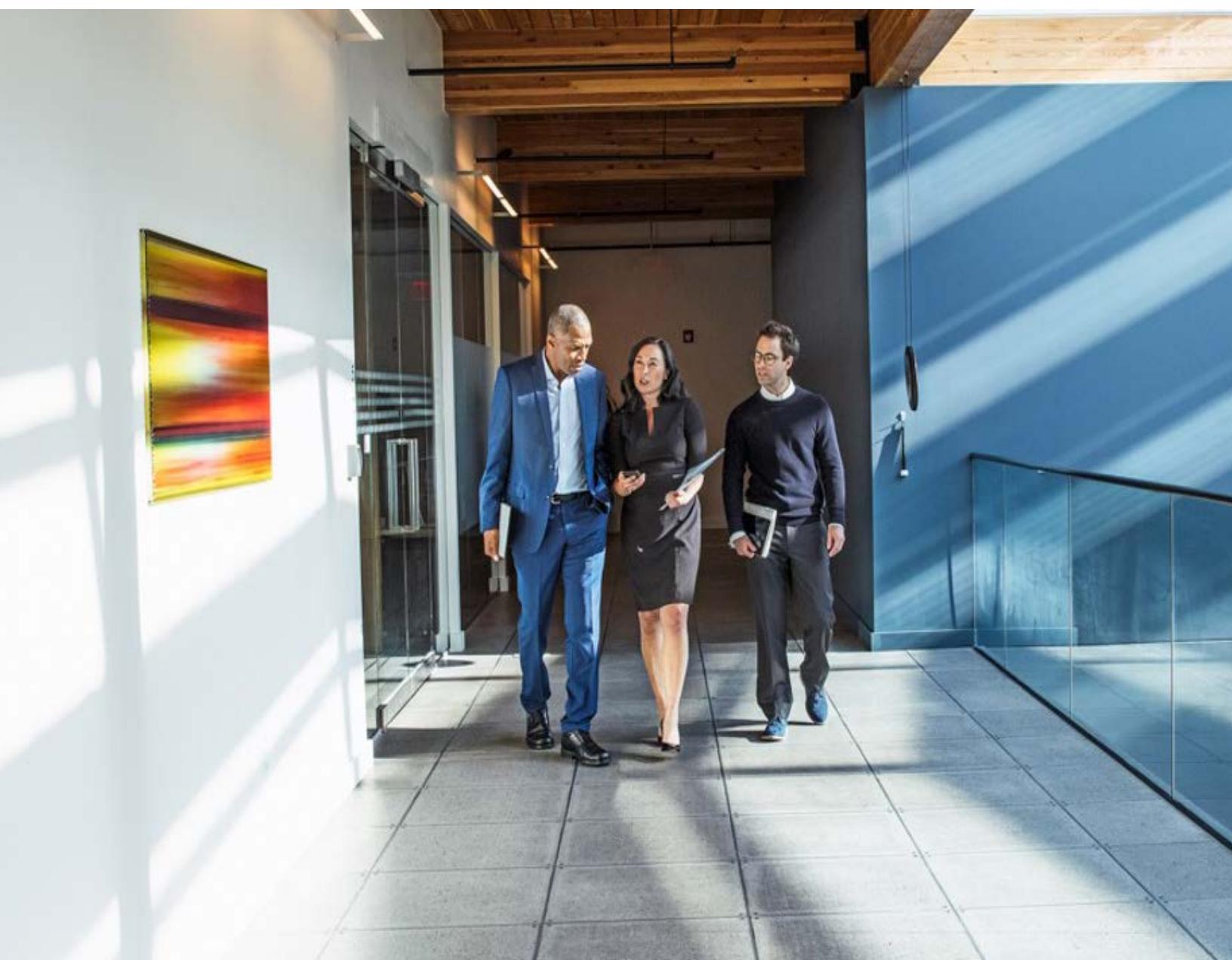


# Why CDP matters in B2B:

## Consumer experiences are shaping B2B expectations



The CDP Institute's latest research indicates that 34 percent of business-to-business (B2B) companies plan to start deploying a customer data platform (CDP) in the next year.<sup>1</sup> B2Bs have significantly longer and more complex sales cycles than their B2C counterparts, which create huge volumes of data. However, that data often goes stale much quicker as positions turn over and contacts within accounts change or become outdated. Moreover, the relationship-driven nature of B2B business requires a persistent and holistic view of the customer across the entire journey in order to remain effective. Yet as B2B buyers become increasingly more comfortable engaging via a multitude of digital channels, the resulting data ends up siloed across many different systems. Without the means to successfully unify



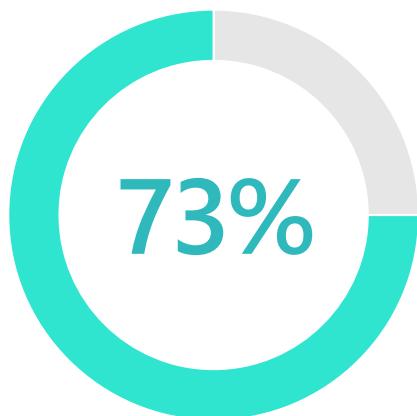
all of this data, it's nearly impossible for organizations to deliver the personalized experiences B2B decision-makers expect.

With the influence of today's digital economy, B2B buyers have changed the rules of engagement. Accustomed to fast, frictionless, and personal experiences in their everyday lives with intuitive services like

# Research indicates that **34 percent** of B2B companies plan to deploy a CDP in the next year

Netflix and Uber, they are bringing those high expectations to their roles as B2B buyers.

Accenture reports that 73 percent of B2B buyers want a personalized, B2C-like experience<sup>2</sup> and have come to expect business offers and engagements to be tailored to their behaviors and specific needs. In fact, 64 percent of B2B decision makers say they won't engage a salesperson if the communication is not personalized,<sup>3</sup> making it all the more vital to gain a better understanding of customers in order to engage them in meaningful ways – and a CDP can help.



**percent of B2B buyers want a personalized, B2C-like experience**

## What is a CDP?

A CDP is a system that centralizes customer data from all channels and sources, providing a 360-degree view of customers. Aside from simply aggregating data, a CDP also analyzes this multi-source data to provide insights and recommendations that can be applied across every stage of the buyer journey. In considering a CDP, B2B organizations have the following needs and requirements:

- Data ingestion: bring in account and contact data, as well as anonymous data, from all channels and sources without the need for complex and time-consuming configurations
- Unification and enrichment: standardize data, resolve identities, and enrich data to create account and contact profiles in near real time, all while aggregating data across contacts and tracking relationships between contacts, buying groups, and accounts
- Analysis & insights: use built-in analytics and customizable AI to generate insights, predictions, reports, and dashboards
- Activation: out-of-the-box integration with other internal and external systems to inform

consistent and personalized omni-channel engagement

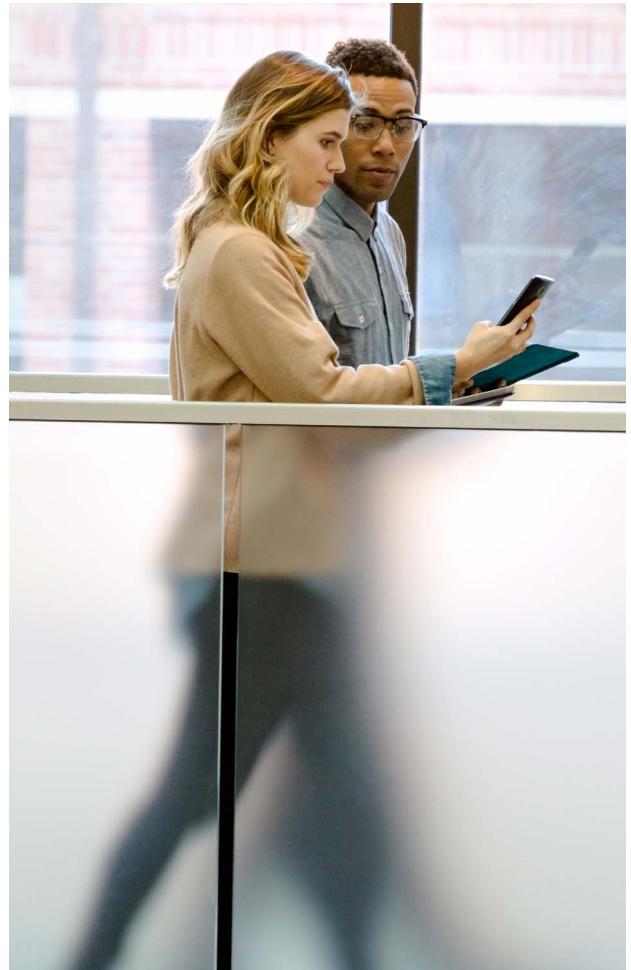
- Scalability & customization: a reliable and hyper-scalable platform that has the power and flexibility to support full customization when needed
- Data protection and compliance: maintain full control over the data, with enterprise-grade security and governance tools

performs identity resolution at the contact and account level to produce unified profiles. The data is combined with AI to generate rich, actionable insights that help organizations make more informed decisions, such as accounts to target, content to share, products to recommend, and the best time to call. Insights are activated through direct integration with the business applications and tools that B2Bs use every day, including those for sales, marketing,

## What use cases does a CDP enable for B2B?

A CDP not only offers B2B organizations seamless unification of their customer data, but provides the foundation to derive compelling insights – from account segmentation recommendations to predictions about customer behavior – that drive intelligent and personalized engagements.

Bringing together customer data from all sources (like CRM, ERP, email, website, POS, cases, partner systems, firmographics, and social networks like LinkedIn), a CDP



workflow, and analytics.

In today's fast-paced, competitive environment, a robust CDP is an essential tool for delivering personalized B2B experiences at scale – enabling account-based marketing, driving more effective sales programs, and supporting intelligent, data-driven action.

## Account-Based Marketing (ABM)

On average, B2B marketers see a 171 percent increase in annual contract value after implementing an ABM strategy,<sup>4</sup> and 87 percent of B2B marketers report that

ABM outperforms every other marketing investment.<sup>5</sup> With complete customer profiles and the resulting intelligence, organizations can better prioritize high-potential customers and align their sales and marketing teams to deliver coordinated and personalized experiences at the account level.

- AI-driven account segmentation helps organizations identify potential new customers based on existing customer characteristics
- Predictive scoring lets marketing and sales focus their activities on specific accounts that

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are most likely to convert and close

- Actionable insights generated from unified account and contact profiles enable delivery of highly relevant, targeted messaging and campaigns tailored to the decision-makers and stakeholders within each account

## Sales Empowerment

Organizations that equip their B2B sales teams with rich customer data, curated content, and insights across the customer journey can have more personalized conversations, deepen relationships, and be more productive.

- Comprehensive account profiles provide sellers the context they need (e.g., the last three activities or the next three activities across all channels) to deliver seamless and consistent interactions
- Relationship insights based on unified data proactively alert sellers to at-risk customers or deals that need extra attention
- Practical and precise insights – possible only with unified customer data – highlight the most relevant content, resources, and training for sellers, eliminating the tedious, time-consuming search for relevant content and tools for each account



## Intelligent Recommendations

Proactive recommendations and automated processes based on unified customer profiles, including product and market insights, ensure a well-orchestrated customer journey. For example, when product trial usage exceeds a threshold, an alert is automatically sent to the salesperson to follow up with a call.

- Data-driven next-best-action suggestions ensure front-line employees can consistently deliver speedy and relevant engagement based on real-time signals from transactions, behaviors, or observations
- Cross-sell and up-sell recommendations (e.g., a service add-on that complements a recent purchase) increase customer lifetime values
- AI-based churn prediction identifies at-risk accounts, supplying intelligent recommendations for re-engagement

# Dynamics 365 Customer Insights

With Microsoft's CDP solution, Dynamics 365 Customer Insights, organizations can deliver on the heightened expectations of today's B2B buyers and enable a personalized, omnichannel experience. Customer Insights brings together account and contact data from across channels (including first, second, and third-party data), enabling a single view of customers and unlocking AI-driven insights to support a truly customer-centric approach. Organizations can quickly understand what is working and what isn't – organization-wide – in order to make better business decisions and continue to refine processes.

Customer Insights empowers every employee to meaningfully engage each account, while extending insights directly to the other business applications B2Bs use every day to enable coordinated action across all lines of business – from marketing, to sales, and customer service. Additionally, organizations can connect to a myriad of data sources to seamlessly run analytics on their data estate through Microsoft Power

BI, build custom line of business applications through Microsoft Power Apps, and can leverage intelligent insights to trigger business processes in Microsoft Power Automate.

B2Bs see results faster with this ready-to-go, self-service CDP designed to enable intelligent action with minimal training or assistance from IT. Customer Insights enables breakthrough experiences for customers while maintaining the strictest compliance and security standards, ensuring that all customer data is securely managed and adheres to GDPR regulations. Built on the hyper-scale Microsoft Azure platform, Customer Insights allows organizations to tap into powerful analytics and full customization capabilities using Microsoft AI, Azure machine learning, and Power Platform.



To learn more, visit the Dynamics 365 Customer Insights [website](#).

[1 B2B Marketing](#)

[2 Accenture](#)

[3 LinkedIn](#)

[4 ABM Leadership Alliance](#)

[5 ITSMA](#)