

salesforce

How a B2C Mindset + B2B Tech Creates Customer Centricity

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MERKLE

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Today's speakers



Heidi Hough

VP of Dealer Enablement,
Global Agriculture
Valmont Industries



Randy Higgins

Chief Strategy Officer
Shift7, A Merkle Company

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Mobile App under "My Surveys"**



Our Perspective

OUR PERSPECTIVE

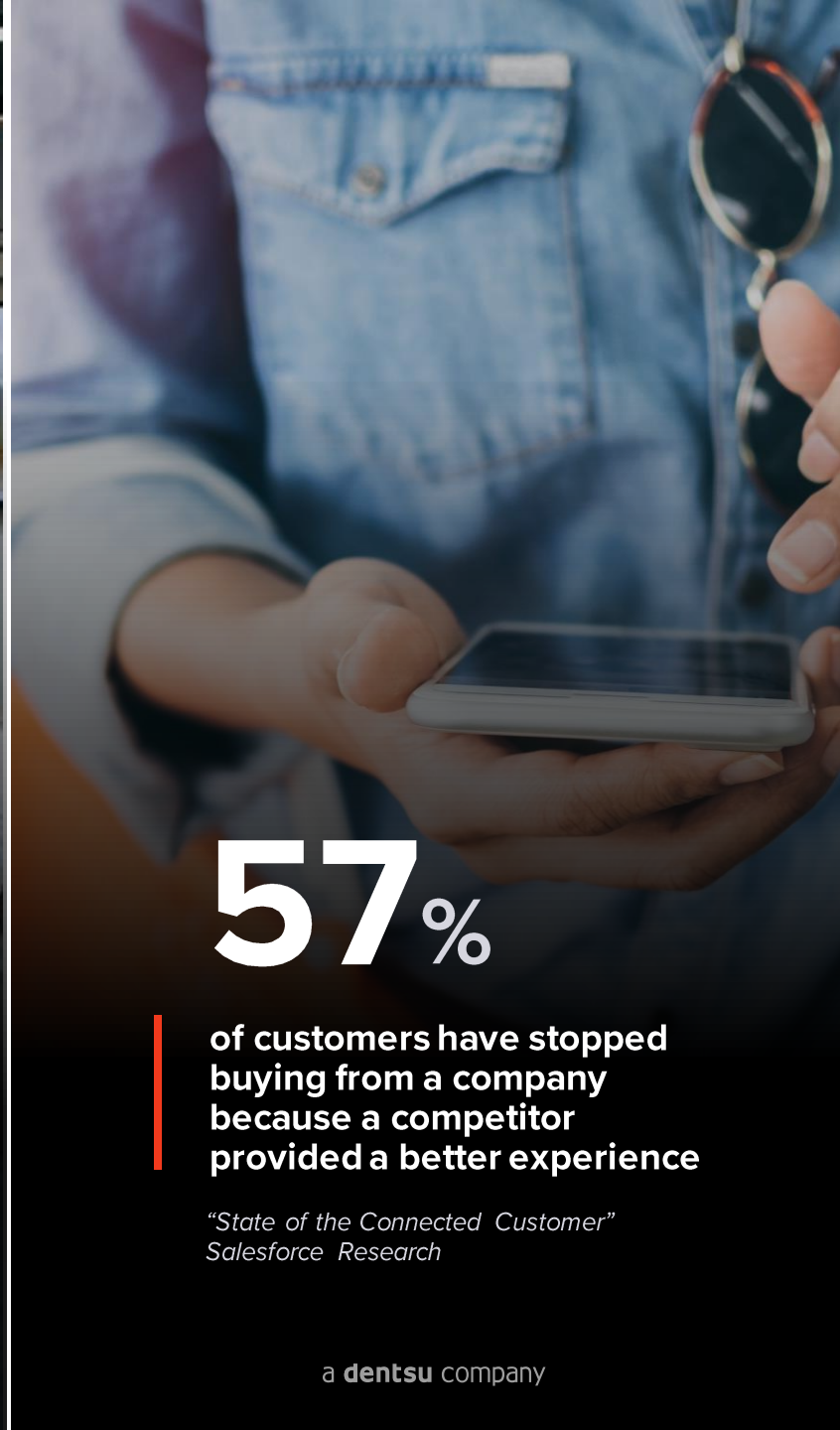
Extensive Research Shows Changing B2B Buyer Expectations





82%

of business buyers want the same experience as when they're buying for themselves.



57%

of customers have stopped buying from a company because a competitor provided a better experience

"State of the Connected Customer"
Salesforce Research



82%

of B2B buyers say they've used Amazon to make a purchase for work

Forrester / IR B2B Buy-Side Survey

We See This Trend Across Verticals

	Retail & CPG	Tech & Telecom	Media & Entertainment	Travel & Hospitality	Auto & Mfg.	FinServ & Insurance	Healthcare	Non-profit
RESEARCHING	More Human (+6%)	More Digital (+16%)	More Digital (+21%)	Equal Split (+/-5%)	More Digital (+11%)	More Digital (+7%)	More Human (+19%)	Equal Split (+/-5%)
EVALUATING / SELECTING	More Human (+13%)	More Digital (+20%)	More Digital (+12%)	Equal Split (+/-5%)	Equal Split (+/-5%)	Equal Split (+/-5%)	More Human (+21%)	Equal Split (+/-5%)
PURCHASING	More Human (+21%)	Equal Split (+/-5%)	Equal Split (+/-5%)	More Human (+17%)	More Human (+20%)	Equal Split (+/-5%)	More Human (+27%)	More Human (+13%)
PAYING	More Human (+7%)	More Digital (+30%)	More Digital (+31%)	More Digital (+8%)	More Digital (+11%)	More Digital (+28%)	Equal Split (+/-5%)	More Digital (+10%)
REQUESTING SUPPORT	More Human (+42%)	More Human (+34%)	More Human (+32%)	More Human (+44%)	More Human (+21%)	More Human (+38%)	More Human (+48%)	More Human (+42%)

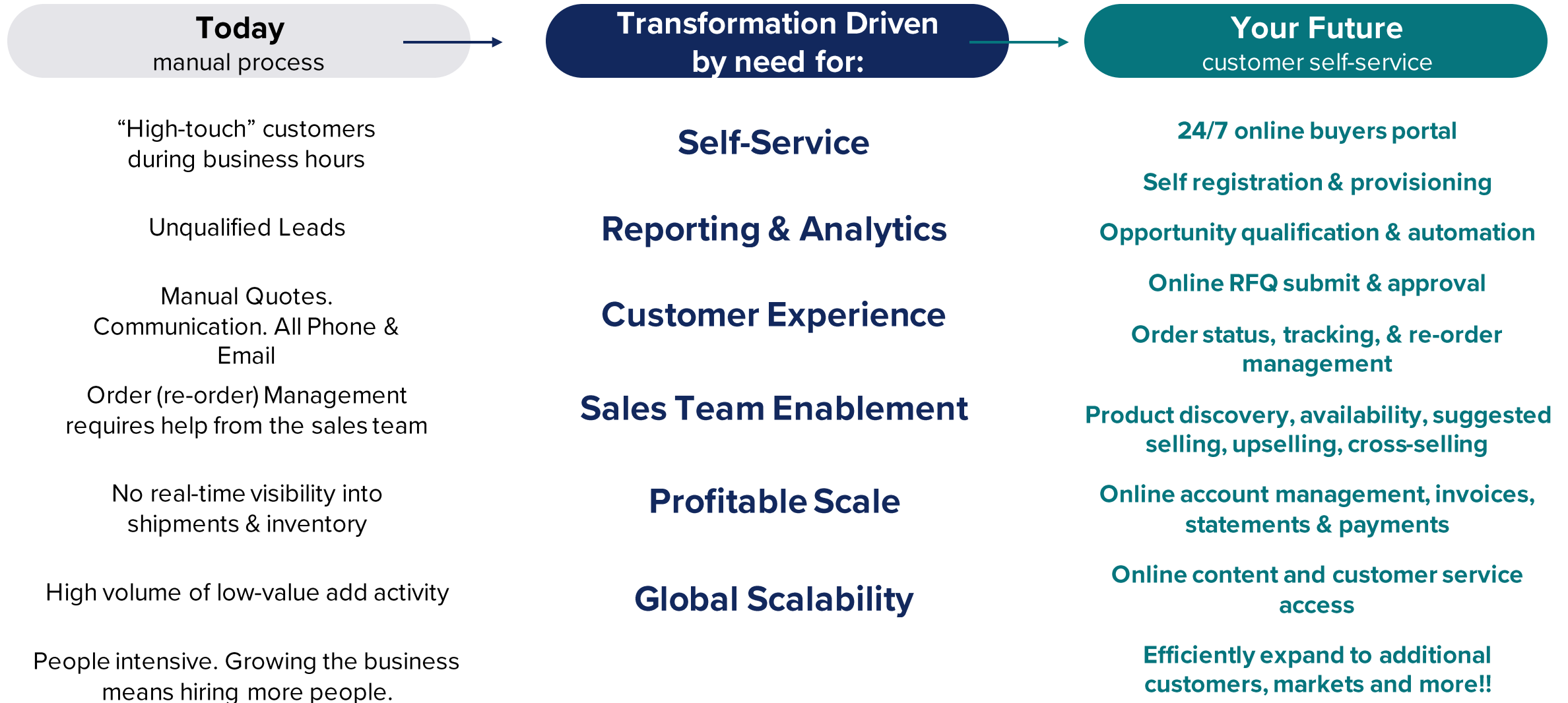
■ = Human Experiences Strongly Preferred (+20% or more)

■ = Digital Experiences Strongly Preferred (+20% or more)

Base: 2,100 Consumers

Q20. Now, when interacting with [CATEGORY] in the future, what kind of experience would you most prefer when you are engaging in each of the activities below?

What does this mean?



The Challenge

How to meet these evolving
expectations

OUR PERSPECTIVE

B2B is different...

Here's why



COMPLEX BUYERS

- Buying Workflows
- Approvals
- Purchasing Budgets
- Allocations
- Credit Terms



COMPLEX PRODUCTS

- Bundles / Kits
- Assemblies
- Parts & Fitment
- Manufacture-to-Order
- Guided Selling



COMPLEX PRICING

- Tiered Pricing
- MAP Pricing
- Contract Pricing
- Volume Break Pricing
- Stackable Promotions



COMPLEX ORDERS

- Sales Agreements
- Rebate Thresholds
- Split Shipments
- Reorder / Replenishment



COMPLEX FULFILLMENT

- Multi-Warehouse
- LTL / FTL Freight
- Commercial Carriers
- Dispatch & Routing
- ATP



COMPLEX COMPLIANCE

- Tax Compliance
- Spec Documents
- Hazardous Materials
- Export Restrictions

SHIFT7 ACCELERATES SALESFORCE VALUE ACROSS KEY DISCIPLINES

- | Buyer Portals (Commerce)
- | Marketing Cloud
- | Manufacturing
- | CPQ
- | Service, Sales & Connected Care
- | Insights & Analytics



SINGLE SOURCE OF TRUTH



Customer 360

**How does this
work in real-life?**

**How an 80-
year-old
manufacturing
brand creates
customer
centricity**





Valmont Industries

For nearly 80 years, Valmont has been a global leader in creating vital infrastructure and advancing agricultural productivity. Today, we remain committed to doing more with less by innovating through technology.

\$4.2B

Annual Sales (2023)

#1

Leader in agricultural irrigation systems with center pivot technology.

+11K

Global Employees

Commercial Digital Transformation (CDT) Vision

To become a leading and innovative agriculture enablement partner by embracing digital transformation, thereby enhancing the efficiency, sustainability, and value Valley provides to our Dealer partners.

Dealer Digital Capabilities – High Five Goals



Dealer-centric (VOD)



Integrated Online Platform



Digital Infrastructure



Dealer Enablement and Training

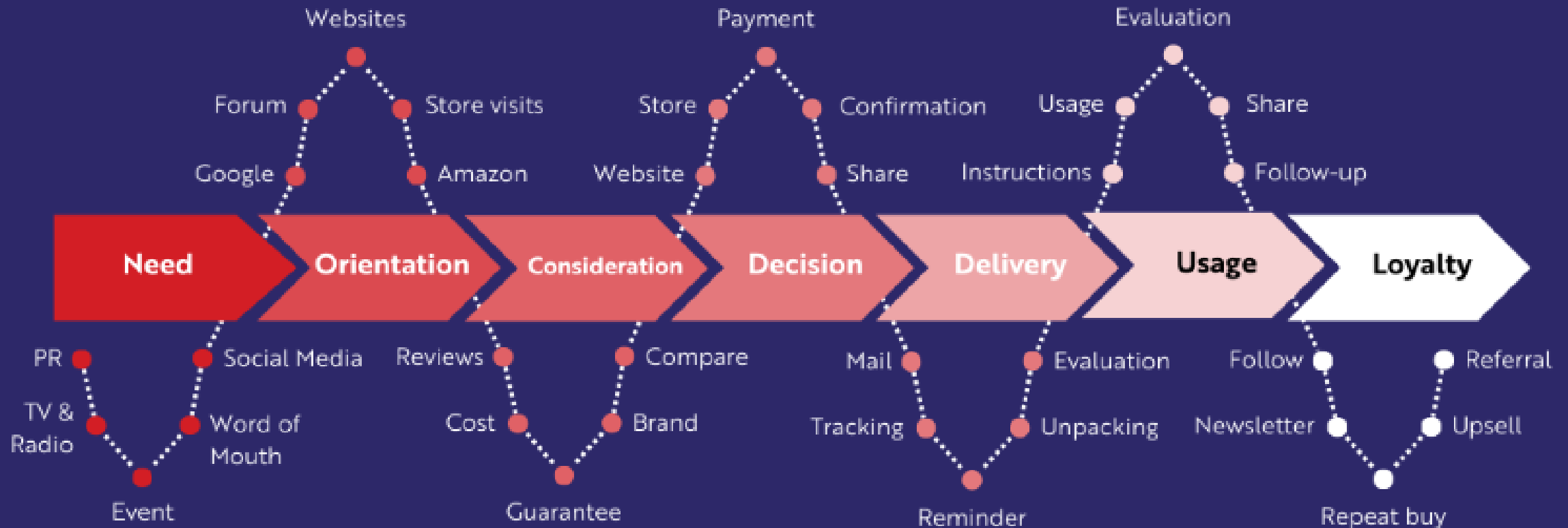


Operational Efficiency

**How does a
customer-
centric model
make a
difference?**



Customer Journey Map



Mapping the Journey

**Identifying
Parts**

**Finalizing
an Order**

**Tracking
Orders**

**Reporting +
ERP**

**Freight &
Inventory**

**Pricing &
Cost Visibility**

**Warranty &
Insurance**

**Mobile vs
Desktop**

PERSONAS **ARE NOT** DEMOGRAPHICS

Be careful relying on things like:

- Age
- Gender
- Skin-color
- Household Income
- Marital Status



king

Prince Charles

- Male
- Born in 1948
- Raised in the UK
- Married twice
- Lives in a castle
- Wealthy & famous



Ozzy Osbourne

- Male
- Born in 1948
- Raised in the UK
- Married twice
- Lives in a castle
- Wealthy & famous

* Personas shouldn't be about demographics. Personas should be about the problems & challenges people face.

**What does it
mean to be
customer-centric
in your space?**



How does the customer play a role in digital transformation?



What role does data play in digital transformation?



**What can we
learn from
DTC
commerce?**



How are you
leveraging
Salesforce on
the journey?



How are you leveraging Generative AI?



Where do you
see resistance
to digital
transformation?



**What role does
user experience
play in digital
transformation?**



How do you make
sure you have the
right customer
feedback to drive
innovation?



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Thank you

