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**B2B International**

20 Of The Best  
Frameworks,  
Models & Metrics



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A Merkle Company



# 20 Of The Best Frameworks, Models & Metrics

“You don’t have to be a genius or a visionary or even a college graduate to be successful. You just need a framework and a dream.”

Michael Dell, Founder, Chairman and CEO of Dell Technologies

For over two decades, we have helped the world's best b2b brands make smarter decisions driven by insights, empowering them to grow. We have now developed this booklet on what we believe are the top 20 frameworks, models and metrics for use in b2b market research.

Each of the 20 analytical tools has helped us tell thousands of stories over the years, from the story of a brand's health to the story of the customer experience. They have helped businesses structure solutions to problems, identify opportunities, and map a course of action.

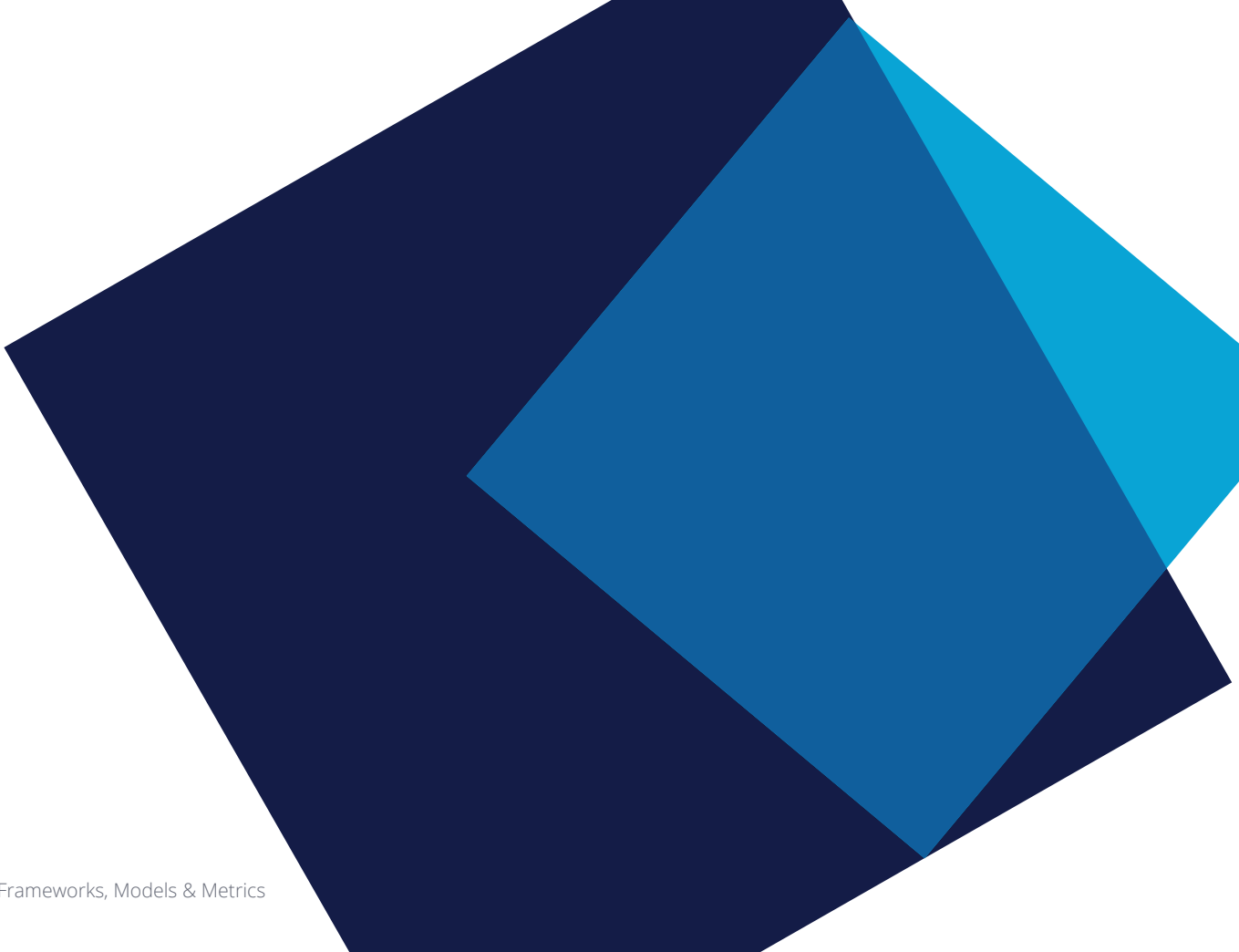
The business tools we share here fall into 5 categories, depending on the nature of your business and research objectives:

- Customer satisfaction, loyalty and experience
- Brand performance
- Differentiation
- Product & pricing
- Segmentation

We have kept the explanation of each framework, model and metric deliberately concise as this is not intended to be a book or white paper; rather a taster of the tools in our toolkit. Consider using this as a checklist for auditing your current research initiatives, and a means of identifying new ways to understand and address business issues.

Finally, while analytical tools structure and simplify a story, remember that the best research is not about one metric alone. In the case of the NPS, for instance, it is a highly useful means of measuring advocacy, but the figure alone does not tell the full story. As Albert Einstein said, "Not everything that counts can be counted, and not everything that can be counted counts." It is for this reason that our top 20 goes beyond metrics and includes frameworks and models that are often applied in qualitative research and workshops.

If you have any questions on any of the tools documented, don't hesitate to contact us on [info@b2binternational.com](mailto:info@b2binternational.com)



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# Customer Satisfaction, Loyalty & Experience



# Net Promoter Score (NPS)

NPS is an industry standard metric that measures a user's advocacy towards a brand, and is closely linked with brand loyalty (if you are an advocate of a brand then you are likely to continue using it in the future).

Strong scores in NPS have been associated with business growth and profitability, as it can be up to 95% more expensive to obtain a new customer than to retain an existing one. Also, driving increased numbers of promoters has been shown to have a significant effect on growth, as promoters are known to generate higher lifetime value and are 50% more likely to generate new customers.



$$\text{NPS} = \% \text{ of Promoters} - \% \text{ of Detractors}$$

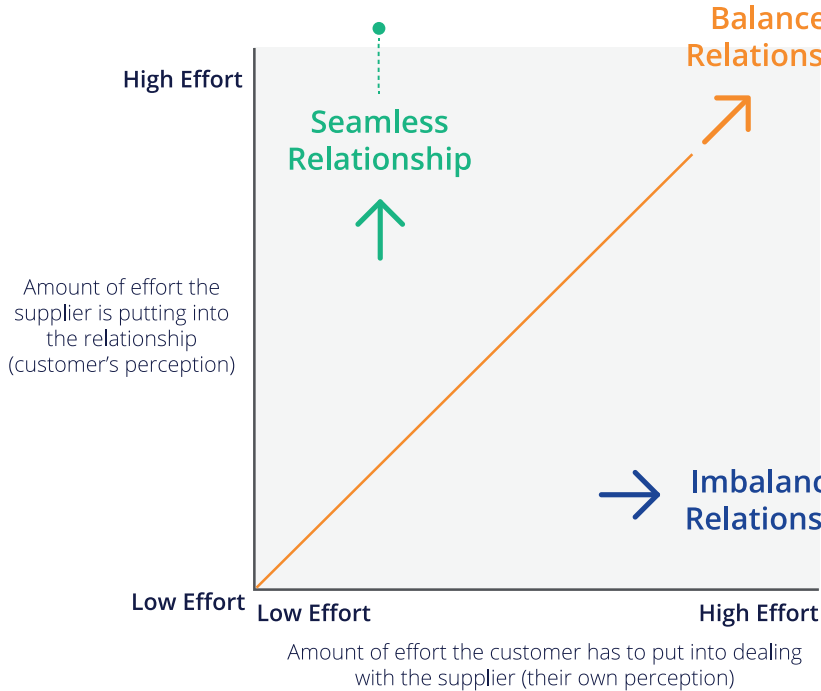
*Fred Reichheld, Bain & Company, and Satmetrix*

## Customer Effort Score

Customer effort analysis assesses the extent to which a brand is seen as actively seeking to make the user experience seamless. Indeed, research constantly shows that a key driver of overall satisfaction and loyalty is a brand that “makes the customer’s job easier”. There is, therefore, a very strong relationship between performance on the Customer Effort Score (typically asked on a 5 point scale) and other critical brand health and customer experience metrics.

In addition to the overall Customer Effort Score and detailed scores throughout the customer journey, the data can be plotted to map the effort a customer perceives to have to put into the relationship versus the effort put in by the brand. This can then be compared to competitor performance.

The customer has the perception that their supplier is putting a lot of effort into their business relationship which is taking away stress from them; e.g. they don't have to chase for feedback, deliveries are on time, supplier is proactive.



If we can plot both scores on the average line it means that the customer perceives their relationship as being quite “normal” in terms of effort; e.g. the supplier is working to please the customer, however occasionally proactivity is missing.

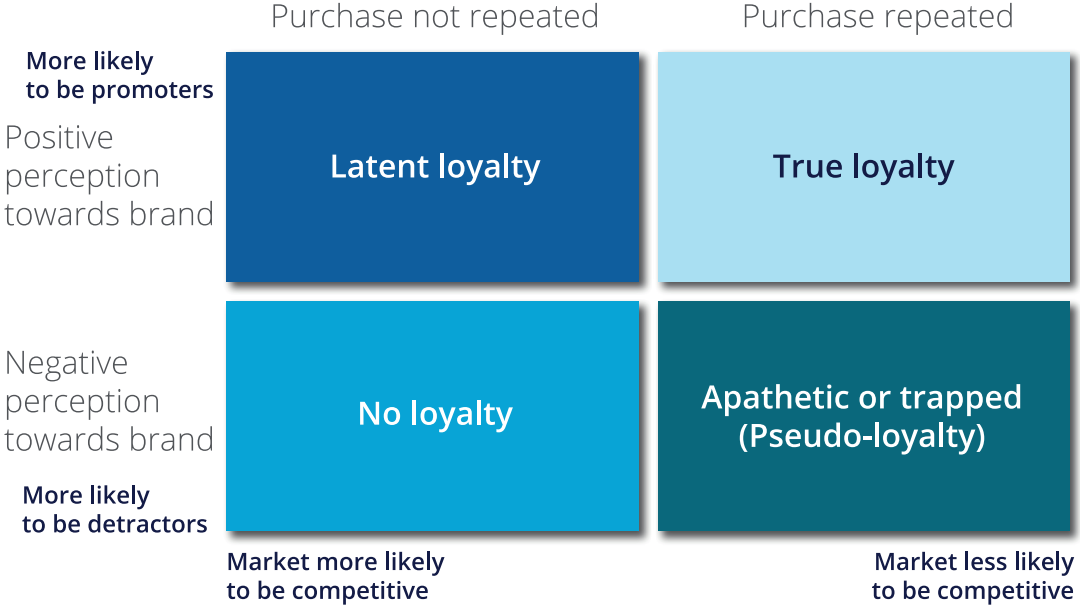
The customer perceives they are putting more effort into dealing with their supplier than the other way around (i.e. the supplier is putting in little effort making the customer's life more complicated). This could be complex ordering systems, late or even no feedback to queries etc.

## Loyalty Analyzer

The loyalty analyzer model (an adaptation of the Dick & Basu loyalty matrix) acknowledges that there are different dimensions to loyalty taking into account both brand perceptions and purchase behaviors. Only a select few b2b companies achieve 'true' loyalty where customers perceive them positively and also repeatedly buy from them.

# Behavioural loyalty

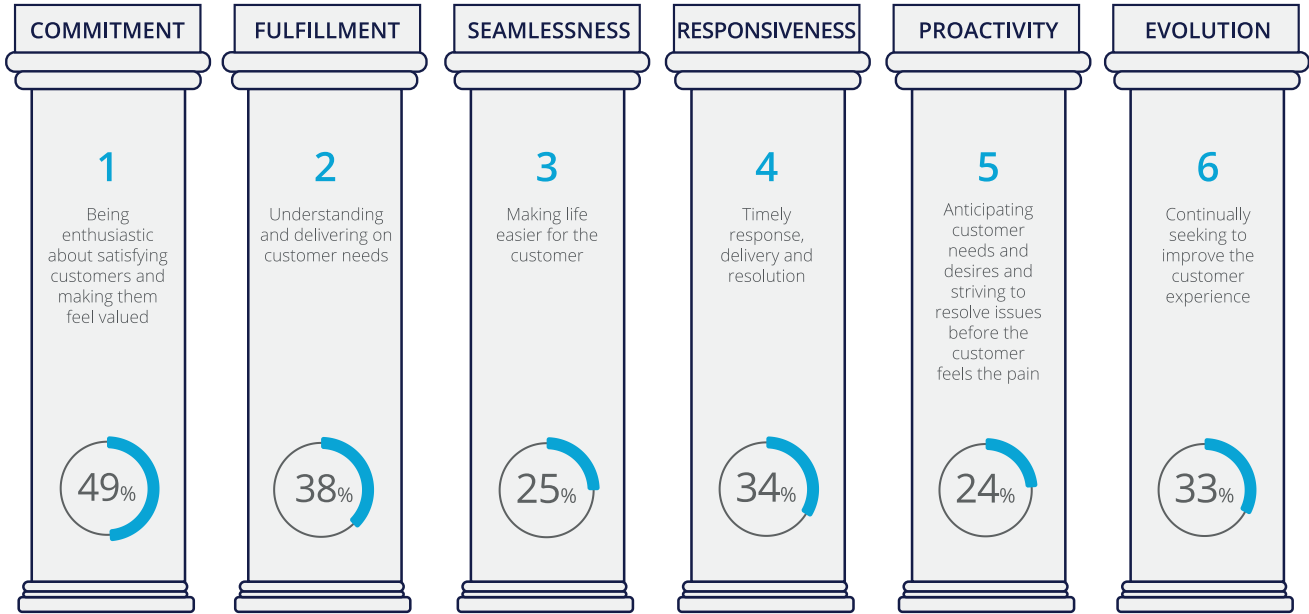
Attitudinal loyalty





## Customer Experience Excellence Pillars

Excellent customer experience is linked to business growth. In examining the customer experience of over 500 b2b brands, we identified six pillars behind b2b brands delivering a superior customer experience. We use these pillars as a framework for measuring brand performance, putting this into the context of b2b benchmarks.











Percentages indicate the proportion of B2B firms that say they perform well on each attribute, as per a 2019 B2B International survey.

# Customer Journey Mapping

Customer Journey Mapping provides a detailed assessment of the whole customer experience throughout the journey from brand awareness through to purchase triggers, usage, repeat purchase and everything in between.

Plotting the various touchpoints on the customer journey map is done through workshops and/or qualitative research. Voice of the customer research can also be used to identify which touchpoints are the most critical in shaping the customer experience (i.e. “moments of truth” that can make or break the relationship), as well as the touchpoints on which a brand has strong and weak performance (indicating where reallocation of resources may be required).

 AWARENESS	 INTEREST	 DECISION	 SERVICE SET-UP	 THE FLIGHT	 RELATIONSHIP STRENGTHENING	 CONCERN	 RETURN
How customers become aware of AIRLINE BRAND	How customers become interested in flying with AIRLINE BRAND	The things that help customers make the decision to fly with AIRLINE BRAND	What AIRLINE BRAND does prior to the flight	Experience of AIRLINE BRAND on the day of travel	What AIRLINE BRAND does to develop on-going relationships and delight its customers	How AIRLINE BRAND deals with concerns and complaints	How AIRLINE BRAND wins back previous lost customers
Livery	Prospect material	Price	Customer notifications	Checking in bags	Loyalty program	Receiving complaints	Recognition of lapsed customers
Brand - umbrella / corporate	Promotional offers	Bags go free	Contact details	Pre-flight info	Communications post flight	Following up on complaints	Lapsed customer communication
Website	Past experience	Locations	App for notifications	Boarding process	Offers for flights		
Press	Customer	Ease of boarding		Cleanliness of aircraft	Offers for extras (hotels / cars)		
Advertising	Website	Past experience		Space for hand luggage	Hospitality / contact		
Sponsorship	Press	Referral		Material in the seat pouch	Key account program		

# Brand Performance



## Brand Health Wheel

This brand audit tool developed by B2B International provides a framework for assessing the key components of brand health: awareness to usage; brand positioning and brand delivery (the extent to which the brand delivers on its promise). The framework provides an easy means of understanding the overall health of a brand, including traffic light shading indicating strengths and weaknesses and where action is required to improve brand performance.

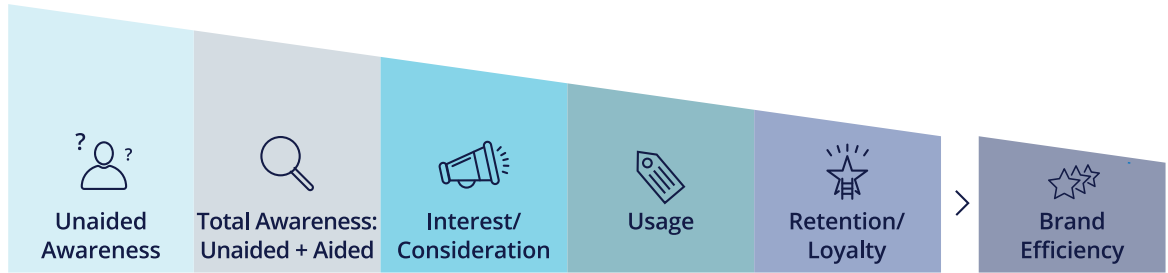




## Brand Funnel & Brand Efficiency

Understanding how well a brand is able to convert brand awareness into consideration, consideration into usage, and usage into advocacy is critical in identifying where brand efforts are strongest, and where they are weakest (resulting in missed opportunities for gaining new customers). The brand funnel looks at brand performance at each of these vital stages of the customer journey, and measures the conversion gap or “fall out” at each stage.

The brand efficiency score is the percent of those aware of the brand that go on to be advocates. This one score summarizes brand funnel performance. In identifying where the biggest gaps lie between the stages of the brand funnel, it is possible to direct marketing efforts and investment into particular deficiencies, with the goal of raising overall brand performance.



Total awareness ▶ Those who would consider the brand ▶ Those who use the brand ▶ Users giving 9 or 10 for likelihood to recommend\* ▶ % of those aware who go on to be advocates

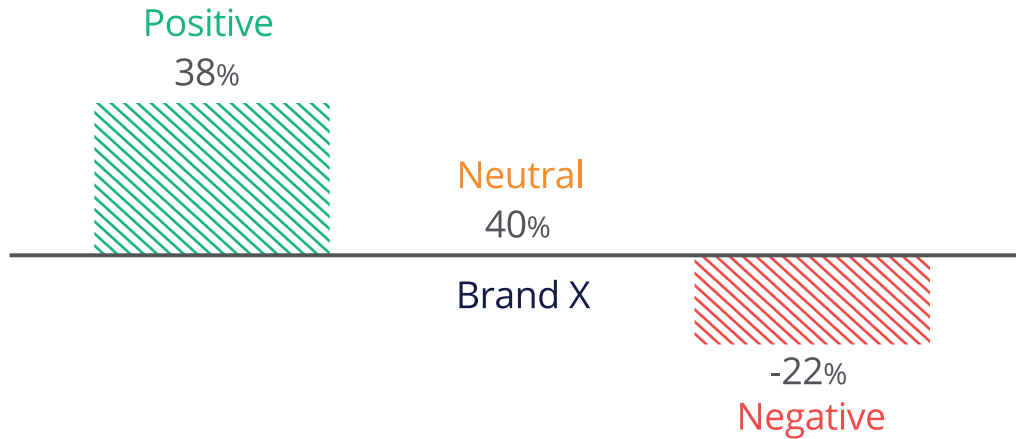
	Unaided Awareness	Total Awareness: Unaided + Aided	Interest/Consideration	Usage	Retention/Loyalty	Brand Efficiency
Brand 1	44%	94%	59%	66%	35%	37%
Brand 2	28%	83%	61%	36%	24%	29%
Brand 3	2%	26%	11%	7%	3%	12%

\*% out of the total sample

## Brand Momentum Score

The brand momentum question assesses the extent to which the brand is seen as growing, holding ground, or declining. The output from this is a simple and valuable metric for capturing the extent to which a brand is perceived as future-proof. This can be benchmarked over time, in isolation and against competitors.

## Brand Momentum Score = 16



# Product & Pricing





## Kano Model

Some brand and product traits are basic expectations of the market and without them, brands would not be brought into the consideration set. These are considered the “threshold attributes”.

The “performance factors” are the brand attributes upon which suppliers are judged and compared against one another. These factors typically have a direct correlation with satisfaction, in that an improvement to the offering results in a higher satisfaction score, just as deterioration to the offering results in lower satisfaction. Performance attributes are also strongly related to price positioning, in that usually the higher the performance, the more a customer is willing to pay.

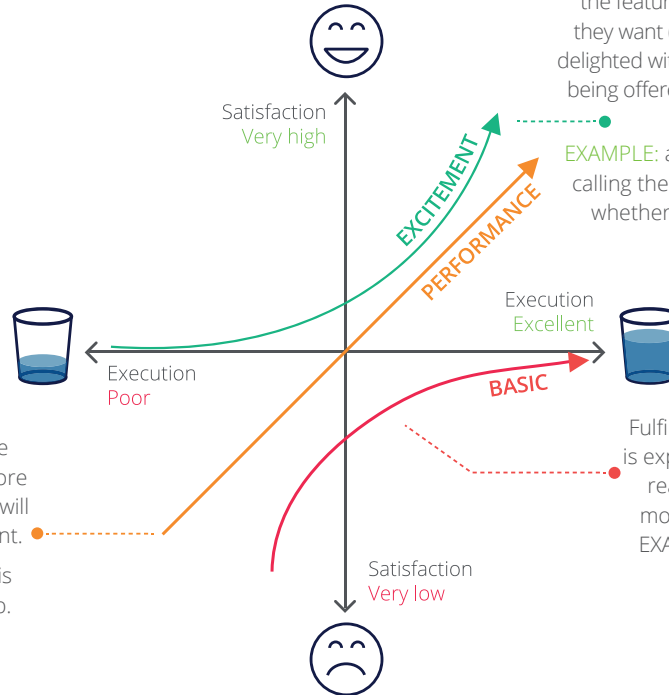
Finally the “excitement attributes” are brand values not all suppliers aspire to, and fewer still achieve. This is because they are often unrecognized needs and highly appealing “wow” factors if offered. These excitement attributes have the potential to delight customers if properly executed and it is here where there is a true opportunity for a brand to differentiate.

# Kano's Hierarchy of Needs Model

The Kano model provides a means of identifying where the greatest opportunity for product and service differentiation lies.

In offering exciting attributes a supplier is able to differentiate from the competition. They are the features that customers don't even know they want (unexpected and unspoken) but are delighted with when they find them. In case of not being offered there is no dissatisfaction though.

**EXAMPLE:** a high level manager of the supplier calling the customer after a complaint asking whether this has been resolved now and promising to improve.



Performance attributes should be fulfilled on a minimum level; the more they are addressed, the more they will yield satisfaction or even excitement.

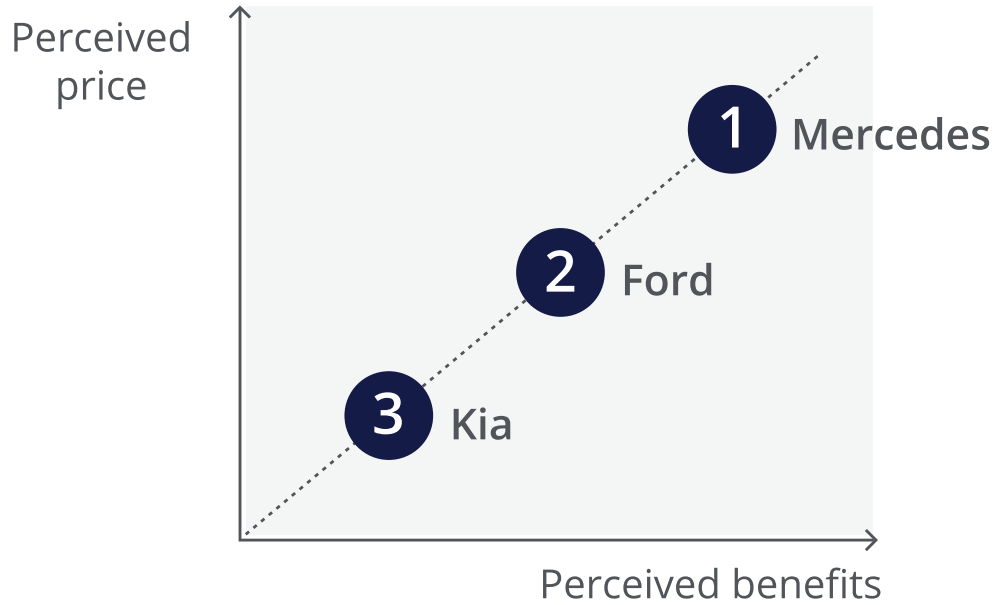
**EXAMPLE:** customer service staff is proactive and empowered to help.

Fulfilling the market's basic requirements is expected by the market. The customers' reaction to those is neutral; it will not motivate customers to switch supplier. **EXAMPLE:** an express carrier delivering on time.



## Value Equivalence Line

The Value Equivalence Line tracks the points at which the perceived benefits of an offering are aligned with the perceived price positioning. Brands typically gravitate towards the line where the price paid is seen as an equal reflection of the benefits received. However, if the market considers a disequilibrium between the two axes, then the brand falls to the left or the right of the line, depending on whether it is seen as under- or over-priced versus the benefits received and compared to available alternatives. Brands to the right of the line will likely increase market share, whereas those to the left of the line will likely decrease market share.



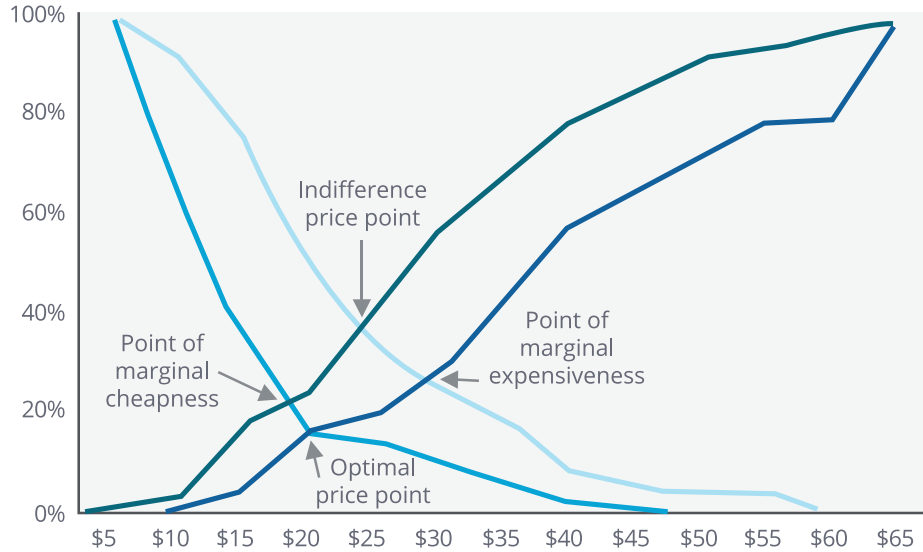
McKinsey & Company

## Price Sensitivity Meter

The “Price Sensitivity Meter” was first introduced by Dutch economist Peter van Westendorp in 1976. It is based on the data from four questions that focus on the price points where an offering is seen as too expensive to purchase, too cheap to purchase (where the quality is under question), getting expensive (but still of a purchasable price), and good value for money (an attractive price point).

The intersections of the curves are analyzed to identify the optimum price range i.e. the lower and upper bounds of acceptable pricing, and the optimum price point.

— Too Cheap    — Good Value    — Getting Expensive    — Too Expensive

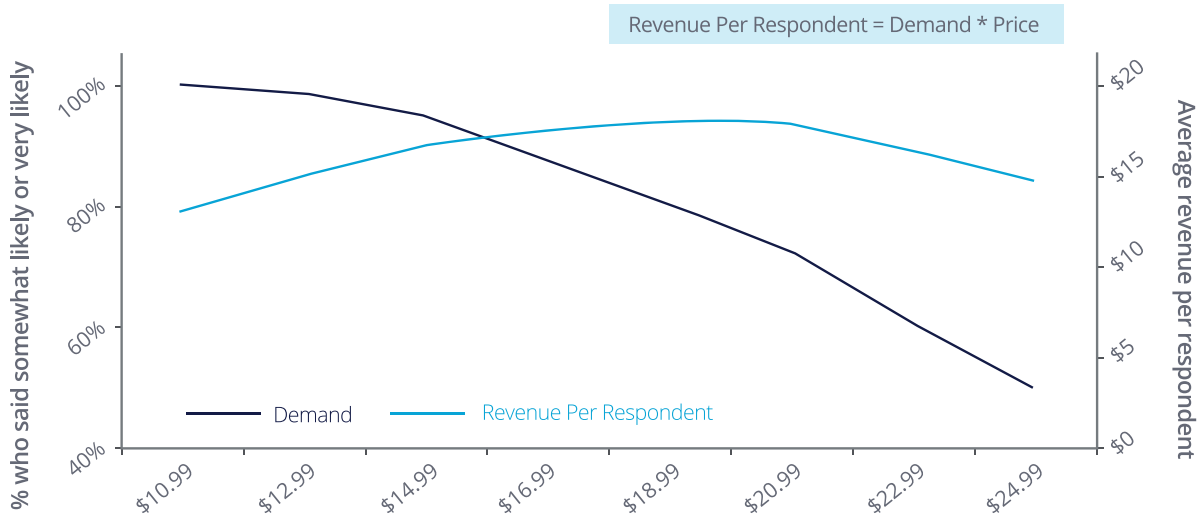


Peter van z

## Gabor Granger Demand Curve

The economists Andre Gabor and Clive Granger developed a method for determining the price elasticity of products and services, which has been in use since the 1960s. The tool is simple and is based upon asking people the likelihood of their purchasing a product or service at different prices.

The data from the price questions enable demand and revenue curves to be plotted to determine the optimum price to deliver the maximum revenue. An example of the results from a Gabor Granger exercise is shown opposite. The purple demand curve shows the percent likely to buy at the varying price points. The blue revenue curve provides an indication of optimal pricing and is based on the revenue per head at each price point (i.e. each respondent in the survey is assigned the price they would pay, or \$0 if they would not buy at the specific price point, resulting in an average revenue per head across the whole sample).



*Andre Gabor and Clive Granger*

# Differentiation





## Golden Circle

The author Simon Sinek with his Golden Circle argues that people don't buy what you do; they buy why you do it.

Consider our example opposite for a construction equipment rental company. Providing equipment is what they do. How they do it is through national distribution. The ultimate why they do it is to take the downtime out of construction.

Most brands focus only on the what and the how, but people buy far more into who a brand is and the extent to which it echoes their beliefs. Sinek argues that it is therefore necessary to start with the why, not the what.

This framework encourages brand stakeholders to acknowledge and buy into what lies at the emotional core of the brand – in other words, to think beyond the product and service to what the customer is buying into and how it will make them feel.



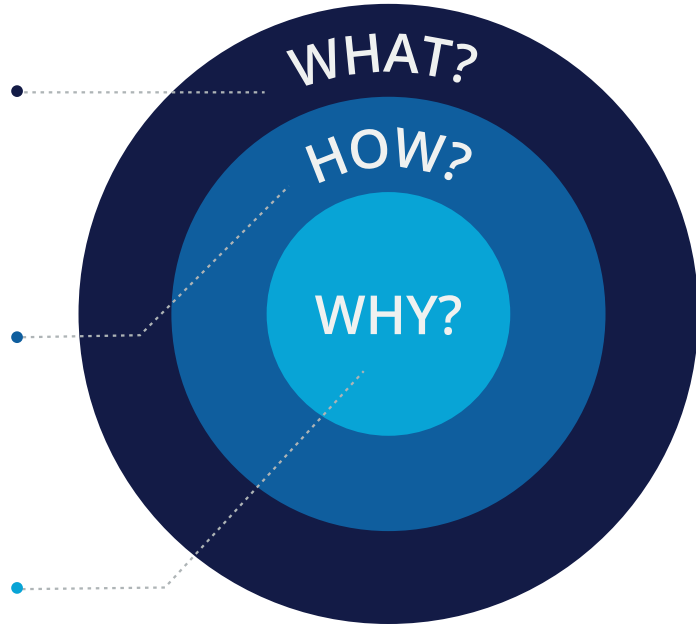
A variety of equipment provided more cost efficiently than if purchased, wherever and whenever needed.



Through national distribution capable of supplying any equipment in short notice.



To take the downtime out of construction.



*Simon Sinek*

## Emotional Engagement Ladder

Most brands deliver on functional needs such as reliability, quality and value for money. While these are positive perceptions, they are plain and often shared with competing brands in the category. The emotional engagement ladder developed by B2B International provides a framework for achieving greater differentiation through more emotive positioning based around four levels of emotional engagement.

The framework is customized to the specific brand and product/service category, but the four levels of emotional engagement remain the same, regardless of the market or industry.

## 4. Eminence

The brand is held in high esteem by customers – typically prestigious brands or those that comprise a degree of exclusivity. Attribute examples: “A brand I’m proud to use.” “A brand that helps us differentiate from our competitors.” “A brand for others to live up to.” “A brand that makes me feel special.”

## 3. Enrichment

The brand makes a significant impact on the user experience and/or empowers the customer to achieve more. Attribute examples: “A brand that provides evidence and insight to help us make decisions more confidently.” “A brand that keeps us informed on market trends and changes we need to know of.” “A brand that goes the extra mile.”

## 2. Empathy

The brand demonstrates an understanding of buyer/user needs, pain points and desires. Attribute examples: “A brand that is easy to relate to.” “A brand that is agile in problem solving”. “A brand that really cares.”

## 1. Trust

The brand has to be trusted to enter the consideration set. Attributes examples: “A brand you can rely on”. “A safe bet.” “A brand I know others like us use.”

## Three Circles

The three circles is a framework used in workshops for aligning a business on its unique selling point. To arrive at this, Joel Urbany, creator of the three circles strategic insight model, argues that it is necessary to draw three circles that overlap:

- Customer needs (to ascertain what customers value and why);
- Company offerings (to represent how customers perceive your offerings);
- Competitor offerings (to represent how customers perceive your competitors' offerings).

The value of the framework comes in particular from assessing where the three circles overlap with one another. The most challenging parts are uncovering the white space (customer needs not met by any supplier) and the unique points (points of difference distinct to the brand undertaking the exercise). If these are identified and incorporated successfully into brand development and marketing efforts, the payback can be substantial.

### YOUR UNIQUE POINTS •

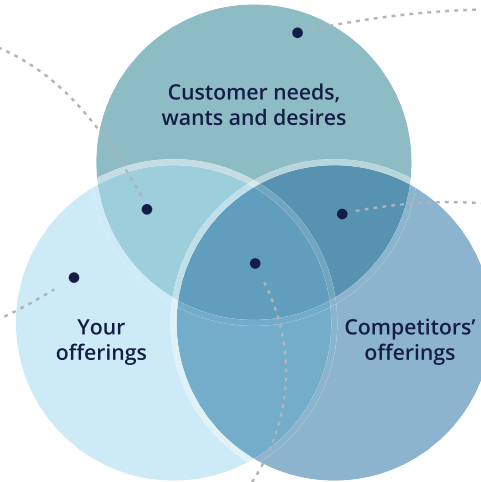
Customers want these and you provide them. This is your 'uniqueness' which increases the appeal of the brand and offering.

### IRRELEVANT POINTS •

Customers may not recognize these yet you provide them. These may be irrelevant in the market.

### POINTS OF PARITY •

Customers want these and everyone provides them. You need to offer these to be in the market. These are table stakes.



### • WHITE SPACE

Needs that are not currently met by any supplier - opportunity for growth?

### • COMPETITORS' UNIQUE POINTS

Customers want these and competitors provide them. Competitors' strengths decrease the likelihood of your success.

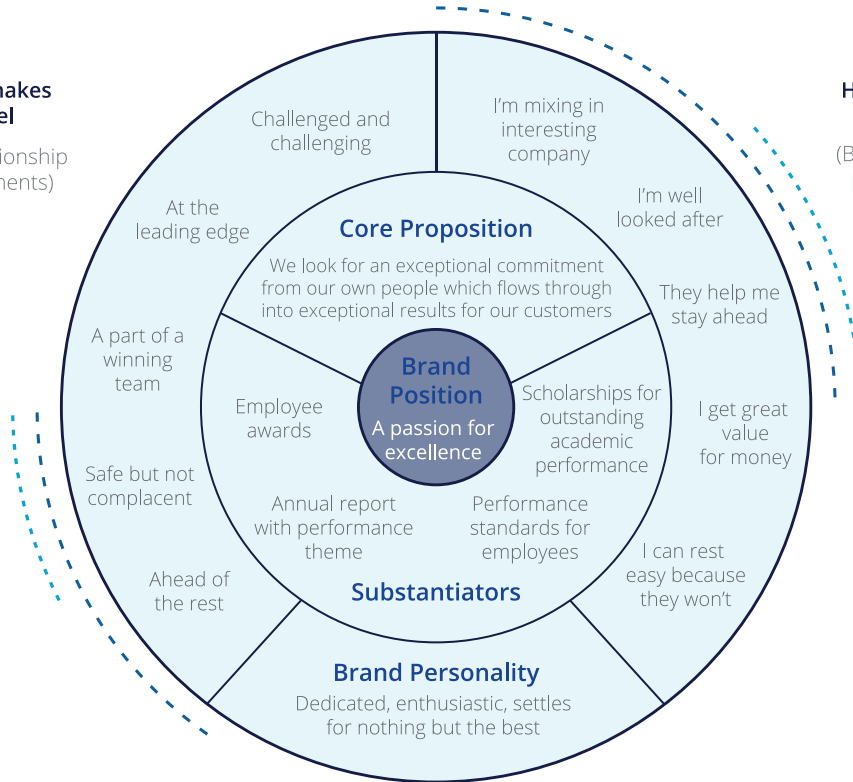
*Joel Urbany, University of Notre Dame's Mendoza College of Business, Indiana*

## Brand Positioning Bullseye

The brand bullseye is a framework used in workshops for arriving at the essence of a brand. It tends to be easier when voice of the customer findings are available on brand perceptions, the personality of the brand and feelings about the brand. These insights are then paired with reasons to believe in the brand (the evidence that the brand delivers on its promise) including substantiators. The work in the outer circles of the framework provides the foundation for arriving at the core proposition and ultimately the brand position summarizing the brand essence in just a few words.

**How the brand makes customers feel**

(Brand values, relationship positioning statements)



**How the customer talks about the brand**

(Brand associations, brand positioning statements)

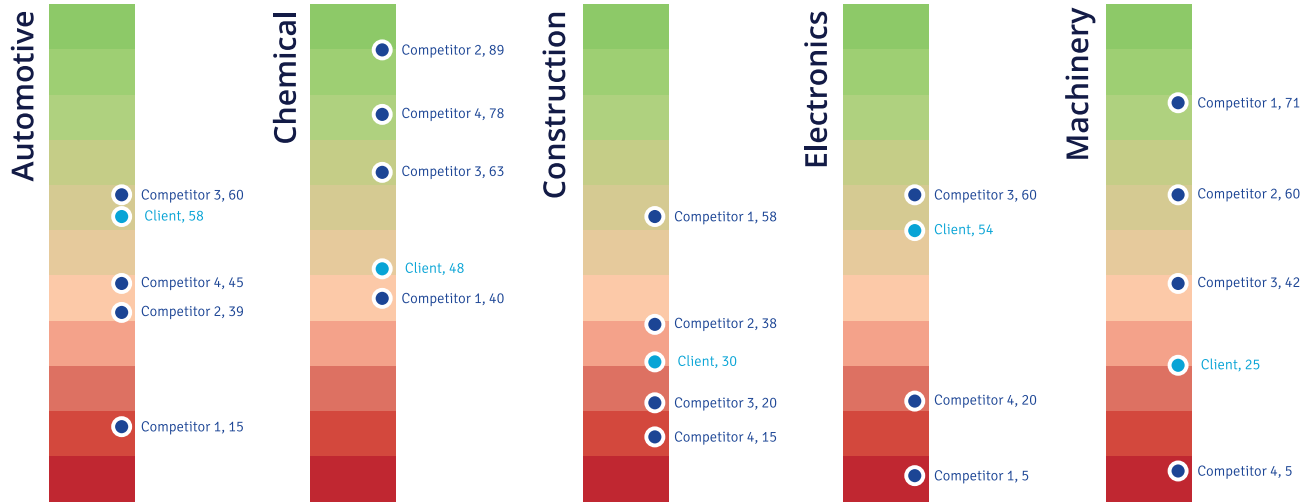
**How the brand comes across to customers**  
(Brand personality traits)

*Philip T. Kotler (Northwestern University)  
& Kevin Lane Keller (Tuck School of  
Business, Dartmouth College)*



## Net Value Score (NVS)

Understanding the perceived value a brand offers is important given that value plays a role in attracting new users as well as retaining existing customers. The Net Value Score assessment starts with analysis of the perceived benefits and the perceived price of a range of brands in order to assess the brands that are likely to increase and decrease their share of the market, as shown in framework 10 - McKinsey's Value Equivalence Line.



*B2B International*

Brands are only chosen if they are thought to offer good value. B2B International's proprietary algorithm measures the perceived value of a brand's offering relative to that of competitors. This algorithm delivers a "Net Value Score" for each brand, which can be plotted by industry sector (as above), line of business, etc. The data is used to understand the industry sectors and/or product categories where the brand is seen to offer more and less value than competitors, therefore leading to possible marketing, branding and pricing strategies.

# Advertising Effectiveness Framework

The following 4 critical success factors provide a framework for testing advertising campaign effectiveness in both qualitative and quantitative research.

## Campaign Impact

Impact has 3 purposes: catching attention; driving a response; creating memorability. An ad needs to get noticed, often on a crowded website or in a dense magazine. Preferably it should prompt a call-to-action of some kind, and/or be memorable for action later.



## Brand Fit

An ad campaign must align with the identity of the brand, including consistency of brand messaging and visual brand assets.



## Campaign Resonance

It is vital that an ad resonates with the target audience on the 3 'C's: it needs to be clear, credible and compelling. Often ads that invoke an emotional response (e.g. by appealing to pain points or feelings) resonate more strongly.



## Brand Favourability

An ad shapes brand perceptions and so it is important that it increases favorability towards the brand in some way. It is therefore necessary to explore shifts in brand perceptions as a result of the campaign, e.g. if the brand is now seen as more innovative, more flexible, more trusted, etc.



*B2B International*

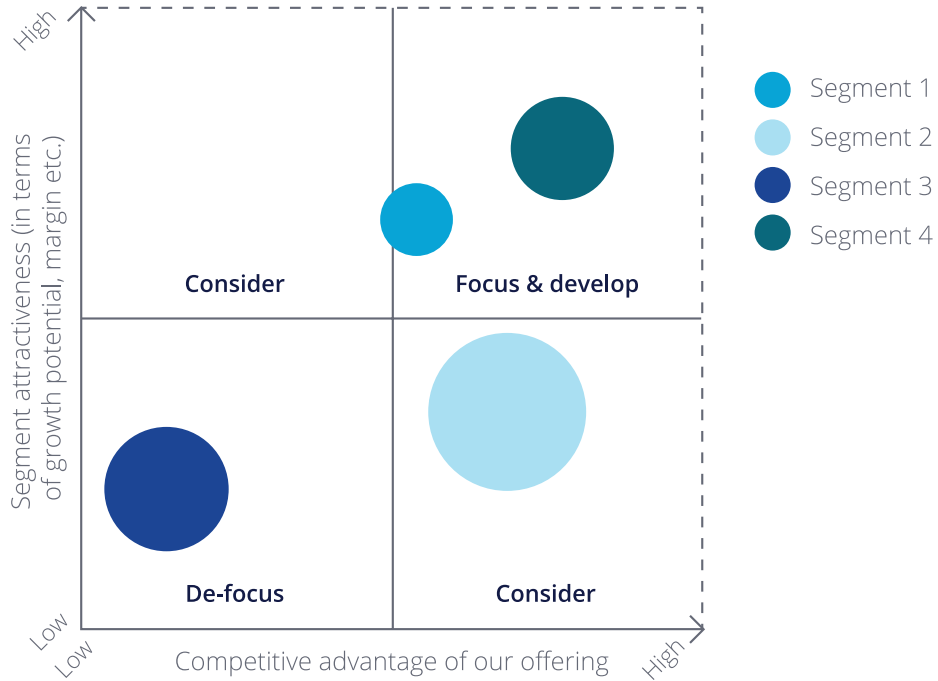
# Segmentation





## Directional Policy Matrix

The key to a good segmentation is deciding which segments are worth pursuing and which are not. This can be done by measuring the attractiveness of each segment versus the brand's competitive position within each segment, and then plotting this on a directional policy matrix (DPM) to indicate where the biggest potential lies. The size of each bubble represents the relative size of each segment (e.g. by numbers of businesses, total spend, etc.)








General Electric, McKinsey, Shell



## CVP Framework

The Customer Value Proposition (CVP) is the sum of the features and benefits a customer should expect to receive in purchasing a product or service, and how these features and benefits are communicated to the market. Each brand offering should have a clear CVP, which should be tailored to different segments of a target audience, for example a CVP for small businesses versus a CVP for mid-sized businesses. The framework for arriving at a CVP is shown opposite and is typically used in workshops as part of a segmentation go-to-market plan.

 <b>Target audience</b>	Who is the customer?
 <b>Value</b>	What can we offer the customer that they value?
 <b>Superior</b>	What can we offer that is better than the competition?
 <b>Profit</b>	How will we make money out of this?
 <b>Banner headline</b>	What would we say to a customer if confronted by the elevator test?

A successful CVP passes the 3D test: it needs to be distinctive, desirable, and defensible



For further information, please contact us on [info@b2binternational.com](mailto:info@b2binternational.com)

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