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Grid Dynamics

trusted engineering partner for digital transformation

Personalization in B2B Commerce: Beyond Demographics to Roles

Webinar | July 2nd 2025

GUEST SPEAKERS

Jonathan Newman

Principal B2B Advisor

20+ years in senior leadership roles.

Robust track record of driving digital transformation and operational efficiencies within global B2B, B2C, and B2B2C organizations, including: Ingram Micro, Office Depot, ComputerLand, Belkin, Belron International & Future Electronics.

Specializing in e-Commerce & digital transformation.

Prithpal Roda

CTO EMEA
Grid Dynamics

20+ years in technical leadership roles.

Driving cross-functional strategic initiatives in B2B and B2C enterprises, helping organizations scale operations, modernize IT systems, reduce technical debt, and streamline software costs and maintenance.

Specializing in Digital Commerce & supporting estates

Maneesh Kumar

Technology Director
CTO Office, Grid Dynamics

20+ years in senior technical roles.

Extensive experience managing strategic and complex technical initiatives, particularly within e-Commerce – for both B2B and B2C.

Expertise span system design, solution architecture, vendor selection, team building, and project discovery.

Specializing in emerging technologies, composable commerce & AI.

Jillian Baché

Enterprise Account Executive
commercetools

10+ years in senior account executive and business growth roles.

Prior to commercetools, JIllian spent nearly a decade at Adobe, where she focused on Magento.

Her main focus is on empowering businesses to select critical technologies which scale digital UX and drive business growth.

Specializing in e-commerce platforms and composable commerce solutions.

Peter Curran

General Manager, Commerce
Coveo

20+ years in senior leadership roles.

Held C-level roles across startups and established B2B firms.

Digital commerce GTM expert, with extensive experience in enterprise e-commerce, search and discovery, content management, collaboration, and analytics.

Specializing in direct and indirect strategies for growth.

Personalization in B2B Commerce : Beyond Demographics to Roles

- What's driving change in B2B—and to keep up in the age of AI
- Unlocking customer journey data to fuel B2B growth
- Cracking the code of B2B user personalization—Moving beyond demographics to roles
- Accelerating digital transformation with x-functional teams—Breaking the silo mindset
- B2B digital transformation playbook—Small, strategic changes for big impact

Key takeaways

- Learn how to build role-based personas that will engage your customers across all process touch points.
- Improve conversions and customer loyalty through underused personalization strategies.
- Discover pragmatic personalization tactics for quick wins.
- Case Study : Using AI personalization to unlock new opportunities for your customer.

Today's Agenda

Approaching Personalization as a B2B Leader	10 mins
In session personalization with Coveo	10 mins
Technical perspectives + case study	10 mins
Q&A with guest speaker	20 mins
Wrap up	

Approaching Personalization as a B2B Leader

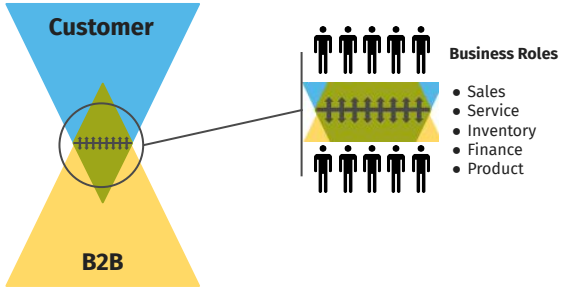
Business Perspective

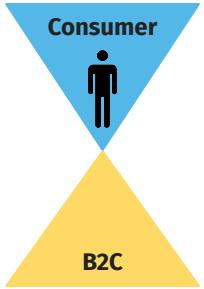
- Consumerization within B2B has created new customer expectations but it also creates opportunities to engage your customers across all touch points
- There are significant differences between B2C and B2B customers that influence personalization strategies
- A clear, feedback-driven personalization roadmap is required to meet customer expectations and achieve business goals
- Sophisticated personalization strategies are connected across all channels and touchpoints

"B2B buyers expect more self-service capabilities. B2B customers have come to expect a seamless and personalized buying experience, similar to what they experience in their personal lives."

Forrester - February 6, 2024

Customer & Personalisation





B2B:

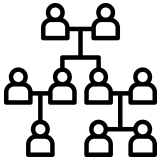
- The ***customer*** is a ***business user*** performing a ***role*** → they are making a ***professional decision***
- B2B businesses are dealing with ***multiple individuals*** performing ***multiple roles*** within the customer organisation
- B2B businesses often ***win the customer*** and then transact under a ***contractual agreement*** over several ***years***

B2C:

- The customer is the ***consumer*** → they are making a ***personal purchasing decision***
- B2C businesses are dealing with an ***individual consumer*** and ***customer journey***
- They have powerful tools for ***observation*** & ***testing***
- B2C businesses are focussed on winning ***every*** customer visit and ***every*** customer order

B2B users have Firmographics <u>and</u> Demographics <u>and</u> Roles-based personas.

Foundations of B2B Personalization



Functional Role

Personalization based on job functions within an organization.

Business Process Objectives

Understanding customer goals and decision-making roles.

Firmographics

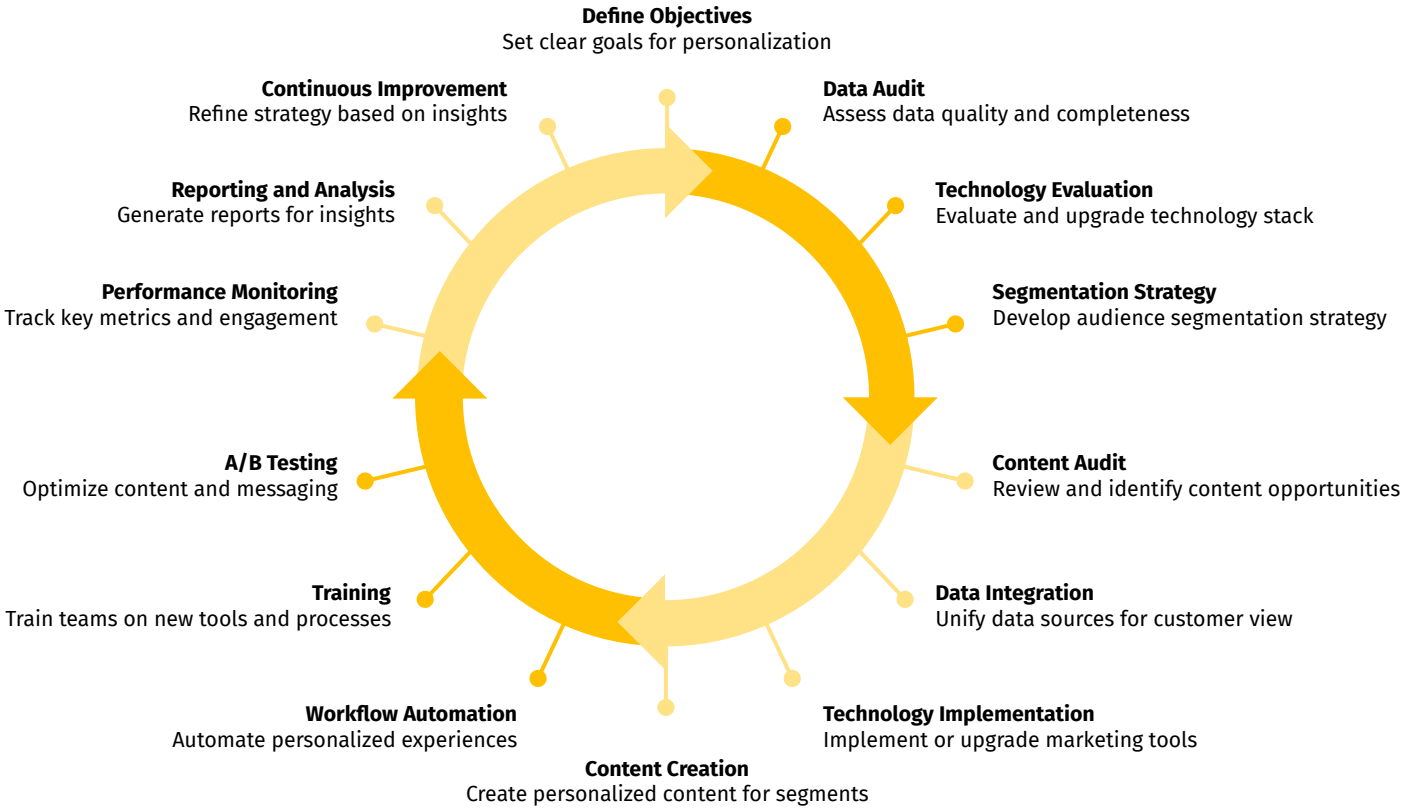
Tailoring to industry, size, revenue, and technology.

Demographics

Personalizing based on individual details and interactions.

B2C Personalization is predominantly Product & Merchandising.
B2B Personalization extends to different Workflows, Functional Capabilities & Experiences.

B2B Personalization Strategy Cycle



Personalisation Across All Touchpoints

1. Collecting real time data <u>across 8 touch-points</u>
   - where do customers leave the journey?
   - what's causing customers to switch channel?
2. Enabling personalisation across multiple touch-points
3. Optimising the channels used to reach customers

<u>INSIGHTS</u>

- 25% of calls in to CSC are made AFTER browsing the website
- 56% of customers who placed an online order called CSC within 30 mins
- 23% of online customers who placed an order OFFLINE had viewed their shopping basket ONLINE
- 20% of customers that place an order via FAX viewed the website first
- 80% of customers that receive a catalogue do NOTHING within the next 5 days

The most comprehensive suite of powerful AI models

Spotlight: Search & Navigation

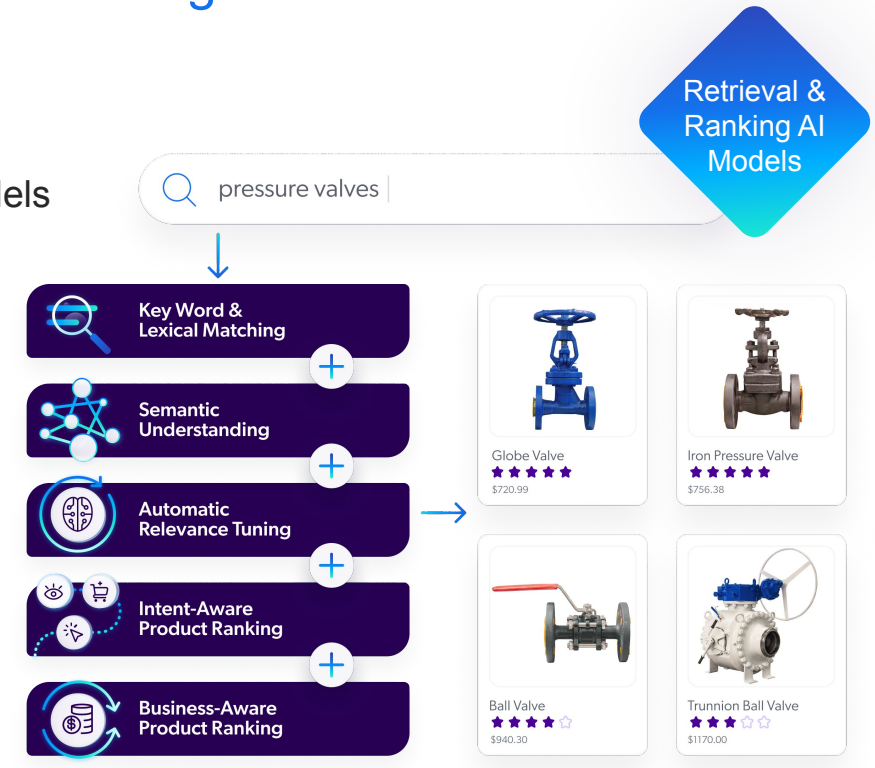
Breadth & Depth of AI

Index & Connectivity

Merchandising & Insights

Multiple layers of retrieval and ranking AI models all orchestrated to to maximize relevance:

- Key word and lexical matching
- Semantic Understanding
- Automatic Relevance Tuning
- Intent-Aware Product Ranking
- Business-Aware Product Ranking



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The most comprehensive suite of powerful AI models

Spotlight: Deep Learning for Personalization

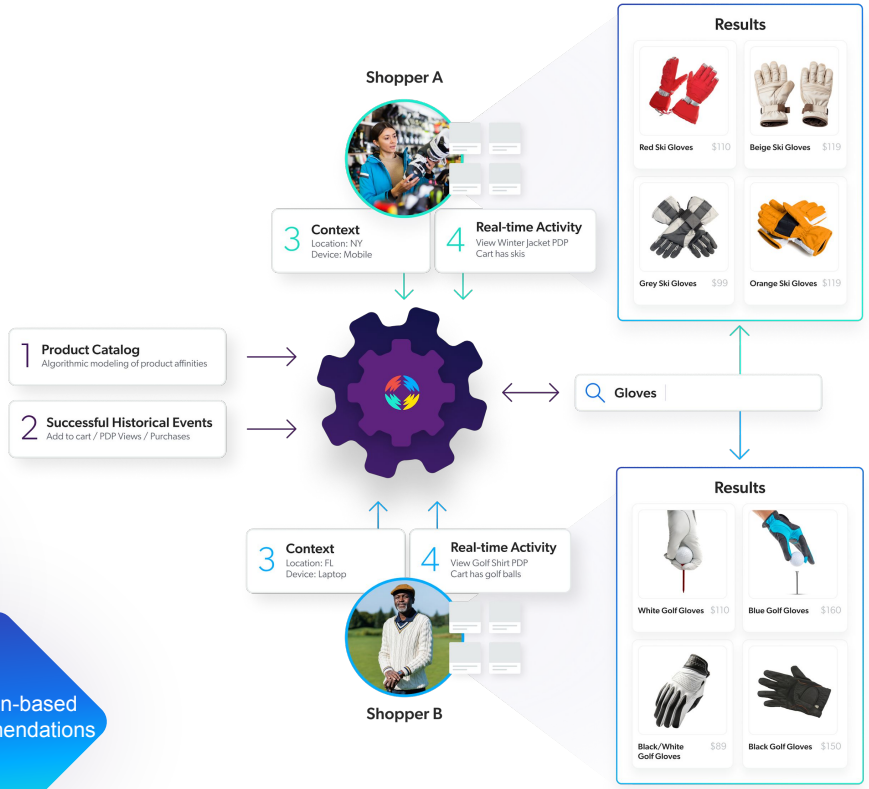
Breadth & Depth of AI

Index & Connectivity

Merchandising & Insights

Readjusts experiences in real-time within a session

- Uses product vectors with behavior embedded
- No login or audience segmentation required
- Applied to personalize
  - Query suggestions
  - Rankings
  - Recommendations



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Optimized search and discovery built to handle complexity

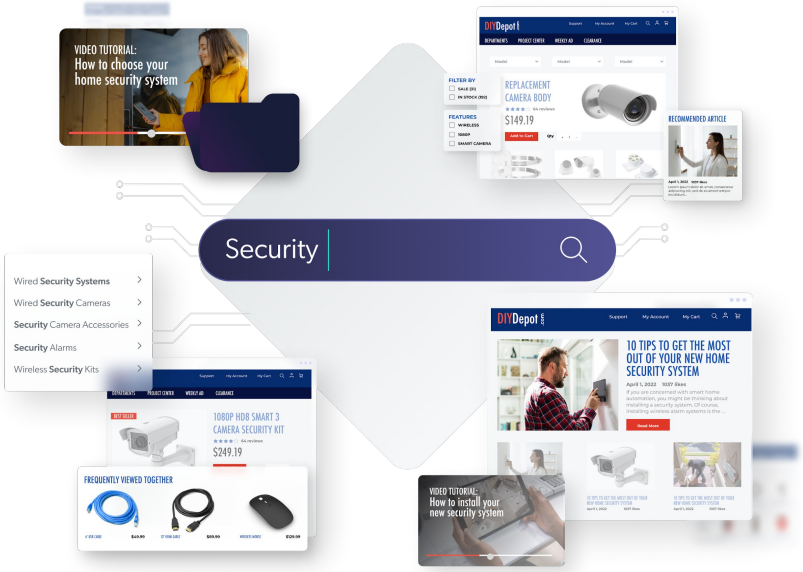
Spotlight: Unified Index

Breadth & Depth of AI

Index & Connectivity

Merchandising & Insights

- Provides unified product & content discovery
- Native, Universal and Custom connectors which are maintained and able to pull data from any source
- Connects to and indexes any type of rich content – from ‘how-to’ videos to technical specs to product brochures, community posts or service guides



Native

SAP, Salesforce, Sitecore, YouTube

Universal (Generic)

Web, Sitemap, File, Database, RSS, Amazon S3

Custom

REST, Push API, Custom, Catalog

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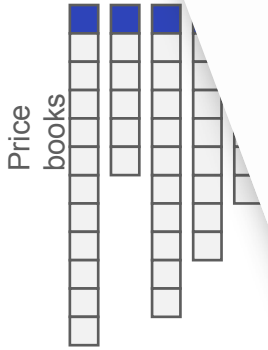
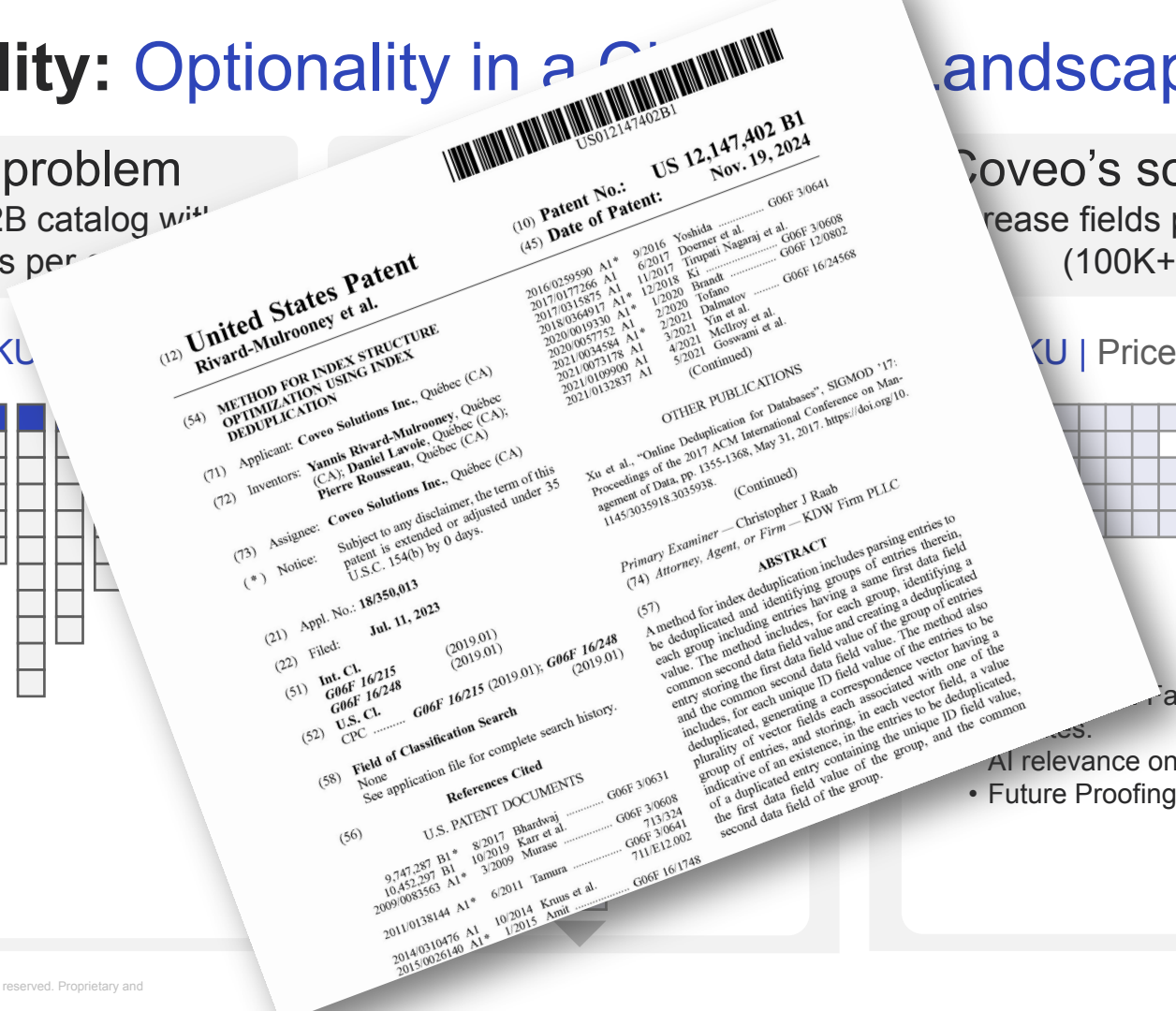
Scalability: Optionality in a C landscape

The problem

Large B2B catalog wit
price books per

SKU





(12) **United States Patent**
Rivard-Mulrooney et al.

(10) **Patent No.: US 12,147,402 B1**
(45) **Date of Patent: Nov. 19, 2024**

(54) **METHOD FOR INDEX STRUCTURE OPTIMIZATION USING INDEX DEDUPLICATION**

(71) Applicant: **Coveo Solutions Inc.**, Québec (CA)

(72) Inventors: **Yannis Rivard-Mulrooney**, Québec (CA); **Daniel Lavoie**, Québec (CA); **Pierre Rousseau**, Québec (CA)

(73) Assignee: **Coveo Solutions Inc.**, Québec (CA)

(*) Notice: Subject to any disclaimer, the term of this patent is extended or adjusted under 35 U.S.C. 154(b) by 0 days.

(21) Appl. No.: **18/350,013**

(22) Filed: **Jul. 11, 2023**

(51) **Int. Cl.**
G06F 16/215 (2019.01)
G06F 16/248 (2019.01)

(52) **U.S. Cl.**
CPC ***G06F 16/215*** (2019.01); ***G06F 16/248*** (2019.01)

(58) **Field of Classification Search**
None
See application file for complete search history.

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(Continued)

Primary Examiner — Christopher J Raab
(74) *Attorney, Agent, or Firm* — KDW Firm PLLC

ABSTRACT

(57) A method for index deduplication includes parsing entries to be deduplicated and identifying groups of entries therein, each group including entries having a same first data field value. The method includes, for each group, identifying a common second data field value and creating a deduplicated entry storing the first data field value of the group of entries and the common second data field value. The method also includes, for each unique ID field value of the entries to be deduplicated, generating a correspondence vector having a plurality of vector fields each associated with one of the group of entries, and storing, in each vector field, a value indicative of an existence, in the entries to be deduplicated, of a duplicated entry containing the unique ID field value, the first data field value of the group, and the common second data field of the group.

Coveo's solution

rease fields per items
(100K+)

KU | Price books

Fast
es.
AI relevance on SKUs
- Future Proofing

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Empowered business users for strategic and impactful actions

Spotlight: Merchandising Hub

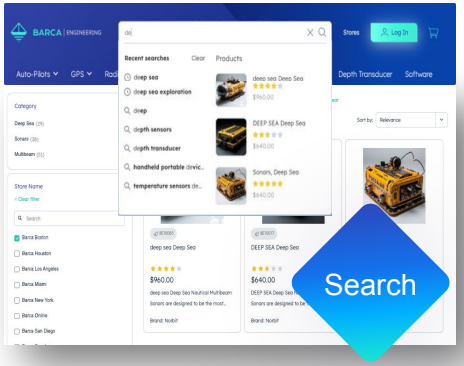
Breadth & Depth of AI

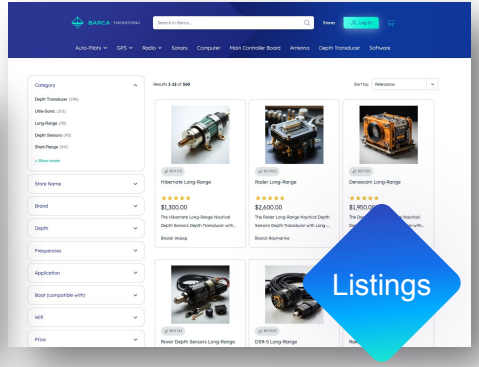
Index & Connectivity

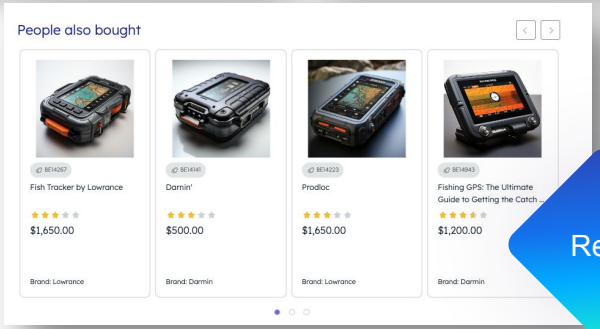
Merchandising & Insights

Built on top of our Commerce API the Merchandising Hub is designed to make business users independent from developers

- Easy rule creation for ranking and filtering
- Intuitive visual editor and preview to see impact of applied rules
- Configure and deploy AI recommendation strategies in a few clicks
- Easy workflow for scheduling and integrated A/B testing
- Page or query-specific analytics
- Visibility into AI and ranking







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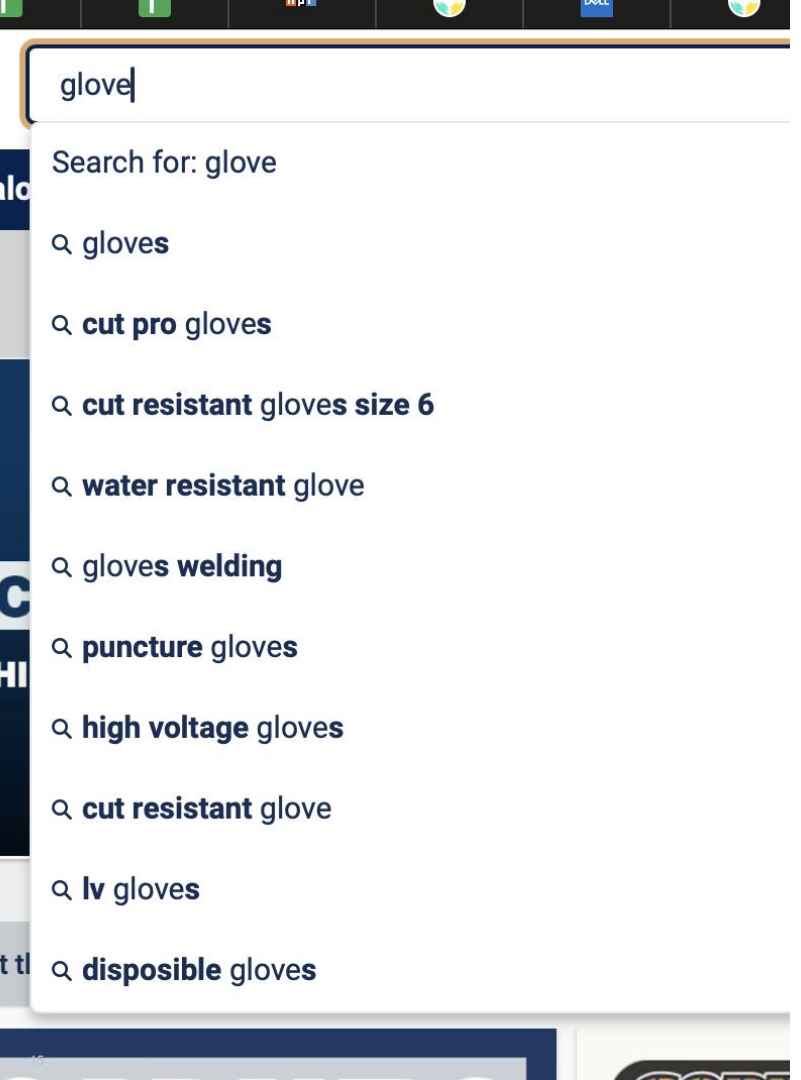
Demo

B2B seller of Industrial & Safety Products for MRO

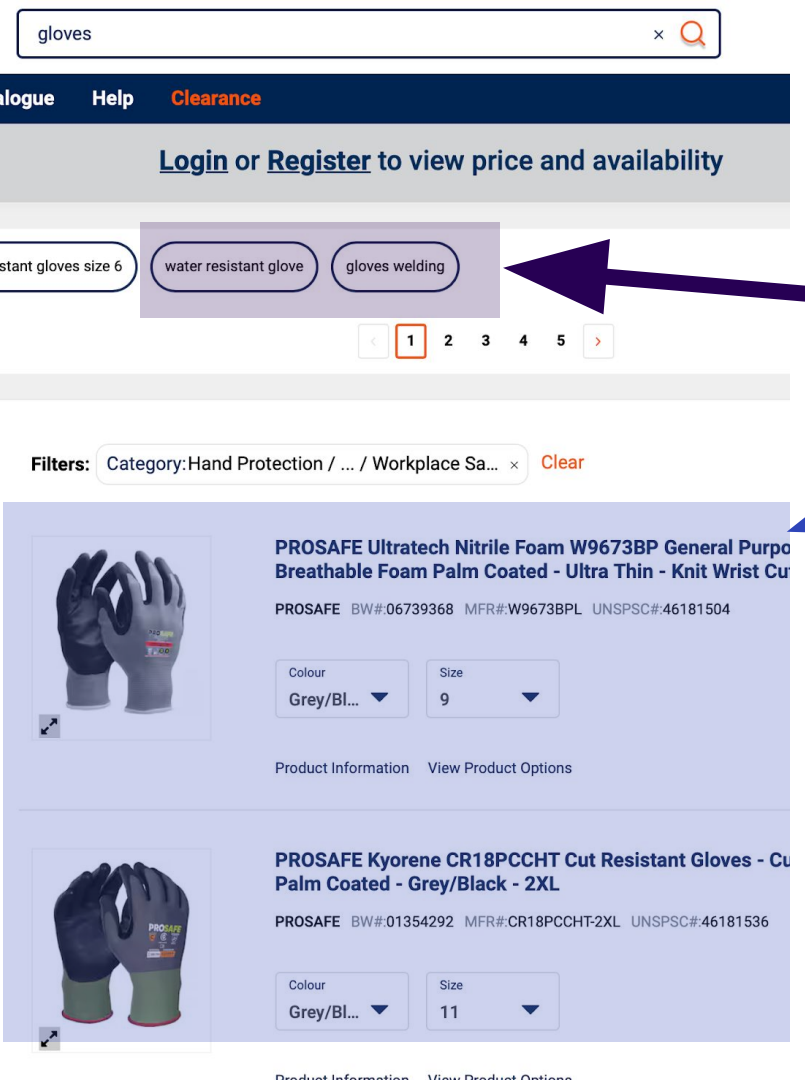


Consider ”gloves”

Simple nouns are often the most difficult to handle because there may be thousands of relevant products:

- **Boots** (construction or chemical plant)
- **Masks** (laboratory or asbestos removal)
- **Coveralls** (flame resistant or clean room)
- **Torch** (flashlight or welding torch)
- **Seal** (food grade or cryogenic)
- **Wire** (electrical versus welding)
- **Chain** (for lifting or for a drive system)

Default Results



In this case Coveo:

- Attempts to Disambiguate
  - Recommends alternate queries
- Shows best sellers
  - Based on all recent user behavior

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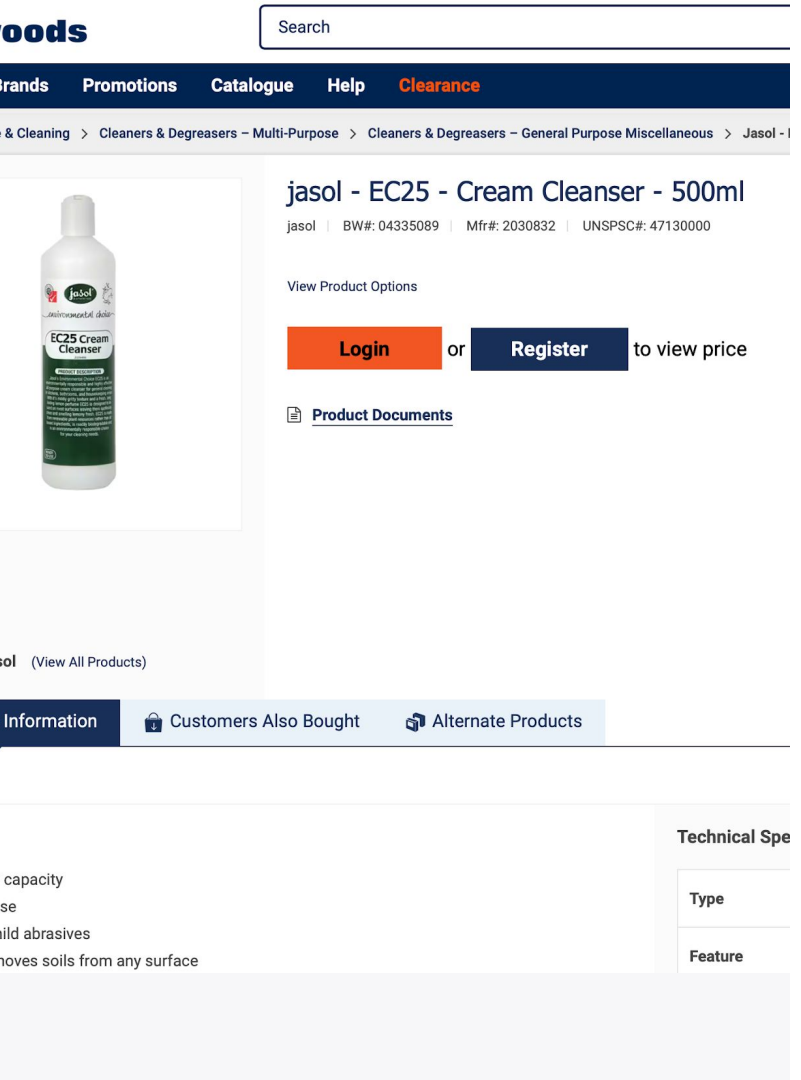
Intent Observation



The user then begins using the site and they:

- Add an abrasive cleanser
- Add acetone
- And shows interest in chemicals

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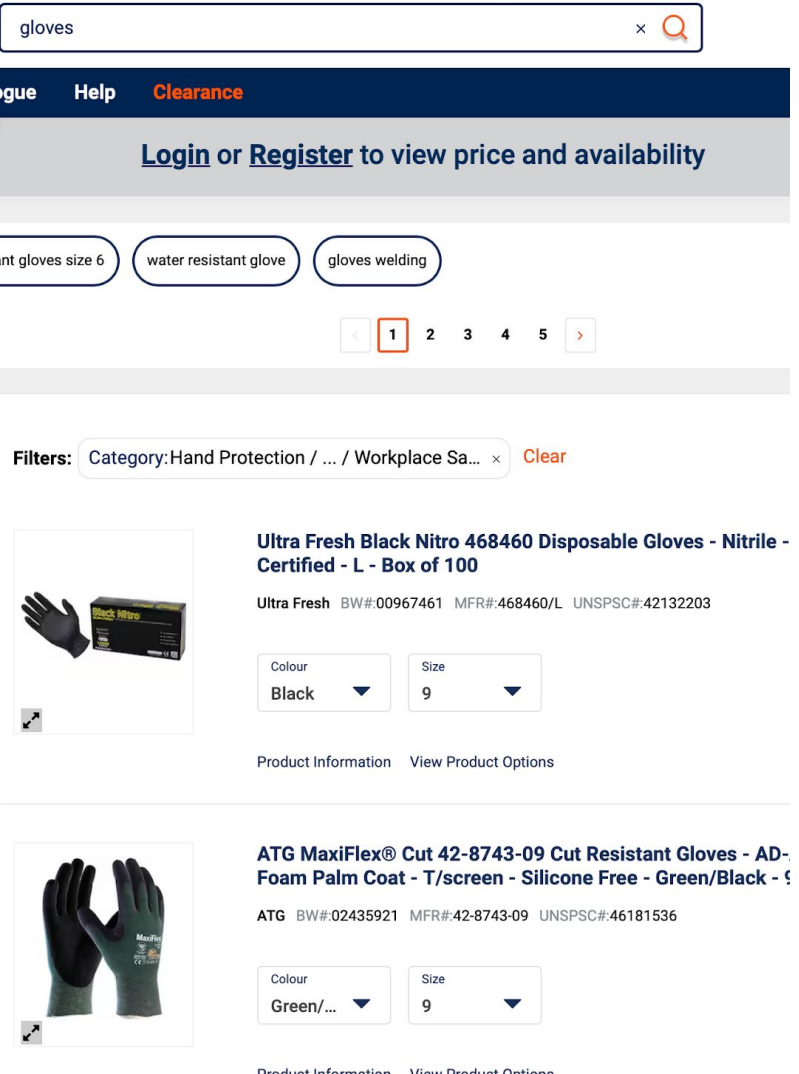
In-Session Adaptation



Now the same query for gloves:

- Still returns a best seller
- But focuses first on a chemical resistant glove

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Understanding the technology involved in personalisation

Breakdown of Personalization

What types of useful data do we have?

- Customer Identity
- Customer Transactions
- Customer Behaviour

Awareness of sources :

- 0, 1st, 2nd & 3rd party

Combined with :

- Market Trends
- Sales Data

1. Gather and process data
2. Analysis & Intelligence
3. Present a *more* relevant experience to your customer

B2B Order Personalisation & Recommendation

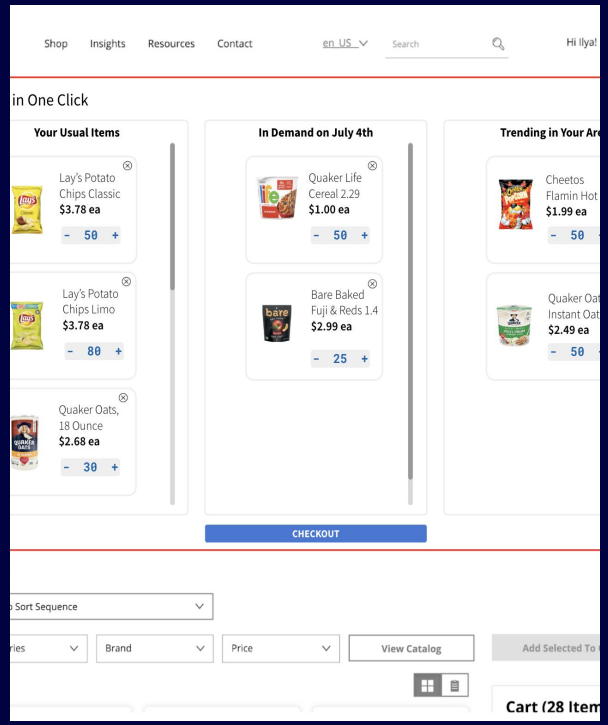
$86B+
revenue

200+
countries

10k+
SMBs

The strategy was to **maximise conversion** across B2B channels. They understood that they could do this by surfacing recommendations during the buying journey that were highly applicable and specific to their customers.

Engaging with Grid Dynamics AI division in 2018, they embarked on the process of envisioning and delivering a solution that would empower their users with **personalized product recommendations** (order personalization based on signals), order sizing recommendations and market trend intelligence based on historical purchasing behaviour and smart forecasting.



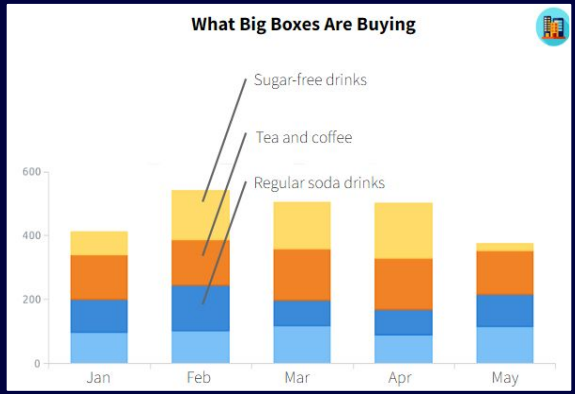
B2B Order Personalisation & Recommendation

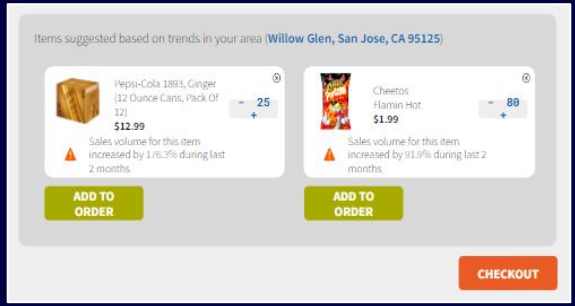
7+ years
of partnership

4 months
to launch MVP

▲orders
volume

- The recommendation engine surfaced market Insights, assortment suggestions and location based analytics to product distributors and resellers during the online purchase process..
- The solution provided integrations with multiple channels including B2B and B2C channels to deliver the recommendation across business models.
- The solution was designed and deployed as a multi-tenant recommendation engine to be leverage across the group business.
- This was a live deployed application of AI and Machine Learning well ahead of the industry curve.





Understanding the technology involved in personalisation

Break down of the Customer Data Platform

- Standalone, Embedded or distributed?
- Can we use B2C CDPs?
- B2B CDP Emerging v Established v Mature
- Where are the personalisation opportunities from here?

Intro to commercetools:

Empowering brands to innovate, scale, and win in digital commerce —faster and smarter than anyone else

Market Leader and Innovator

Architect of composable commerce, now the industry standard

Gartner

FORRESTER®

IDC

PARADIGM B2B

Gartner Peer Insights Customers' Choice 2025 ™

commercetools

5x Leader
since 2020
(Digital Commerce)

Rapid Growth & Scale

$175M
revenue in 2024

+75% YoY
profitable growth; cash flow positive

Trusted by global brands

500+
enterprise customers across 50+ countries

adelco · BIC · CARGO CREW · Cepheid. A better way. · cimpress · DANONE ONE PLANET. ONE HEALTH · Dawn · GEBERIT · LabelVie GROUPE · Leebmann24 · normet · TEKTON · zoro

The New Baseline: What B2B Buyers Expect (and What's Just Table Stakes)

TABLE STAKES

64% of B2B buyers expect suppliers to provide tailored digital products[1]

77% of B2B buyers say their latest purchase was very complex or difficult [2]

Customized catalogs: Tailored product assortments help buyers find relevant items faster, improving both efficiency and user satisfaction

Custom pricing: Reflecting negotiated terms, volume discounts or loyalty tiers reinforces trust and strengthens commercial relationships

Negotiated discounts on minimum order quantity (MOQ): Enable pricing negotiation on bulk orders or when buying on a purchase order commitment

Entitlements: Restricting access to specific products, services or pricing based on contracts, roles or regulations ensures compliance and streamlines the buying experience

Sources: [1]Dentsu Superpowers Index [2]Gartner

True B2B Personalization : customer-specific commerce

Crawl, Walk, Run

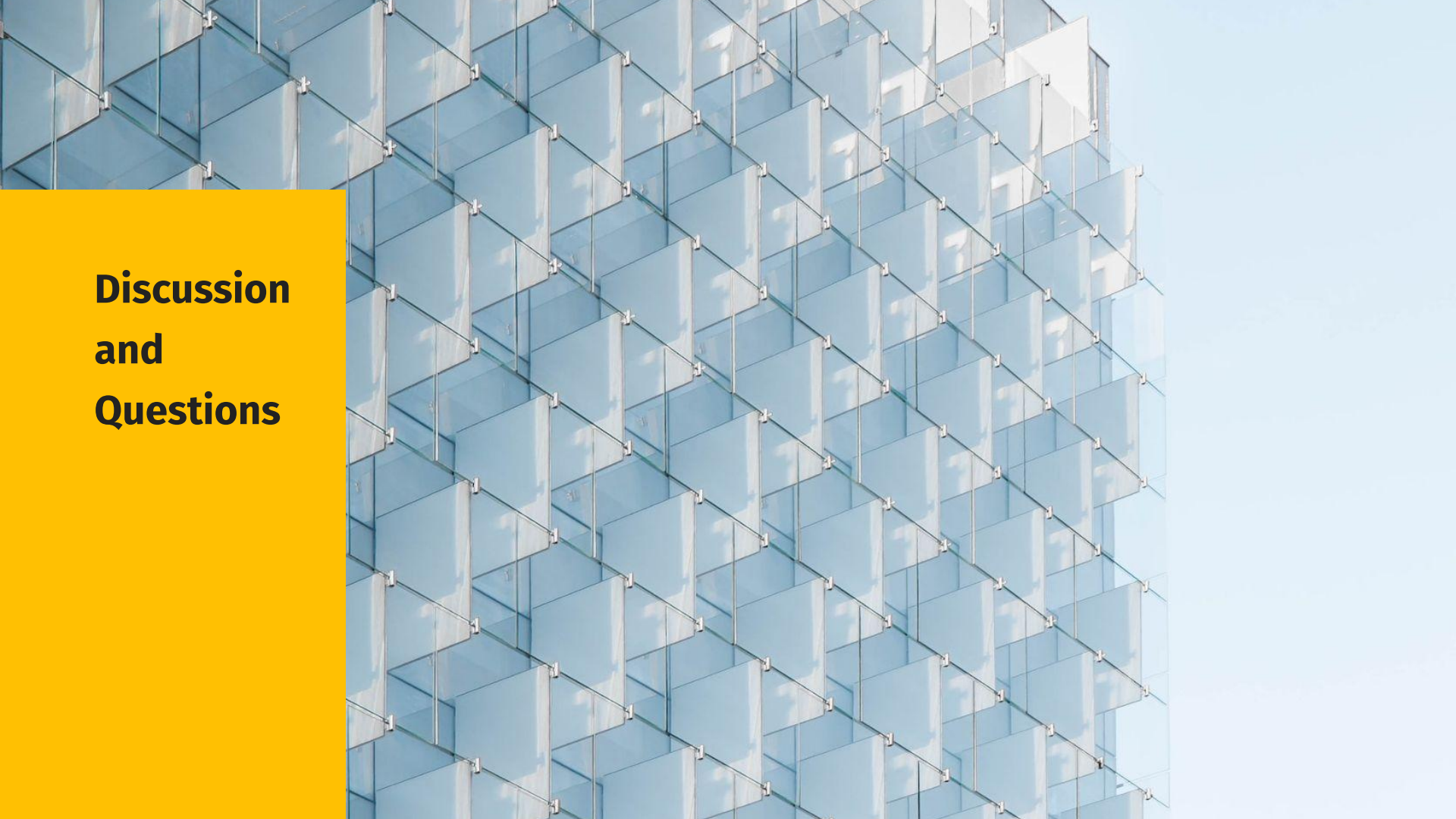
Business Units	Associate Roles	Customer Groups	Stores
Includes departments, subsidiaries or regional locations	specific roles like *buyer, reviewer* or *approver*	Can be defined via parameters like geography, industry, or buyer behavior	create logical groupings tailored to specific contexts

commercetools

customers driving personalization

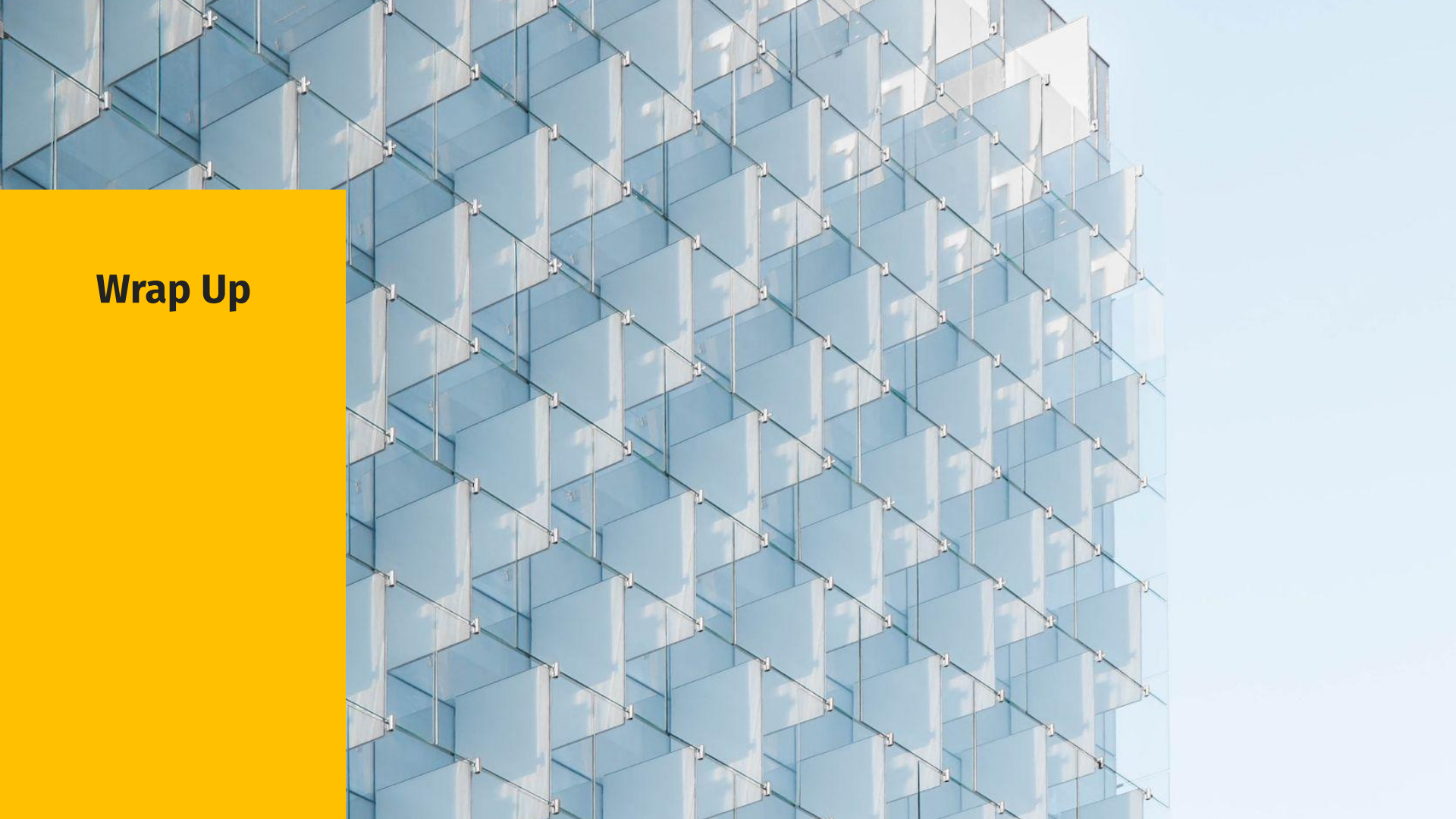
Cepheid®
A better way.

LALLEMAND



Discussion and Questions

Wrap Up



Wrap Up

Today, we covered

- Learning how to build role-based personas that will engage your customers across all process touch points.
- Improving conversions and customer loyalty through underused personalization strategies.
- Discovering pragmatic personalization tactics for quick wins.
- Case Study : Using AI personalization to unlock new opportunities for your customer.

Next Time - Wednesday 16th July

- Understand how silos form and what organisational habits reinforce them.
- How to overcome silos that block digital growth.
- Discover actionable tactics that will help you quickly foster collaboration across departments.
- Case Study : Cross functional teams in action

Featuring:

Guest Speaker:

Charlie Bell
Senior Director EMEA,
Solutions Engineering
Contentful

- Setting the stage – What's driving the change and how do I keep up?
- Unlocking customer journey data to fuel B2B growth
- Cracking the code of B2B user personalization: Moving beyond demographics to roles
- Accelerating digital transformation with x-functional teams – Breaking the silo mindset
- B2B digital transformation playbook – Small, strategic changes for big impact