



B2B Customer Management

The Great Debate

“Innovation is the ability to convert ideas into invoices.”

L Duncan



B2B CUSTOMER MANAGEMENT

THE GREAT DEBATE

WHAT DOES 'LEADING EDGE' MEAN FOR B2B CUSTOMER MANAGEMENT

Welcome to the fourth instalment to our series of 'Great Debates' at Mercedes-Benz World. It is brought to you by four partners - Customer Attuned, eBECS, Deep-Insight and Star Commercial Academy. We are passionate about customer experience, bringing complementary perspectives and expertise into the customer management mix that we're delighted to share with you.

Leading Edge is something that every brand aspires to be, which is why we chose this modern and innovative venue. This great company is a perfect example of the attitude we need to adopt - Mercedes-Benz invented their first car in 1886 and "Simply never stopped reinventing it". Our visit to the Brooklands Museum at the end of the

day will also remind us of how this location has been the cradle of innovation for over a century.

Today's debate will look at three perspectives of Leading Edge from our guest speakers; Chris Russell, Head of Operations at Luvata, Nigel Brotherton, CRM Development Manager at Volkswagen Group UK and Mairead McSweeney, Head of Business Operations at BT Ireland, held together by our hilarious Master of Ceremonies, Neil Mullarkey. In the afternoon, you have the chance to contribute your opinions and challenge concepts and ideas in our Great Debate.

[We hope you will enjoy the day - please contribute freely and make new friends in the B2B Customer Management community!](#)

Today's Agenda

- 10:00 am Registration and morning coffee
- 10:20 am Welcome from Neil Mullarkey - Master of Ceremonies
- 10:30 am **Chris Russell, Head of Operations, Luvata**
- 11:10 am Improv Interval with Neil Mullarkey and coffee break
- 11:30 am **Nigel Brotherton, CRM Development Manager, Volkswagen Group UK**
- 12:10 pm Improv Interval with Neil Mullarkey and coffee break
- 12:20 pm **Mairead McSweeney, Head of Business Operations, BT Ireland**
- 1:00 pm Lunch (Guests are welcome to experience the GT5 Pods in the showroom)
- 1:45pm Improv Session with Neil Mullarkey
- 2:00pm **The Great Debate - What does leading edge mean to B2B Customer Management?**
- 2:30pm Workshop by eBECS
- 3:00pm Closing improv session with Neil Mullarkey
- 3:15pm Close
- 3:30pm Brooklands Museum Tour

SPEAKERS

Master of Ceremonies:



Neil Mullarkey

Business Trainer and Comedian

Neil Mullarkey co-founded the London Comedy Store Players, Europe's top improv troupe, in 1985 with Mike Myers and still performs with them. They are recognised by the Guinness World of Records as the world's longest-running comedy troupe with the same core cast. Neil studied Economics and Social and Political Science at Cambridge University where he was also President of the Footlights.

Neil's credits include *Whose Line Is it Anyway*, *I'm Sorry I Haven't A Clue*, *Have I Got News For You*, *QI* and two *Austin Powers* movies. He has toured the UK and beyond improvising with Eddie Izzard, and he directed the interactive comedy whodunit *Scissor Happy* in London's West End.

Since 1999, Neil has been bringing the skills of theatre and especially improvisation to hundreds of clients including the world's biggest organizations (including Microsoft, WPP, KPMG, Saatchi & Saatchi, Barclays, Vodafone, Ernst & Young, PA Consulting, Unilever, Google, UK Sport, the BBC, Gartner, Volvo, ITV, BlackRock, Lloyds Banking Group and many creative agencies and business schools). In 2013, he was invited to speak in China, India, USA, Italy, Luxembourg, Norway, Denmark, Singapore, Switzerland, the Netherlands, Brazil and, um, the Isle of Man.

Neil trained in executive coaching at Ashridge Business School and Solutions Focus team coaching. His unique, interactive approach also embraces story-telling and forum theatre and is a regular speaker at the London Business Forum and a Visiting Lecturer at Cass Business School, City University.

(And Mullarkey is his real name).



Chris Russell

Head of Operations, Luvata

Chris is responsible for operational excellence across 36 plants in the 19 countries in which Luvata has manufacturing operations. In this role, Chris has overseen the development of the Luvata Production System, Luvata Sales System, Pricing and Risk Management to become an integrated operating system across a diverse range of applications and multiple divisions.

Chris' experience in operational excellence spans many

disciplines; originally from a logistics background he held several senior positions with Baxi Group in logistics, operations management and lean manufacturing implementation. Chris has also held roles as Operations Director for an aluminium extrusion plant and Head of Operations for an automotive assembly plant.

Having led positive change across many cultures and businesses, Chris has gained a great insight in to what the key ingredients are for successfully implementing and sustaining improvements in operational excellence as well as what it takes to align operational and commercial excellence in business to business environments.



Nigel Brotherton

CRM Development Manager,
Volkswagen Group UK

Nigel is CRM Development Manager within the Volkswagen Group. His remit is to raise the skills, capabilities and thinking in Customer Management across the Audi, SEAT, SKODA and Volkswagen brands. His original plan on joining Volkswagen was to stay for at least two years - that was back in the 80s! Since then Nigel has spent many years in Marketing, starting in product management and then progressing through the world of communications to eventually become

Head of Marketing for Commercial Vehicles and then Audi. Along the way he had a spell in Sales Operations, a role that brought to life the challenges of delivering a consistent customer experience through a franchise network. For the last few years Nigel has immersed himself back in the disciplines of CRM and customer retention.

During his time at Volkswagen the Group has grown from a company selling 80,000 cars and vans a year to one that has achieved four times that so far this year. From being 'challenger brands' in the past, Audi and Volkswagen have become prime targets for other car companies' acquisition programmes so CRM and customer retention play a crucial role in maintaining the Group's sales performance.



Mairead McSweeney

Head of Business Operations, BT Ireland

Mairead McSweeney is Head of Business Operations for BT in the Republic of Ireland and Northern Ireland, providing the critical link between strategy, financial analysis and operational execution plans. She is also responsible for the delivery of governance and change programmes, including BT Ireland's customer satisfaction survey, measured by Deep Insight.

Since joining BT in 1999, Mairead has held several senior positions across the BT Ireland business including Senior Service Delivery Manager, managing a team of 80 people, and most recently as Head of Wholesale Operations, responsible for the governance and business planning for the wholesale division. Prior to BT, Mairead headed up a Customer Relationship Team in Lufthansa Global Telesales, leading on the successful implementation and migration of new Service Departments for the Italian, Japanese and Portuguese markets.



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- Increase win rates
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- Drive CRM adoption & ROI

“ In sales, information is power.... To win business, we need to know the movements of our clients and competitors... The customized search agents in InsideView give us valuable information to help us be successful.”

—Tim Thorpe, Black & Veatch



CRM INTELLIGENCE™ FOR MICROSOFT DYNAMICS CRM

Real-Time Contact Data. Business Insights. Connections Intelligence. Inside CRM.

92% of buyers won't respond to a cold call or unfamiliar email. The question is how do you become one of the few that breaks through?

By knowing something or someone that's important to them. How do you earn their trust? By understanding their business issues.

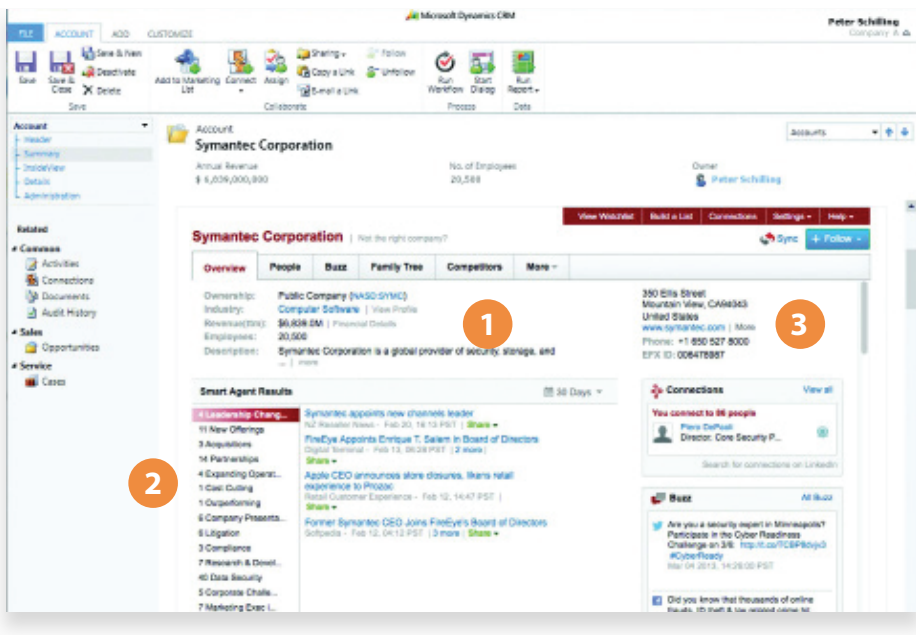
How do you competition-proof your relationships?
By getting to know the person behind the contact data.

Bottom line? Knowledge wins.

Whether you're in marketing, sales or account management, the more you know about your prospect or customer, the more you're able to bring value to every conversation...and the more you win.

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Find, understand and connect with your most promising prospects.



1. COMPANY & PEOPLE DATA

- Millions of company and people profiles
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NOTE:

Microsoft Dynamics CRM Insights, a Microsoft offering powered by InsideView, is included in all Microsoft Dynamics CRM Online Professional licenses in the U.S. and Canada, at no additional charge. It is equivalent to the InsideView for Sales™ Professional edition. Visit www.insideview.com/microsoft-insights for more information.

Workshop

eBECS will demonstrate how B2B companies can find more leads, win more opportunities and retain more customers by leveraging social technologies within CRM.



Microsoft PartnerNetwork



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"4.5 out of 5 Stars"

DATA SERVICES ALSO AVAILABLE

- Master data management services
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Contact: **Stephen Wilson**, Director at swilson@ebecs.com or visit www.ebecs.com



THE CUSTOMER ATTUNED MODEL EXPLAINED

15 Critical Business Capability Areas for Profitable B2B Customer Management.

Customer Attuned is an innovative and practical capability assessment based on a B2B customer management (CM) model that is based on three vital underpinning drivers of success that must be valued, protected, managed and invested in for competitive advantage:



- Trust - never undermine your trustworthiness in business
- Interdependence - build mutual dependence/rectify dependency imbalance
- Equitability - ensure the relationship works commercially over time for all parties involved

The model represents a virtuous circle of knowledge-through-strategy/ planning-through- implementation & performance tracking - working on three levels:

- Operating in and developing your market
- Managing account relationships
- Organising resources and operations

This results in 15 critical capability areas in which companies need to be "attuned" in order to build and capitalise on trust, interdependence and equitability. These are briefly explained as follows:

ATTUNED KNOWLEDGE

01

MARKET KNOWLEDGE

Good institutional knowledge of market structure, organisation & value; industry logic; procurement trends; Internationalisation; supply chain; shopper & consumer purchasing behaviours & needs; competitive position & reputation; and category insight.

02

CUSTOMER KNOWLEDGE

There is clear and consistent understanding across the business of customer profitability; trends and triggers (from data mining); needs & wants chains; customer pain & gain points; account relationship quality (depth & breath); and procurement decision making & makers.

03

ORGANISATIONAL KNOWLEDGE

The company must learn from successes and failures regarding its customer & performance culture; organisational design (OD); approach to change; developing new technology; knowledge sharing; Ways of Working; and head knowledge dependency avoidance.

ATTUNED STRATEGY

04

MARKET STRATEGY

There are 'living' market and marketing strategies that cover brand & CVP; innovation & co-creation; category; new market entrance, channels & media; reputation; and pricing.

05

CUSTOMER STRATEGY

Many B2B businesses still don't have a clear customer strategy (still all about products & channels). Your customer strategy should include value objectives; segmentation / classification; trade spend (end-consumer marketing); Ease of Doing Business; partnering; Key Account Management; and trust.

06

ORGANISATIONAL STRATEGY

The way you're organised will fundamentally affect the way that the customer experience will be delivered. Your strategy should encompass leadership & ownership; organisational design; culture & values; enabling technology and change management.

ATTUNED PLANNING

07

MARKET PLANNING

The long-term strategy must be interpreted into 12m plans for category; new & old product development (incl. phase & gate); CVP development; new markets & channels; Point of Purchase (POP); shopper marketing; and above-the-line & promotions.

08

RELATIONSHIP PLANNING

Most B2B companies have account plans, but they often don't drive the relationship. Good relationship planning should cover value objectives; decision trees; joint working & business plans (JBPs); contact frequency; tailourisation; risk management; stakeholder engagement; digital engagement; and trust building.

09

ORGANISATIONAL PLANNING

HR plans are usually too internally focused. Organisational Design and changes that impact customers must be planned for, along with CM capabilities & competencies; and recruitment & induction. Information & Technology and organisational planning must be aligned.

ATTUNED IMPLEMENTATION

10

MARKET DEVELOPMENT

Coordinating the execution of market, product, channel, CVP and promotional plans is a highly complex business and is the life blood of revenue preservation and growth.

11

CUSTOMER EXPERIENCE DELIVERY

This should be where all the knowledge, strategy and planning come together to build trusting, interdependent and equitable relationships - from hunting new business & negotiating, through day-to-day customer service delivery, to relationship development (farming), Key Account Management and attrition minimisation.

12

ORGANISATIONAL ALIGNMENT TO CUSTOMERS

Product-centricity and silo'd working remain huge barriers in organisations to delivering great account relationships. Ways of Working, performance management, continuous improvement and people development practices should be aligned to the customer journey rather than internal operations. Similarly, customer information must be joined-up and free-flowing across the staff that collect, manage and use it.

ATTUNED RESULTS

13

MARKET RESULTS

Effective implementation of strategies and plans that are thus Attuned will result in your business enhancing its reputation and demonstrably winning in its chosen markets and categories. This will be closely tracked, with results and learnings added to the knowledge base.

14

CUSTOMER-BASED MEASURES

Account performance will be tracked at the highest levels to ensure effective hunting, farming, relationship quality and Key Account / JPB performance.

15

HIGH PERFORMANCE ORGANISATION

A dashboard will cover organisational performance (leadership effectiveness, cultural health, service & quality compliance, systems & processes, root cause analyses) and individual performance (KPI cascade; consistency in Ways of Working; personal accountability for SLAs and performance management outcomes).

All 15 elements are important in their own right - and more vitally in how well they are joined up in your organisation. A Customer Attuned assessment will quantify and benchmark how well you are building trust, interdependence and equitability. It will give a practical way forward to becoming more attuned to your current and future customers' needs and requirements.

'Game Changers' for Leading Edge Supply Chains



In 2013 a white paper from the Supply Chain Management Faculty at the University of Tennessee highlighted 10 'Game-changing' trends in supply chains that have been evolving over the past decade towards 'Excellence'. They defined game-changing trends as those trends that meet the two basic criteria of being extremely impactful on a firm's economic profit and shareholder value, as well as very difficult to implement successfully. Their analysis was based on responses from approximately 150 supply chain professionals across a wide range of industries (retailers, manufacturers, and service providers, large and small in size).

GAME-CHANGING TRENDS EVOLUTION

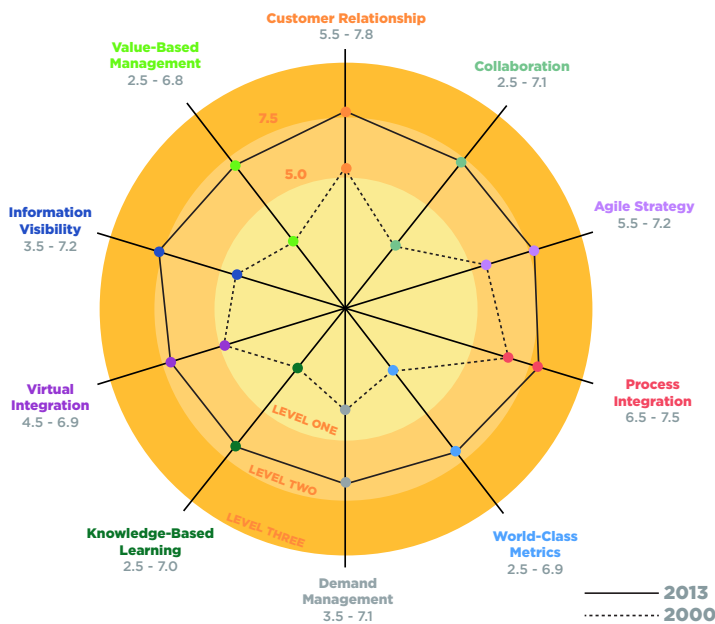


Figure 1: Game-changing trend evolution. Source: Supply Chain Management Faculty, University of Tennessee, 2013.

Figure 1 shows the complete set of trends and their progression from a 'Base' Level 1 in the year 2000, where all trends except Customer Relationship and Process Integration were at Level 1, towards 'Excellence' Level 3 in 2013.

The experiences of the consulting team at Star Commercial matched the findings in this paper and in 2014 we began to look at the four 'Game-Changing' trends that we see our clients focusing on and that therefore we have developed and implemented successful programmes for. Each Star Commercial director has picked the one of these four trends that they feel passionately about. In this introduction our Jonathan Brough shares his thoughts, views and experiences relating to the first Game-Changer we feel will help make an organisation's supply chain Leading Edge:

Game-changer 1: Collaboration

By Jonathan Brough, Managing Partner, Star Commercial Academy Limited

Supply chain professionals have been talking about collaboration for years, but unfortunately, as one executive lamented, "When all is said and done, there's been more said than done."

In our experience there are 5 key steps to ensuring collaboration initiatives deliver outstanding results and superior supply chain relationships.

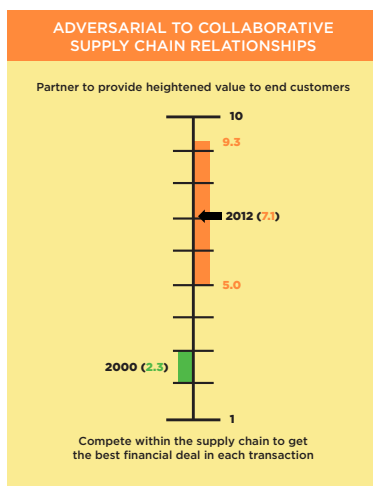
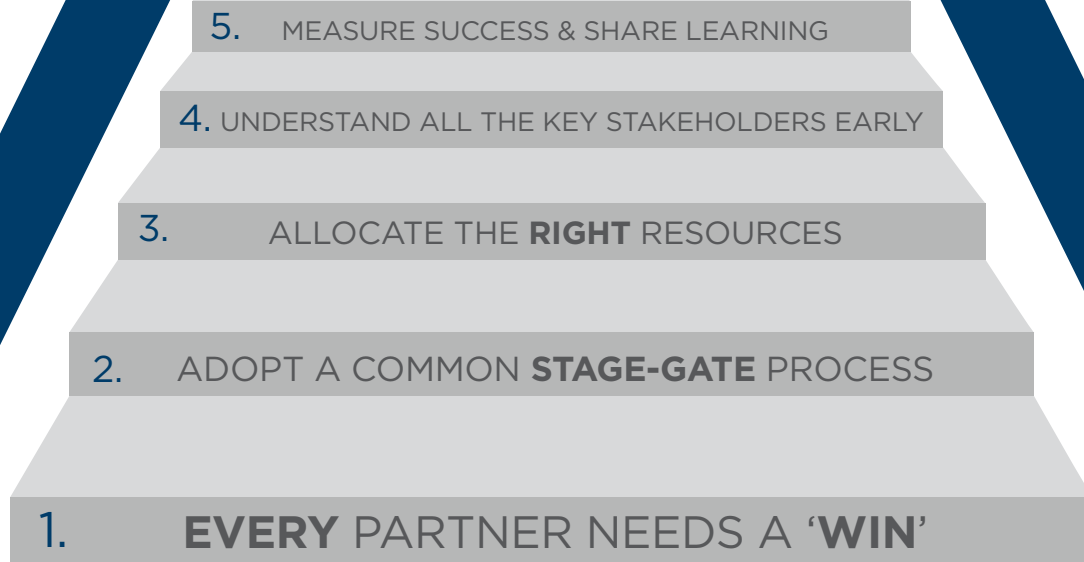


Figure 2: Adversarial to Collaborative Supply Chain Relationships. Source: The Supply Chain Management Faculty, University of Tennessee, 2013

LEADING EDGE COLLABORATION



1. EVERY PARTNER NEEDS A WIN - A compelling business case that each partner in a supply chain collaboration can deliver. However these business cases can and often are different for each partner. This seems an obvious statement but all too often we see one partner trying to exploit the other. For example a customer driving down profit margins in a supplier or transferring inefficiencies to another partner, such as distribution, to address their own performance gaps, rather than attempting to optimise the supply chain for all parties.

2. ADOPT A COMMON STAGE-GATE PROCESS - This ensures every party understands where the initiative is, the key stages and what key decisions are required to move from one stage to the next. Agree the process **BEFORE** you develop the planned activities so that every part of the collaboration can be traced back to a specific stage and there is also complete clarity on the information that is required at each decision gate.

3. ALLOCATE THE RIGHT RESOURCES - Not necessarily your best people but rather those with the correct capabilities and maximum level of motivation. Build a team that complement each other and have the blend of skills and personalities to collaborate immediately.

4. UNDERSTAND ALL KEY STAKEHOLDERS EARLY - At the beginning of any collaboration, understand who the key stakeholders are in every party, including any third parties, then engage and communicate with each of them effectively. Star is a licensed practitioner for the DeepInsight® methodology which can provide a genuine understanding of how to adapt communications styles with different stakeholders. We often see companies actively trying to ignore those stakeholders who may not immediately be supporters of such an initiative.

5. MEASURE SUCCESS & SHARE LEARNING - Measure success against the original objectives and share all the learning with each partner and other collaboration project teams. Set measurable objectives that reward a strong performance but encourage the right team behaviours.

To learn about the other Game-Changers the Star team believe are key, please download the full article from www.starcommercialacademy.com.

“Leading Edge” in B2B Customer Management



Deep-Insight

customer retention | employee performance

The last time we met Susan and Bill (at the Cutty Sark in June 2014), they were discussing survival tactics. Thankfully, they have managed to get the company back on an even keel – excuse the boating pun – over the past few months and now have a new challenge to face.

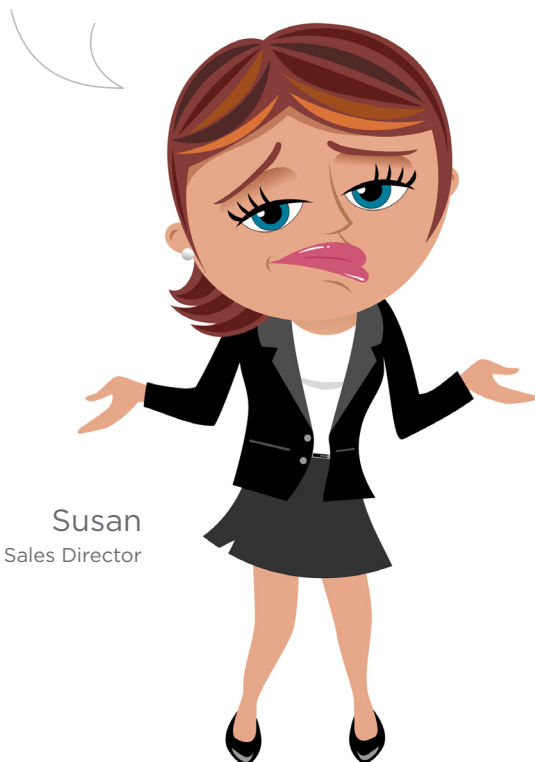
At the last board meeting, the CEO asked them to prepare a strategy that would transform the company from an ‘Even Keel’ company to becoming a ‘Leading Edge’ company.

“I don’t want us to be competing on price. I want us to be seen by our clients as unique, innovative, really easy to do business with. Now it’s up to you two to make that happen. Get back to me by 23 September with a strategy. And it better be good.”

Unfortunately, Susan and Bill are at loggerheads trying to plot a course towards that Leading Edge organisation that their CEO so desperately wants to become.

DIFFERENT VIEWS FROM SALES & MARKETING

“Leading Edge is a simple sales concept. Leading Edge = More Sales. It really is as simple as that. We can become Leading Edge if Bill provides me with market-beating products. That’s the thing he can’t seem to grasp.”



Susan’s view is (as usual) plain and easy to grasp: “Give me decent products/services and I’ll sell them. If the products/services are Leading Edge, we’ll sell more of them. It’s not really my job to DESIGN them, so don’t go asking me about transforming this company into a leading edge organisation.”

“Leading Edge is a complex brand concept. It’s how you are seen vis-à-vis the competition. We’re a services business and the differentiating factor is the quality of our service and account teams, not the products. That’s what Susan fails to grasp.”



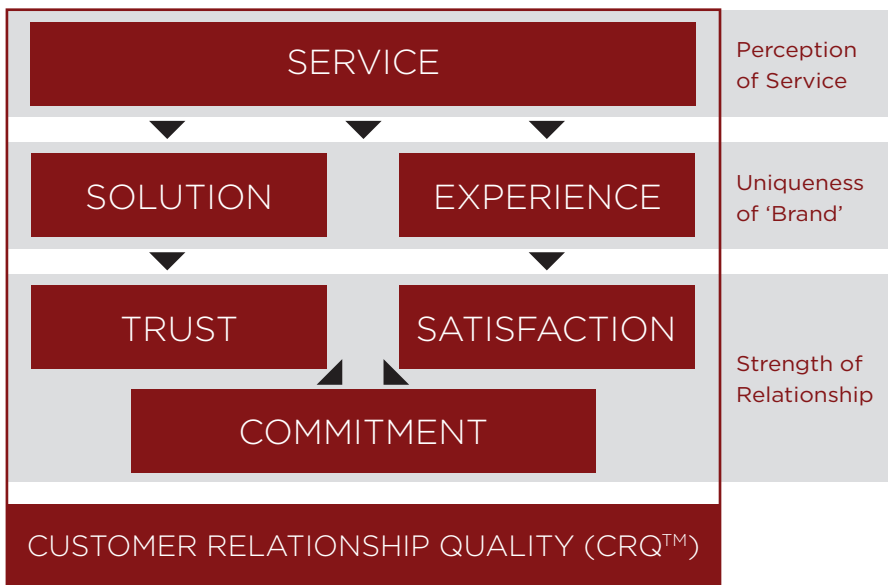
Bill has a slightly more nuanced view. He accepts that it’s his job to translate customer needs into the sorts of products and services that the clients will love and buy, but he also makes the valid point that he and Susan are in a B2B services business, and that Susan’s account teams (as well as the Service/Delivery teams) have a key role in making the service a Leading Edge one in the client’s mind.



Deep-Insight

customer retention | employee performance

BRIDGING THE GAP



As usual, Bill is half-right. And so is Susan.

But let's start by bringing a little clarity on the terms we are using. Let's begin with a definition of what a 'unique' brand is in the business-to-business world.

In the B2B world, the uniqueness of your brand is dependent on a combination of whether you provide a unique Solution for your clients and whether they find the Experience of working with you to be uniquely satisfying.

Deep-Insight defines **Solution** as a combination of **innovation**, **leading edge** and **value-for-money**. These are three related but slightly different concepts but if you score well on all three, the chances are that you have an offering that can help your clients improve their standing in the marketplace in a way that none of your competitors can provide. When we talk about 'solutions' we're not just talking 'product'. As Bill says, it's as much about how the account managers, sales and delivery teams position your company's product or service, as it is about the product/service itself.

Experience is a measure of **how easy you are to do business with** and if you are seen as a **trusted partner**. You can have the best products or services in the world but if your clients can't work with you and don't see your people as trusted partners, your brand is going to suffer.

So when Bill and Susan's CEO talks about wanting to be a unique, innovative, leading edge company, he's really talking about building a B2B brand that excels at all the different elements that we group under the headings Solution and Experience. And that means the Bill and Susan need to work together to get all those elements right. But as the methodology above shows, you can't build a unique B2B brand without having an excellent service to underpin it. So Bill and Jane and going to have to rope in the Operations Director as well. We wish them well on their journey.

ARE YOU A LEADING EDGE ORGANISATION?

Ultimately, the real definition of Leading Edge will be dictated by your customers. But you'll never know if you don't ask them.

If you want to find out if you're a Leading Edge company and how to plan the route towards transforming your organisation into something that is truly unique in the eyes of your customers, contact Peter Lavers: peter.lavers@deep-insight.com or John O'Connor: john.oconnor@deep-insight.com today.

NEWS RELEASE



WHAT B2B AND B2C CUSTOMER MANAGEMENT CAN LEARN FROM EACH OTHER - JUNE 2014 QUEEN'S HOUSE & CUTTY SARK

The 3rd instalment of The Great Debate saw Senior level CMO's, Acquisition and Market Intelligence Managers from both sides of B2B and B2C industries, that included automotive, telco, insurance and financial services, debate and challenge what fundamentally they can teach each other.

Ian Bray, Managing Director of Fuller's lead the proceedings with an earnest talk on the journey Fuller's undertook in meeting their customers needs. Angela Marshall, Sales and Customer Support from De La Rue together with Dyfed Smith of eBECS, gave a talk on the impact of CRM systems embedded in the heart of the company. Markus Kramer, Former CMO of Aston Martin, enlightened the audience with a luxury sector perspective. Together with our fantastically hilarious Master of Ceremonies, Neil Mullarkey, who perpetually gets everyone out of their comfort zones and teaches us the techniques required in communicating.

Joining the incredible speakers was Prof. Merlin Stone, newly appointed Director of Customer Attuned, who together debated what critical points B2B and B2C can learn from each other, here's their Top 5:

WHAT B2C CAN LEARN FROM B2B

Rapport. B2B is strong in relationship building and developing personal connections with customers. B2C should build rapport with customers (especially high value ones), using connected behavioural and attitudinal data.

Influencers. Account management teams in B2B recognise the importance of engaging with the networks of stakeholders and influencers within their customers. Many B2C companies struggle to incorporate social structures and networks in their data hierarchies and to recognise "networked promoters" within their customer bases.

Product Expertise. B2B has technical specialists such as "Sales Engineers" who are integral to the sales process and who REALLY know their product. This is rarely true in B2C, where product specialists are more commonly deployed in aftersales/service situations, often shielded by generalist enquiry management staff.

Resourcing. B2B can sometimes be better in directing its resources to high value customers via Key Account Management (KAM) teams than in many B2C markets where a 'one size fits all' approach is common.

Contract Recovery. When a B2B company gets feedback indicating dissatisfaction or poor relationship quality (e.g. from a Deep-Insight assessment), it is clear that there is a limited time to recover the relationship before the contract is re-tendered. B2C often has departmental silos which prevent personal response.

WHAT B2B CAN LEARN FROM B2C

Speed. B2C is increasingly 'instant' / real-time. Corporate agility, responsiveness, listening and speed of delivery are high on the agenda. B2B are way behind the expectations of customer-side staff who are used to much quicker and better service in their personal lives.

Empowerment. "CRM is becoming CMR (customer-managed relationships) in B2C". Most B2B companies are behind in managing customer permissions and channel / media preferences and in recognising the importance of non-owned media (e.g. user forums, social media) and channels (e.g. aggregators).

Social Engagement. While mass Facebook and Twitter engagement as used by consumer brands is not pertinent to B2B, this does not mean they can be ignored. B2B needs to appreciate the importance of engaging in the media that customers use.

Social Influence. The concept of 'communities of interest' (CoI) is well established in B2C. B2B companies should consider deeper engagement with CoIs (e.g. Linked In Groups) that either who directly use and endorse their products. Asking questions and listening to customer answers is as important as giving answers to customer questions.

Social Listening. B2B companies should add value to their customers by finding "hidden truths" of insight. B2B companies should use social listening techniques to track what is being said about the industry, market, sector and indeed their customers.



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