



# Prioritize Postsale Customer Marketing To Drive Business Value and Growth

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FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY INFLUITIVE | JUNE 2021

## Prioritizing Customer Marketing Goals And Investment Is Essential

Historically, B2B marketers have treated postsale marketing as a secondary consideration behind marketing activities aimed at customer acquisition. It's a long-held business axiom that retaining a happy customer is less expensive than acquiring a new one — yet B2B marketers are slow to react with focused and funded customer marketing (CM) strategies, which focus on postsale activities to drive retention and growth with existing customers.

However, the rise of subscription-based business models, as well as the advent of more empowered business consumers, are upending that dynamic.<sup>1</sup> Marketers that deliver high-quality postsale engagement can unlock major business benefits, but they must start shifting priorities, organizational structures, and investment to do so — and start now.

## Key Findings



Marketers still aren't focused on the right places for maximum impact. They don't invest in nurturing customer relationships enough, despite its importance and contribution to the business.



Too many brands struggle with creating and learning from vibrant customer communities. Maintaining customer engagement is marketers' top challenge, followed by measuring and learning from interactions.



Customer advocacy programs drive growth and customer empathy. Marketers highlighted that effective customer advocacy deepens relationships and improves customer insight and understanding.

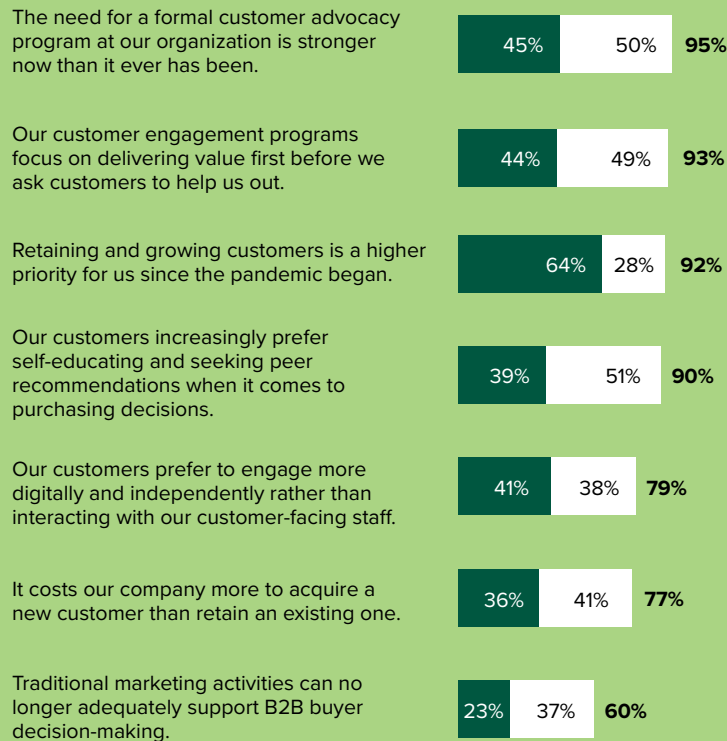
## B2B Companies Must Attend To Postsale Marketing And Advocacy Strategies

The COVID-19 pandemic disrupted global business and produced economic and systemic changes that increased the importance of consistent postsale engagement. Sixty percent of survey respondents agreed that traditional marketing activities aren't working anymore, while 92% reported that retaining and growing their customer base is now a higher priority, and 95% agreed that the need for formal advocacy programs has increased.

Respondents also recognized that postsale marketing efforts must center on delivering genuine customer value. Customers increasingly prefer hearing from peers, rather than from sales, and are more likely than ever to turn to digital channels for information. Both new and existing customers find more value in customer advocacy than in brand-to-customer marketing experiences. It's therefore essential that customer advocacy become a key pillar of B2B firms' CM strategies.

### "Please rate your level of agreement with the following statements."

● Strongly agree    ● Agree



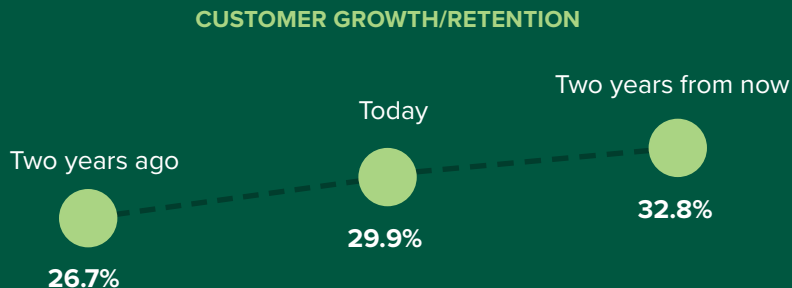
## Marketers Struggle To Align Postsale Importance With Investment

While it's encouraging to see widespread awareness among respondents on the importance of customer marketing, many respondents' organizations aren't supporting this understanding with increased investment. Marketers reported spending approximately 30% of their organizations' budgets on customer growth and retention, and only expected that portion to rise to around 33% in two years.

This is an opportunity for B2B firms to differentiate themselves with more mature CM strategies. These strategies will drive improved customer experiences and enrichment, and promote customer-contributions to marketing assets, while driving predictable revenue growth. To get there, however, brands will have to devote more focus and investment than many appear ready for today.<sup>2</sup>

**Customer marketing spend is insufficient for meeting buyer needs.**

**“What percent of your organization’s marketing program budget went to customer growth/retention two years ago? What percent goes there today? What percent do you expect to go there two years from now?”**



Four-year  $\Delta$  (pp)

**+6.1**

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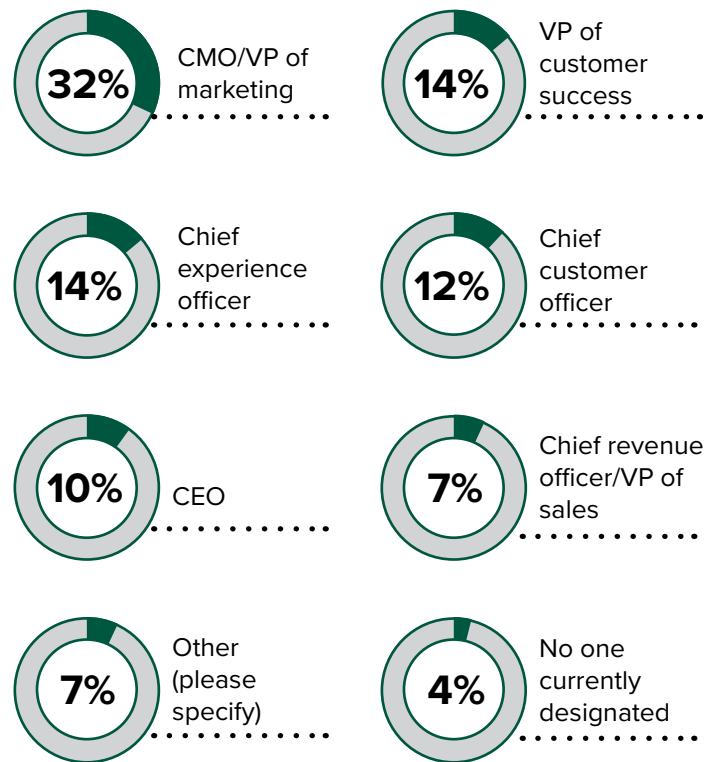
Base: 194 North American marketing technology decision-makers  
Source: A commissioned study conducted by Forrester Consulting on behalf of Influitive, April 2021

## Functional Fragmentation Can Hinder Customer Engagement

While CM teams can report into multiple heads within corporate, product, global, and demand-gen, Forrester's B2B research shows it is important to establish a discrete team under marketing leadership that is accountable for deepening customer engagement. When CM teams report into multiple heads, it can fracture processes and accountability, leading to a failure to deliver a consistent sequence of customer experiences that help reinforce relationships and identify areas of advocacy.<sup>3</sup>

In this study, respondents tapped marketing leadership the most to head up customer advocacy programs. However, two-thirds of respondents reported into one of a multitude of roles within the organization, risking their organizations' ability to provide consistent experiences across the customer lifecycle.

### "Which executive at your organization is primarily responsible for your customer advocacy strategy?"



## Firms Must Overcome Multiple Customer Marketing And Advocacy Challenges

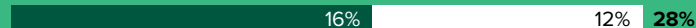
Successful B2B marketers embrace customer engagement as a primary goal. But even with sufficient funding and executive support, these teams still face a range of challenges. Respondents said creating vibrant customer communities is a top concern. By sharing common practices, goals, and interests, communities deliver trusted, customer-centric value to each participant, thereby creating more customer value, engagement, insights, and advocacy.<sup>4</sup>

Yet even vibrant communities can fail to pay off when companies struggle to measure the value of customer advocacy, fail to leverage the insights these communities generate, or lack empathetic engagement strategies that only confuse and annoy customers with too many ad hoc requests. All these challenges hinder progress towards building vibrant communities that deliver customers' most trusted source of information, problem-solving, and advocacy.

### “What challenges does your marketing team face when it comes to building relationships with customers and getting them to advocate for you?”

● Rank 1   ● Rank 2

Maintaining high engagement within our customer community



Measuring the impact of advocate activity on revenue, pipeline, retention, or loyalty



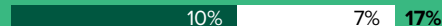
Getting insight into where customers are in their post-sale journey so we know when/how to engage them



Too many ad hoc programs and interactions that confuse or annoy customers with multiple requests



Marketing goals and activities that are too focused on customer acquisition



Lack of information or insight into which customers would make the best advocates



Getting buy-in from sales, service, success management, and other customer-facing teams to support an advocacy program



Lack of access to buyers and users in current accounts who would be good customer advocates



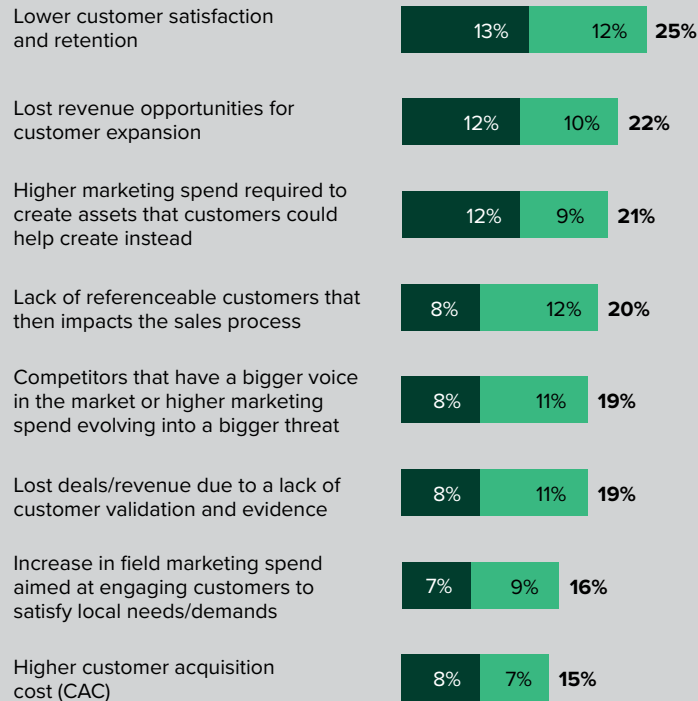
## Unbridled Customer Advocacy Harms Progress On Key Marketing Goals

Marketers who struggle to effectively turn existing customers into advocates find themselves at a disadvantage meeting business goals. Since the majority of the B2B customer lifetime occurs after contracts are signed, marketers need postsale insight and interactions to understand how and why their customers benefit from their offerings if they want to increase loyalty and advocacy.<sup>5</sup>

Respondents reported that the biggest outcome of ineffective customer advocacy is low customer satisfaction and retention. Low engagement also causes their organizations to miss out on revenue opportunities that come from expanding customer relationships. Without these deeper insights and advocate activity, marketing teams tend to spend more on less effective programs. They also lack the references and testimonials that both existing and prospective customers want to see to help guide their purchase journeys.

### “What are the consequences of not addressing the challenges your marketing team faces when working to turn customers into advocates?”

● Rank 1 ● Rank 2



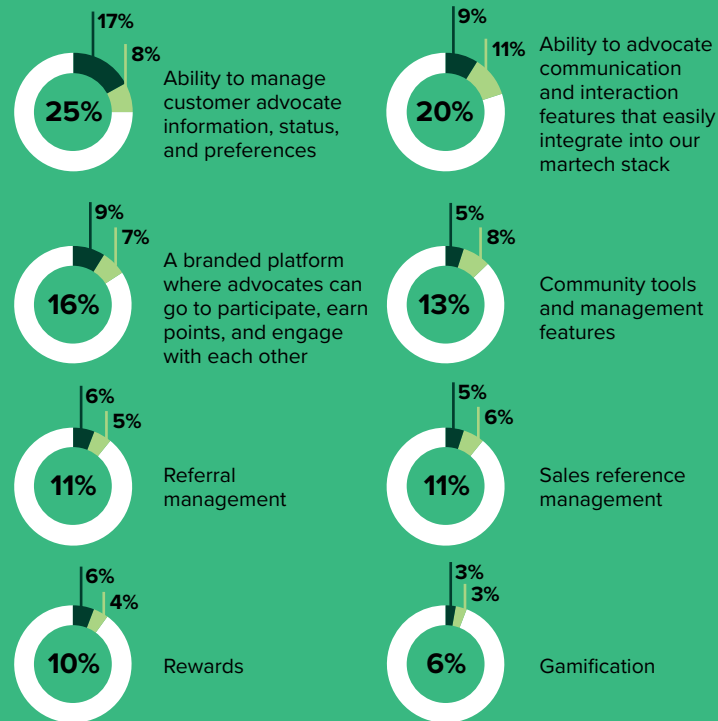
## Failing To Harness Customer Advocacy Harms Business Performance

Customer communities are a forum for customers to connect and share product experiences, goals, and interests. They are powerful in delivering shared value to participants, thereby creating more customer value, engagement, insights, and advocacy for the companies that sponsor them.<sup>6</sup>

Respondents reported prioritizing capabilities like managing customer advocate profiles and platform communication features that also easily integrate with their wider marketing technology stack, rather than prioritizing the need for a branded platform where advocates can engage and gain recognition for their time and effort. B2B marketers who focus on building branded platforms will position themselves for greater success.

## “What are your organization’s most desired capabilities when selecting a technology solution for a customer advocacy program?”

● Rank 1 ● Rank 2





## Focus On Value-In, Value-Out To Drive Customer Community Success

To increase customer engagement program maturity, CM teams must adopt capabilities that allow customers to interact with one another and share best practices. Customer-driven content like testimonials and case studies are more effective ways to influence buyers during the purchase journey.<sup>7</sup>

Respondents said their organizations' desired customer community features represent a mix of customer- and business-centric capabilities. For the business, ensuring the security of vital customer data, as well as gaining visibility into community health through dashboards and measurement, is critical. Customers will respond to implementations that make it easy to bring the community into other touchpoints and customer-facing initiatives. Also, customers will engage where they want, meaning easy-to-use mobile interfaces are a significant requirement for effective community interactions.

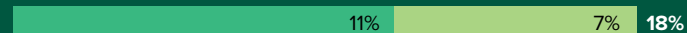
## “What are your organization’s most desired features of a customer community solution?”

● Rank 1 ● Rank 2

Ability to hook community into other customer touchpoints and initiatives



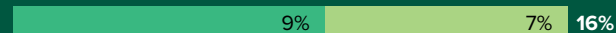
Mobile interface with responsive design



Adequate security for customer data



Measurement/dashboards/metrics



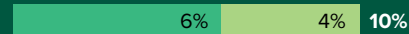
Rich user profiles with social media integration



Groups — topic based or for those with common interests



Listening/recording function to record, store, access, and share



Searchable knowledgebase



## Customer Advocacy Programs Deepen Customer Relationships

The most effective B2B marketers know that customer advocacy programs aren't just a content creation channel. Many turn their attention from uncovering cross-sell/upsell opportunities as their main focus to leveraging customer advocacy to deepen and expand relationships.<sup>8</sup>

Respondents need the improvements they make in customer advocacy to drive improved results. It's about delivering deeper customer relationships in terms of account penetration and engagement. Those critical outcomes empower marketers to deliver better customer experiences. Respondents said customer advocacy would let them better understand what their organizations' customers need and how best to support customer journeys.

## “What outcomes would you expect/have you experienced with a customer advocacy platform?”

● Rank 1    ● Rank 2

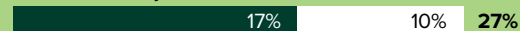
Deeper customer relationships as measured by penetration, activity, and engagement



Increased post-sale customer journey knowledge so we can use this understanding to better serve them



Increases in key customer satisfaction or success metrics



Higher revenue growth from current customer accounts



More efficient marketing and sales processes and resource use



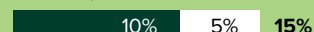
Stickier customer relationships as measured by retention and loyalty



Increased inbound demand when buyers engage with customer-contributed assets/marketing



Customers who continue to buy from us after they move to another company/role



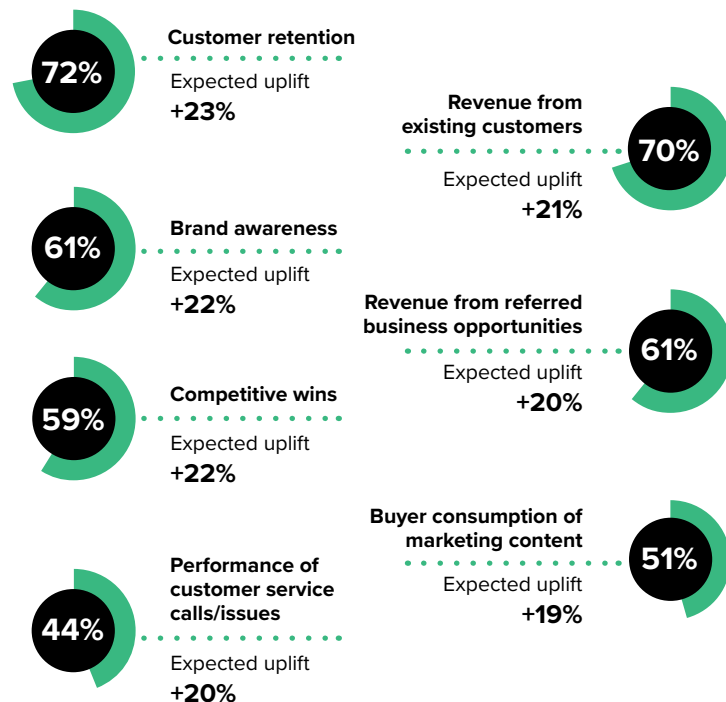
## Building Mature Customer Advocacy Strategies Pays Off Handsomely

Leaders succeed when they shift the organizational mindset from reaping testimonials and references to prioritizing creating customer value. They also place smart bets on enabling technologies that can power new experiences and outcomes as they align multiple teams within the organization behind their strategy.

While this effort is considerable, respondents show that it leads to rich rewards. As respondents worked toward greater advocacy maturity, a majority expected to drive greater than 20% uplift in retention, revenue from existing customers, brand awareness, and competitive wins, as well as a near or at 20% uplift in revenue from referrals and customer engagement with their marketing content. Nearly half also believe that customer service performance would improve by 20%.

**“If your organization increased the maturity of your customer advocacy strategy, how would you expect the performance to change?”**

(Showing “Will improve” as well as expected uplift)



## Conclusion

B2B marketers have a massive opportunity to better understand their customers, drive deeper relationships, and mine customer delight for testimonials and case studies. But harnessing this opportunity requires brands to see the sale not as a finish line, but the start of a critical journey to crafting a seamless and rewarding customer journey to drive growth.

Customers would rather share their knowledge, experiences, and advice than deliver promotional testimonials. To tether postsale experiences to authentic advocacy, B2B marketers must remember this and invest in programs that begin on the day customers sign up, deliver measurable business results, and track key milestones along the entire journey. These practices, backed by an advocate technology platform, lay the foundation for genuine, valuable customer community interactions that fuel growth and net new acquisition while positioning B2B firms for greater and lasting success.

### Project Director:

Nicholas Phelps,  
Principal Market Impact Consultant

### Contributing Research:

Forrester's B2B Marketing  
research group



## Methodology

This Opportunity Snapshot was commissioned by Influitive. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of marketing technology decision-makers at B2B organizations in North America. The custom survey began and was completed in April 2021.

### ENDNOTES

<sup>1</sup> Source: "Customer Marketing Elevates B2B Post-Sale Experiences And Buyer Value," Forrester Research, Inc., March 31, 2020.

<sup>2</sup> Ibid.

<sup>3</sup> Ibid.

<sup>4</sup> Ibid.

<sup>5</sup> Source: "Postsale Immersion Boosts Marketing Empathy," Forrester Research, Inc., March 26, 2021.

<sup>6</sup> Ibid.

<sup>7</sup> Source: "Credible Empathetic Content Wins Over Elusive B2B Buyers," Forrester Research, Inc., April 30, 2020.

<sup>8</sup> Ibid.

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## Demographics

### COMPANY SIZE

Two to 999 employees (31%)

1,000 to 4,999 employees (41%)

5,000 employees or more (29%)

### DEPARTMENT

Marketing (53%)

Customer experience (28%)

Customer success (19%)

### CUSTOMER ADVOCACY RESPONSIBILITY

Final decision-maker (14%)

Part of team leading (54%)

Influences decisions (31%)

### SENIORITY

C-level or VP (25%)

Director (45%)

Manager or below (31%)

A woman with blonde hair tied back, wearing a light-colored short-sleeved shirt, is smiling and holding a dark coffee cup. She is sitting at a wooden table in a cafe or office setting. In the background, other people are visible, including a man in a dark shirt and another person in a light-colored shirt. The scene is dimly lit, with warm ambient lighting. The Forrester logo is overlaid in the center of the image.

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