B2B Loyalty, The B2C Way

by Emily Collins, March 19, 2015

KEY TAKEAWAYS

B2B Marketers Must Prioritize Retention

Today's business buyers proactively seek the information they need to inform their purchase and renewal decisions -- just as consumers take control of their purchases. It's time to expand the focus of B2B engagement to the entire customer relationship, including loyalty and retention, which are not traditional priorities for B2B marketers.

Don't Discount B2C Loyalty Approaches And Benefits

B2C loyalty programs may be associated with points and discounts, but those are only two of many options available. Other evolved approaches provide customers with meaningful value and make them feel valued. With modifications, applying perks that work well in a B2C setting may not be as much of a stretch in B2B situations as you think.

Use The Nuances Of Your B2B Business Model To Guide Loyalty Strategy Decisions

The B2B landscape encompasses a wide range of markets, sales models, business relationships, and product and service types. To avoid over- or under-engineering your loyalty strategy, examine the stickiness of your product or service, the degree of separation from your customers, and frequency of revenue transactions when selecting your approach.

B2B Loyalty, The B2C Way

Consumer Loyalty Principles Can Help B2B Companies Reward, Recognize, And Engage Their Customers

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WHY READ THIS REPORT

Earning customer loyalty is very important to B2B marketers. After all, loyalty translates directly into referrals and new cross-sell/upsell opportunities. But it's easy for customer insights (CI) pros in B2B companies to dismiss B2C loyalty marketing practices as tactics that apply only to discount-hungry consumers and not to their complex business buyers. This is a missed opportunity. There's actually a lot B2B marketers can learn from B2C loyalty approaches and strategies like the core tenets of intelligent loyalty: a deeper understanding of customer motivations using data, more consistent interactions across organizational silos, and adaptive strategies that keep up with customer demands. This report will demonstrate how B2C loyalty principles apply to a B2B enterprise.

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Notes & Resources

Forrester interviewed eight vendor and user companies, including: Brierley+Partners, Influitive, Junction Solutions, Kobie Marketing, Lenati, Marketo, and Otter Products.

Related Research Documents

Be A Loyalty Company, Not A Company With A Loyalty Program
February 18, 2015

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January 20, 2015

Perk Up Your Customer Loyalty Program
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B2B MARKETERS CAN NO LONGER BE HIT-OR-MISS ABOUT LOYALTY

B2B companies are not immune to the age of the customer: Business buyers also proactively seek the information they need to inform their purchase and renewal decisions, just as consumers have taken more control of interactions with brands in a B2C context.[1] B2B and B2C CMOs alike feel increased pressure to turn their organizations toward the customer and improve customer understanding.[2] As a result, B2B marketers must change their mindset, moving from a focus on products, internal processes, and organizational silos to a focus on the total customer relationship — from discovery and purchase to engagement, retention, and loyalty.[3]

But Today They Continue To Prioritize Acquisition Over Retention

Retention and loyalty programs aren't completely foreign concepts to the B2B world. Many companies that sell business products and services rely on channel partner loyalty programs to retain relationships with their reselling partners and invest heavily in customer reference programs.[4] But sectorwide, loyalty falls short of other marketing priorities because:

- **The lion's share of the marketing budget goes to generating leads.** B2B companies continue to spend a significant portion of their marketing budgets on acquisition and brand building activities — like advertising, PR, and corporate sponsorships — compared with customer response, direct marketing, and innovation.[5] Even initiatives that nurture relationships with existing customers and end users, like social communities, advocacy marketing, and reference programs, serve a primary goal of building the new business pipeline.

- **Retention is passed off as someone else's problem.** With marketing primarily focused on acquisition activities, responsibility for retention and relationship management historically falls to sales, support, and service. The complex and multilayered nature of B2B customer relationships adds a wrinkle to retention initiatives because there are multiple audiences to consider: from the buyer, to the channel partner, to the end user. Without a unifying thread or strategy to tie them all together, it's easy to deflect accountability or duplicate efforts.

- **Customer insights practices are not taken seriously.** B2B marketers rely on a variety of structured engagements (referral programs and social communities) and unstructured interactions (sales calls, lunches, bundling, and promotion) to manage and nurture client relationships. While these interactions build intimacy with customers, it's difficult to scale them without integrated systems to collect, analyze, and apply customer insights. As Chandar Pattabhiram, the VP of product and corporate marketing at Marketo, explained: "Today we have programs in place dedicated to partners, certified users, and champions, but the challenge is stitching [the data and strategies] all together under one platform."

DEEPEN BUSINESS RELATIONSHIPS WITH B2C RETENTION TACTICS

It's easy for CI pros in B2B companies to reject archetypical loyalty approaches such as points and discounts that work well in B2C settings. Why? A points-based program that rewards for frequency of purchase is not the right fit for all B2B models — such as a subscription-based technology vendor selling software products or a broker selling benefits programs. But points and discounts aren't the be-all, end-all of consumer loyalty.[6] B2C marketers use many other mechanisms to drive loyalty and retention. B2B companies stand to benefit from three core tenets valued by B2C marketers, which have nothing to do with discounting, and everything to do with building a flexible, customer-obsessed loyalty strategy:[7]
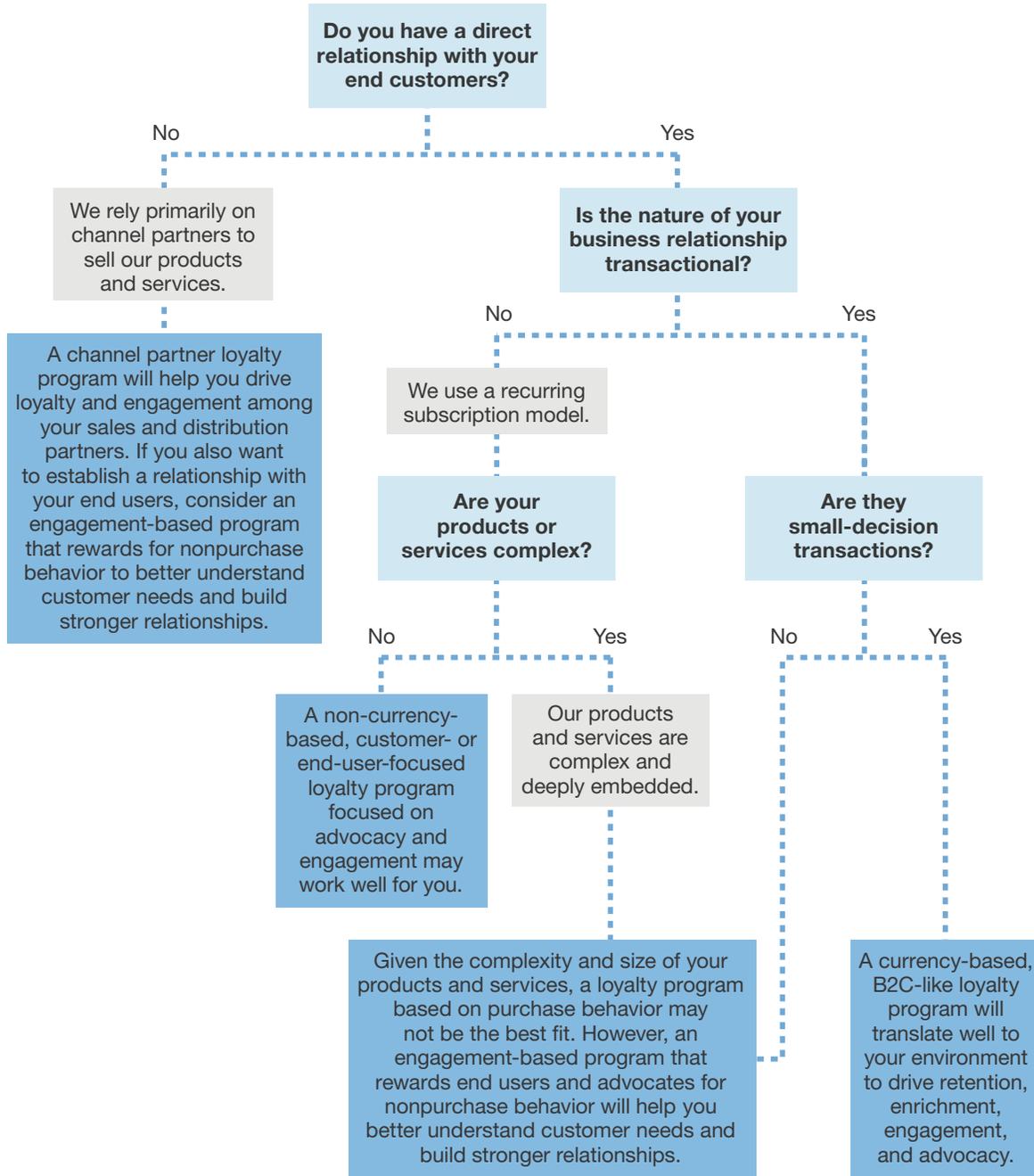
- **A deep understanding of customer needs and motivations.** To shift their businesses toward the customer — whether a consumer of freight management services or a buyer of business technology — B2B companies must grow their accumulated tacit knowledge about the customer. This means drawing new customer insights from a variety of sources, including satisfaction surveys, Net Promoter Score (NPS) surveys, digital interactions, and data from customer relationship management (CRM) or customer success management (CSM) systems.[8] This kind of centralized customer knowledge is especially useful in B2B environments where the customer relationships are multilayered and motivations for making a purchase decision are complex.

- **Consistent customer interactions across organizational silos.** Like consumers, business customers interact with many parts of the organization, including marketing, sales, service, and support. Building partnerships and data-sharing processes among the teams that interface most frequently with customers, resellers, and end users ensures that everyone reaches across the aisle when it comes to the health of customer relationships, and this leads to more productive customer outcomes.[9] In fact, 60% of global business and technical decision-makers think that increased employee access to customer data would improve customer retention and loyalty.[10] Caterpillar used journey mapping to identify customer moments that drive value and loyalty unconfined by organizational and process silos. As a result, it was able to make customer experience improvements that spanned multiple departments.[11]

- **An adaptive strategy that accounts for the changing customer and market landscape.** Building flexibility into a loyalty strategy protects against stagnation and ensures resilience in the face of rapidly evolving customer expectations and competitive conditions. For instance, you can pilot a program with specific buyer segments prior to "official" launch to validate its impact on customer behavior, or use test-and-learn techniques on end user communications to optimize the messaging content. Why use an iterative approach, especially in B2B? Because loyalty, and especially structured loyalty programs, may be a newer undertaking.

Use Three Factors To Steer Your Strategy

The B2B landscape encompasses a wide range of markets, sales models, business relationships, and product and service types. A one-size-fits-all approach to loyalty certainly isn't the answer, but neither is a highly customized approach for each business model. Whether you're building out a structured program for your sales channel partners or looking for new ways to engage the end users of your products and services, three factors will determine the direction of your strategy (see Figure 1):

- **The stickiness of your product and service offering.** How complex and embedded within an enterprise are the products and services that you sell? Are the products and services widely available in the market? The answer to these questions will help you assess where loyalty is at risk and determine your retention priorities. For example, a cloud storage-as-a-service product will be cheaper and easier to replace than a CRM system that's connected to many internal systems and channels and is used by multiple departments.

- **The degrees of separation from your customer.** Do you sell directly to your customers? Is the buyer of your products and services different than the end user? The answer to these questions will help you identify the size and scope of the audience you want to influence with your loyalty strategy or program. Companies like NetSuite, which primarily distributes its software through resellers, take a multifaceted approach: They earn partner loyalty with channel loyalty programs and engage end users with advocacy marketing programs and conferences. Otter Products, a tablet and phone case manufacturer, is implementing a targeted loyalty program to learn more about its medium-sized retail resellers and gain better visibility into the product supply chain.

- **The frequency of revenue recognitions.** Do you sell your products and services in one-time transactions or on a recurring subscription basis? The answer to this question guides the type of mechanisms you'll employ to retain and engage customers. Spend- or frequency-based loyalty programs will resonate better when the relationship is more transactional and mimics a consumer relationship. On the other hand, companies employing a longer-term subscription model should focus on mechanisms that reinforce engagement, value, and usage of the product or service. Junction Solutions leverages Influitive's customer advocacy platform to identify and engage advocates while building its repository of case studies and growing its referral pool.

Figure 1 Your Business Model Determines Your Path To B2B Loyalty

Do you have a direct relationship with your end customers?

No

Yes

We rely primarily on channel partners to sell our products and services.

Is the nature of your business relationship transactional?

A channel partner loyalty program will help you drive loyalty and engagement among your sales and distribution partners. If you also want to establish a relationship with your end users, consider an engagement-based program that rewards for nonpurchase behavior to better understand customer needs and build stronger relationships.

No

Yes

We use a recurring subscription model.

Are your products or services complex?

Are they small-decision transactions?

No

Yes

No

Yes

A non-currency-based, customer- or end-user-focused loyalty program focused on advocacy and engagement may work well for you.

Our products and services are complex and deeply embedded.

Given the complexity and size of your products and services, a loyalty program based on purchase behavior may not be the best fit. However, an engagement-based program that rewards end users and advocates for nonpurchase behavior will help you better understand customer needs and build stronger relationships.

A currency-based, B2C-like loyalty program will translate well to your environment to drive retention, enrichment, engagement, and advocacy.

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Adapt B2C Loyalty Perks To Reward, Engage, And Recognize Business Customers

Once you understand the influencing factors of your loyalty approach, it's time to create your engagement plan. B2C loyalty programs may be associated with points and discounts, but those are only two of many options available.[12] And while modifications will be required, the applicability of those perks may not be as much of a stretch in B2B situations as you think (see Figure 2). Consider a mix of:

- **Material rewards that incent and reinforce desired behaviors.** Benefits that offer monetary value have high appeal in the B2C context. But when used strategically, financial benefits and material incentives can play a role in some B2B loyalty situations as well. Plenty of B2B companies — especially those selling software-as-a-service (SaaS) solutions — already leverage bundling and promotional discounting in the sales process to close deals. Verizon's Small Biz Rewards program awards small businesses — which are typically more price sensitive and prone to switching than enterprise accounts — points for every dollar they spend on Verizon services.[13] Cisco Systems offers a number of incentives and rebates to its channel partners and customers for activities like selling products and attending trainings.[14]

- **Experiential benefits that engage channel partners, customers, and end users alike.** Engagement-focused benefits like exclusive content and special events provide customers with opportunities to deepen and expand their relationship with the firm. The options are endless — VIP lounge access at user events, early releases of new products — but they are most successful when they align with and reinforce your brand. For example, a product manufacturer may issue points to resellers that can be redeemed for special trainings or passes to an annual conference.

- **Recognition and customer acknowledgement that appeals to advocates.** For B2B companies that put a lot of stock in advocacy as a way to build qualified leads, recognizing customer value and showing appreciation also goes a long way to building customer intimacy. For example, Cisco's Champions influencer program motivates influencers to create content not through monetary rewards, but through public recognition and opportunities to collaborate with Cisco executives.[15] And SAP has a formal program for identifying, engaging, and rewarding mentors in its 2.5-million-member SAP Community Network (SCN).

Figure 2 Adapt B2C Benefits To Reward, Recognize, And Engage Business Customers

Level of applicability to B2B

High

Medium

Low

B2C benefit	Definition	Applicability to B2B	Sample use case
Access	Offering program members a chance to view new products, services, sales, and so on, exclusively or before members	B2B companies can leverage access to products, services, and events as a way to recognize, engage, and reward customers in an experiential way.	A manufacturing company grants retail distributors exclusive access to limited product lines, or first pick of new product colors or types.
Member events	In-person experiences designed to celebrate loyalty, recognize interest in specific products or services, or invite feedback	• B2B marketers already commit significant budget to in-person events. • As a loyalty benefit, events provide an opportunity to recognize and engage customers and foster a unique and differentiated customer experiences.	A large marketing technology firm invites loyalty members to attend user conferences and trade shows for educational, advocacy, and training purposes.
Surprise and delight	Rewards occurring at seemingly random intervals that aren't advertised	• This type of benefit provides a way for brands to randomly reward and recognize customer behavior. • Many B2B companies likely already employ these types of activities.	On Super Bowl Sunday, a marketing automation vendor team sent other marketing teams surprise deliveries of war room care packages, coordinated via Twitter. They also highlighted great game-day social campaigns as they unfolded across platforms and engaged marketers in conversations about their work.

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Figure 2 Adapt B2C Benefits To Reward, Recognize, And Engage Business Customers (Cont.)

B2C benefit	Definition	Applicability to B2B	Sample use case
Content	Exclusive videos, podcasts, articles, blog posts, educational newsletters, or other multimedia assets presented to members	B2B companies may have syndicated content available to engage and educate customers, instead of purely incenting repurchase or renewal.	A consumer goods company rewards retailers with training videos and wikis to help sales associates and end users get the most out of the product or service features.
Experiential benefits	Unique or enhanced customer experiences tailored based on preference or status	While the resources required to create and execute personalized or unique experiences can be extensive, the flexibility, customizability, and engagement benefits of experiential rewards make them a great fit for B2B companies in many industries.	Power users within a software vendor's loyalty program earn access to a dedicated customer service representative.
Status tier	Levels and associated benefits unlocked by customers who meet the qualifying criteria (e.g., spend $500 in a 12-month period or fly 15 segments and 25,000 miles)	• With a focus on recognition, status tiers offer a low-cost way for B2B companies to recognize subsets of active or valuable customers. • They are useful for tiering other benefits that might be too expensive to give to all customers.	Members of a B2B social community can earn "mentor" status and receive special benefits and incentives.

Figure 2 Adapt B2C Benefits To Reward, Recognize, And Engage Business Customers (Cont.)

B2C benefit	Definition	Applicability to B2B	Sample use case
Rewards catalog	A collection of reward options members can choose from, often including merchandise, gift cards, travel, and so on	A rewards catalog adds variety, choice, and flexibility to loyalty programs. For B2B companies, success requires some control over who earns the benefit versus who receives the benefit, as well as a deep understanding of what members will find meaningful and valuable.	The rewards catalog for a points-based B2B telco loyalty program includes general merchandise as well as brand-aligned products and services.
Reward certificate	An in-kind voucher issued after a designated period of time has passed or a spend threshold has been reached	• The value proposition of reward certificates, instant discounts, and cash back are straightforward. It's one-dimensional and transaction-centric. • B2B companies, especially in the tech sector, shy away from using direct financial incentives due to the limited impact on engagement.	A cloud storage vendor issues a voucher to be applied to complementary products or services.
Instant discounts	A one-time or ongoing discount, usually offered at the point of sale. Often used to incent customers to sign up for the loyalty program.		Packaging or bundling discounts are offered exclusively to program members.
Cash back	At designated intervals or spend thresholds, a company issues members a check, unrestricted gift card, or statement credit		An agricultural supplies manufacturer issues an annual rebate to be applied to future purchases.

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Figure 2 Adapt B2C Benefits To Reward, Recognize, And Engage Business Customers (Cont.)

B2C benefit	Definition	Applicability to B2B	Sample use case
Targeted offers	Personalized discounts or other offer content based on customer knowledge, demographics, location, purchase history, and so on	• Personalizing and focusing member content and offers based on customer insights is important for creating relevancy for savvy business customers. • But with longer purchasing cycles and higher price points, targeted offers may not have as big of an impact.	A large multinational company uses customers' natural language to personalize messages. Seventy percent of B2B buyers have an emotional connection with the company.
Loyalty currency	Points, miles, dollars, or other mediums of exchange issued when a consumer completes a desired interaction, purchase, or otherwise	• Since currency can be earned or redeemed for any number of activities and rewards, it offers a flexible rewards mechanism for both B2C and B2B companies. • However, success requires some frequency of interaction for customers to earn a meaningful number of points and effort to maintain customer engagement with those activities.	Members of a small business loyalty program for a telecommunications company earn points for purchases as well as completing their profile and online surveys. Points can be redeemed for merchandise, gift cards, and so on.

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Figure 2 Adapt B2C Benefits To Reward, Recognize, And Engage Business Customers (Cont.)

B2C benefit	Definition	Applicability to B2B	Sample use-case
Instant wins and sweepstakes	Entry into contests to win merchandise, travel, or experiences	• In the B2C world, instant wins offer companies a way to encourage program members to burn points for "high value" items at a low cost. • Unless the benefit has high perceived value, these benefits won't have much lasting impact in complex B2B environments.	Members can win entry into a user conference.
eCommerce redemption	Direct redemption with eCommerce sites to provide a points-as-payment option at checkout	This benefit is still an emerging opportunity in the B2C world. B2B applications are limited and require a business relationship where the customer acts more like a consumer and accumulates loyalty currency at a regular rate.	Members of a points-based B2B loyalty program can redeem their points against future online purchases.
Auctions	Opportunities to bid against other members for merchandise, travel, or experiences	While for B2C programs, auctions offer an aspirational reward at a low cost, few B2B will similarly benefit due to the complex motivations involved in business purchases. Success requires close proximity to the end user and certainty that the items auctioned off — whether a trip to the Bahamas or branded swag — motivate the desired behavior (i.e., purchase or renewal) and have high perceived value to the member.	Members of a points-based loyalty program targeted at small business owners redeem points for opportunities to bid for a free pass to a user conference or box tickets to a sporting event for their entire team.

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RECOMMENDATIONS

EXTEND AND ELEVATE YOUR EXISTING RETENTION EFFORTS

Loyalty programs may be a B2C construct, but the concepts apply in B2B marketing. As B2B marketers get serious about loyalty, they can jumpstart their efforts by embracing some B2C approaches. In some cases, it may be a matter of reframing, organizing, and scaling what's already in place. In the short term, if CI pros want to prioritize retention and relationship-building, they must:

- **Redirect efforts that can benefit both acquisition and retention objectives.** Strains of loyalty marketing may already exist at your company in the form of advocacy and referral programs, customer reference management initiatives, trade shows, and social communities. And just because the primary focus today is on generating more qualified leads, reducing service costs, and gathering case study content, it doesn't mean those initiatives can't evolve to serve a dual retention purpose tomorrow. After all, many of the activities in these types of initiatives naturally nurture and engage existing clients. Measure their impact on loyalty metrics like retention, enrichment, and engagement, and begin elevating relationship management within those initiatives.

- **Reach across the aisle to sales, service, and support.** Shifting from a tactic-driven mindset to one driven by the buyer life cycle — from purchase to engagement and retention — requires internal collaboration.[16] Identify and audit all existing efforts that retain and grow existing relationships to identify areas where marketing can provide support and ensure alignment across metrics and objectives. Otter Products' exploration of customer loyalty programs started as a sales-led initiative, but its loyalty program will be run as a marketing program with customer insights and results feeding back into sales, field marketing, and supply chain teams.

- **Raise innovation efforts to focus on serving and retaining existing customers.** B2B CMOs need help breaking free from traditional marketing paradigms focused on branding, promotion, and lead management. Loyalty and retention may not get a dedicated line item in the budget yet, but we see marketers allocating more budget — albeit only 5% on average — toward innovation efforts in 2015.[17] Earmarking some of those dollars to invest in building customer loyalty will help you deepen customer understanding and create more engaged customer relationships.

SUPPLEMENTAL MATERIAL

Companies Interviewed For This Report

Brierley+Partners

Influitive

Junction Solutions

Kobie Marketing

Lenati

Marketo

Otter Products

ENDNOTES

[1] In a recent survey of 128 business buyers, 74% reported they research half or more of their work purchases online. Slightly more than half indicated they find gathering information online on my own superior to interacting with a sales representative, while only 20% found engaging with a sales rep to be a superior approach. "I find interacting with a sales representative superior to gathering information online on my own." (20% agree versus 42% disagree). Source: Forrester/Internet Retailer Q2 2014 Global B2B Sell-Side Online Survey.

[2] Forrester predicts that CMOs will claim customer-centric innovation as their remit. See the November 10, 2014, "Predictions 2015: CMOs Boldly Reach For More Influence In The Enterprise" report.

[3] Savvy marketers are re-engineering their lead-to-revenue (L2R) process to transform marketing — from a top-notch supplier of leads for the load-bearing sales channel to the architect of customer engagement across the entire customer life cycle. See the January 30, 2015, "Shift Focus To The Customer Life Cycle To Take L2RM To The Next Level" report.

[4] For more on channel partner loyalty, check out the channel partner loyalty playbook starting with the executive overview. See the December 5, 2014, "Foster Channel Partner Loyalty For Competitive Advantage" report.

[5] From 2014 to 2015, little changed in B2B program planning; marketers continue to juggle tactics across a highly fragmented marketing mix. But having more money to spend filling the pipeline doesn't deepen buyer relationships in a world where rapidly changing technologies give buyers more control over the purchase process. See the January 20, 2015, "Direct Your 2015 B2B Budget Gains Toward Creating Exceptional Customer Experiences" report.

[6] Points-based loyalty programs simply aren't good enough to keep up with today's landscape. See the February 18, 2015, "Be A Loyalty Company, Not A Company With A Loyalty Program" report.

[7] Successful loyalty strategies boost customer retention, engagement, and the bottom line. But today, many companies fail because they haven't established the foundation they need to build basic customer understanding, iterate, and collaborate across the enterprise. This report, part of the customer loyalty playbook, outlines key processes that CI professionals need to implement when striving to increase customer loyalty. See the September 25, 2014, "Three Must-Haves For Loyalty Strategy Success" report.

8 Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.

9 For example, data collected at user conferences can help CMOs present factual information to sales about the impact of events and engage in conversations about how to maximize events assets and dollars in the future. inContact did just that when it partnered with DoubleDutch to create a social event application. The app received an average of 923 interactions per person and helped inContact's marketing team supply new, relevant insights about which clients were most engaged. See the January 20, 2015, "Direct Your 2015 B2B Budget Gains Toward Creating Exceptional Customer Experiences" report.

10 Source: Forrester/KMWorld September 2014 Global Internalizing The Customer Voice Online Survey.

   For more information, see the January 2, 2015, "How Customer Activation Better Wins And Serves Business Buyers" report.

11 Journey mapping can help B2B companies identify the customer interactions that matter unconfined by organizational and process silos. Caterpillar mapped the end-to-end customer life cycle to identify 12 touchpoints that drive loyalty. See the March 14, 2012, "How B2B Firms Improve Customer And Partner Experience" report.

12 For more ways to design and build a loyalty program, see the May 30, 2014, "Perk Up Your Customer Loyalty Program" report.

13 Source: Verizon (https://smallbizrewards.verizon.com/).

14 Source: "Incentives and Promotions," Cisco (http://www.cisco.com/web/partners/incentives_and_promotions/index.html).

15 Influencer engagement programs can be highly effective for achieving social reach objectives because they help spread a brand's messages through influencers' well-established connections. But marketers often struggle to determine what types of incentives, if any, they should offer their influencers. When it comes to establishing genuine word of mouth through your influencers, your best course of action is not to offer financial incentives — ever. This report shows marketing leaders why financial incentives are not worth the additional investment and how nonfinancial incentives, such as public recognition and content collaboration, are the best approach for driving authentic engagements with key influencers. See the September 9, 2014, "Brief: Do Not Pay Your Influencers" report.

16 Today's digitally empowered buyer controls the buying process far more than vendors control the selling process. A cross-channel, customer-focused strategy is necessary to successfully engage with today's buyers, but this shift is hindered by product and organizational silos. Aligning marketing with the customer life cycle can help B2B marketers make the pivot. See the January 30, 2015, "Shift Focus To The Customer Life Cycle To Take L2RM To The Next Level" report.

17 Innovations fuel future business opportunities, but senior marketers earmark only 5% of program funds to experiment with new approaches and ideas, while 13% fail to set aside budget for it at all. See the January 20, 2015, "Direct Your 2015 B2B Budget Gains Toward Creating Exceptional Customer Experiences" report.

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