



Creating Total Value



Connecting experience and
performance to drive growth in B2B



Contents

Foreword	03
Introduction	04
Total Experience	06
Total Performance	14
Total Value	22
Conclusion and key recommendations	27
Methodology	28





Foreword

Business-to-business (B2B) is experiencing intense digital acceleration, automation, and artificial intelligence (AI) evolution, shifting the focus from isolated interactions to unifying customer, employee, partner, and digital touchpoints into an integrated whole.

In the very near future, value may no longer be derived from experiences delivered by a single function like marketing, sales or service — or even a single company — but rather the sum of highly proactive and personalized experiences delivered by an ecosystem of entities focused on the same customer outcomes. A concept we call Total Value. This reflects the convergence of Total Experience and Total Performance: human and digital, the emotional and the measurable.

Total Experience unites customer, employee, and partner interactions into a cohesive system, enabling seamless, proactive, and personalized experiences across the entire customer lifecycle. Total Performance refers to the orchestration of inter-function and inter-company front, middle, and back-office operations to deliver tangible business results, productivity, profitability, loyalty, and growth.

Our research highlights this transitional B2B environment, revealing that progressive organizations are increasingly treating customer experience as an enterprise-wide discipline. They leverage technology not just for efficiency, but to drive better decisions, cultivate deeper relationships, and achieve sustainable growth.

Achieving B2B excellence

requires holistic thinking, integration, and cohesion. When experience and operational performance align, organizations can unlock Total Value. This report aims to inspire that shift.



Walt Becker
Global Customer CoE Lead
KPMG International



Introduction

The traditional competitive battlegrounds within business-to-business (B2B), longstanding relationships and deep product expertise, are being reshaped by digital innovation, changing customer behaviors, and the growing role of AI. No longer defined solely by contracts, product specifications, or transactional service, B2B relationships are evolving into dynamic, growth-led partnerships. The businesses of today may not look the same by 2030 and the journey from here to there requires skillful navigation.

To understand the evolution of B2B customer experience we conducted a multi-faceted approach drawing upon [KPMG's Intelligent Enterprise Industries series](#), desk research and detailed interviews with leading B2B CX executives.

The research revealed a significant transformation: companies are moving from digitization to full digitalization, with technology managing end-to-end workflows, single platforms providing real-time insights, and AI augmenting human roles and mediating transactional relationships.

This report explores B2B CX transformation from linear, sales-led processes to dynamic, data-driven journeys, where meaningful human interactions coexist with intelligent automation and proactive experience design.

We identified the following strategic trends shaping B2B CX delivery:

Total Experience

Rise of agentic and AI technologies

These play a greater part in performing routine tasks, managing workflows across functions, and accelerating insights to value on both the buy and sell side of B2B relationships.

AI-human hybrid journeys

Companies are seeking to balance intelligent automation with human experience seamlessly — the design challenge is knowing how and when to bring in each.

Total Performance

B2B as a platform

Connected, real-time customer data ecosystems. Data integration across functional silos and organizational boundaries is powering meaningful personalization, smarter account management, and predictive service.

Value streams and journeys are breaking down silos

Value streams are essential in B2B for implementing agentic as they provide a clear, end-to-end view of how value is delivered across the customer lifecycle — enabling agents to act with purpose, context, and alignment to key business outcomes.

Total Value

Customer lifetime value is becoming the ultimate metric

Measurement is shifting to evidence of business impact. Organizations are linking experience data to outcomes such as revenue retention, product adoption or usage, and customer profitability, repositioning customer success as a strategic growth partner rather than a cost centre.

From products to outcomes

The emphasis has moved from individual or bundles of products to how an ecosystem of products and services can deliver specific outcomes, reshaping roles across account teams.

Finally, we share the key steps that B2B organizations can take to accelerate their progress towards CX excellence.



Case study

Spotlight on a leading Spanish bank: A unified approach to the B2B experience

This leading Spanish bank is strategically leveraging AI to redefine its B2B client and employee experience, aiming for a “total experience” that seamlessly integrates various touchpoints. This transformation is underpinned by a centralized AI strategy, executed through platforms like Agentforce, which allows cognitive models to be applied across diverse business areas. The bank differentiates between classic AI for process optimization and generative AI for operational efficiencies, all governed by a Chief Artificial Intelligence Officer through a structured process (GUIA) to ensure alignment with strategic objectives.

Digitalization is a cornerstone of this evolution, with generative AI being deployed to enhance tasks such as visit preparation and report generation, boosting agility and efficiency for account managers. This allows managers to focus on high-value activities like complex financial decisions and personalized negotiations, while AI handles more routine aspects. The role of account manager is evolving, becoming more strategic, and supported by AI-driven insights.

The bank's innovation culture extends beyond AI deployment, fostering disruptive solutions through initiatives like the Cosmos Plan and collaborations with startups and universities. Data management is critical to their AI strategy, with an integral approach centered on migrating to a modern Google Cloud Platform architecture called DataNow. This platform ensures data efficiency, traceability, and quality, feeding decision-making across all levels: digital assistants for front office, analytical solutions like Gemini for middle office, and automated document management for back office.

Looking ahead, the bank envisions an intelligent orchestration model for B2B processes, driven by autonomous AI agents. These agents can automate complex tasks, further improve operational efficiency and deliver personalized experiences for both clients and employees, ultimately freeing managers to provide more strategic, personalized advice.



01 Total Experience





The B2B CX evolution

Across our research a unifying thread emerges; organizations that excel are no longer managing customer, employee, and partner interactions as separate disciplines. Instead, they are designing an integrated Total Experience, an ecosystem in which every stakeholder touchpoint is interconnected, informed by data, and orchestrated around shared outcomes.

Historically, B2B CX was linear, sales-led, and largely reactive, relying on human-to-human interactions. Fragmented systems, limited insights, and inconsistent experiences hindered personalization and digital trust.

Today's B2B environment, marked by digital portals and self-service tools, struggles with fragmented systems and data. Personalization, and emotional resonance, amplifies the importance of balancing digital and human interactions.

Future B2B experiences will likely blend automation with human expertise. Agentic AI can enable proactive, personalized service, powered by real-time data ecosystems for smarter decisions. Human touchpoints may be fewer but more critical, reserved for strategic partnerships, emotional intelligence, and human governance. Experience will be measured by tangible customer outcomes like retention, growth, and profitability.

B2B CX current state

The current environment is fragmented, transactional, and process-heavy, despite significant investment in digital tools. Pain points like long cycle times, manual information sharing, and reactive support persist due to legacy systems and siloed data, highlighting the urgency for transformation.

The path ahead is not about automating for efficiency alone — it is about orchestrating experiences that deliver measurable value and deepen relationships across the full B2B lifecycle.

B2B CX challenges and transformation opportunities

The table below translates these themes into a lifecycle-wide view, showing how today's pain points and tomorrow's opportunities surface at each stage of the B2B journey.

	Market and customer needs	Product and offer development	Sales and solutioning	Contracting and onboarding	Service delivery and activation	Billing and invoicing	Service and support	Renewal
Key touchpoints	Research, customer feedback, account reviews	Product configurators, digital product catalogues, co-creation	Sales rep, digital RFP platforms, solution, demo environments	Contract negotiations, e-signature, onboarding portals	Older systems, installation updates, field service visits	Billing portals, invoice emails, dispute resolution calls	Customer service hotlines, tech support, account management	Customer success reviews, usage dashboards, up-sell/cross-sell offers
Customer pain points	Generic offers, slow feedback, lack of market knowledge	Inflexible products, long lead times for new solutions	Repetitive information sharing, slow quoting	Contract complexity, onboarding delays, poor communication	Missed SLAs, coordination issues, limited transparency	Billing errors, difficult dispute resolution, unclear charges	Long wait times, multiple handoffs, inconsistent experience	Lack of insights, reactive outreach, renewal terms
Artificial Intelligence (AI) opportunities	Predictive market analysis, NLP for feedback	AI-driven recommendation engines, automated offer testing	AI sales assistants, AI proposals, chatbots for RFP queries	Smart contract analysis, AI-risk detection, onboarding bots	AI demand forecasting, automated provisioning, predictive field service routing	AI for anomaly detection in billing, virtual agents for billing inquiries	AI-driven self-service support, predictive ticket routing, sentiment analysis	Churn prediction, usage pattern analytics, AI for upsell targeting
Legacy tech stack challenges	Siloed data sources, outdated analytics platforms	Rigid product systems, long release cycles	Disconnected CRM and quoting tools, manual solution design	Paper-based contracts, fragmented onboarding workflows	Legacy OSS/BSS systems, limited integration with field ops	Batch-based billing systems, lack of real-time visibility	Disjointed support systems, outdated platforms	Static renewal processes, limited insight integration



Case study

Spotlight on Vodafone Three: Designing a signature experience around the customer

At Vodafone Three, customer experience is not a function but a culture. Dimple Ramaiya, Head of the Customer Centre of Excellence, leads the effort to design a “signature experience” that defines how customers engage with the brand. “We’re not only here to serve our customers,” she explains, “we’re here to help drive their business objectives. That’s the real measure of success.”

Her team is structured around four “towers”: customer insights, CX Fix (root cause resolution), operational readiness, and product delivery. Together they embed customer centricity from strategy to operations.

Measurement is central. Beyond survey data, Vodafone Three tracks customer sentiment through transactional net promoter score (tNPS), operational performance such as resolution time, and commercial outcomes. The company is also piloting AI-led sentiment analysis with Genesys. Ramaiya describes this triangulation as an “experience portfolio” enabling the business to link CX improvements directly to profitability.

Cultural ownership is key. Leaders across Vodafone Three co-own the signature experience, ensuring consistent delivery. “They know their teams best, and working together we can create clear action plans,” Ramaiya says.

AI and data governance underpin the roadmap, with chatbots and agents seamlessly integrated. Yet Ramaiya stresses that culture is the foundation stating, “Culture eats strategy for breakfast.” By embedding accountability, her team has created momentum. “They’re intelligent, committed, and passionate about doing the right thing for our customers.”

Vodafone Three’s approach demonstrates how embedding measurement, culture, and AI responsibly can transform customer experience into a signature brand differentiator.

Case study

Spotlight on A&O Shearman: Consistency, feedback, and the future of client experience

For Louis Roman, Managing Director responsible for clients at A&O Shearman, the true battleground in professional services is no longer expertise alone, but the quality and consistency of the client experience.

“Elite legal expertise is table stakes,” he explains. “Of course it has to be there, but it’s rarely the differentiator. What sets us apart is the experience we deliver.”

That perspective has shaped Roman’s mission: to bring a global, diverse firm together around a unified, consistent standard of client engagement. With thousands of lawyers operating across multiple jurisdictions, consistency is not a given. Clients, however, see only one firm, and they expect to be treated as such. Achieving that requires not just process alignment, but also a cultural shift, helping seasoned professionals, many with decades of experience, to appreciate that clients buy more than expertise; they buy how that expertise is delivered.

The role of feedback: Feedback is central to this transformation. A&O Shearman runs a structured programme of post-matter reviews, relationship reviews, and pitch debriefs. Yet Roman is pushing the firm further, encouraging every lawyer to see feedback as part of how they engage with clients every day. “We are a feedback driven business,” he says. “Every client comment, every adjustment they request, every sentiment expressed, it’s all feedback. The challenge is getting 3,500 lawyers to hone their antennae, to capture this feedback and leverage it to continuously adapt their service delivery. Rather than seeing feedback as the job of a central team or senior relationship partner alone.”

AI enabled legal services: Equipping people to ask better questions, listen actively, and respond with agility is key to embedding this mindset. It also aligns with the firm’s early adoption of AI. Augmenting traditional legal services with AI tools is already helping lawyers work smarter and faster, allowing clients to benefit from greater efficiency and accuracy without sacrificing human judgement.

Beyond this, A&O Shearman is also taking AI directly to market with its largest institutional clients, offering tools — such as ContractMatrix — that streamline high-volume, standardized processes traditionally handled by in-house teams. This creates cost and headcount efficiencies, enabling clients to do more with less. But the firm is clear that AI will not replace the nuanced, contextual insight that senior lawyers bring. Instead, the future lies in seamless baton passes between human and machine, identifying the moments where technology can add speed and precision without eroding trust in human expertise and judgement.

As global complexity grows, political, regulatory, and consumer attitudes now diverge sharply even between Western markets, the importance of consistent, experience-led engagement becomes ever more pronounced. In Roman’s view, the firms that succeed will be those that combine expertise with empathy, technology with judgement, and scale with consistency.



The future B2B experience: Agentic AI

Agentic AI is rapidly transforming B2B customer engagement by overcoming disconnects between functional and organizational silos. This advanced AI acts autonomously, making decisions, initiating actions, and managing workflows. It functions as a digital team member, optimizing customer journeys, accelerating routine tasks, identifying risks, and orchestrating interventions across channels.

Agentic AI will handle significant account management tasks, shifting human teams towards strategic co-creation. This evolution streamlines customer relationships, shortens sales cycles, and smooths onboarding. While agentic AI excels in low-complexity interactions, providing speed and accuracy, human empathy and judgment will remain crucial for emotionally charged or high-stakes interactions.

58 percent

report significant or extensive use of autonomous systems, 61 percent are implementing agentic AI.¹

The following table illustrates how agentic AI can transform customer experiences across the lifecycle:

Market and customer needs	Product and offer development	Sales and solutioning	Contracting and onboarding	Service delivery and activation	Billing and invoicing	Service and support	Renewal
Autonomous agents continuously scan customer behavior, network usage, competitor pricing and industry shifts.	Product agents simulate new configurations, test demand scenarios, and optimize packaging for customer segments.	Sales agents dynamically co-create solutions with enterprise buyers, simulating ROI and technical fit.	Contract agents review terms, optimize clauses for risk/reward, and generate contracts in natural language.	Delivery agents track real-time provisioning, proactively resolve roadblocks, and coordinate field agents.	Billing agents reconcile usage data, auto-correct anomalies, and communicate transparency with customer agents.	Support agents act as persistent, context-aware companions for enterprise clients.	Customer success agents monitor health, usage, and value realization, triggering targeted renewal strategies.
Agents synthesize insight into actionable portfolio recommendations and alert product owners.	Agents co-develop offers with clients based on shared intent and evolving business needs.	Agents orchestrate RFP responses across silos in real time.	Onboarding agents autonomously coordinate internal teams, systems, and third parties to streamline activation.	Multi-agent systems continuously optimize resource allocation and route service engineers.	Agents negotiate invoice adjustments based on SLAs, upsell terms or event-based pricing.	They track intent over time, learn preferences, and preemptively resolve issues.	Upsell agents collaborate with client-side digital twins to co-design growth proposals.
Collaborative agents interface with client-side systems to anticipate demand.		Multi-agent negotiation bots align product, pricing, legal, and delivery inputs to optimize win rates.				Multi-modal interaction (chat, voice, email) is seamless.	AI agents simulate and predict expansion scenarios based on market shifts.

¹ KPMG International (2025). Shaping the intelligent enterprise: Advancing beyond single-point AI use cases to agentic workflows.



Case study

Spotlight on a leading Spanish bank: Corporate and institutional banking

This leading Spanish bank, a pioneer in integrating artificial intelligence as a strategic enabler, is actively transforming its Corporate and Institutional Banking operations through a sophisticated suite of AI agents, or “Robots.”

Robot 1: Assistance for Clients. This AI agent functions as a conversational assistant, designed to integrate both internal and external information using augmented retrieval techniques. It provides precise and contextualized answers to clients and bankers alike, ensuring omnichannel, consistent, and traceable attention.

Robot 2: AI Banker. This advanced agent combines generative AI capabilities with analytics and access to unstructured data, creating a unified data environment. It empowers account managers with a comprehensive 360-degree view of clients, enabling them to identify opportunities, prepare account plans, generate automatic commercial proposals, and simulate risk or profitability scenarios in real-time.

Robot 3: Risk Robot (often working in conjunction with Robot 2) automates risk and compliance processes. These agents are linked to credit and origination, integrating financial information, risk policies, and documentary traceability.

Robot 4: Operations and processes. This supports a broader application of AI across operational workflows.

Robot 5: Software development for internal innovation and efficiency. This AI-assisted development tool streamlines software implementation by shortening development cycles and ensuring rigorous quality control.

Robot 6: Connected employee. Manages employee participation and global AI adoption.

The bank is building toward an agentic future where client agents and bank agents work cooperatively together.

Case study

Spotlight on FR Opella: Building the foundations for AI through structured digital transformation

When FR Opella spun out from Sanofi in 2025, it faced fragmented systems and shadow IT across markets. Adrien Taine, Global Digital Commerce Lead, recalls: “Local markets ran their own systems, shadow IT was everywhere, and processes were inconsistent. We knew we had to reset.”

The reset involved standardizing on Salesforce for CRM, commerce, marketing, service, and experience, alongside Snowflake and Power BI for centralized analytics. Today, this unified stack spans 15 markets, providing a common data model and omnichannel engagement.

This foundation enables cautious AI adoption. Early pilots include retail execution, sales preparation, segmentation, route optimization, and AI-driven content creation. “The point is not to chase hype,” Taine explains, “but to follow a maturity curve... from discrete use cases to enterprise-wide reinvention.”

The key challenge lies in integrating external ecosystem data, essential for proving ROI in complex B2B commerce. Taine emphasizes a customer-first approach, blending digital tools with human sales teams to build business partnerships.

For Taine, culture is as vital as technology: “Many companies are trying to do what we’ve done, but very few succeed. What makes the difference is mindset... building customer-first thinking and embedding digital as part of daily work.”

FR Opella’s case highlights the disciplined balance of structure, culture, and AI readiness as enablers of sustainable digital transformation.



The Six Pillars of Total Experience

Defined by 16 years of research and millions of evaluations, The Six Pillars of Experience provide a powerful framework for B2B customer experience excellence. These principles are vital for creating Total Experiences, reinforcing value, deepening loyalty, and driving mutual success across customer, employee, partner, and alliance interactions.



Integrity

Integrity ensures interactions uphold contractual agreements, data security, and IP rights, with transparency in pricing, SLAs, and project progress. It fosters ethical practices and regulatory compliance, building long-term trust and predictable relationships in complex B2B environments.



Resolution

Resolution prioritizes efficient problem-solving for complex B2B challenges through dedicated support, clear escalation, and proactive communication. It equips employees with tools and training, and partners with collaborative frameworks, to swiftly diagnose and remediate issues, minimizing disruptions and ensuring business continuity.



Expectations

Expectations involve meticulously defining and managing contractual scope, deliverables, and outcomes with clear communication of milestones, metrics, and responsibilities. Proactive updates on progress and risks are essential. Setting realistic, transparent expectations and consistent delivery strengthens credibility and fosters enduring business relationships.



Time and Effort

Time and Effort optimizes workflows, automates routine tasks, and provides self-service options. This includes intuitive platforms for order management, reporting, and collaboration, reducing administrative burden for clients and partners. For employees, it streamlines internal processes, freeing time for strategic engagement, ensuring efficient and productive interactions that respect all stakeholders' time.



Personalization

Personalization tailors solutions, communications, and support to an organization's industry, business model, and strategic objectives. It involves understanding their unique challenges and growth aspirations. Designing for personalization includes configurable products/services, customized reporting, and dedicated account management, addressing distinct organizational needs and priorities.



Empathy

Empathy in Total Experience relates to the understanding of clients' and partners' pressures, priorities, and strategic goals. It involves designing solutions that address pain points, anticipate future needs, and support success. For employees, it fosters understanding of client context, enabling them to be trusted advisors, building relationships based on mutual understanding and shared success.



Building B2B experience from the ground up: A hierarchy of trust and value

Exceptional B2B experiences are built on trust, clarity, and care, forming a hierarchy similar to Maslow's pyramid, where foundational expectations (clarity, reliable support, consistent delivery) underpin higher-order experiences. Net promoter scores (NPS) link basic delivery to moderate advocacy, while recognition, empathy, and personal relevance drive strong emotional loyalty and exceptional performance. Technology's impact is limited if trust-eroding events persist.

This model also applies to the employee experience and emphasizes internal culture and external delivery, recognizing that customer excellence starts with employee clarity, support, and purpose.

The Six Pillars span employee experience and customer experience





Case study

Spotlight on E.ON: Embedding customer journeys at the heart of transformation

Following the npower acquisition, E.ON UK transformed its B2B business by embedding customer journeys into operations. Charlotte Fox, Director of I&C Strategy, Customer and External Affairs, explains: “We recognized that while robust systems and processes are essential, they can also lead to an overly inward focus. To truly differentiate, we needed to shift to an outside-in perspective — thinking about everything through the lens of the customer.”

To support this shift, the organization defined five strategic goals, placing ‘putting customers first’ at the top of the list. Delivering this ambition meant going beyond isolated improvements and instead adopting a journey-led approach to customer experience. A dedicated customer journey team was established to lead this transformation, mapping and redesigning key journeys from as-is to future states.

E.ON began with the critical ‘join’ journey, and has since established flagship journeys covering complaints, billing, and, next to be implemented, customer queries. Drawing inspiration from lean and agile principles, the organization created tribes and squads focused on optimizing each stage of these journeys. Each squad is cross-functional — led by a journey owner and including members from across relevant disciplines such as digital, IT, operations, and customer service.

The emphasis is on end-to-end journeys — taking a holistic view of customer experience across all touchpoints and interactions. E.ON invested in building robust journey governance structures, ensuring that journeys became embedded business processes rather than static visualizations. Each journey has a clearly defined owner, linked KPIs, and dedicated governance boards that drive continuous improvement across the entire experience.

Monthly senior reviews align IT priorities with journey goals, integrating CX into business rhythms. “People across the business can see how their work connects to the bigger picture,” Fox notes.

AI is being piloted, such as virtual assistants in the ‘join’ journey to eliminate billing errors. Customer profiles also humanize the experience for back-office teams.

E.ON’s disciplined journey governance, cross-functional squads, and AI pilots demonstrate how embedding journeys can transform energy sector CX.



02 Total Performance





Adaptive Total Performance

In the AI-enabled world, Total Performance redefines performance beyond efficiency, focusing on an organization's ability to sense, adapt, and act with precision, aligning operational decisions and resources to customer value. It's an integrated system orchestrating financial, operational, people, innovation, and sustainability performance through data, AI, and human collaboration.

When it comes to accelerating organizational performance, the ability to "see around corners" is becoming a hallmark of high-performing B2B organizations. AI-driven forecasting platforms now integrate multiple data sources, customer orders, logistics data, weather forecasts, market signals, to generate scenario-based predictions rather than single point estimates. This allows businesses to anticipate shifts earlier and allocate resources accordingly. For example, agentic AI systems can autonomously reconcile financial data, adjust procurement schedules, or flag early warning signals in cash flow, all without human intervention.

Agentic capabilities also extend into scenario planning. Instead of waiting for end-of-quarter reviews, CFOs can run continuous simulations based on real-time data, assessing the financial implications of supply disruptions, pricing changes, or new partnership opportunities.

Operational excellence: From efficiency to intelligence

Operational performance remains the backbone of B2B value creation. Traditional approaches, Lean, Six Sigma, process automation, are now converging with AI and data-driven orchestration.

Modern B2B enterprises are deploying agentic AI to orchestrate end-to-end operations across supply, production, logistics, and service. These agents continuously analyze signal data (machine sensors, IoT devices, customer orders) to identify bottlenecks and reconfigure workflows dynamically.

By aligning workflows to common data models and shared process taxonomies, firms can scale AI across multiple business units and partners. Operational excellence becomes less about local efficiency and more about enterprise-wide synchronization, ensuring that every process contributes to consistent customer outcomes.

People performance: augmentation, not automation

B2B performance increasingly depends on how effectively humans and machines collaborate. The highest-performing organizations are not those that automate most tasks, but those that augment most people.

AI and agentic technologies are reshaping the employee experience, from onboarding to performance management. In many B2B firms, AI-powered assistants now act as real-time coaches, analyzing workflow patterns, suggesting productivity improvements, and supporting decision-making. Employees gain the freedom to focus on higher-value work such as innovation, client partnership, and problem-solving.

At the organizational level, this augmentation creates measurable productivity gains while enhancing engagement. When employees see AI as a collaborator rather than a competitor, they become more motivated to innovate and contribute.

Innovation performance: co-creating the future

B2B innovation now emerges from co-creation across partners, suppliers, and customers, forming an open network of shared data, risk, and reward. AI accelerates this by surfacing cross-organizational insights, with predictive analytics identifying unmet needs and generative design tools prototyping solutions rapidly.

Agentic AI further enables autonomous agents to act on emerging signals, recommending collaborations or initiating personalization workflows.



Case study

Spotlight on Telefonica: Elevating human-centered experiences through AI

As Telefónica evolves from telco to techco, customer experience underpins transformation. Héctor Lorenzo explains: “In B2B, it is not about removing human interaction to cut costs, but about enabling our people to have more meaningful, productive interactions with customers.”

AI augments employees, improving presales, care, and order management. A key success is AI-led order validation, ensuring billing accuracy. Another is presales documentation checks, accelerating deal flow.

Initially focused on ROI from individual use cases, Telefónica is now industrializing AI by connecting tools across the enterprise. Data readiness has been pivotal: “Data is the fuel for AI,” Lorenzo notes, with investment in a modern data management platform to close quality gaps.

Lessons from the journey include AI should augment, not replace humans; business units must lead use case selection; linking use cases multiplies value; and adoption must be cautious to protect customer trust.

Telefónica’s model illustrates responsible, human-centered AI deployment in complex B2B ecosystems.

Case study

Spotlight on Iberdrola: Coordinating a complex ecosystem through CX leadership

Raquel González López leads Iberdrola’s CX team with a mandate: “Improving experience is not the job of one department, it is the responsibility of the entire organization.”

A major challenge is ensuring third-party providers meet Iberdrola’s standards. Auditing, training, and cultural alignment ensure consistency. An online learning platform provides real-time updates so providers and staff can respond accurately and consistently.

Cross-functional collaboration is embedded, with CX represented in every process definition. Technology supports but does not dominate; AI, chatbots, and analytics simplify interactions while humans provide reassurance for complex needs like solar installation. “Technology should solve a real problem, not just be something ‘cool’,” González remarks.

Ecosystem thinking underpins Iberdrola’s role in sustainability, orchestrating solar, mobility, and energy efficiency services. Data enables customers to make informed, sustainable choices. “It’s essential that companies integrate sustainability and ethical practices into customer experience,” González stresses.



Sustainability performance: Intelligence for a greener value chain

Sustainability has evolved from compliance measures into a performance discipline. B2B clients now expect their suppliers to demonstrate measurable environmental, social, and governance outcomes, verified through transparent data and auditable AI systems.

AI plays a pivotal role in tracking and optimizing sustainability performance. Machine learning models can forecast emissions across complex supply chains, while agentic AI agents autonomously identify opportunities to reduce waste, reroute logistics, or shift production to renewable-powered facilities. In parallel, generative AI is being used to simulate the carbon impact of design changes before they happen.

Sustainability is also a key dimension of Total Performance because it directly influences cost, reputation, and resilience.

Data and AI: The foundation of Total Performance

Data is the connective tissue for Total Performance across financial, operational, people, innovation, and sustainability. However, B2B enterprises face fragmentation from siloed data, inconsistent standards, and limited trust in AI. Achieving Total Performance requires connected intelligence: a single performance fabric with real-time data, trusted AI frameworks, and thoughtful governance models.

Agentic architectures link predictive models to autonomous execution, enabling systems to monitor inventory, detect risks, and trigger collaborations while updating forecasts. Leadership defines performance intent, guiding autonomous learning systems. A key challenge is data access, quality, and management, as fragmented customer data across silos limits visibility and creates disjointed client experiences.

In many B2B organizations, customer data is still trapped in functional silos, scattered across marketing systems, sales platforms, service logs, product databases, and finance platforms. This fragmentation limits visibility, stifles coordination, and creates a disjointed experience for clients whose expectations have been reshaped by consumer-grade digital interactions.

But a wave of forward-thinking companies are breaking down these silos, leveraging integrated data to power predictive service models, delivering hyper-personalized experiences, and enabling smarter, more responsive account management.

66 percent

have found data access, quality and management is the most significant challenge to a seamless experience.²

Case study

Spotlight on Siemens: From B2B to B2Brilliant

Heather Simon, VP of Digital Experience, anchors Siemens' strategy on an "outside-in" philosophy: "We always start with the customer and work back."

Siemens adapts B2C-level expectations to industrial B2B, embedding care and personality into digital tools. Customer journey design precedes technology implementation, ensuring alignment with buyer goals. Cross-functional collaboration via Siemens Xcelerator enables joined-up outcomes.

AI adoption is shifting from internal efficiency to customer-facing value. Siemens has introduced AI-augmented search and envisions agentic AI delivering needs-based experiences. "Content will find the customer, driven by their needs in real time," Simon says.

Future scenarios include "agent-to-agent" collaboration between Siemens and clients, requiring new skills and mindsets. The Industrial Metaverse and Industry Foundation Model extends this, enabling non-experts to run factories via natural language.

Simon states: "We're helping our customers embed best practice into every layer of their operation. It's about using digital tools not just to visualize the future, but to build it, better."

² KPMG International (2025). Shaping the intelligent enterprise: Advancing beyond single-point AI use cases to agentic workflows.



At the heart of this shift is the recognition that B2B customers are not just accounts; they are evolving relationships that span complex journeys. When data is unified across functions and touchpoints, businesses can move beyond reactive support to anticipatory engagement. For example, Salesforce uses its own platform to centralize data from marketing, service, usage telemetry, and product roadmaps — enabling account managers to identify early signals of churn, trigger proactive service interventions, and tailor renewal strategies based on real-time product engagement patterns.

Similarly, global manufacturer Schneider Electric integrates customer data from field devices, IoT sensors, customer service portals, and enterprise systems to deliver predictive maintenance and lifecycle support. This approach not only prevents outages but transforms the service relationship — from “we’ll fix it when it breaks” to “we’ll ensure it doesn’t break in the first place.” It’s a shift made possible by shared data platforms that link engineering, operations, and customer service into a cohesive value stream.

Towards hyper-personalization

Hyper-personalization, a key outcome of data integration, extends beyond mere naming to understanding B2B business context, intent, urgency, and role. Integrating CRM, ERP, and service data with behavioural analytics and AI enables tailored experiences at scale, like personalized pricing and onboarding paths, boosting engagement and satisfaction.

Integrated data also empowers account managers with 360-degree client views via real-time dashboards, providing actionable insights for proactive engagement and identifying upselling opportunities.

For example, Adobe provides personalized pricing, onboarding paths, and resource recommendations based on a customer’s maturity, usage history, and industry-specific needs. This level of precision strengthens engagement, reduces time-to-value, and boosts customer satisfaction.

Case study

Spotlight on Bupa: Elevating corporate healthcare through connected care and human-centric AI

Bupa is redefining corporate healthcare by integrating technology, empathy, and medical expertise into what it calls “connected care.” Craig Goddard, Global Group Customer Director, emphasizes the global mission: “Whether it’s Europe, Latin America, Asia Pacific, or the UK, our priority is to understand the moments that matter most to customers and act on feedback to improve experiences.”

Traditionally known for private medical insurance, Bupa is shifting toward preventative and personalized healthcare. Employers now want holistic wellness rather than just treatment coverage. Co-designed services, such as on-site clinics at large multinational clients, demonstrate Bupa’s ability to align healthcare delivery with corporate culture. As Goddard explains: “That’s personalization at scale. We don’t just deliver a standard Bupa model; we shape an experience aligned with the employer’s values.”

Personalization drives the strategy. By blending analytics with clinician empathy, Bupa tailor's services to workforce demographics, digital risk profiles, and employee communication preferences. “We use data to anticipate needs, but we also listen closely,” Goddard notes. AI plays a critical role, particularly in markets like Spain where innovation is trialed. It supports triage, collects medical history, and prepares clinicians, but Bupa ensures human oversight for sensitive cases. “It’s about knowing when to automate and when to introduce the human touch,” Goddard explains. Bupa also orchestrates experiences across ecosystems. Customers expect seamless care even when moving between Bupa and partners, so shared data and AI-enabled summaries keep clinicians focused on outcomes, such as returning to sport, rather than isolated processes.

Bupa’s transformation illustrates how AI efficiency, personalization, and human empathy can converge to redefine healthcare for corporate clients worldwide.



B2B as a platform

The traditional B2B model is evolving into 'B2B as a Platform,' creating interconnected ecosystems where companies, partners, and clients co-create value through shared data and intelligence. Businesses become integration layers, connecting value streams into seamless digital-human ecosystems, exemplified by firms like ADP and Telefónica. These platforms enable real-time collaboration and decision-making, extending the client's operating model.

Experience and ecosystem are inseparable, with agentic AI driving self-optimizing networks. 'B2B as a Platform' embodies Total Value, where customer journeys, employee empowerment, partner collaboration, and digital orchestration create adaptive enterprises that continuously learn and deliver value.

Case study

Spotlight on Maersk: Making shipping containers around the world as easy as buying an airline ticket

Maersk, the global logistics and shipping leader, has reimagined its customer experience by embedding AI across its value chain. Traditionally, the shipping industry has been characterized by opacity, fragmented communication, and a lack of end-to-end visibility. Maersk addressed these pain points by developing a digital ecosystem powered by AI, enabling customers to track and manage shipments with precision and transparency. Using predictive analytics, Maersk provides real-time insights into supply chain disruptions, offering customers proactive rerouting options and estimated time-of-arrival updates.

Their AI-powered customer platforms have replaced manual, reactive service with anticipatory support, reducing delays and cutting administrative burden for clients. For many global shippers, this shift has turned logistics from a black box into a predictable, manageable, and customer-centric service.

The company's investment in AI agents and microservices architecture has further elevated personalization and responsiveness. Maersk leverages natural language processing to improve digital interactions, enabling conversational interfaces that allow customers to query shipment data, resolve issues, and manage logistics without needing to navigate complex systems.

Behind the scenes, AI-driven orchestration stitches together processes across booking, documentation, and customs clearance, accelerating traditionally slow workflows. Customers experience smoother handoffs across functions and faster resolution of problems, often before they arise. By combining predictive intelligence with a composable technology backbone, Maersk has built a service model that not only optimizes operational efficiency but also delivers confidence, clarity, and trust to customers navigating the complexity of global trade.



Orchestrating cross-functional processes through value streams

B2B customer experience, a complex network of activities across marketing, sales, service, supply chain, and financial operations, is often hindered by isolated optimization and departmental silos. This leads to customer friction, inconsistent messages, and fragmented support, with employees navigating internal hand-offs instead of solving client problems.

Our research indicates slow progress in CX quality due to fragmented front offices, conflicting KPIs, and siloed data. Disconnects between front, middle, and back offices create significant barriers to seamless CX. Front-office teams prioritize short-term sales, while middle and back offices struggle with speed, transparency, and internal efficiency, resulting in disjointed customer journeys, eroded trust, and undermined digital investments.

This fragmentation undermines customer trust and creates hidden costs: duplicated effort, slow response times, missed opportunities, and experiences that feel disjointed or impersonal. Even when companies invest in new platforms or analytics, they often layer them on top of outdated processes, further complicating the landscape. The result is an organization that struggles to sense customer needs in real time or respond with precision.

AI, and, increasingly, agentic AI, offers a way through. Progressive B2B brands are breaking this pattern by re-orienting their operations around value streams, end-to-end flows of work that create value for a specific customer or market segment. Value streams provide a unifying lens for orchestrating processes across the enterprise, connecting the front, middle, and back office around a common purpose.

Key elements of this approach include:

- **Mapping value streams to customer journeys:** Defining how leads are generated, opportunities nurtured, contracts fulfilled, services delivered, and renewals managed as one integrated flow.
- **Orchestrating cross-functional activity:** Marketing, sales, service, operations, and finance align to the same value stream, supported by shared KPIs such as customer lifetime value, on-time delivery, and experience quality.
- **Leveraging agentic AI and automation:** Intelligent agents monitor signals along the value stream, predict customer needs, and trigger coordinated actions — for example, reprioritizing production when a high-value order is at risk or proactively scheduling service before an issue escalates.
- **Continuous improvement loops:** Because value streams expose where delays, errors, or unmet needs occur, teams can systematically eliminate waste, enhance speed, and personalize experiences.

Adopting a value stream approach enables B2B firms to orchestrate cross-marketing, sales, and service processes with supply chain discipline. This creates a cohesive experience layer, providing customers with timely, informed responses and empowering employees to focus on outcomes. Ultimately, value streams help transform CX into a scalable enterprise capability, fostering resilience, growth, and trust across geographies, product lines, and partner ecosystems.

AI and agentic AI offers a way through

Progressive B2B brands are breaking this pattern by re-orienting their operations around value streams, end-to-end flows of work that create value for a specific customer or market segment.³

³ KPMG International (2025). Shaping the intelligent enterprise: Advancing beyond single-point AI use cases to agentic workflows.



Case study

Spotlight on American Express: The relationship between human expertise and intelligent automation for businesses

American Express has long been an AI pioneer, embedding machine learning into underwriting, fraud prevention, onboarding, and support for more than a decade. Today, the company is entering a new phase, generative and agentic AI, focused on personalization, speed, and simplicity. Widad Chaoui, SVP Corporate and B2B Product Management says: “We’re meticulously reviewing our workflows to see where generative AI can add value. We’re looking at infusing intelligence into the customer’s experience – not just automating tasks but helping users get to outcomes or decisions faster.”

Business customers now expect the same seamless experiences they enjoy as consumers, such as intuitive interfaces, instant visibility, and frictionless control. American Express has responded by creating a suite of integrated digital solutions covering spend management, supplier payments, and third-party software integrations. “We want clients to manage cards, control aggregated spend and connect with their software ecosystem all through a single interface.”

Amex’s commercial services organization has also evolved culturally to embrace the pace of technological transformation. Many of its teams, influenced by recent fintech acquisitions, are digital-first and early adopters of emerging technologies. “AI is a transformative tool, much like mobile or cloud was a decade ago,” Widad reflects.

“The question isn’t whether businesses will adopt AI and agentic solutions, it’s how fast they’ll get comfortable with them,” Widad observes. She likens it to the mobile revolution: “At first, only a few used mobile apps for business, then suddenly it became second nature. We think AI will follow a similar curve.”

Interestingly, Widad predicts that in this cycle, B2B may lead rather than lag. “The efficiency gains are so clear that mid-sized and growing businesses might adopt faster than consumers did. It’s a competitive imperative now.”



03

Total Value





The evolving nature of B2B purchasing

B2B purchasing is undergoing a profound transformation, driven by evolving buyer expectations, complex decision-making units, and the pervasive influence of technology, particularly Gen AI.

Modern B2B buyers, often digital natives, now expect a seamless, personalized experience akin to B2C interactions, conducting extensive online research before engaging with sales teams.⁴ This shift necessitates vendors to prioritize speed, transparency, and clear value propositions beyond mere functional fit.

Purchases are no longer solitary decisions; they involve multiple stakeholders across various departments, including technical, financial, and executive roles, with external experts further shaping opinions extending the buying group to 6–10 participants.⁵ This intricate “buying group” dynamic demands tailored engagement strategies and a focus on building consensus among diverse perspectives.

Gen AI is rapidly becoming central to research and evaluation, with a significant percentage of buyers utilizing these tools for information gathering. For example, in the tech industry, 80 percent of buyers use Gen AI for vendor research.⁶ However, concerns about misinformation highlight the critical need for vendors to embed accurate, validated insights into AI-powered channels, moving beyond traditional SEO tactics.

The focus has broadened from a narrow point-of-sale customer experience to a holistic buyer experience across the entire journey, with procurement teams now playing a strategic role. Furthermore, modern buying journeys are heavily influenced by peer validation, industry analysts, digital communities, and AI recommendations.⁷

Mapping these influencer ecosystems and collaborating with credible voices is essential for vendors. Looking ahead, AI is poised to act as sophisticated buyer agents, comparing suppliers and filtering options, making it imperative for vendors to ensure their data is consistent, accurate, and readily accessible to both human and AI systems.

Case study

Spotlight on Shopify: Redefining B2B eCommerce

Shopify is rapidly reshaping B2B eCommerce. Dwayne Doshier, Partner Growth Architect, likens growth to a rocket ship: “We have enjoyed seven consecutive quarters of 100 percent YoY revenue growth for B2B.”

The ambition is to bring Shopify’s trademark simplicity to complex B2B markets. Its platform supports everything from small entrepreneurs to large enterprises requiring APIs, catalogue management, and advanced pricing.

Empathy is core. “It requires empathy to understand and help complex organizations,” Doshier says. Shopify’s “jobs to be done” approach ensures workflows align with real buyer needs.

The composable architecture underpins this, with 8,000 partner apps and 200 first-party integrations providing scalability and flexibility. Shopify Collective enables merchants to dropship from within its ecosystem, unlocking new revenue streams.

Looking ahead, autonomous commerce is rising, with auto-reordering workflows reducing costs. AI is central too: Sidekick and Magic support merchants with insight and content creation. Shopify is a leader in reaching customers on new AI transaction touch points, and our Universal Commerce Protocol enables selling on ChatGPT, Google Gemini, and Microsoft Copilot.

Shopify positions itself not only as a platform but as a growth partner, bringing simplicity, empathy, and innovation to enterprise-scale commerce.

⁴ ClientPoint. (2024, January). White paper: The evolution of the B2B consumer buyer.

⁵ Sopro. (2025, July). B2B buyer statistics and insights.

⁶ Demand Gen Report. (2025, November). GenAI overtakes search for a quarter of B2B buyers: Report.

⁷ Munro Agency. (2025). The B2B buyer journey.



The shift from products to outcomes

Traditional B2B models, focused on transactional sales and revenue, are insufficient. Buyers now seek partners for strategic outcomes, expecting proactive collaboration, continuous improvement, and accountability. This shift is driven by digitalization enabling real-time outcome measurement, AI/automation optimizing value over time, competitive pressure on customer outcomes, and buyer preference for deeper, value-delivering partnerships.

Case study

Spotlight on HPE: Engineering customer success for the AI era

For Simon Creasey, VP of Customer Success and Lifetime Value, HPE, customer success is a commercial imperative. “Retention and growth go hand in hand. When customers are realizing value, they stay, and they buy more.” Creasey’s global team integrates Salesforce CRM with HPE’s systems to monitor adoption and customer health, enabling proactive interventions. HPE GreenLake, its as-a-service platform, exemplifies this success with higher retention and growth rates driven by predictive support. “It’s about seeing the problem before the customer feels it,” Creasey explains.

He distinguishes customer experience from success: “CX spans the full brand journey, while CS focuses narrowly on post-purchase outcomes.” This outcome-driven mindset drives HPE’s strategy. Creasey critiques the inefficiency of humans as “middleware.” Instead, AI and simplification should free staff to solve complex issues. He sees agentic AI as a future coach: “Imagine an AI agent that checks your customer success plan, rates it, compares it to best practice, and gives you suggestions in real time.”

For HPE, success means more than service; it means enabling outcomes, preventing problems, and empowering people.

Case study

Spotlight on a leading global business services provider: Turning client success into a strategic engine

A leading global business services provider recognized that traditional transactional relationships were no longer sufficient. Clients sought genuine partnerships that delivered measurable business outcomes, not just products. The firm needed to evolve its operating model to ensure a cohesive, outcome-driven client experience that could also scale efficiently, particularly in complex areas like human capital management, payroll, and compliance.

The organization embarked on a strategic initiative to re-engineer its client success framework, repositioning it as a core driver of growth. Internally, the firm unified its client-facing teams, breaking down departmental silos. Client success executives and managers now operate as a seamless unit, ensuring that clients experience a single, cohesive partnership rather than fragmented interactions.

Advanced, AI-enabled platforms were introduced to oversee and optimize complex workflows. The firm successfully piloted autonomous agents to manage routine processes, significantly reducing the administrative burden on clients and liberating human professionals to concentrate on higher-value strategic and relationship-building activities. This allowed human talent to focus on interpreting complex scenarios and fostering deeper client relationships.

Client advisory boards were transformed from periodic consultations into dynamic, continuous forums for co-creation. This direct engagement highlighted a critical client demand for integrated “one data” solutions. In response, the firm is developing agentic AI capabilities to curate disparate insights, such as those from human capital management, regulatory compliance, and financial operations, into a unified, actionable view for clients.



The convergence of account management and customer success around outcomes

Account Manager (AM) and Customer Success Manager (CSM) roles are converging due to recurring revenue models, evolving customer expectations, and AI insights. Historically, AMs focused on revenue, CSMs on adoption. Now, both deliver outcomes, reduce churn, and drive expansion, requiring data literacy and consultative skills. Automation frees them for strategic customer engagement and co-creation. AMs are becoming strategic partners, CSMs outcome architects. This hybridization, though blurring boundaries, reflects a shift to customer lifetime value. Successful organizations will balance advocacy and revenue, personalize engagement, and orchestrate across functions, leading to unified, lifecycle-focused roles centered on value creation, retention, and growth.

Driver	Impact/tension	What it demands
Recurring revenue/subscription economics	The lifetime value of a customer becomes critical; it's not just about acquiring new business.	Both AMs and CSMs are being measured on retention, expansion, and reducing churn.
Customer expectations for strategic partnerships	Customers don't just want vendor-supplied features, they want help getting business outcomes, advisory value, and proactive guidance.	Increased consultative, value-focused engagement from both AMs and CSMs.
Data, analytics, and "customer health" insight tools	You can't just rely on gut or anecdote; predictive models, usage data, and signals are now table stakes.	Roles must be more data-literate and able to act from insights.
Automation, AI, and digital channels	Some routine tasks, alerts, low-level support, health check reminders, can be partially automated or augmented.	Unlocked capacity for human roles to focus on strategic, high-touch activities.
Blurring of growth/retention functions	In many companies, expansion (upsell, cross-sell) is no longer the sole territory of sales/AM. Customer success teams are increasingly owning or influencing it.	Employees in these roles must balance advocacy/trust with revenue responsibility.
Organizational alignment and cross-functional demands	To deliver customer outcomes, CSMs and AMs must work tightly with product, support, marketing, operations, etc.	Strong collaboration, influencing skills, ability to "connect the dots" across functions.
Smaller companies/leaner operations	Some organizations can't afford fully separated AM and CS teams; roles must be more hybrid.	Individuals may wear both hats (strategic customer success + revenue growth).



Case study

Spotlight on SAP: A new role for AI-enabled account managers

SAP's CX team explained their unified "total experience" strategy which centers on a universal AI entry point, Joule. "Joule is our AI copilot, which helps customers, employees and partners execute transactions across SAP applications."

Joule is grounded in harmonized business data and uses collaborative AI agents to automate cross-functional workflows spanning SAP and third-party systems. This connective tissue removes siloed application experiences and enables SAP to deliver consistent outcomes throughout the B2B client journey.

Business AI and Joule handle most routine customer service interactions independently. Questions like "*Where's my order?*" or "*Can I change my delivery address?*" will get instant answers from Joule without waiting for a human. Customers get 24/7 support with immediate resolution for standard requests, while human agents focus on complex or sensitive situations.

For account managers, this is where AI assistants in Joule become game changing. These aren't just tools; they're role-based partners designed specifically for jobs like Account Manager or Customer Service Representative. Each account manager gets their own AI assistant that understands their role and continuously monitors their entire portfolio, surfacing what needs attention: "Customer A hasn't ordered in six weeks" or "Customer B just placed their largest order ever."

Here's the key difference: account managers don't coordinate multiple AI agents or figure out which tools to use. They simply ask their AI assistant through Joule in natural language — "*What accounts need my attention?*" or "*Help me prep for my call with Customer X.*" The assistant coordinates multiple agents in the background — checking order history, analyzing payment patterns, reviewing service tickets — and brings back one comprehensive answer. The complexity stays hidden.

This allows account managers to manage larger portfolios while being more attentive to each customer. Their AI assistant handles continuous monitoring and routine tasks, so they focus on strategic conversations and relationship building instead of administration.

Rethinking pricing models

As the emphasis shifts to outcomes, pricing models must evolve as well. The traditional one-time sale or subscription is giving way to value-based models, where fees are linked to the actual results delivered. Examples include:

- Performance-based contracts, where pricing depends on achieving defined metrics (e.g. productivity gains, energy savings, revenue uplift).
- Shared-risk/shared-reward models, where both customer and provider benefit from success and share in downside risk.
- Pay-per-use or consumption-based pricing, enabled by digital monitoring of service usage and impact.

These models align incentives between customer and provider, fostering deeper collaboration and long-term relationships. They also require new capabilities: data transparency, outcome measurement, and robust governance frameworks.

Redefining success

As this shift progresses, firms must also rethink how they measure success. Traditional metrics like product sales, market share, and customer acquisition are giving way to more sophisticated indicators of value:

- **Customer outcomes** — improvements in the customer's own performance or competitiveness.
- **Customer lifetime value** — reflecting deeper, more enduring relationships.
- **Ecosystem value contribution** — the ability to drive growth across the wider partner network.

Importantly, this new model also encourages co-creation, engaging customers as active participants in designing and refining solutions, and further strengthening relationships. Agentic AI will further enhance this model, enabling continuous measurement of customer outcomes, adaptive personalization of services, and dynamic optimisation of ecosystem interactions. AI agents will not just support the customer experience but actively drive it.



Conclusion and key recommendations

The future of B2B excellence lies not in optimizing isolated interactions, but in unifying customer, employee, and partner touchpoints into an integrated, intelligent whole — what we term **Total Experience**.

This systemic approach, underpinned by operational Total Performance and ultimately delivering Total Value, represents a new benchmark for success where emotional connection and enterprise performance reinforce one another.

Our research reveals that leading organizations are moving beyond reactive service and transactional engagements towards proactive, anticipatory, and outcome-focused experiences. The shift from manual, siloed, and sales-led processes to a hybrid, data-driven journey is critical. This journey is characterized by fewer, yet more meaningful, human interactions coexisting with intelligent automation and proactive service design. Agentic AI emerges as a powerful enabler, capable of overcoming silo disconnects, orchestrating complex workflows, and fundamentally shifting the role of human teams towards co-creating value.

Ultimately, the next frontier of B2B customer experience will be defined through a holistic view, designing every experience with empathy, intention, and value at its core. The journey demands a strategic reframe of customer experience from a service function to a strategic growth enabler, focusing on AI-augmented capabilities, unified value streams, evolved measurement models, a culture of orchestration, digital empathy, and championing customer outcomes.

To prepare for this future, B2B CX leaders must reframe the role of customer experience from a service function to a strategic growth enabler. The following priorities will likely be essential:

- 1 Build AI-augmented CX capabilities**
Invest in conversational, empathic, and agentic AI that can support hybrid customer journeys and client outcomes. Start with high-value use cases — onboarding, renewal risk detection, or issue triage — and scale from there.
- 2 Unify experience around value streams and journeys**
Tear down silos between marketing, sales, service, and success. Design around value creation for the customer, not internal structures. Use integrated value streams and customer journeys to orchestrate action.
- 3 Evolve your measurement model**
Move beyond traditional CX metrics. Track trust, stakeholder-level satisfaction, value realization, and journey performance. Use the Six Pillars as a dynamic maturity model to guide progress.
- 4 Create a culture of orchestration, not ownership**
Shift mindsets from “my customer” to “our experience.” Use shared goals, cross-functional teams, and intelligent routing to ensure the customer receives the best action from the best resource — human or AI.
- 5 Prioritize digital empathy and emotional design**
As AI takes on more interactions, ensure it reflects your values and voice. Design with emotional awareness, clarity, and transparency to build — not break — trust in the moments that matter.
- 6 Champion customer outcomes, not just experiences**
Embed your team deeper into the customer’s business. Make their success your success. Measure your impact not just on satisfaction, but on growth, retention, and transformation.

The next frontier of B2B CX will not be defined by touchpoints, but by trust, outcomes, and orchestrated intelligence. It will be driven by organizations that understand the power of combining human insight with AI capability, and who design every experience, digital or human, with empathy, intention, and value at its core.



Methodology

Our methodology for understanding the evolution of AI within the B2B landscape has drawn upon the extensive research undertaken for the [KPMG Intelligent Industries series](#) supplemented by interviews with executives in leading B2B companies. The research therefore employed a multi-faceted approach, including:

Quantitative and qualitative data collection

Insights gathered through the Intelligent Enterprise Industries series based on a survey of over 1,400 AI executives representing leading companies across eight industries.

This provided a broad understanding of how leaders are navigating AI opportunities and challenges.



Targeted company analysis

In addition, we conducted detailed desk-based deep dives into 50 prominent global B2B companies.

This was further enriched by direct interviews with executives from 17 of these organizations, allowing for nuanced, industry-specific insights.

We express our sincere appreciation to the organizations who contributed to this report for their invaluable contributions of insights and case studies directly to this research program.



Change smarter, move faster with KPMG Velocity

Drive growth and agility with precision and speed for lasting resilience.

Our AI-enabled products and services help you transform, operate, and thrive in the intelligent economy.

[See what's possible](#)

KPMG. Make the Difference.

kpmg.com/velocity



Get in touch

Nat Gross

Partner
nat.gross@kpmg.co.uk
KPMG in the UK

Tim Knight

Partner
tim.knight@kpmg.co.uk
KPMG in the UK

Taher Balafrej

Partner
tbalafrej@kpmg.com
KPMG Switzerland

Salim Khelladi

Director
salimkhelladi@kpmg.com
KPMG Switzerland

Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

kpmg.com



The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

© 2026 Copyright owned by one or more of the KPMG International entities. KPMG International entities provide no services to clients. All rights reserved.

KPMG refers to the global organization or to one or more of the member firms of KPMG International Limited ("KPMG International"), each of which is a separate legal entity. KPMG International Limited is a private English company limited by guarantee and does not provide services to clients. For more details about our structure please visit kpmg.com/governance.

The KPMG name and logo are trademarks used under license by the independent member firms of the KPMG global organization.

Throughout this document, "we", "KPMG", "us" and "our" refers to the KPMG global organization, to KPMG International Limited ("KPMG International"), and/or to one or more of the member firms of KPMG International, each of which is a separate legal entity.

Designed by Evaluesserve.

Publication name: Creating Total Value: Connecting experience and performance to drive growth in B2B | Publication number: 140360-G | Publication date: February 2026