2015 B2B Customer Experience Research Findings
Executive Summary

With growth as a business priority, front-office C-Suite executives are focused on attracting and retaining customers. Key to that is delivering an end-to-end experience that customers notice and value and that differentiates the company from competitors. While many business-to-consumer (B2C) companies have long understood the importance of the customer experience, business-to-business (B2B) companies now recognize its value.

According to Accenture's B2B Customer Experience Survey (see sidebar, About the research), more than 8 in 10 B2B executives recognize customer experience as a strategic priority. Companies are allocating larger budgets and paying more attention to developing key customer experience capabilities. Furthermore, a growing percentage of B2B companies see the customer experience as a competitive differentiator. The driving force behind companies' strategic focus on the customer experience is digital disruption. It drives deep changes with business customers, who now move at different speeds and, fundamentally transforms the B2B marketplace with new entrants and business models.

However, our study also found that most companies still have considerable gaps in their customer experience strategy and execution capabilities—despite widely acknowledging their importance. These shortcomings, as well as a number of internal barriers, continue to make it difficult for most companies to generate a significant return on their customer experience investments.

About the research

Between February, 2015 and March, 2015, Accenture surveyed 1,350 customer experience, sales and service executives around the world to get their perspectives on the importance of the customer experience to their business, how well they are delivering it, the benefits they've generated, and the challenges they encounter. Respondents represented companies from 10 countries and 16 industries, with the vast majority posting annual revenues of more than US$1 billion. In this research, Accenture defines “customer experience” as how business customers and their stakeholders perceive the entirety of interactions they have with a supplier company across all sales and marketing as well as service touch points.

A small group of companies is the exception. Looking beneath the surface, we found that companies' performance is far from uniform. In fact, our segmentation of the study's data revealed a sizable gap between two different types of companies: Customer Experience (CX) Leaders, which represent about one-quarter of participating enterprises, and companies we call Strivers. While Leaders excel in all of the key customer experience strategy and execution capabilities and yield high financial value, Strivers have a highly uneven track record with moderate financial growth—and, as result, generate a far lower return on their customer experience investments. In fact, we estimate that more than 40% of Strivers' spend fail to deliver optimal return or, at worst, are outright wasted.

What makes Leaders so much more successful? Our analysis revealed six key characteristics that distinguish Leaders from Strivers. Leaders consider all of the customer experience strategy and execution capabilities important and perform well on them. Enabled by the Internet of Things, they see after-sales service as a critical driver of the customer experience, and are more likely to use customer experience to help them disrupt markets. Leaders also invest heavily in digital technology while, at the same time, strengthening their legacy capabilities. They understand the role and value of the connected ecosystem in delivering an optimal B2B customer experience. Finally, Leaders believe in the criticality of people, and take a balanced approach to building the skills of the talent and leadership empowerment.

As the customer experience continues to grow in stature across the B2B landscape, companies that emulate Leaders’ perspective, practices, and philosophy will be best poised to see their efforts bear fruit in the form of more robust, sustainable growth.

According to our survey, the customer experience remains a critical concern for the vast majority of B2B companies. Eighty-six percent of executives said the customer experience they provide in sales and service interactions is important to their strategic priorities. Of those, 41 percent said it is critically important, which is similar to 2014. Seventy-four percent also said that, in two year’s time, customer experience-related considerations will play an even larger role in their overall corporate strategy than they do today. And just under eight in 10 executives believe that delivering a differentiated sales and service customer experience links directly to business results (78 percent) and provides a competitive advantage (77 percent).

Reflecting this growing importance, 45 percent of executives said their customer experience management budget has increased significantly in the past fiscal year. What’s driving the force behind companies’ strategic focus on the customer experience? The biggest factor is how customers themselves have changed over time—and the implications those changes have for the business. For example, three-quarters of executives said changes in customers’ behaviors and attitudes have a major impact on their sales and service efforts—particularly customers’ higher expectations for tailored solutions, the fact customers are more knowledgeable and self-directed, and customers’ continual monitoring and evaluation of their suppliers.

In other words, business customers increasingly demand a consumer-like experience, are more empowered by their access to ever-more information, and expect ongoing engagement from those they do business with. But importantly, we also found that customer changes are not uniform—which means the customer experience that is most relevant will differ across regions and countries that have distinct needs, use different channels for sales and service, and move at different speeds.

In addition to strategic importance, key customer experience capability areas are increasingly important (Figure 1). A greater percentage this year than in 2014 said virtually every customer experience strategy and execution capability was important to delivering a superior customer experience. Though more companies also said they are doing a better job developing these capabilities, significant performance gap still exist.

Figure 1. Importance and performance of customer experience capabilities: 2015 versus 2014

Note: Average percentages of underlying capabilities by key area (top 2 scores).

Source: Accenture 2015 B2B Customer Experience survey
That said, companies still face a variety of barriers in delivering a superior customer experience (Figure 2). The most commonly cited barrier this year was the fact that the company’s directors or managers have too little time to dedicate to the customer experience. Other prevalent barriers are lack of formal customer experience processes, lack of attention to the customer experience from the C-suite, and lack of cross-organizational integration necessary to deliver a superior customer experience. But, as figure 2 shows, there is a relatively small delta between the most and least common barriers. In other words, companies face myriad challenges in creating and executing an optimal customer experience. There is no simple solution to making customer experience initiatives more effective.

Another troubling sign: Companies’ preparedness to deliver the desired customer experience has dropped sharply in the past year. In 2014, 40 percent of executives said that when it comes to skills, tools and resources, their organization is well prepared to achieve their customer experience objectives. This year, that figure fell to 32 percent. This suggests that while companies agree on the priority and value of the customer experience, fewer are confident they can deliver it.

### Figure 2. Barriers to successful customer experience delivery

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Minimal barrier</th>
<th>1 Minimal barrier</th>
<th>2 Minimal barrier</th>
<th>3 Minimal barrier</th>
<th>4 Minimal barrier</th>
<th>5 Minimal barrier</th>
<th>Top 2 scores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directors/Managers have too little time to dedicate to customer experience</td>
<td>9%</td>
<td>16%</td>
<td>26%</td>
<td>31%</td>
<td>17%</td>
<td></td>
<td>48%</td>
</tr>
<tr>
<td>Processes for delivering optimal Customer Experiences</td>
<td>9%</td>
<td>17%</td>
<td>28%</td>
<td>33%</td>
<td>13%</td>
<td></td>
<td>46%</td>
</tr>
</tbody>
</table>
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Reshaping or creating new markets: the customer experience as an enabler for disruption

One of the new issues this year’s survey explored is an increasingly prevalent phenomenon: the use of the customer experience to disrupt, define or reshape markets—especially by new entrants.

Nearly nine in 10 executives said they consider defending their business against new types of competitors a priority at least to some extent. That’s because for a majority of companies, their customers are becoming more open to engaging in services and offerings from new entrants, and new entrants in their industry are using the customer experience as their key differentiator (Figure 3). In fact, six in 10 executives believe these new entrants are better at providing positive customer experiences than traditional players in the industry.

In many cases, companies in our survey are taking a page from new entrants’ playbook: Two-thirds of executives said their company is considering or already acting as a new entrant in a different industry outside of its “traditional” scope. And for a large majority of companies, digital—including web and mobile sales and service channels, and intelligent devices—will play an increasingly important role in their ability to act as disruptors.

Figure 3. Executives’ beliefs about new entrants and disruptors

<table>
<thead>
<tr>
<th>Statement</th>
<th>1 Strongly disagree</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our customers are becoming more open to engaging in services and offerings from new entrants</td>
<td>2% 7% 23% 47% 21%</td>
<td></td>
<td></td>
<td></td>
<td>68%</td>
</tr>
<tr>
<td>New entrants in our industry use customer experience as their key differentiator</td>
<td>3% 7% 23% 46% 21%</td>
<td></td>
<td></td>
<td></td>
<td>67%</td>
</tr>
<tr>
<td>Our company is considering or already acting a new entrant in a different industry(ies) outside of our &quot;traditional&quot; scope</td>
<td>4% 9% 20% 45% 22%</td>
<td></td>
<td></td>
<td></td>
<td>67%</td>
</tr>
<tr>
<td>Typically, these companies are better at providing positive customer experiences than traditional players in the industry</td>
<td>5% 12% 24% 38% 21%</td>
<td></td>
<td></td>
<td></td>
<td>59%</td>
</tr>
</tbody>
</table>

Source: Accenture 2015 B2B Customer Experience survey
Customer Experience Leaders: generating significantly greater return on their customer experience investments

While the preceding presents our findings at an aggregate level, the story becomes more compelling with additional analysis. In segmenting the data, we identified distinct groups of companies (Figure 4).

Leaders, which represent 23 percent of the survey sample, both agree that the customer experience is highly important to their strategic priorities and have experienced significant revenue growth in the past year. They generally excel in both customer experience strategy and execution capabilities. At the opposite end of the spectrum are Laggards (20 percent of the sample). Laggards also stated the customer experience is important to their strategic priorities but have experienced limited to negative growth in the past year. They perform poorly on both customer experience strategy and execution.

Between Leaders and Laggards are Strivers, accounting for 57 percent of the sample across three profiles. Strivers are failing to collect the results from their customer experience investment that Leaders enjoy because they are falling short in some way either both strategically and operationally—or on just one of these two dimensions—weak strategy for the Execution Heroes or poor execution for Strategy Standouts. Strivers experience a revenue growth rate that’s half of Leaders’.

Our analysis reveals a considerable gap between Leaders and Strivers in the return on their customer experience investments. Compared with Leaders—which achieve financial, strategic and delivery excellence—40% and more of Strivers’ investments fail to deliver optimal return or, at worst, are outright wasted (Figure 4).

While customer experience Leaders are found in all sectors, they are most prevailing in two: Industrial equipment and consumers goods and services. Interestingly, those two industries also have higher-than-average numbers of Laggards.

Our segmentation revealed an intriguing finding: While the percentage of Strivers grew in the past year—by nearly 10 percentage points—the proportion of Leaders remained the same (Figure 5). This suggests that, when it comes to the customer experience, a majority of companies are in a race toward mediocrity, not excellence.

![Figure 4: Five company profiles with significant differences in CX investments efficiency](image)

Note: Based on companies for which CX is a priority (n=1160)
Source: Accenture 2015 B2B Customer Experience survey

![Figure 5. Leaders, Strivers, and Laggards distribution compared to last year](image)

Source: Accenture 2015 B2B Customer Experience survey
Playing to win: the six key characteristics of Customer Experience Leaders

What do Customer Experience Leaders do differently from Strivers? Our analysis identified differentiators that enable Leaders to generate outsized returns on their customer experience investments.

Leaders “walk the talk” and continue to outperform
Leaders were much more likely than Strivers to rate all 17 key capabilities as important—despite the priority Strivers claim to place on the customer experience. Furthermore, Leaders’ performance on all 17 outpaced that of Strivers considerably.

As a result, Leaders are twice as likely as Strivers (62 percent versus 31 percent) to say that, from a skills, tools and resource standpoint, they are very well prepared to achieve their customer experience objectives.

Leaders start “from the back”
Leaders value customer service in ways Strivers don’t: Six in 10 Leaders, compared with one-third of Strivers, believe after-sales service is important to the delivery of an optimal customer service experience. In fact, to Leaders, service is by far the most important point in the customer life cycle (Figure 6).

They also are more likely than Strivers (65 percent versus 58 percent) to understand that in the coming years they will need to reinvent the service and support they provide to business customers to keep up with customer experience expectations.

Leaders don’t avoid disruption, they create it
Leaders are more likely than Strivers to consider defending their business from new types of competitors a priority (62 percent versus 42 percent), as well as to believe it’s a much bigger priority today compared with two years ago (57 percent versus 37 percent).

Furthermore, Leaders are more likely than Strivers to recognize new entrants as a threat: They believe that their customers are becoming more open to engaging in services and offerings from new entrants, that new entrants in their industry use customer experience as their key differentiator, and that new entrants typically are better at providing positive customer experiences than traditional players in the industry.

But even more important, Leaders are more proactive in using the customer experience to become the disruptor instead of being disrupted: They are considering or already acting as a new entrant in a different industry outside of their “traditional” scope.

Figure 6. Importance of customer experience mastery along journey stages: Leaders versus Strivers (% of “very important”)

<table>
<thead>
<tr>
<th>Stage</th>
<th>Leaders</th>
<th>Strivers</th>
<th>Laggards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning, discovering &amp; considering</td>
<td>53%</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>Evaluating, regulating &amp; purchasing</td>
<td>34%</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Installation or deliver</td>
<td>17%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>After-sales support &amp; service</td>
<td>20%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Cross-/upsale after sales</td>
<td>61%</td>
<td>52%</td>
<td>53%</td>
</tr>
<tr>
<td>End of contract/disconnect</td>
<td>61%</td>
<td>52%</td>
<td>53%</td>
</tr>
<tr>
<td>Ongoing account management</td>
<td>61%</td>
<td>52%</td>
<td>53%</td>
</tr>
</tbody>
</table>

Source: Accenture 2015 B2B Customer Experience survey
Leaders invest heavily in both digital and legacy

Leaders recognize the critical role that digital technologies play in delivering the experience customers value and demand. For instance, Leaders are much more likely than Strivers to strongly agree that digital channels and technologies will significantly improve their interactions with business customers, provide new sources of revenue, engage employees and partners more effectively, and help them reduce costs (Figure 7). They also are more likely to consider a wide range of digital investments for sales and service a focus and priority. In fact, a majority of Leaders consider seven (out of 13) areas as priorities; only two areas are seen as priorities by at least one-third of Strivers. By far, the fastest growing investment area is smart/intelligent devices—often referred to as Internet of Things—with 48% of Leaders spending significantly more in this area in the last two years (Figure 8).

Figure 7. Impact of digital in delivering the customer experience: Leaders versus Strivers (% of “strongly agree”)

<table>
<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Strivers</th>
<th>Trying Hard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer interaction</td>
<td>63%</td>
<td>45%</td>
<td>53%</td>
</tr>
<tr>
<td>Employee engagement</td>
<td>38%</td>
<td>34%</td>
<td>36%</td>
</tr>
<tr>
<td>Partner engagement</td>
<td>25%</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Revenue growth</td>
<td>14%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Cost reduction</td>
<td></td>
<td></td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: Accenture 2015 B2B Customer Experience survey

Figure 8. Importance of Digital Investments: Leaders versus Strivers (% of “critically important”)

<table>
<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Strivers</th>
<th>Trying hard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online sales/eCommerce</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Customer self-service</td>
<td>53%</td>
<td>51%</td>
<td>51%</td>
</tr>
<tr>
<td>Integration across digital sales</td>
<td>33%</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Cloud-based sales</td>
<td>10%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Digital marketing</td>
<td>10%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Customer/partner collaboration tools</td>
<td>11%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Social media presence</td>
<td>10%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Intelligent/smart devices (IoT)</td>
<td>14%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Mobile enablement for customers</td>
<td>15%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Mobile enablement for workforce</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cloud-based service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile sales solutions for customers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Accenture 2015 B2B Customer Experience survey
Given this, it’s not surprising that Leaders are more convinced their digital investments will give them a competitive advantage (44 percent versus 23 percent), and to allocate a larger portion of their customer experience budget to technology-enabled customer experiences. (67 percent versus 41 percent).

But Leaders’ focus on digital doesn’t mean they ignore traditional channels. To the contrary, they also are nearly twice as many as Strivers to say they’ve significantly increased their investment in the past two years in legacy or traditional channels—including field service capabilities, the contact center, training for the sales and service workforce, and legacy CRM systems (Figure 9).

As a result of this dual focus, Leaders have developed a very clear “digital-physical” vision that is tuned to the multi-speed customer agenda and tracked rigorously. They have a clearly established view of how traditional and digital interaction channels should be integrated, and systematically measure the return on their investment in digital as well as in other initiatives. They also believe that proposing a differentiated channel mix, that combines physical and digital interactions, to different customer segments is a key differentiator for their company.

Leaders understand the role and value of the connected ecosystem

Delivering a compelling customer experience has increasingly become a collaborative exercise—something Leaders roundly recognize. In fact, Leaders place a greater emphasis on working with other organizations to create the right customer experience across sales and service, and they employ relevant incentives and rigorous performance monitoring to ensure the desired experience is delivered.

More than half of Leaders said collaboration with sales partners is important to delivering optimal experiences, and 47 percent said the same about collaboration with service partners. Those figures for Strivers were 33 percent and 34 percent, respectively (Figure 10). Additionally, four in 10 Leaders, versus three in 10 Strivers, extensively link partner incentives to the customer experiences they deliver. And just over half of Leaders, compared with only 29 percent of Strivers, have a rigorous vendor management program that monitors and optimizes the delivery of the customer experience across several external organizations.

![Figure 9. Significant increase in ‘traditional/legacy’ investments over last 2 years](source: Accenture 2015 B2B Customer Experience survey)

![Figure 10. Importance of external collaboration to delivery optimal customer experience.](source: Accenture 2015 B2B Customer Experience survey)
Leaders put leadership, internal collaboration and balanced skill building at the core

Internally, collaboration and leadership alignment is also critical. While there is no single best answer for the organizational centralization of the customer experience function, Leaders tend to have direct or close proximity to Profit & Loss authority (Figure 11).

When it comes to building new digital skills, Leaders are more likely to take a balanced approach that infuses the enterprise with fresh talent and perspectives while also repositioning/retraining existing resources: Just under half of Leaders, versus one one-fourth of Strivers, said they find needed resources through an balanced mix of hiring new people and retraining or repositioning current employees (Figure 12). Strivers (and, to an even greater extent, Laggards) are much more reliant on primarily retraining existing staff to fill new roles.

Figure 11. Prevailing models to organize the Customer Experience responsibilities internally.

Figure 12. How companies build digital skills and talent to manage and deliver the customer experience.

Source: Accenture 2015 B2B Customer Experience survey
The customer experience in action: How Michelin uses innovative solutions to transform the service experience

Leaders don’t set themselves apart by fixing things once they break. Their focus is on proactive maintenance and preventing problems in the first place. Michelin solutions, a new business launched by the Michelin Group, built an ecosystem of experts to deliver its new EFFIFUEL™ solution. The solution uses high tech and high touch to reduce fuel consumption in truck fleets. Sensors inside vehicles collect data on fuel consumption, temperature, speed and location. This data is then transmitted to a cloud service of a Michelin solutions partner, and that’s where the human touch begins. Michelin solutions fuel experts analyze the data and make recommendations to fleet managers and Michelin solutions instructors train drivers in how to use less diesel fuel when driving. Result: truck fleet managers can save 2 liters of fuel for every 100 kilometers driven. As a partner to truck fleet managers, Michelin solutions maintains a human touch with this solution. EFFIFUEL™ includes driver training, and the recommendations come from Michelin solutions experts rather than a web service. EFFIFUEL™ also includes the outsourcing of tires on a per-kilometer-driven basis with EFFITIRES™. This innovative solution is a prime example of thinking differently about revenue opportunities.

Conclusion

Most B2B companies now understand the strategic importance of the customer experience, as well as the capabilities that are vital to creating and delivering it. They also are showing increased commitment by ramping up their customer experience investment. However, the majority of companies continue to struggle; they are stuck in a race to mediocrity. They need to further invest in and develop the strategic and execution capabilities to generate positive business impact.

In contrast, Leaders continue to refine key strategic and execution capabilities. They point the way for other companies to play to win. Making the necessary strategic and executional changes for customer experience excellence creates opportunities to:

- Generate revenue growth rather than just reducing costs and trying to catch up to peers
- Pick investments selectively, with confidence in ROI, instead of taking a scattershot approach to allocating resources
- Be a disruptor at the intersection of re-imagined services and an extended, digitally-enabled channel experience versus being disrupted by competitors.

Leaders consistently deliver customer experiences that keep pace with today’s changing business customers’ behaviors and needs. And, those differentiating customer experiences are how executives can help drive their companies’ growth.
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