

B2B CX PLAYBOOK

Customer Understanding as a Competitive Advantage

How to understand, measure and improve customer experience



B2B

International

a dentsu company

www.b2binternational.com

Introduction.

Customer experience (CX) is one of the clearest ways for B2B organizations to protect revenue, grow share of wallet, and build stronger customer relationships. Today, B2B organizations have access to more customer data than ever before. CRM platforms, digital analytics, and AI-powered tools can provide a wealth of information about customer behavior, helping businesses identify patterns.

However, this data alone can rarely explain the reasons behind customer activity. It can tell us what customers are doing (e.g., purchasing more or less), but not necessarily why, what is influencing their choices, or how they really feel about their interactions with your organization.

This is where customer experience research adds an important piece to the puzzle. By combining behavioral and operational data with direct customer feedback, organizations can uncover the motivations, expectations, and unmet needs that cannot be uncovered through CRM platforms or AI tools alone.

The challenge is that customer feedback is often fragmented across surveys run by different teams, CRM systems, sales conversations, and customer complaints.

This often means businesses struggle to answer the questions that matter most: Why are customers leaving? Where are relationships at risk? and Which improvements should we prioritize first?

This guide is designed to help B2B organizations take a structured approach to customer experience, not by populating another dashboard or treating CX research as an annual box-checking exercise, but by using customer understanding to make better business decisions and deliver a stronger overall customer experience.

At B2B International, we believe the best CX research programs do three things well:



They understand what customers really need



They measure the things that matter most



They turn insight into action that supports business objectives

1 Why B2B CX Matters.

In B2B markets, organizations have traditionally competed on product performance, price, and relationships. While these factors remain important, they are also areas where it is becoming increasingly difficult to stand out. With that in mind, customer experience is becoming a more important source of competitive advantage.

A challenge many of our clients face is that products and services are becoming more comparable, while barriers to switching continue to decrease. Our own research shows that the difference between winning and losing B2B brands is increasingly shaped by the experiences buyers have, including how easy suppliers are to work with, how confident they make buyers feel about their choice, and how effectively they remove friction from the journey.

For many years, we have also seen customer expectations continue to rise. It is important to remember that B2B buyers are not comparing the experience you provide against your direct competitors. Every business and consumer experience they have shapes their expectations, from the speed of response they receive to the level of personalization, convenience, and support they experience.

In addition, research consistently demonstrates that customer experience has a direct impact on customer loyalty, retention, and growth. Organizations that create better customer experiences are more likely to retain customers, grow existing accounts, and benefit from stronger customer loyalty.

How CX Can Support Business Growth:

Objective	How CX Contributes
Protect revenue	Identifies relationships at risk, before customers leave
Grow accounts	Uncovers unmet needs, future priorities and opportunities
Improve retention	Highlights pain points and the factors that drive dissatisfaction
Increase loyalty	Identifies the moments that matter most and the experiences that have the greatest impact
Improve conversion	Finds friction in the buyer journey and where people drop off
Differentiate	Helps businesses become easier to work with and more valuable to customers

This is about much more than improving satisfaction scores. It is about creating a competitive advantage that drives customer loyalty and long-term commercial success.



2 A CX Health Check.

So where do you begin? Because customer experience means different things to different organizations, before designing or improving any customer experience program it is useful to understand where your organization stands today.

We've created a simple health check to help you reflect on your organization's current approach to customer experience and identify potential areas for improvement.

Score your organisation on a scale of 1-5, where: **1 = Strongly Disagree** and **5 = Strongly Agree**

Statement	Score
We have a solid understanding of our customers' needs and expectations	
We regularly gather meaningful customer feedback	
We use customer insight to inform business decisions	
We act on feedback and communicate improvements	
Customer experience is a priority across the business	

Your score



5-10: GETTING STARTED

Customer feedback is often informal or ad-hoc, the priority is building a clearer understanding of customer needs.



11-15: DEVELOPING

Feedback is being captured, but there are opportunities to improve how insight is shared and acted upon.



16-20: ESTABLISHED

Customer feedback is embedded in decision-making and is helping to shape improvements across the business.



21-25: LEADING

Customer experience is a clear competitive advantage and directly supports retention and growth

The most successful CX programmes are not necessarily the ones that have the most dashboards or tools, but the ones that enable organisations to understand what matters and make better decisions.

3 Understanding Your Customers.

Many organizations know more than they think about their customers. The challenge is that this knowledge often sits in different places or with a wide range of individuals across the business.

For example, sales teams may have insight into why customers choose one supplier over another, while account managers may understand where relationships are strengthening or remaining stable. Senior leaders may have a view on where the business should grow, but not necessarily an understanding of whether the current experience is helping or holding the business back.

Before launching anything new or making changes to existing programs, it's worth asking a simple question:

What Do We Already Know?

Existing research, CRM data, account plans, and sales team knowledge can provide valuable clues. Bringing this information together can create a baseline view of the organization's understanding of customer needs and begin to highlight where the gaps are.

Once you have a good understanding of what already exists, internal stakeholders are often a useful next step. They can help stress-test assumptions, identify recurring themes, highlight differences across customer types or regions, and begin aligning around the business priorities research should support.

However, internal perspectives should not replace direct customer feedback. Customer interviews allow organizations to understand not just what customers think, but why they think it. This depth of understanding is critical.



A qualitative approach is often most appropriate for exploring customers' overall experiences and their interactions with key touchpoints. The goal is not to speak to every customer, but to understand what matters most. In-depth interviews are a valuable tool for exploring the reasons behind customer behavior, uncovering unmet needs, and understanding the context behind experiences. They can help identify the moments that matter most and the factors that influence loyalty and retention.

Customer journey mapping is also useful because it brings customer understanding together by identifying the moments that matter throughout the customer journey. It can help organizations understand where customers experience unnecessary effort and where improvements are likely to have the greatest impact on loyalty, retention, and growth.

If customer understanding research is conducted effectively, businesses should have:

- A clear understanding of customer needs and expectations
- Visibility of the moments that matter most
- An understanding of the pain points or areas of friction in the customer journey
- Clarity on the customer groups that are most important to future growth
- Priorities to be measured through ongoing customer feedback

Customer needs, expectations, and priorities are constantly evolving. For this reason, customer understanding should not be viewed as a one-time exercise. The most customer-centric organizations continually invest in understanding their customers and use this insight to inform future decisions.



4 Measuring What Matters.

Once you have a good understanding of customers, the next step is deciding how to structure customer feedback over time. This decision shouldn't be driven by the metrics a business wants to track, but by the decisions it needs to make.

If an organization wants to improve customer retention, measurement should focus on identifying which customers may be at risk and why. If the goal is account growth, measurement should reveal where relationships are strongest and where unmet needs exist. If the focus is service improvement, measurement should identify pain points across the journey.

There's a range of goals your business may be working toward. Here are examples of the metrics you may wish to consider in support of those objectives:



The most important question isn't "What was our NPS score?" but "What is driving the score, and what should we do about it?" The purpose of measurement is not to create more reporting, but to provide evidence that supports business decision-making.

A hand holding a smartphone displaying a table of business priorities and metrics. The table is titled 'BUSINESS PRIORITY' and 'WHAT TO MEASURE'. It lists four categories: Retention, Growth, Service Improvement, and Differentiation, each with associated metrics.

BUSINESS PRIORITY	WHAT TO MEASURE
Retention	Loyalty, effort, relationship strength
Growth	Unmet needs, perceived value, future priorities
Service Improvement	Ease, responsiveness, issue resolution
Differentiation	Trust, confidence, competitor comparison

Relationship Surveys

Relationship surveys provide a broad view of the customer experience and are typically conducted to understand the overall strength of the relationship. They are particularly useful for organizations looking to understand customer satisfaction, loyalty, advocacy, ease of doing business, and relationship strength.

Because they take a holistic view of the relationship, typically on an annual basis, they can help identify broader opportunities and risks that may not be visible through feedback gathered from individual interactions. They are often used to track changes over time and understand how customer perceptions differ across customer groups, markets, or regions.

Transactional Feedback

Transactional feedback focuses on in-the-moment views of specific interactions or touchpoints. This could include onboarding, technical support, issue resolution, product deliveries, or account reviews.

By capturing feedback closer to the interaction itself, organizations can gain a better understanding of where friction exists and where improvements may be required. The drawback is that feedback is generally tied to a customer's most recent experience rather than an overall view of the relationship. Therefore, transactional feedback is often most effective when used alongside relationship measurement.

Bringing Multiple Sources Together

While surveys often form the foundation of a customer experience program, they are not the only source of insight available. With more data available than ever before, the ability to utilize information from multiple sources is becoming increasingly important. Yet in practice, few B2B organizations do this well.

CRM information, spend and purchase data, win/loss research, account reviews, and operational performance metrics can all provide valuable context. Bringing these sources together helps organizations build a more complete understanding of the customer experience, validate findings, and identify opportunities that may not emerge from surveys alone.

Customer experience programs are often at their strongest when they combine customer perceptions with operational and behavioral insight, creating a richer picture of what customers experience and why.





5 From Customer Insight to Growth.

As with any research program, CX initiatives only create value when insight leads to better decisions. Many organizations have customer feedback, dashboards, and reporting, but still struggle to identify what should change and where to focus.

Not every aspect of the customer experience has equal impact. Some areas are more influential on loyalty, retention, or growth. Some elements are basic expectations, while others have a much stronger influence on whether a customer stays, buys more, or recommends your brand to others.

The most effective CX programs do not try to fix everything. They provide the evidence needed to focus investment where it will have the greatest impact for both customers and the business.

Using Customer Insight to Drive Business Decisions:

BUSINESS DECISION		CUSTOMER INSIGHT REQUIRED	
	Which customers are most at risk?	▶	Relationship strength, confidence and engagement
	Where should we invest?	▶	Improvement opportunities with the greatest customer and commercial impact
	What should we improve first?	▶	Pain points and moments of friction
	Where can we grow?	▶	Unmet needs and account development opportunities
	How do we differentiate?	▶	Experiences that matter most to customers

6 Closing Thought.

The future of CX isn't about more reports or metrics. It's about using customer understanding to make better business decisions. Organizations that do this well will be better positioned to protect revenue, strengthen customer relationships, and unlock growth.

Whether you are developing a new customer experience program or strengthening an existing one, B2B International can help you build an evidence-led approach that supports customer retention, account growth, and long-term business performance.





International

a **dentsu** company

