CustomerGauge

ACCOUNT EXPERIENCE™ MANAGEMENT SOFTWARE

The B2B Buyer's Guide

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INTRODUCTION

Congratulations on your upcoming customer-centric transformation!

If you've started looking at solutions already, most likely you've witnessed that the CX tech landscape is vast— from basic survey tools to CX platforms to customer success software.

There are a lot of options out there. However, few available solutions seem to point specifically to the needs of B2B companies and enterprises. That's because much of the CX tech space is still dedicated to the single contact experiences of B2C consumer products and services—like the Ubers and Coca Colas of the world.

If you're here, that's because you understand the unique needs of your B2B model, and that typical CX tools or simple survey offerings will not cut it. You're looking for a software buyer's guide to B2B CX solutions that cater to your partner ecosystem and multi-contact account experiences.

In this guide, we'll arm you with the expertise you'll need to purchase your next B2B CX (i.e. Account Experience™) software tool and prepare you and your company for the CX journey that lies ahead.

Preparation: Your Journey Starts Here

Preparing Your Organization for a CX Investment and Transformation

At this point, you're looking to answer one seemingly simple question: what vendor partnership is right for you? After all, the CX technology market is filled with solutions that claim to be the "holy grail." Based on our experience, the most successful CX programs leaders accomplish three factors before approaching any kind of CX vendor relationship:

1. Identify the need for change
2. Get senior leadership/champion buy-in of your CX investment
3. Establish what your business needs are

If you're looking to champion a CX program, know right now: you can't do it alone. It doesn't matter whether you're in a $2m start-up or a $54b enterprise—starting and maintaining a CX program is not a one-person-job. If you want a CX program that lasts, taking serious steps to turn product/service-centric organizations into customer-centric organizations should be your main objective.

This type of transition won't be easy. People are naturally adverse to change. Not everyone will view you as the "hero." But know that your customers will. And if things are done right, your company eventually will too.

The first step in this journey is identifying the need for change and convincing others to invest in CX. After all, any tool or process investment should support a cross-organizational CX effort. To get started, begin with the following:

Identify & Communicate a Cross-Departmental Need for Change

If you're looking to garner support for a full-scale CX program, start by making a business case based on a particular pain point or a number of pain points. Perhaps your B2B organization has struggled to support your CX program due to a lack of guidance or sufficient tools? Maybe this is the first time you've considered aligning an account-based approach to experience management?

Whatever the case, to begin the process of onboarding a CX program, you need to start building a strong case for its fruition prior to approaching or inviting others to participate.

STARTING AND MAINTAINING A CX PROGRAM IS NOT A ONE-PERSON-JOB.

Gather a Coalition of Champions and Get Sponsorship from the C-Suite

Understanding how a CX program serves each area of your business is vital for not only long-term buy-in, but on-going improvement and growth. Once a need for change is identified, work should be done to gather a championing coalition around the experience program. There are a number of ways to establish buy-in:

Communicate your initiative, and keep it simple

Communicating a problem means getting people to see a problem is there. Do this by asking them questions that they cannot, but should, be able to answer and their imagination will create feelings such as the threat of losing money, the fear of losing money in the future, the fear that competitors may do a better job, or they are missing opportunities. In other words, they will fear that the company—and the employees—are not doing what they should be doing.

Explain how the program benefits others

It's important to build your case early on so you can bring this to other members of the organization. However, your reasons for initiating the program most likely won't completely align with their goals. Therefore, it's okay to ask how your stakeholders think your program can benefit them. If they don't know, there's a high risk they won't find your program as important as other tasks or responsibilities.

Co-create the program and listen to your tribe

Since you are running or are about to run a cross-organizational change management exercise, you will impact people in departments where you haven't established any credibility. Do you understand their line of business, their tasks, responsibilities and targets? Who are you to come in and tell them what to do and what to change?

The best approach is to invite people to help co-create the CX program. Your task is to identify what we call "CX heroes" or "CX champions." These are people from different parts of your organization who can drive action in their own groups. Champions can help you communicate problems, solutions and other information to their units, they can assume central roles in your program once it's operational, and they can help you coordinate and cooperate across departments.

Continually visualize the problem and the solution

During the implementation of the CX program, make sure not only to keep the steering group informed about progress and delays, but stakeholders as well.

Build a Program Charter

With your coalition now in place, it's important to designate the goals and mission of your customer experience program. Specifically, a program charter should define:

- The reason for undertaking the project
- The project details
- Stakeholders required to be involved
- Budget, timeline, and resources required
- The initial risk assessment

TIP 01: **CX Program Charter Help**

While your organization probably has a number of program charters in place, you might not have considered using such an approach to your CX program. If you're looking to start building a program charter or develop a CX program strategy, contact our professional services team.

Contact Our Experts

CX Maturity Map Overview

Before we jump into the vendor discussion, it's important to clarify where your company lies in terms of CX program maturity. More often than not, we see that companies have at least some kind of CX program or at least a survey program in place.

While you can garner insights from a CX program, the purpose of your program should be to act on findings to:

- Improve experiences
- Increase retention
- Grow revenue

Based on our years of experience working with companies across industries, there are generally four phases a CX program can go through. Companies along these paths experience different levels of growth and process improvements.

Foundations

- CX Fundamentals
- Organizational Buy-In

Measure

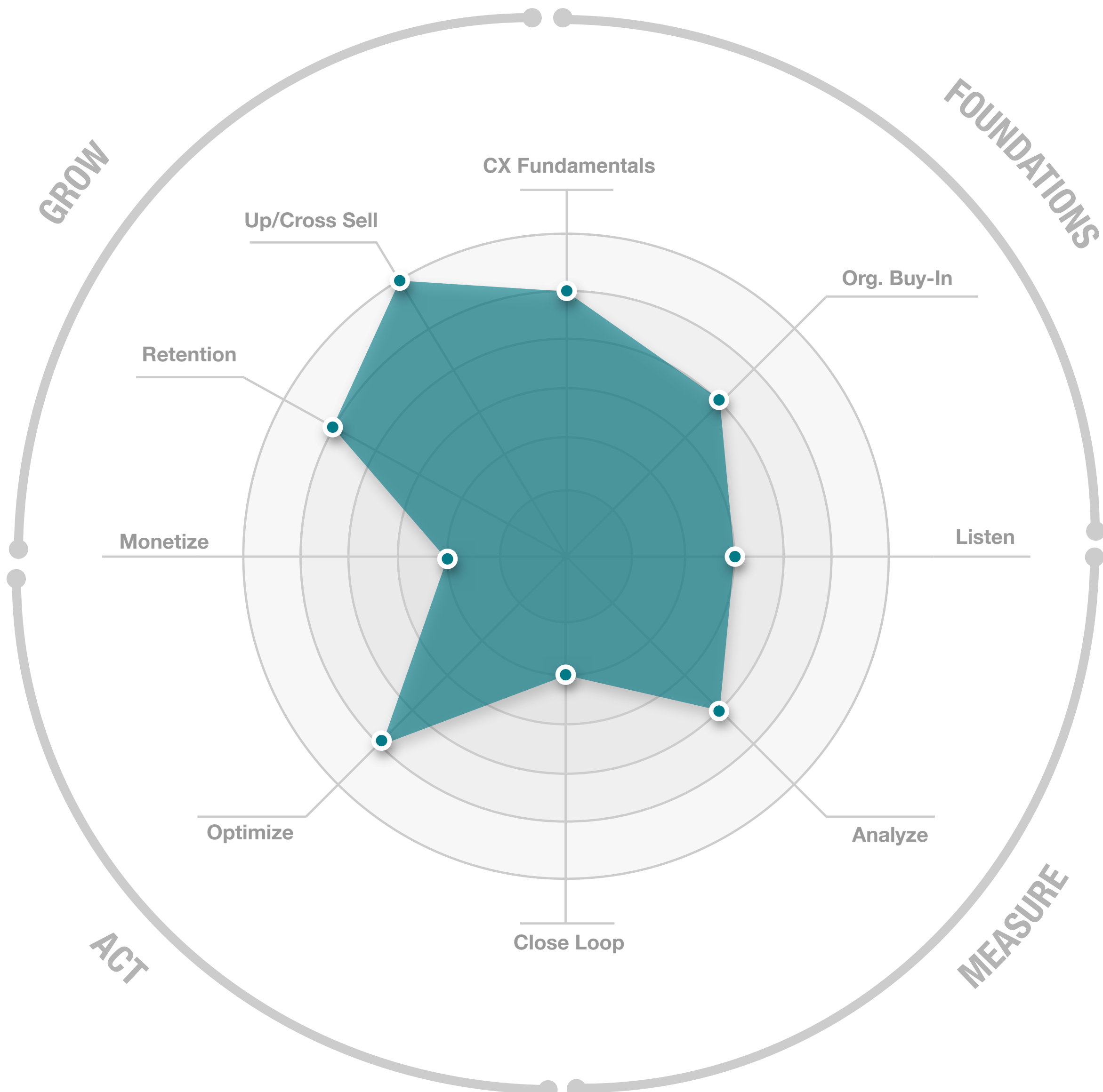
- Listen
- Analyze

Act

- Close Loop
- Optimize

Grow

- Monetize
- Retention
- Up/Cross Sell



Consideration: Choosing the Right Vendor

Partner Evaluation and Checklist

With a better understanding of where your company lands on the CX maturity spectrum, you can now begin looking at what you want out of your vendor based on your business needs and requirements. Your CX program charter is a good starting point for narrowing down vendor requirements. Some of the content here expands on the program charter elements mentioned earlier.

TCO & ROI Evaluation

Total cost of ownership (TCO) is used to assess the direct and indirect financial costs of a product or service purchased. Why is this important when it comes to your CX software? Well, considering that most software is SaaS-based, there are a number of factors to consider in the purchasing process. Some of these are more tangible, such as licensing or services, others such as time and efforts towards change management, are a bit more indirect.

Return on investment (ROI) implies the impact that a product or service will have on your bottom line. Your ROI list will again be part of the program charter, and should be shared with the vendor. The following are good examples of ROI expectations:

- Identify which touch points are most directly contributing to revenue churn
- Increase referral sales volume through account management tools
- Eliminate potential losses from detractors generating negative sentiment about your brand

YOUR CX PROGRAM CHARTER IS A GOOD STARTING POINT FOR NARROWING DOWN VENDOR REQUIREMENTS.

What to Look For—
CX Technology Checklist

The following pages list those CX technology features every B2B organization should look for when onboarding a CX solution vendor. You can also download the list by clicking the button below.

Download Checklist

FOUNDATIONS
CHECKLIST

Pre-Onboarding Services	CustomerGauge	Vendor 2
Proof of concept (POC)	☑	☐
Onboarding scope plan	☑	☐
Consulting services Expert-led training to support customer-centric transformation	☑	☐

Onboarding Services	CustomerGauge	Vendor 2
CSM Support Team	☑	☐
Guided implementation services	☑	☐
Consulting services Post-onboarding training; e.g. cross-departmental program manager workshops	☑	☐
Certification Accredited AX certification course	☑	☐

Checklist Progress:

1 2 3 4 5 6

MEASURE
CHECKLIST

Surveying

Surveying	CustomerGauge	Vendor 2
Self-service survey builder	☑	☐
Multi-metric capabilities	☑	☐
Net Promoter Score® CSAT CES eNPS® Custom	☑	☐
Multi-device/touch point survey capabilities In-app SMS Email Phone Web	☑	☐
Anonymous surveys	☑	☐
Drivers and multi-select options	☑	☐

Reporting

Reporting	CustomerGauge	Vendor 2
Report designer & templates	☑	☐
Persona-based dashboards Permission-based Single-sign on	☑	☐
Real-time analytics & campaign tracking Response rate Retention Churn Coverage etc.	☑	☐
Touch point analysis	☑	☐
Text & sentiment analysis	☑	☐

Checklist Progress:

1 2 3 4 5 6

ACT
CHECKLIST

Account Management	CustomerGauge	Vendor 2
Real-time account dashboards Stakeholder management & contact tracking Reach & coverage Touch point tracking & case management summary	☑	☐
Activity monitoring	☑	☐
Account segmentation	☑	☐

Case Management— Accounts & Contacts

Case Management— Accounts & Contacts	CustomerGauge	Vendor 2
Business review tool	☑	☐
Multi-contact tracking	☑	☐
Multi-device case management	☑	☐
Closed loop follow-up Frontline Management Executive	☑	☐
Closed loop KPI tracking	☑	☐

Integrations

Integrations	CustomerGauge	Vendor 2
Out-of-the-box, two-way integrations CRM Support ticket systems Sales/Marketing platforms Etc.	☑	☐
Rest-based API	☑	☐
Revenue data upload	☑	☐

Checklist Progress:

1 2 3 4 5 6

GROW
CHECKLIST

Workflows	CustomerGauge	Vendor 2
Retention management segmented by satisfaction & revenue	☑	☐
Smart workflows & automated closed loop follow-up	☑	☐
Churn prediction & tracking	☑	☐
Recommended action steps	☑	☐

ROI Reporting		
Target setting by revenue & CX improvement	☑	☐
Touch point analysis by NPS & revenue	☑	☐
Predictive ROI & sentiment modeling	☑	☐

Checklist Progress:

1 — 2 — 3 — 4 — 5 — 6 →

(CONTINUED)
GROW
CHECKLIST

Account Growth & Retention Referral Marketing	CustomerGauge	Vendor 2
Opportunity tracking Up-sell Cross-sell Partnership opportunities Referral marketing tracking and campaign KPIs	☑	☐
Customer vs. revenue churn analysis	☑	☐
Unknown sentiment and revenue coverage	☑	☐
Customer lifecycle reporting	☑	☐
Reviews Management		
SEO-optimized reviews site	☑	☐
Automated survey follow-up	☑	☐
Embed reviews to company website	☑	☐
Institutionalize		
Digital signage	☑	☐
Consulting services & stakeholder coaching	☑	☐
Employee satisfaction & experience feature set	☑	☐

Checklist Progress:

1 2 3 4 5 6

SECURITY
CHECKLIST

Compliance	CustomerGauge	Vendor 2
GDPR-compliant	✓	
HIPAA-compliant	✓	
EU-US Privacy Shield Certified	✓	
Single Tenant Databases and data segregation	✓	
Service Level Agreement (SLA)	✓	
Protection		
Incident Response Plan (IRP)	✓	
SO27001, ISO9001, SOC1-2-3	✓	
Network security (e.g. AWS Shield)	✓	
Business Continuity Plan (BCP)	✓	
OWASP Secure Coding Practices	✓	
24/7 security operations	✓	
Data encryption	✓	
Availability & Recovery tracking	✓	
Local & off-site data redundancy	✓	
Enterprise-Ready Features		
Single-sign on (SSO)	✓	
Self-service friendly	✓	
Permission-based login	✓	
Hierarchy data filtering	✓	
International data centers	✓	
Multi-lingual platform	✓	
Checked Box Total:	66	

1 2 3 4 5 6

What To Ask For—Vendor Review & Demos

The provided CX technology checklist might not encompass your entire business requirements. However, it should be an ideal template for approaching the next step in your CX vendor journey: presentations and demos.

TIP 02: When To Involve Your IT Staff

At some point in time, you'll need to pull in your IT staff to understand any technical limitations or requirements of onboarding a new vendor. Depending on the size and orientation of your company, this may be more informal or rigid in nature. Some IT departments may even require the CX provider to go through a streamlined Vendor Approval Process.

To ensure you don't encounter any unforeseen blockades, be sure to keep an open dialog with your IT department during this time and to bring anything that comes up to the attention of your potential vendor's account executive.

Generally speaking, you want to involve your coalition of decision-makers and champions, and then involve the relevant parties to address any concerns and considerations.

Based on our experience working with companies of various sizes, there are generally two presentations and demos that take place when working with a CX technology vendor:

THE NEXT STEP IN YOUR CX VENDOR JOURNEY: PRESENTATIONS AND DEMOS.

CX Champion Meeting

This type of demo/presentation will provide you, and additional “champion” stakeholders, with a better understanding of how the CX tech supports their use case. Depending on your particular role, this meeting should have both you and titles including heads of Sales, Customer Experience, Customer Success, and other departments, if need be, such as Marketing. Two or more possible users of the system, such as Account Managers and Customer Success may also be vital for frontline buy-in as well.

Bringing in relevant stakeholders and users into the vendor discussion can help fast track buy-in. After all, a true B2B CX software should be cross-departmental in nature. You should ask the vendor to ensure that this type of demo covers the following elements:

Role-based walkthrough: Provide a list of the names and titles of those joining this type of demo to the vendor’s account executive. This will enable the account executive to polish and personalize the demo and presentation around your unique business cases.

- **Frontline:** A “day-in-the-life” approach is useful if your audience includes users of the system.
- **Management/Executive team:** Management and executive dashboards should be shown at the meeting to distill buy-in and use cases for decision-makers.

CX and revenue impact: The vendor should clearly establish how your business can utilize the solution to impact their customer satisfaction and ROI. If they cannot convince you that this tool supports both, it’s time to move on.

Address pain points/discuss touch points: Be honest and open with the account executive about your company’s pain points or struggles in the past with your CX program. Then, make clear how you want to reach your customers along the customer journey.

Share your CX technology checklist: Don’t be afraid of transparency! Providing a checklist like the checklist template or a modified version of a checklist to an account executive prior to a meeting can only help ensure that all specifications are covered.

Executive Briefing

While the champion and user presentation/demo should be a longer meeting, don’t expect to take this approach with your executive or C-Suite level people. Be sure to establish this as a shorter meeting with both those attending and the vendor’s account executive.

This type of presentation should specifically follow three elements:

- A business case clearly defined with the vendor
- Executive level dashboard or platform overview
- A review of next steps and/or high-level project overview

Prior to this meeting, you should establish a clear understanding of what the C-Suite expects from this presentation and update the vendor on anything that may veer outside the standard elements mentioned above.

Decision: Pulling the Trigger

How to Approach the Decision Making Process

You've taken a look at a few vendors and are now ready to take the plunge. Before moving forward, however, you need to do two things to make sure the fit is ideal:

Vet your ideal vendor(s): This process can include a number of elements, and generally depends on your company's standard vendor assessment process. This vetting process can include both a Request for Proposal (RFP), which is particularly helpful if you're still deciding between two vendors, and/or a request for references.

Determine your ideal implementation path: Proof of Concept (POC) or full rollout? When it comes time to onboarding, you want to have a clear understanding of your rollout strategy. However, if you're looking to further test your CX technology investment, a POC maybe the right path forward.

In this final section, we'll quickly walk through each of these elements.

MAKE SURE IT'S A GOOD FIT

Vetting a Vendor

We highly recommend developing a vendor evaluation process internally. Ensure it is flexible enough to adjust to business cases, but standard enough to meet any larger business and IT requirements.

The following sections look at two key aspects in any vendor assessment process: references and RFPs.

References

One element standard in most vendor evaluations is a request for references. Ideally you should request the following type of references from a potential vendor:

- A business in a similar industry or model as you
- A business with similar pain points/objectives as yours
- A business similar in size and organizational hierarchy

Two to three references, like any hiring process, is traditional. Give the vendor time to reach out and let the customer know you'd like to speak with them. In addition, don't be afraid to do your own "back door" research via LinkedIn or other platforms.

This kind of due diligence may provide another layer of insight from other solutions users. Just ensure you use the same criteria you've given the vendor to reach out to these companies.

Request for Proposal

Having trouble deciding between vendors? Weren't able to get all the stakeholders in the initial presentations or demos? Both of these instances are good cause for issuing a Request for Proposal (RFP). Developing the framework for an RFP is very dependent on the particular technology you are onboarding. Luckily, the CX Technology Checklist provided earlier is a great jumping off point for developing a CX technology RFP.

Taking these features and transforming them into RFP questions will help you develop a standard structure for this purpose. For example:

FEATURES:

Account Management	• **Real-time Account Dashboards** Stakeholder management & contact tracking Reach & coverage Touch point tracking & case management summary • **Activity Monitoring** • **Account Segmentation**

RFP EXAMPLE QUESTIONS:

Account Management	Vendor Response
How do you manage multiple contacts under an account?	
What metrics do you track at the account level?	
How can our account managers track activities?	

Getting Started: POC or Full Rollout?

Beyond the large change management exercise you're undertaking, onboarding a B2B CX technology is an important investment to get right. So, don't be afraid to take the time and consider how you'd like to proceed.

Proof of Concept

Proof of Concepts (POC) are becoming increasingly popular in the enterprise SaaS space. They typically last 14-30 days and give companies the opportunity to see a CX solution in action—with their own data. This also gives your team time to interact with the vendor staff that will support your CX journey.

POCs often come with a flat cost, but the value gained from building a real business case in the CX solution is well worth the price.

TIP 03: Scale Your POC with the Vendor

Using the vendor checklist we provided earlier can help you and the vendor narrow the scope and scale of your POC.

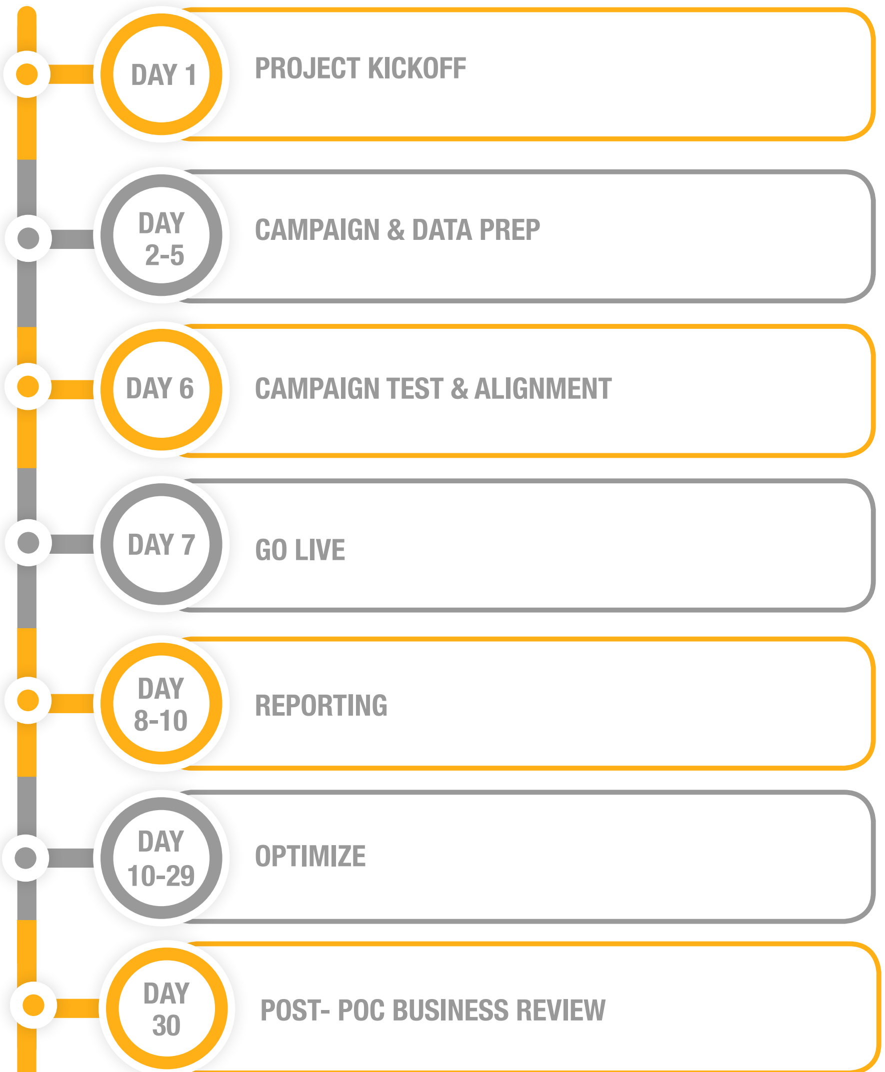
Again you can download the **full checklist here.**

Benefits of a Traditional Pre-Rollout POC

- Proves value of customer experience program to key stakeholders
- Fast and quick audit of customer satisfaction
- Identify revenue at risk
- Develops recommendations on strategy to move ahead
- A controlled pulse on a segment of accounts to understand satisfaction vs. revenue impact
- Seamless transition to a full working system that can scale to your entire company

How it Works

The POC process will largely depend on the vendor. Typically, the B2B CX vendor will take a subset of your data/accounts contacts and use that to build a business case with an expected outcome at the end. As mentioned, POCs of this scale and technology type traditionally take 14-30 days. Your vendor should have a clear timeline and outline of your POC project plan prior to the data upload. Remember, this is not a full scale rollout. The vendor should work on scaling the expected outcomes appropriately. Things like integrations, transactional surveys, and multi-lingual capabilities don't happen during this time.



TIP 04: Let's Talk About Your Data

A pre-rollout POC is a great opportunity to evaluate and clean up your data. Yes, it's an involved process. However, the value you get not just in the POC phase, but the eventual rollout, is very much dependent on the data quality effort you put in now.

Full Scale Rollout

Some companies may decide to jump right into a traditional rollout process. You should work with your vendor to determine what this rollout process looks like prior to the buying decision. Are you looking to do a regional rollout? Global? Defining the scale and timeline for a rollout with your CX vendor will help structure expectations for the CX project.

Again, we refer back to the CX maturity overview presented earlier in this document. This should be your guiding force as you develop your CX program goals. Your ultimate objective should always be to improve CX and generate growth. On the next page, we see a simple example of an implementation outline. This is broken down by activities carried out by both the vendor and your company.

DEFINING THE SCALE & TIMELINE WILL HELP THE STRUCTURE OF THE CX PROJECT

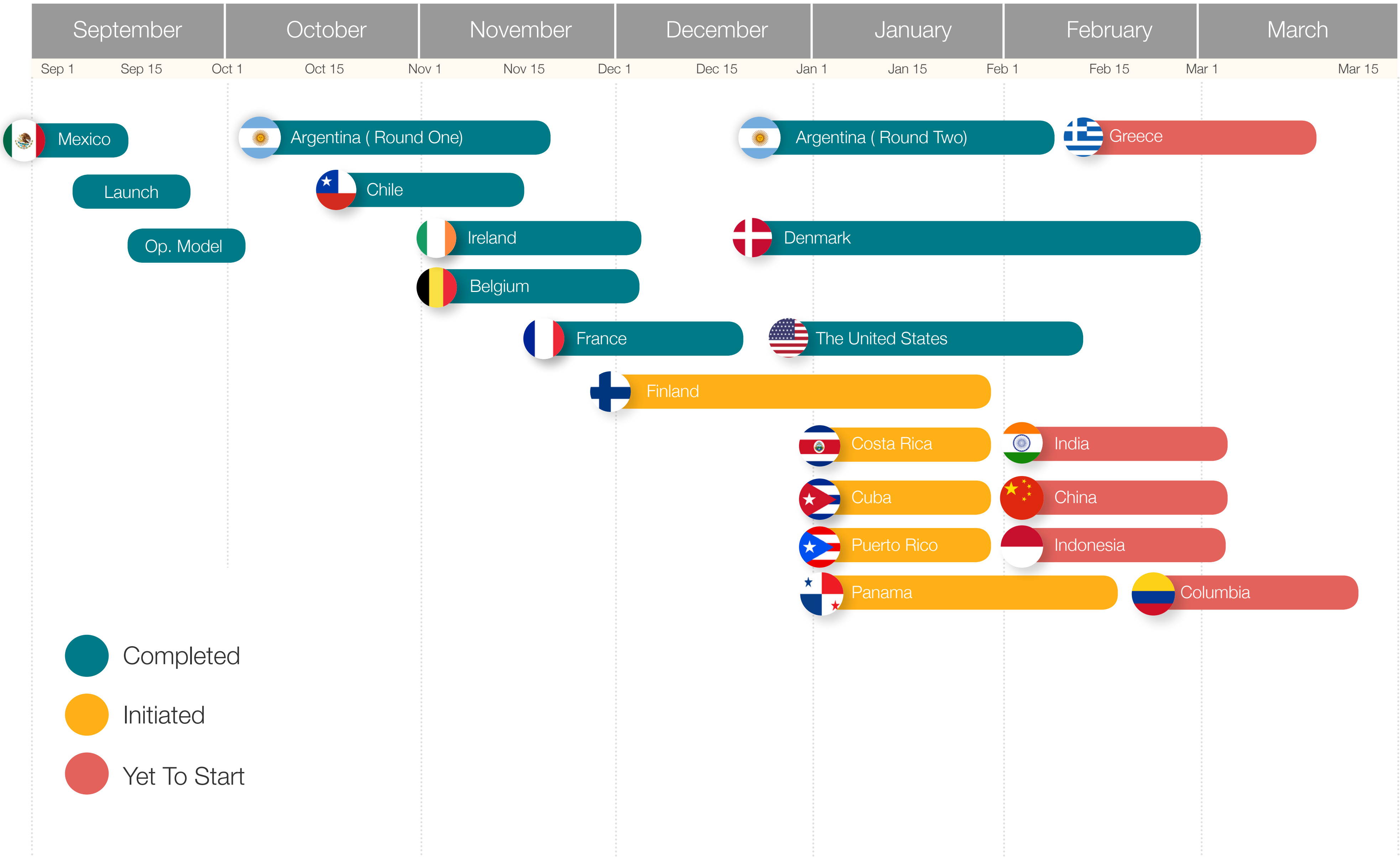
Implementation Phase Project Flow

As mentioned, the scale of your rollout widely depends on where in the company you're pushing this vendor and program to. The following is an example of a global, enterprise-level rollout of a CX technology deployment.

	PRE-ROLLOUT KICKOFF	WEEKS 1-2 DATA ACCESS & SETUP	WEEK 3 SURVEY PROGRAM SETUP	WEEKS 4-5 CLOSED-LOOP SETUP	WEEK 6 GO-LIVE & STABILIZATION	WEEK 7 & BEYOND TOUCHPOINTS & INTEGRATIONS
CLIENT	Identify stakeholders Clarify deliverables	Data structure & definition				
JOINT	Establish project governance plan Establish success criteria Workshop engagements Assess program maturity Establish timelines	Weekly stand-up Integrations setup Establish communication plan	Weekly stand-up Survey training Email training Delviery Manager training	Weekly stand-up	Executive briefing Reporting training Closed-loop training Workflow training	Weekly stand-up Additional integration considerations Workflow training & set-up
CUSTOMERGAUGE		Access granted Data configuration	Touchpoint setup	Workflow setup Workflow testing Program testing	Analytics review	Implement additional touchpoints CX recommendations

Deployment Road Map

Your CX vendor will work in partnership with you to define this rollout in a structured manner. They should help you manage expectations within your organization and provide you with an internal blueprint to communicate this deployment plan throughout your company.



CustomerGauge

READY TO TAKE THE NEXT STEP?

At CustomerGauge, we check all the boxes. Contact us today to begin scoping an engagement plan for the rollout of your program.

Schedule Meeting

About CustomerGauge

CustomerGauge is a software-as-a-service platform that helps clients improve and monetize the B2B customer experience. The system automatically measures and analyzes feedback, reduces churn through close-loop tools, and helps retain accounts. Results are published and analyzed in real-time, using a highly customizable reporting tool, making it ideal for global enterprises.

Stay Connected

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