

Connecting with B2B Customers:

How Tech and B2C Tactics Can Drive Personalization and Loyalty

An original research whitepaper from Apply Digital



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Introduction: Connecting with B2B Customers

In Q4 2024, Apply Digital conducted a survey of 500+ senior executives across B2B and B2C industries to understand the effectiveness of their current customer engagement efforts. As these companies endeavor to connect in a meaningful way with their customers, we wanted to find out what's working, what isn't, and what strategies and tactics they will prioritize moving forward.

The answers presented in our report [The Future of Customer Engagement: Achieving ROI with Loyalty, Personalization and AI](#) are enlightening. We learned that many senior leaders feel that traditional engagement efforts — including personalization and loyalty programs, among other tactics — simply aren't generating the ROI they expect. As a result, these leaders are turning to AI in the hopes of improving engagement and enhancing the customer experience, all with an eye to revenue growth.

It's understood that, in B2B industries, the nature of personalization and loyalty is different from what we see in B2C. Without a clear line of sight into the

nuances of customer behaviour, businesses must navigate gaps in their data to try to better understand what their customers want. Knowing this, to get more out of personalization and loyalty, B2B leaders need to start with a foundation of great technology. As our experience working with [our client Coca-Cola Embonor](#) taught us, by first laying a strong foundation of cutting-edge tech, companies set the stage for improved B2B interactions — which in turn drive more personalized experiences and foster customer loyalty.

In this whitepaper, we've collected the most pertinent insights from our research and layered in commentary from top minds at Apply Digital to gain insight into their thoughts on customer engagement in the B2B space. We hope this whitepaper will enlighten and inspire those working in B2B to further expand and enrich their engagement efforts.

Personalization and Loyalty: boosting the tried and true

When it comes to seeing tangible ROI from personalization engines and loyalty efforts, the senior executives we surveyed expressed disappointment in their perceived return on investment. While **81%** of respondents named personalization engines as an important part of their overall engagement strategy, only **34%** of those surveyed said personalization was essential for superior customer experience. This suggests personalization engines have declined in value in the eyes of senior leaders.

On the topic of loyalty, just **47%** of survey respondents described loyalty and rewards programs as being a highly effective tool for repeat business.

This raises the question:

how can B2B businesses ensure they're getting the maximum ROI from engagement efforts?

When done right, we know that personalization and loyalty reduce friction and complexity while driving revenue for businesses. Research from Deloitte shows that B2C brands that excel at personalization are 48% more likely to exceed revenue goals. On the B2B side, 77% of companies using direct one-to-one personalization observed an increase in market share. We also see this on our projects for large multinational customers across manufacturing, distribution, and building supplies.

While personalized content is no doubt important to connect with B2B customers, it represents only one part of a holistic approach. Our experience suggests B2B brands should start by building out a strategic tech foundation to support better B2B experiences. Once these initial steps have been taken, they should continue to invest in personalization and loyalty as key components of customer engagement efforts.

¹ "Brands that excel at personalization are 48% more likely to have exceeded revenue goals" | [Deloitte Digital](#)

² "The multiplier effect: How B2B winners grow" | [McKinsey](#)

How B2B businesses can take action

B2B Businesses need to get back to basics and:



Identify gaps and pain points to deliver meaningful experiences

B2B businesses have complex selling cycles, and their customers have complex problems. Fully unpack your current engagement strategies to get a better idea of what your customers want, the tactics and technologies you'll need to win them over, and ensure personalization and loyalty are leveraged across the customer journey.



Define your KPIs and start small to create momentum

The foundation of every best-laid plan is knowing where you're going. Have well-defined KPIs and goals that you can work toward — and by starting small, you can achieve early wins and buy-in for future, more complex initiatives.



Build a better view of your customers

B2B businesses can learn from their B2C counterparts and spend time and effort to do customer journey mapping. Knowing what your customers need and want means that you will need to consolidate your customer data into one system for easy access and analysis as well as activation.



Implement AI tech to enhance tools and processes

Whether AI is used for data analysis, real-time personalization or cost efficient chatbots, B2B businesses can boost customer engagement through automation and speed.

“In the B2B domain, a shift is underway: out with the old product-centric approach, in with the new customer-obsessed paradigm. Today’s winning strategy isn’t about showcasing features. It’s about crafting bespoke solutions that seamlessly integrate with each client’s unique operational DNA. This new breed of B2B providers are more than vendors; they’re strategic partners, aligning their offerings not just with client needs, but with their industry regulations and long-term visions.”



Brian Lloyd

CHIEF PLATFORM OFFICER,
APPLY DIGITAL

Case Study #1:

How to create a strong foundation

A new ecosystem to improve the B2B manufacturer CX

The challenge

Our client, a leading B2B manufacturer in the building products space, was struggling with outdated processes across their sales ecosystem and was not serving the needs of their customers. Challenges included having a limited view of their customer acquisition process, outdated communication systems, a manual and siloed quoting process, and no unified vision of the future. The manufacturer requested we delve into an immersive discovery phase to better understand their business, and propose how we could help.

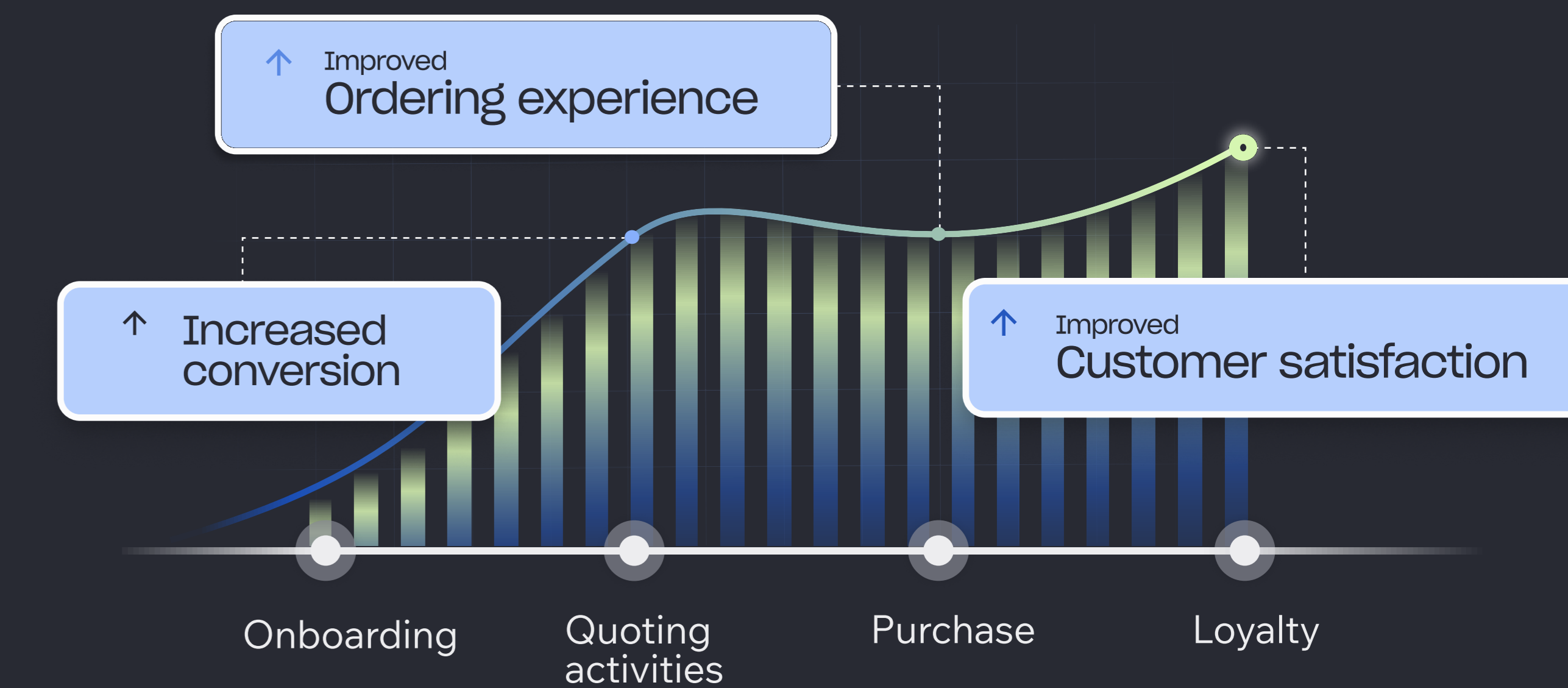
The solution

Our team worked closely with internal stakeholders in CX, sales, tech, and marketing roles at the company and its customers to gain a deep understanding of their challenges. This was captured in a current state 'blueprint' document to clarify the customer goal at each stage of their journey, identify pain points, and align on actions the company can continue to take. Thanks to this in-depth collaboration, we identified several areas of opportunity and proposed a vision where the right tech and the right processes would result in a transformative future for team members and customers.

Our first tech implementation is to build a software solution to transform the quoting process to ensure product information is easily accessible. We are supporting this tech by enabling internal process change with a change management specialist. The value of this improved ordering experience will include streamlining the quote and ordering process, leading to increased conversion, and driving improved customer satisfaction.



IMPACT OF TECH IMPLEMENTATION



“One of the problems today’s B2B companies have is they’re still putting their entire product catalog in front of their buyers. It creates a lot of noise and distraction and doesn’t consider different needs. B2B buyers want more of a B2C experience; they want websites and apps that are easy to use and that save them time.”

Daniel Berger
VP ENTERPRISE SOLUTIONS,
APPLY DIGITAL

“We know that customers don’t want to be sorting through a huge number of choices; what they’re looking for is confidence in the choices they make. B2B businesses need to find ways to instill confidence in the buying decisions customers take. AI is a great tool for improving accuracy and presenting fewer options, with a higher likelihood that one will be the right choice.”

Brian Lloyd
CHIEF PLATFORM OFFICER,
APPLY DIGITAL



Case Study #2:

A strong tech foundation in action

Building a strong tech foundation for Coca-Cola Embonor

The challenge

Coca-Cola Embonor, a leading provider of beverage products in Bolivia and Chile, was struggling to deliver a compelling B2B shopping experience. They wanted to implement a new tech stack to make it easier for buyers from grocery chains and also the mom-and-pop corner stores to order products.

The solution

With a tight, three-month deadline, Apply Digital cross-disciplinary teams took a composable technology approach. We expanded on the existing B2B app using Contentful to lay the new atomic design foundation. We then integrated Commerce Layer to ensure fluency with the company's legacy system. Our development and UX teams built out an engaging front-end experience, coupled with a modern and scalable eCommerce engine to allow flexibility and enable the gathering of first-party customer insights. An advanced search function was added using Algolia, and we integrated powerful personalization features using Insider, creating a simplified end-to-end experience for users.

The results

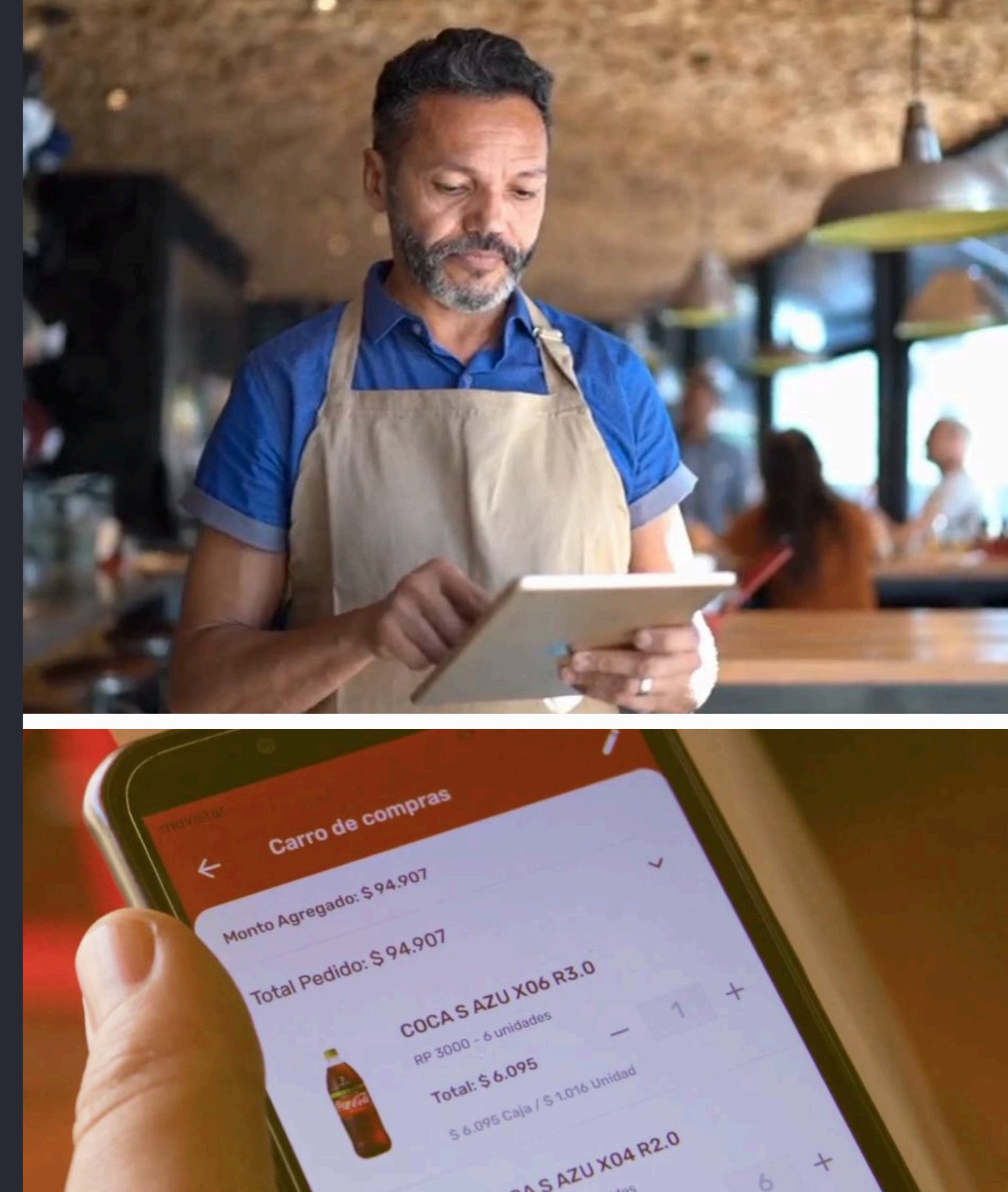


Best B2B project

+40% increase in revenue

+75% increase in B2B repurchase rate

+75% increase in B2B profit



“The LATAM market has its own nuances, and when you add B2B needs, expectations change even further. This was the perfect opportunity to take inspiration from leading B2C experiences and adapt them to meet local and vertical-specific needs. We are delighted to enable Coca-Cola Embonor’s platform, built in collaboration with Apply Digital, and see the engaging B2B customer experiences we can drive when the right strategy meets the right execution.”

Patrick Finn

VP OF CHANNELS & ALLIANCES,
CONTENTFUL

Conclusion

In the B2B sphere, effective engagement can be particularly challenging due to the complex nature of B2B relationships and limited visibility over customer behavior. The decision-makers we surveyed are clearly concerned about declining customer engagement, leading them to question the true ROI of long-standing personalization and loyalty programs. But this narrow perspective risks missing the bigger picture.

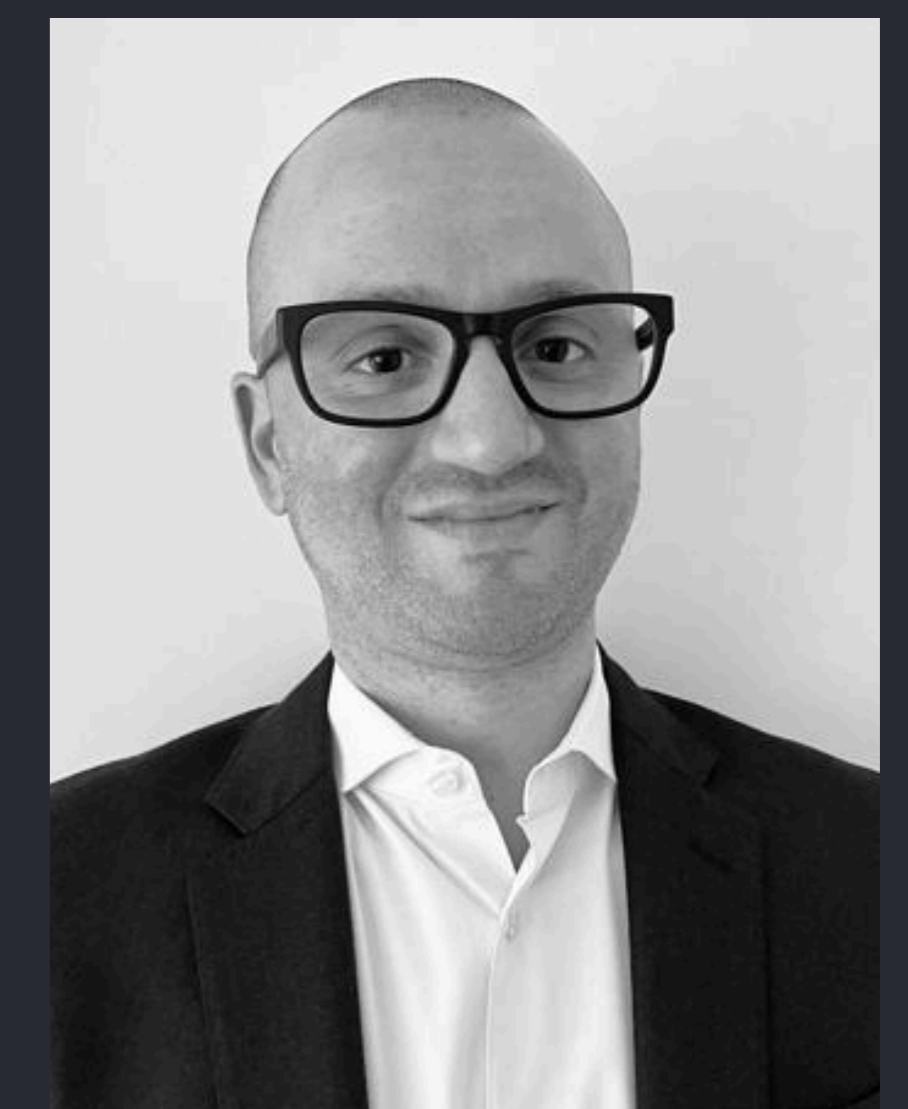
At Apply Digital, our experience has taught us that only a truly holistic approach to customer engagement can achieve consistent results. This means implementing the tech foundation needed to create great experiences while adopting a data-first mindset to understand your customers: what they like, what they don't, what they expect — and then striving to exceed those expectations. Once these strong technology foundations have been established, personalization and loyalty efforts are far more likely to succeed.

As we demonstrated above, to effectively engage customers, B2B businesses should investigate their own operational processes, identify and remedy pain points that arise during the customer journey, and nurture loyalty through better service. And once they have a compelling customer experience in place, B2B companies can consider leveraging the power of AI to improve experiences at scale.

“Today’s AI agents are well-positioned to transform B2B because they can access product and account data across many sources, and use that data to support a wide range of stakeholders — from sales and partner teams to end-users — in different contexts throughout a complex buyer journey.”

Michael Georgas

SENIOR DIRECTOR OF AI,
APPLY DIGITAL



Are you a company
looking to strengthen your
customer engagement
strategies?

Contact Apply Digital
today and one of our
expert team members
will be in touch.

