

EBOOK

Customer AI for B2B2C Companies

How to Deliver Revenue Growth, Higher Profitability, and Enhanced Customer and Channel Partner Experience



Companies with B2B2C go-to-market models cover a wide range of industries, from financial services, to insurance, to manufacturing, and even travel. While they may be in very different markets, however, all B2B2C companies share a common set of objectives.

All B2B2C companies need to grow revenue, increase profitability, and deliver exceptional channel partner and customer experience. Often, value chain complexities and data challenges make it difficult for B2B2C companies to identify and execute against the specific areas most likely to deliver impact faster. Simply getting a complete picture of both channel partner and customer needs can consume significant internal resources and slow down a company's ability to get ahead of competitors.

The application of Customer AI in B2B2C companies significantly reduces barriers to insights that illuminate opportunities for profitable growth and exceptional experiences. Customer AI makes it easy to bring together complex data sets from channel partners and customers, combine them with financial and operational data, and build highly accurate models with that data. These models predict channel partner and customer behavior and uncover the reasons for those behaviors. The CustomerAI platform serves up those insights in easy-to-read visualizations, making advanced analytics accessible to every employee and channel partner. With these insights, B2B2C companies can make every decision fact-based and timely, and give leaders the confidence to make smart investments and deliver more predictable revenue and profits.

In this eBook, we cover the three top business objectives for B2B2C companies and explain how Customer AI becomes the foundation for faster, smarter decisions and actions to achieve all of them.

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What is **Customer AI** and How Does It Work in **B2B2C Go-to-Market Models**?

We founded OCX Cognition after decades of combined experience in the development and deployment of traditional CX measurement systems.

In fact, we served as the leadership team for the pioneering survey analytics company Satmetrix which, along with Fred Reicheld and Bain & Company, created the widely adopted Net Promoter Score® and methodology. We know first-hand the challenges of making customer insights accessible to everyone who needs them. We started OCX Cognition to build a new solution with complete, continuous, and connected data using predictive analytics. We call our solution Customer AI.

Customer AI from OCX Cognition represents a new category of enterprise customer analytics comprised of configurable, next-generation services, like Generative Customer Analytics, Generative AI, and Automated Machine Learning. Built on the latest technologies like elastic compute, storage-on-demand and advanced machine learning, Customer AI delivers a continuous, unified view of customer analytics that unlocks productivity for teams throughout your business.

Customer AI from OCX Cognition solves a previously unsolvable problem. It analyzes operational data along the entire customer value chain, from channel partners to support teams, and continuously predicts the viewpoint of your customers, including their financial future. Customer AI delivers insights into how specific aspects of your operations impact what customers think of your company and your channel partners. It uncovers what steps can shape future outcomes in your favor, from which customers are likely to churn, to which will buy more, and the reasons behind those predictions. With OCX Cognition, predicting customer intentions is a daily reality.

Customer AI provides this data so companies can put their resources toward their actual biggest opportunities first.

- Generate **continuously updated engagement and loyalty metrics** for every channel partner and every customer, with complete data sets across both dimensions
- Link multiple data sets into a **single model of end customer experience**
- Create an **integrated attribution model**, with drivers of both channel partner and company performance
- Identify **optimal resource allocation** that delivers insights into multiple areas:
 - Which customers are at risk? Which represent the greatest opportunity?
 - What are the best channel partner investments for growth and profitability?
 - What are the best customer investments for growth and profitability?
 - Where can investments and resource allocation be combined to address both customers and channel partners?
 - How can we improve our segmentation models for channel partners and customers?



SECTION 2

Customer AI for Revenue Growth

B2B2C companies need to deliver growth by finding and winning new customers and growing the customers they have. This is made more challenging by a complex value chain involving channel partners, competitive markets, often commoditized product categories, regulatory requirements, and complex data sources.

The unification of operational and financial performance in a single model is essential to maximizing customer-led growth. Customer AI predicts behavior and propels growth by accounting for the effects of experiences and attitudes on financial outcomes. It then makes these insights easy to understand for all functions and channel partners so they focus on areas most likely to impact growth.

Specific, actionable, accessible, and sharable customer insights make it faster to find new segments and customers and understand their needs. They also enable channel partners to find and engage new customers and win their business faster. Customer AI brings together attitudinal and behavioral data from customers and channel partners, as well as operational and financial data, to deliver a complete and consistent picture of opportunity and risk. Customer AI can define the ideal channel profile and ideal customer profile to best recruit, allocate resources across existing channel and customers for growth.

How Customer AI shows B2B2C companies and their channel partners where to find and win new customers

- Definition and validation of ideal customer profile based on actual customer data
- Identification of new market opportunities and target segments
- Monitoring of adherence to ICP by agents
- Identification of target customers and their needs
- Enablement for agents to focus on high potential new customers including those already doing business with competitors

How Customer AI shows B2B2C companies and their channel partners where to expand existing customers and identify those at risk

- Identification of existing customers likely to buy new offerings
- Identification of existing customers likely to increase share of wallet by buying more existing offerings
- Increases individual channel partner productivity by delivering insights that guide focus to high potential new and existing customers
- Increases consistency of channel partner forecasts and revenue attainment by providing guidance on which customers are at risk of attrition and why
- Monitoring of adherence to ICP by agents
- Identification of target customers and their needs
- Enablement for agents to focus on high potential new customers including those already doing business with competitors

Customer AI for Improved Profitability

With pressure to grow sales faster than costs, leaders in B2B2C companies cannot rely solely on intuition and personal experience for decision-making. They must embrace data-driven, AI-enabled strategies to stay competitive or risk being replaced by someone more adept at deploying machine learning resources to inform their choices. This is made more urgent by the need to understand two dimensions of value creation: customers and channel partners. This is where a new type of tool is essential.

B2B2C companies must optimize profitability in two ways. One is overall corporate efficiency, where leaders understand where and how to reduce cost-to-serve for both customers and channel partners. The other is overall channel efficiency, where partners sell to more profitable customers. Customer AI makes fact-based decision making easier in both areas because it identifies areas for improvement based on real-world data. By incorporating financial metrics along with behavioral, attitudinal, and operational data from channel partners and customers, Customer AI quantifies potential impact of improvement initiatives so companies can prioritize investments. It removes subjectivity and reduces decision time, ensuring investments have tangible financial benefits.

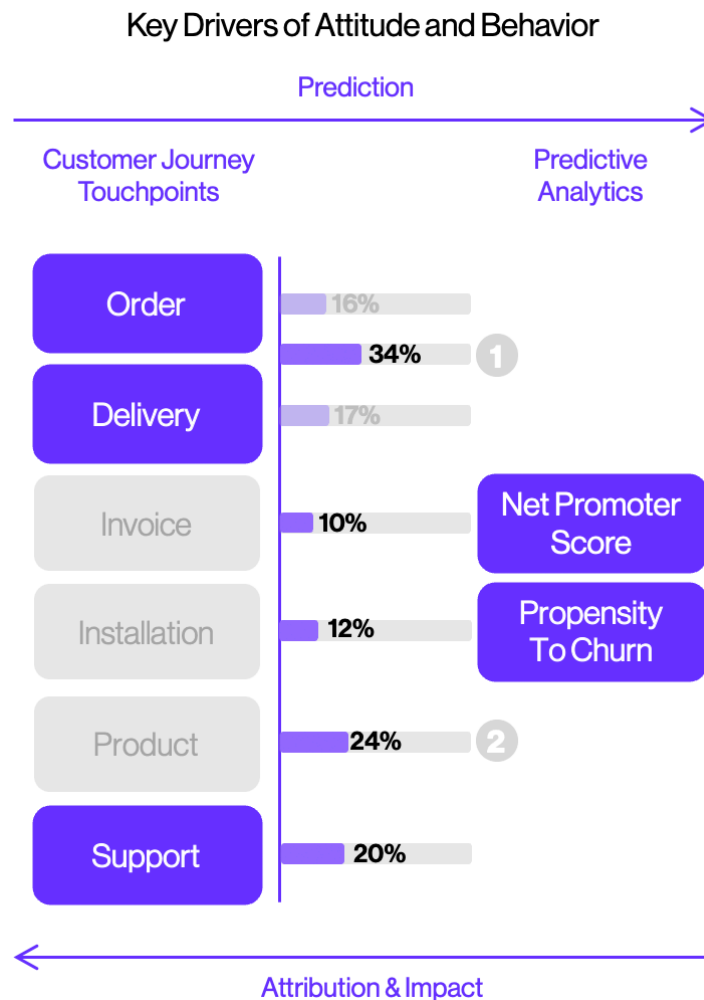
Integrating Customer AI with existing technology and data can also address fundamental efficiency challenges. AI algorithms automate data integration from channel partners and other sources, ensuring consistency and accuracy while reducing manual errors. Machine learning models identify and fix data inconsistencies, enhancing overall data quality.

How Customer AI improves corporate efficiency

- Segments customers based on cost to serve
- Shows how to resolve issues faster and more cost effectively
- Identifies recurring customer issues and their root causes
- Improves risk assessment processes
- Improves data management and access to collect, analyze, and share customer and operational insights across the business and with channel partners
- Builds organizational capabilities around making data-driven decisions
- Develops machine learning models for real-time data quality enhancement

How Customer AI improves channel efficiency

- Identifies recurring channel partner issues and their root causes
- Increases consistency of channel partner delivery of customer experience
- Creates AI algorithms for seamless agent data integration and error correction
- Improves impact of enablement investments by targeting channel partner with specific needs or challenges



Customer AI for Exceptional Channel Partner and Customer Experience Delivery

End customer experience is a critical differentiator in B2B2C companies. Swift resolution of customer and channel partner challenges drives down costs, preserves relationships, and fosters greater engagement from customers and channel partners. At the same time, data deficiencies can easily harm relationships, brand perception, and loyalty. For B2B2C companies, the added challenge is delivering consistent and high-quality experiences across both direct and channel partner touch points. Variability in service levels including online and call centers can lead to customer and channel partner dissatisfaction and attrition, reducing revenue and increasing costs.

Additionally, customers expect direct access options like instant pricing, even in a B2B2C model. Under-use of customer data and lack of access to it for channel partners makes it difficult to personalize interactions and anticipate needs. This leads to experience disconnects, which reduces new customer acquisition and existing customer retention and expansion.

Customer AI makes it easier and faster to personalize interactions and enhance engagement. By analyzing customer data in existing IT systems, AI delivers specific recommendations and tailored communications, which improves customer satisfaction. For example, Customer AI can identify the needs and preferences of specific customer cohorts that it groups together based on financial indicators and other predicted outcomes. This helps companies and their channel partners offer relevant products and services at every touch point.

AI-enabled comprehensive customer journey mapping identifies pain points and optimizes touchpoints, ensuring a cohesive and satisfying customer journey. AI-driven sentiment analysis of customer feedback across various channels offers actionable insights into customer satisfaction and areas for improvement. This continuous feedback loop replaces outdated survey processes, covers 100 percent of end customers and agents, and allows companies to adapt and enhance their offerings in real-time.

Customer AI also provides real-time data alerts to risk and opportunity for proactive intervention and relationship nurturing for customers and channel partners. This makes it easier to offer outstanding channel partner experiences by giving them the tools and insights they need to win new customers and retain and grow existing customers and reach their targets. This helps B2B2C companies deliver consistent and exceptional channel partner and customer experience without increasing costs.

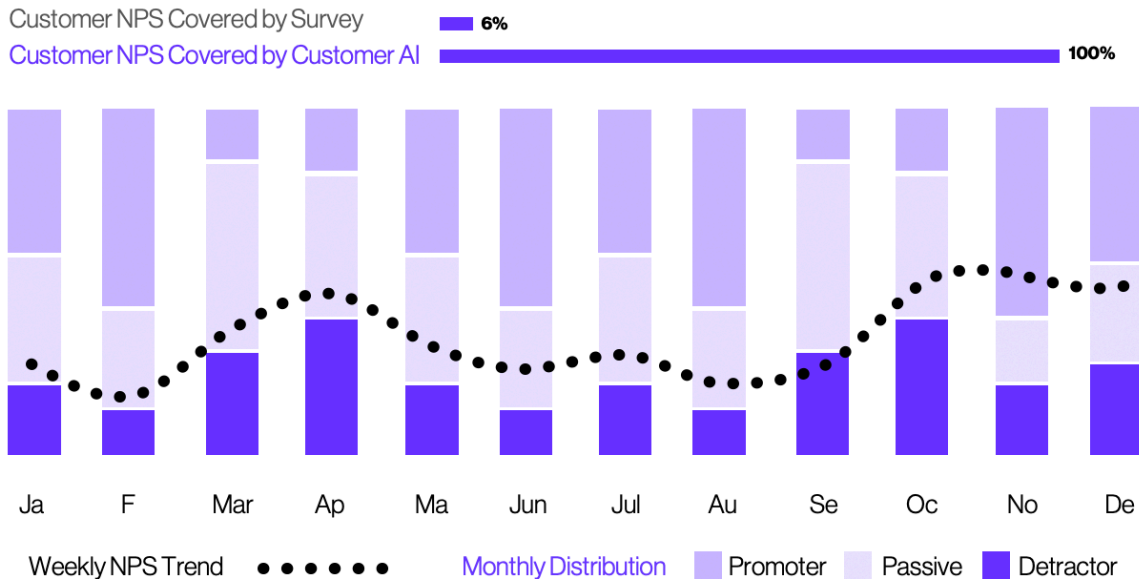
How Customer AI improves customer experience

- Deploys AI-driven customer data analytics for personalized recommendations
- Develops comprehensive AI-enabled customer journey maps
- Replaces outdated customer survey processes with data-driven analytics
- Makes it easier to visualize and share insights and alerts with channel partners to help them prioritize customer engagement
- Provides 100 percent coverage of customers to provide predictions and information in close to real time, enabling communication via tools customer-facing internal teams and channel partners already use

How Customer AI improves channel partner experience

- Replaces outdated channel partner survey processes with data-driven analytics
- Develops comprehensive AI-enabled channel partner journey maps

Complete and Continuous CX Analytics



Additional Resources

More about the OCX Cognition Customer AI platform

<https://ocxcognition.com/customer-ai-architecture/>

Best practices for Customer AI deployment

<https://ocxcognition.com/customer-ai-strategies-and-practices/>

More about the OCX Cognition team and mission

<https://ocxcognition.com/company/>

Request a demo of CustomerAI

<https://ocxcognition.com/product-demo/>

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