

Moving to More Valuable Customer Experiences:



How Transamerica Took the First Step

October 15, 2020

Agenda

- **Current State of B2B**
- **Customer Experience 3.0**
- **Transamerica's Journey**





**B2B marketing
is undergoing
a fundamental
transformation**



Rapidly changing B2B market environment



Rising customer expectations

Need to address a customer journey, not a sales funnel



New audiences + new dynamics

B2B decision-makers look and act differently than before



Criticality of 1st party data

A marketer's best tool is something they already own

**Today's B2B
customers want
valuable, frictionless
and anticipatory
experiences**



A single view of the customer is vital to deliver modern B2B marketing



An aerial photograph of a canoe on a vast expanse of turquoise water. The canoe is positioned horizontally in the upper right quadrant of the frame. Two people are visible inside the canoe, each holding a paddle. The water's surface is textured with small ripples, and a faint wake is visible behind the canoe. The overall color palette is dominated by various shades of green and blue.

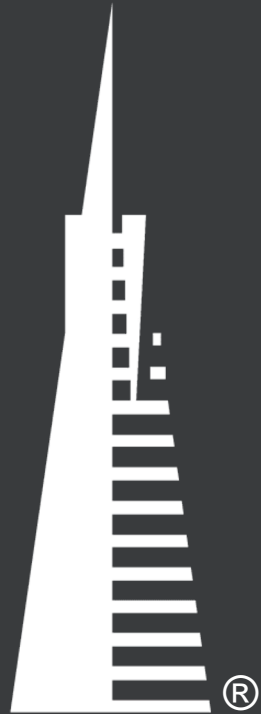
**Transamerica's
Real Time
Journey**

A high-fidelity view of our buyer to improve the customer experience





Transamerica



- **Distributed organization**
- **Multiple points of view on customer needs**
- **Disparate data sources**
- **Several CRM systems**
- **Data fragmentation**

Starting the move towards truly personalized experiences



Process Steps



Step 1:
**Identify and Integrate
Key Marketing Data Sets**

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Step 2:
**Organize In A Way That
Makes it Useful**

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Step 3:
**Understand Customer
Growth Drivers and
Barriers**



**What's
Next?**

Ultimately - deliver the *intelligent*, data-driven, customer journey

Audience Data
Expanded data triggers from 1st & 2nd, 3rd Party Data including individual behaviors



Dynamically created landing pages



Professional Social



Personalized invite to webinar based on engagement

CRM



Triggered based on the webinar registration; personalized email

Events



Attendees were matched in the CRM, creating personalized demo in the booth

Outreach



Upon call, personalized script is provided to inside sales

CRM, 2



User level insights and suggested content assets are automatically sent through Eloqua to relevant partner.

Connected TV



Message based on Exposures



Summary

- How your company can use a single customer view for a competitive advantage
- How to use qualitative and quantitative data to align your team around a unified vision
- How to aggregate data from multiple sources and systems

Get in touch

Jamie Poston

Head of Enterprise Marketing, Transamerica
jamie.poston@transamerica.com

Michael McLaren

Global CEO, Merkle B2B
mmclaren@merkleinc.com



Thank
you

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B2B