customers.

Moreover, buyers said they want to be able to move easily between different channels – mobile, online, social, text – depending on their needs. They want the flexibility of being able to start a transaction on mobile in the morning and finish it later in the day on a desktop.

Over the last few years, companies have made strides in meeting these needs, but they still have a lot of work to do. Almost half of business buyers say companies typically fall short of their expectations when it comes to creating a great customer experience. One reason is that many B2B companies still depend on clunky commerce solutions built on top of legacy ERP systems designed to run back-office operations and optimize workflows – not manage customer touchpoints or build a 360-degree view of the customer.

Those companies moving to the front of the competition, however, recognize that the right commerce system needs to be as flexible as customers are changeable.
Salesforce B2B Commerce is a good example of flexibility. Because it is based in the cloud, it lets companies develop commerce capabilities rapidly and incrementally. Teams can roll out solutions inexpensively in a cycle of deploy, test and adjust, constantly innovating as customer needs evolve.

Since it is fully integrated with the Salesforce Platform, Salesforce B2B Commerce is also endlessly configurable. Its capabilities mesh seamlessly with CRM data to create a single view of the customer, which lets companies stay connected at every touchpoint by linking commerce to marketing, sales and service. That means customer data is available to anyone in the company at any time on any device or platform.
CUSTOMERS DEMAND PERSONALIZED, INTELLIGENT SERVICE

Perhaps the most challenging new reality in the B2B arena is that customers want their vendors to offer the best of all worlds. As much as they demand highly intuitive self-service options that make routine interactions easier, they also want companies to leverage technology to provide the kind of smart, proactive, bespoke service that can help them run their own businesses more effectively. In fact, 78% of business buyers say they seek salespeople who act as trusted advisors that add value to their business, while 72% expect a vendor to personalize the engagement to a buyer’s specific needs.

The most competitive B2B companies excel at building customer journeys in which every interaction reflects things like contract terms, a customer’s unique geographical footprint, and what services they can join together to create value.

78% of business buyers seek salespeople that act as trusted advisors with knowledge of their needs and industries.

72% of business buyers expect vendors to personalize engagement to their needs.

Customer trust and loyalty stem from companies’ understanding of their unique needs, and tailored solutions that address them. Trust, however, is becoming a precious commodity in digital commerce. On the one hand, customers have come to see real value in technologies like artificial intelligence and the Internet of Things that use data to revolutionize the products and the experiences companies offer. Case in point, 65% of customers recognize the good that can come from AI, and 59% say they are open to AI that improves their experience. On the other hand, trust in what companies are doing with all that data, however, is at an all-time low. Almost two-thirds of retail consumers fear their information is vulnerable to a security breach (vs. 50% of business buyers) and similar numbers said they are uncomfortable with the way companies use their data.

91% of business buyers are willing to exchange relevant information about themselves in exchange for personalized offers or discounts.

Resolving this crisis of trust boils down to using data responsibly. What’s critical for all customers – business or retail – is that companies deploy technologies like AI to provide real utility in a transparent way. Customers indicated that they would share their data if a company meets their high expectations for a better experience. In fact, 91% of customers say they would share relevant information about themselves in exchange for personalized offers or discounts. Another 88% percent or more said they would do so in exchange for consistent interactions across every channel, a simpler purchasing process, or proactive customer service. The key, however, is trust: More than 90% of customers agreed that companies can earn their confidence by giving them control over what information is collected about them, being transparent about how it is used, and showing a real commitment to protecting it.

4 TOP SALES TEAMS RESPOND TO CUSTOMER EXPECTATIONS

So what can companies do to improve performance in the age of the connected customer? The data suggests that two things make a big difference. First, top-performing companies are responding to higher customer expectations by becoming more collaborative, data-driven, and insightful. Second, they are empowering the front line with tools that make sales people smarter and the entire organization more responsive.

Salesforce found that companies with top sales teams (those with significant year-over-year revenue growth) are more likely to share four characteristics:

1. Top sales teams use a single view of the customer to collaborate
2. Top sales teams deploy self-service and automation to free up time for selling
3. Top sales teams trade intuition for data-driven insights
4. Top sales teams adopt artificial intelligence to bolster performance
Top sales teams use a single view of the customer to collaborate.

As we’ve seen, business buyers are gravitating to vendors that understand them and provide consistent, personalized experiences across the customer journey. The most effective B2B sales organizations are delivering by using a 360-degree view of the customer to collaborate with other departments as never before. At least 80% of the sales reps surveyed believe a connected view of customer data across marketing, sales, and service is important to increasing customer satisfaction, closing more deals, and empowering reps to be proactive. High-performing sales organizations are 1.4 times more likely than underperformers to have a standard process for collaboration between sales and marketing. They are also 1.4 times more likely to share common goals and metrics across those functions. The same is true of service. High performers are 1.4 times more likely to have a free and open flow of customer data between sales and service and 1.6 times more likely to have service reps who proactively alert sales people to opportunities.

A robust commerce platform like Salesforce B2B Commerce can be transformative. By collecting commerce and CRM data in a single customer record, Salesforce allows everybody in the company to see the customer’s history, the status of outstanding orders and service issues, and notes from the salesperson or service engineer – all in real time. Arming salespeople with mobile access to that data gives them the ability to connect with customers on the go, putting vital information at their fingertips in customer-facing situations.

No matter how customers choose to engage with the company, the interaction will be contextual and meaningful. Business buyers end up feeling that they are dealing with a single, knowledgeable vendor – not a collection of siloed departments – saving time and energy for everyone involved.

86% of B2B salespeople say a connected view of customer data across marketing, sales and service is important to increasing customer satisfaction.

High-performing sales teams are:

- 1.4X more likely than underperformers to have a standard process for collaboration between sales and marketing.
- 1.4X more likely than underperformers to have a free and open flow of customer data between sales and service.

Customers’ elevated expectations require salespeople to find time in the sales process. But research shows that the average salesperson spends 66% of his or her time on non-selling activities, meaning only a third of each day is spent generating revenue and tending to customers. High performers are more likely to give customers the self-service, mobile, and automated options they prefer for many routine interactions like ordering and product research, thereby relieving salespeople of the “order-taking” burden that gets in the way of solving bigger issues. Automation frees ups reps to research customer needs and come up with solutions that lead to a sale. Among high-performing sales teams, 85% are confident they understand the business needs of their customers (vs. 57% of underperforming sales teams) and 86% (vs. 58%) know the people involved in decision-making. That’s because they have the time and resources to look beyond the simple transaction to develop a meaningful understanding of each customer’s unique context and needs.

It’s notable, however, that face-to-face contact with customers is on the wane. While high-performing sales teams are increasing the time they devote to selling, they are using it to connect virtually. Both customers and salespeople can be more efficient using digital channels to communicate, making it less important to meet in person.

Time spent connecting with customers digitally has increased 12% since 2015, compared with 4% for time spent meeting in-person.
Top sales teams trade intuition for data-driven insights.

The best sales teams distinguish themselves by making every minute more productive. While high performers still rely on experience and intuition to spot opportunity, they increasingly turn to data and analytics to both sharpen their own sales strategies and craft more personalized, insightful solutions for their customers. These insights let them constantly adapt and iterate on the customer experience to develop new products, services, and channels.

This isn’t to say that the human touch isn’t vital. 83% of business buyers say that being treated like a person, not a number, is very important to winning their business.

But it does mean that the most effective sales reps are using data to make their customer interactions more productive. Consider that high-performing sales teams are 1.6 times more likely than underperformers to use data to help prioritize leads. Reps are becoming experts at things like calibrating the customer’s past relationship with the company, measuring estimated revenue, and predicting the potential for add-on business. High performers are also 1.5 times more likely to use data analysis to produce timely, accurate sales forecasts that can lead to actionable insights. Underperformers, on the other hand, are 1.7 times more likely to rely on intuition or a “gut feel” when it comes to forecasting.

**HIGH PERFORMING SALES TEAMS ARE:**

1.6X more likely than underperformers to use data to help prioritize leads.  
1.5X more likely to use data analysis to produce timely, accurate sales forecasts that can lead to actionable insights.

*State of Sales,* Salesforce Research, May 2018.
Top sales teams adopt artificial intelligence to bolster performance.

In many ways, sales organizations are just getting started when it comes to using data to increase performance. Over the next two years, sales leaders predict 155% growth in artificial intelligence, 104% growth in marketing automation, and 95% growth in partner relationship management systems. High-performing sales teams are 4.9 times more likely than underperformers to have already adopted AI for things like intelligent forecasting, opportunity insights, and lead prioritization. Almost two-thirds of high performers (62%) expect a big role in guided selling technology that ranks the value of a potential opportunity and suggests timely next steps that push a sale forward.

Clearly, these optimistic growth forecasts are coming off a low base – few sales teams are working with AI now. In most cases, sales leadership, not sales reps, are the ones using data to produce forecasts and monitor performance. But early adopters are clearly impressed with AI. For example, only 46% of sales reps in the survey said they had access to analysis signaling a customer’s propensity to buy. But 85% that have access to analysis find it makes them more effective. Similarly, only around 40% of reps have tools that surface the most promising leads (39%) or suggest next steps on an opportunity (37%). But in both cases, more than 80% of early adopters said these forms of intelligence increased their effectiveness.

85% of sales reps with data insights on customers’ propensity to buy say it makes them more effective.

82% of sales reps with tools that suggest next steps on an opportunity say they make them more effective.

An effective commerce implementation has to begin with a clear ambition for how it can enhance the company’s strategy and improve the customer experience. But companies are too often tempted to include every feature imaginable, which creates interminable delays, massive budgets, and inevitably causes the effort to collapse under its own weight.

A solution that’s purpose-built on a cloud platform offers a clear alternative: Starting with a minimum viable product, the company can get in front of customers quickly, collect real-world data, and use it to sharpen the next rapid iteration. The advantage is that the company can begin generating ROI, score some quick wins, and arm itself with intelligence about what’s working and what’s not.

Flexibility and speed to market are especially critical at a time when B2B commerce has a steep growth trajectory, and customers and companies are still figuring out how they can most productively enhance their relationship. For decision makers, this can be overwhelming. But the most effective implementations start with a key assumption: You don’t really know what your customers want. You have to ask. Too often, large B2B companies adopt an enterprise mindset, assuming that what makes life easier for them will do the same for customers. This is a quick way to veer off course.
One of the key benefits of implementing a commerce platform in manageable stages is that customer feedback becomes part of doing business. The company can gather data and insights on the fly, using them to make better decisions. Creating tight feedback loops to gather and analyze sales data helps companies understand what’s working or not, so features can be tweaked, built up – or abandoned.

A smooth implementation also requires determining who has decision rights – IT, marketing, finance, and so on – and including those people from the very beginning of the project. Trade-offs between features, cost, and speed inevitably crop up in the planning process. It is critical that everyone contributes to these decisions, so a consensus emerges around the overall rationale for the project. Anything less than full alignment is a threat to success.

CONCLUSION

Customers aren’t waiting for change to come their way. They are bringing the retail expectations to work and are looking to their business vendors to treating them as well as Amazon does.

For B2B companies, this is a call to action. Although the challenges of meeting complex customer expectations can be steep, the cost of waiting is a real risk – and they can be overcome. A critical starting place is to recognize that your customers will tell you what they need and then tell you again and again in an endless feedback loop. The only solutions worth investing in are those that enhance your ability to connect with customers in the ways that are most meaningful to them by offering speed to market, manageable costs, superior flexibility, and the ability to scale.
ADDITIONAL RESOURCES YOU MIGHT LIKE:

Learn more about Salesforce B2B Commerce today:
LEARN MORE

Discover why digital is becoming the primary channel for B2B engagement:
GET THE REPORT

Read the Forrester Report: B2B Embraces Its Omnichannel Commerce Future
GET THE REPORT