

Customer DNA for B2B

From data signals to commercial impact

Nathan Slabinck / Maarten De Neve

delaware

Nr of orders last 12m	Days since last order	Customer Segment	Cross-sell potential	Churn
11	18	Medium	Category 2	55%
47	4	Medium	/	75%
3	187	Low	Category 3	83%
52	6	High	/	23%
8	43	Low	Category 2	53%

Flag

B2B
XS26

Your workshop hosts



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Finding the right signals in your data



More data. Less clarity.

“

We have more customer data than ever before.

Yet it remains hard to answer
the one question that matters in B2B:
who is worth pursuing?

”

More data. Less clarity.

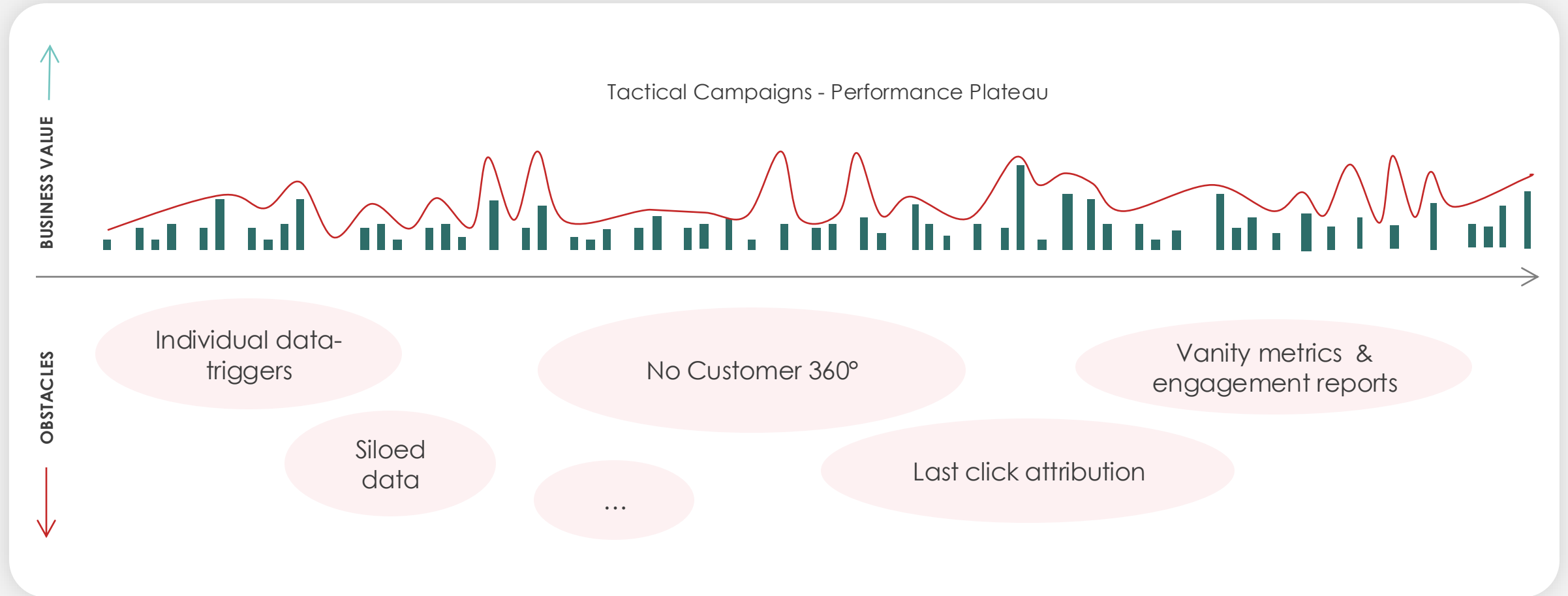
The problem is not a lack of data.

It is knowing which data actually moves the needle and which is just noise.



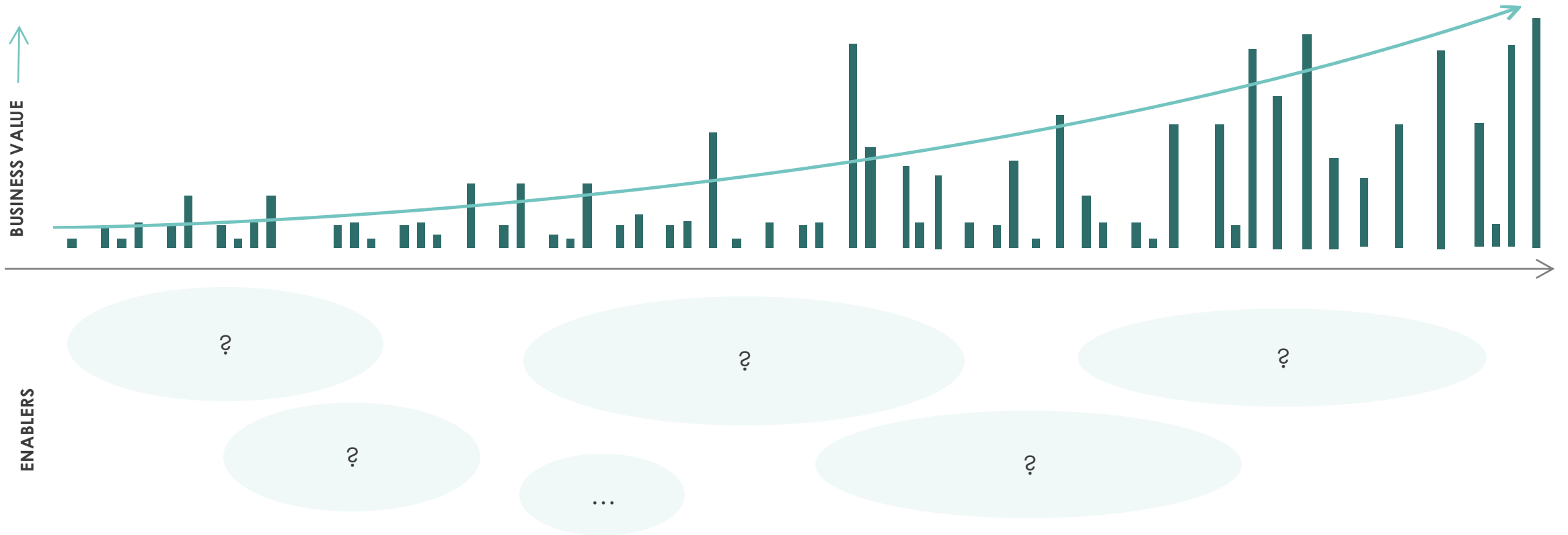
Your customers are already telling you everything

But we might be measuring the wrong things



Your customers are already telling you everything

Find the enablers that actually drive revenue



You need to bridge what Sales and Marketing need, to what IT can actually build.



Customer DNA

A methodology to get you started

Nr of orders last 12m	Days since last order	Customer Segment	Cross-sell potential	Churn
11	18	Medium	Category 2	55%
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Flag Pr



A methodology to help you get started

Customer DNA

Our Methodology for Customer Data Activation:



Building your '**Commercial**' **Golden Record** based on a unified vision.



A comprehensive individual description: characteristics, behaviors, interactions, history, ...

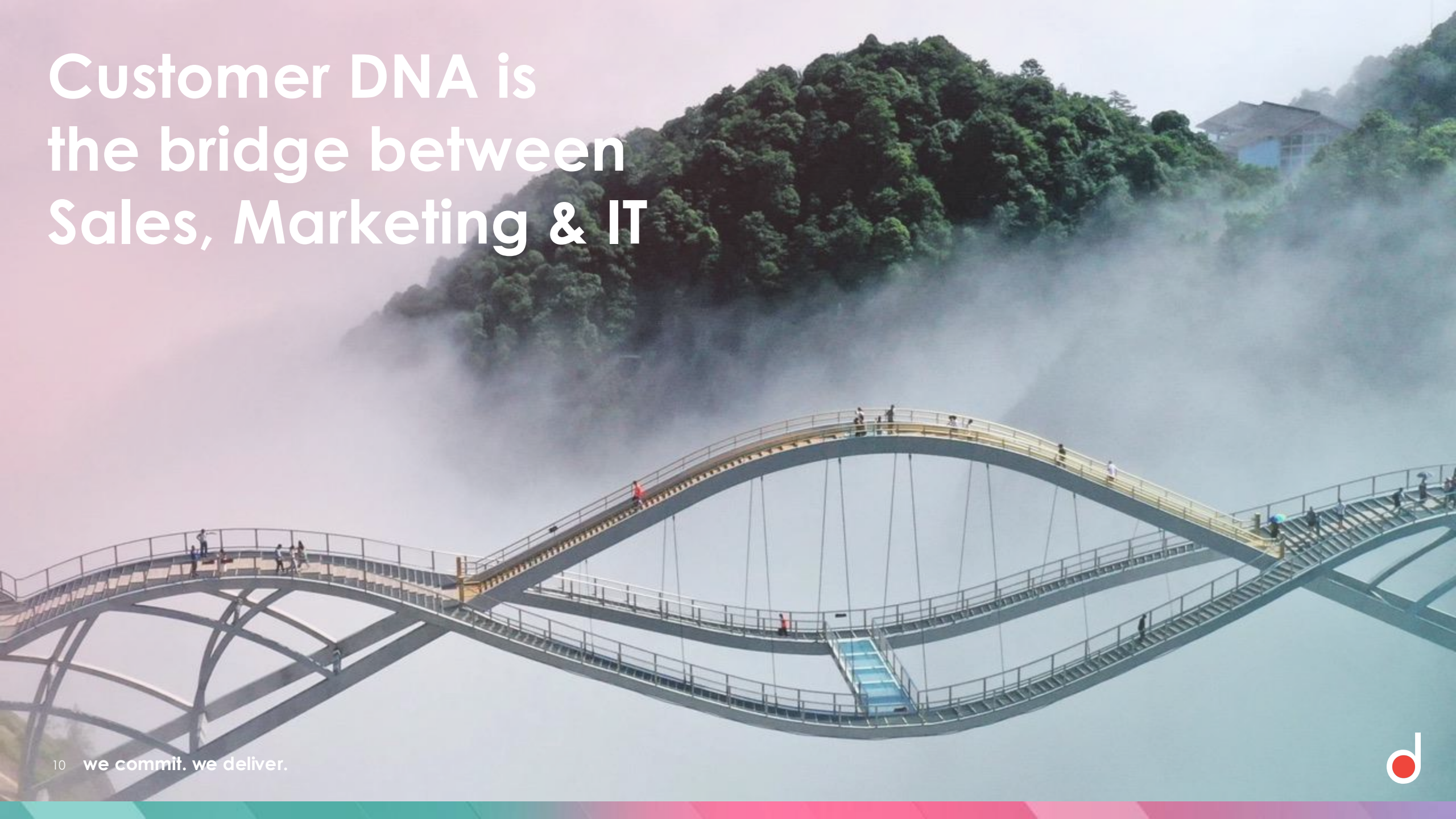


A directly actionable data set showing what drives revenue:

1. **FEATURES:** number of transactions, total revenue, days since last order...
2. **FLAGS:** one-time buyer, inactive fan, high-value fan, cross-sell category...
3. **PREDICTIONS:** churn risk, next purchase moment, product affinity...



Customer DNA is the bridge between Sales, Marketing & IT



Customer DNA

translates data signals spread across teams
into shared, actionable, commercial insights



Customer DNA example

Customer ID	Total Revenue	Products Bought							
2514230	€236.750	42							
2424910	€735.150	247							
2568890	€59.300	18							
2744480	€1.561.680	449							
2463790	€273.220	87							

Feature



‘What do I need to know about my customer to take the right commercial action?’

→ This will define your Customer DNA.



Customer DNA example

Customer ID	Total Revenue	Products Bought	Categories bought	Nr of orders last 12m	Days since last order				
2514230	€236.750	42	1	11	18				
2424910	€735.150	247	3	47	4				
2568890	€59.300	18	1	3	187				
2744480	€1.561.680	449	2	52	6				
2463790	€273.220	87	1	8	43				

Feature



Customer DNA example

Customer ID	Total Revenue	Products Bought	Categories bought	Nr of orders last 12m	Days since last order	Customer Segment	Cross-sell potential		
2514230	€236.750	42	1	11	18	Medium	Category 2		
2424910	€735.150	247	3	47	4	Medium	/		
2568890	€59.300	18	1	3	187	Low	Category 3		
2744480	€1.561.680	449	2	52	6	High	/		
2463790	€273.220	87	1	8	43	Low	Category 2		

Feature

Flag



Customer DNA example

Customer ID	Total Revenue	Products Bought	Categories bought	Nr of orders last 12m	Days since last order	Customer Segment	Cross-sell potential	Churn score	...
2514230	€236.750	42	1	11	18	Medium	Category 2	55%	
2424910	€735.150	247	3	47	4	Medium	/	75%	
2568890	€59.300	18	1	3	187	Low	Category 3	83%	
2744480	€1.561.680	449	2	52	6	High	/	23%	
2463790	€273.220	87	1	8	43	Low	Category 2	53%	

Feature

Flag

Prediction



COMPANY DNA

Who are my customers?

Descriptives

Company name
Industry
Type
Country
Region
Size (people)
Revenue
Growth

DMU / Buyer group

Roles
Decision Power
Key prescriber
User
...



Value

Avg. revenue generated
CLV
Churn prediction
Up- & Cross-sell potential
Share of wallet
...

Relationship

Customer since
Active client (y/n)
Customer segment
Customer loyalty score
Account manager
Churn score
...

Services

Active services
Service start date
Service usage frequency
Upgrades/tier level
...

Satisfaction

Relational NPS score
NPS evolution
Transactional NPS
Nr of reviews
...

Marketing

Engagement rate
Event attendance
Downloads
Newsletter subscription
Email open rate
...



Contact DNA

who are key buying people?

Descriptives

Level
Location

- Town
- Postal code
- Geolocation

Company
...

Product & Region

Primary region
Regional sales rep
Territory
Products purchased
...

Behavior

Frequency of contact
Nr of tickets
Nr of complaints
NPS score
...

Services

Active services
Service start date
Service usage frequency
Upgrades/tier level
...

Loyalty

Collaboration since
Working at company
since
...

Job description

Role
Team size
Buyer Group/DMU-role
Impact level
Active since
...

Marketing

Downloads
Newsletter
Channel preference
...



Where does the Customer DNA reside?

Standalone



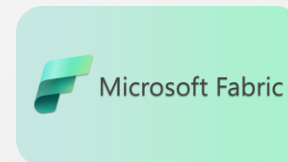
+ Scripts

Within your tech stack

CRM



Data Layer



Start here

Set this as the goal



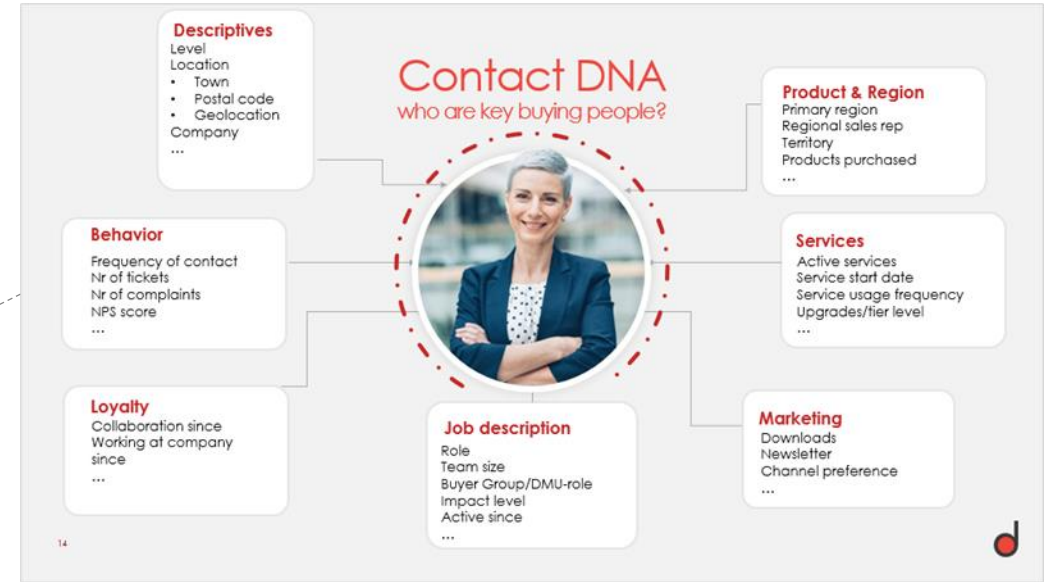
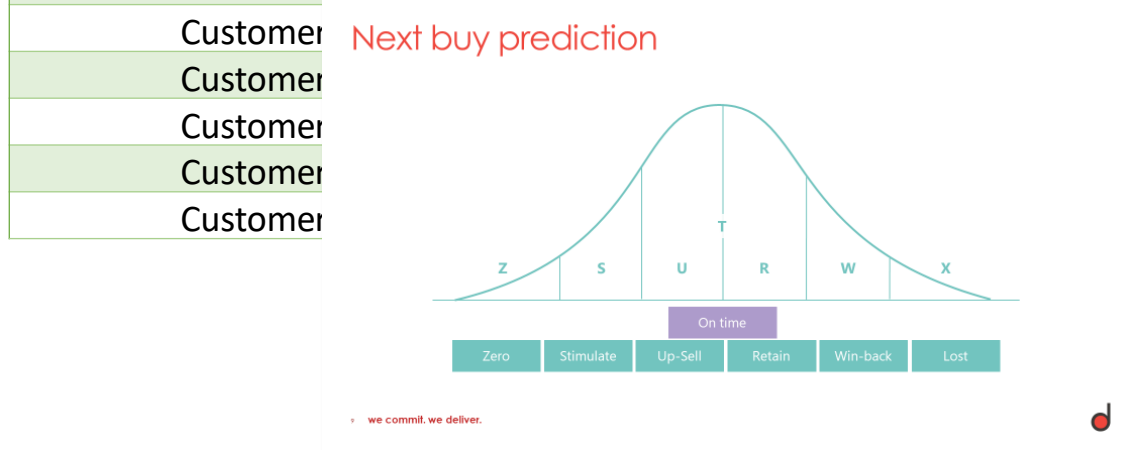
So what does this actually
mean for your business?



Customer DNA for Sales:

Know who to call and why. Before your competitor does.

Customer	Likelihood to buy	Sales priority
Customer 1	94%	1
Customer 2	86%	2
Customer 3	75%	3
Customer 4	75%	4
Customer 5	42%	5
Customer 6	36%	6
Customer 7	34%	7
Customer 8	29%	8
Customer 9	22%	9

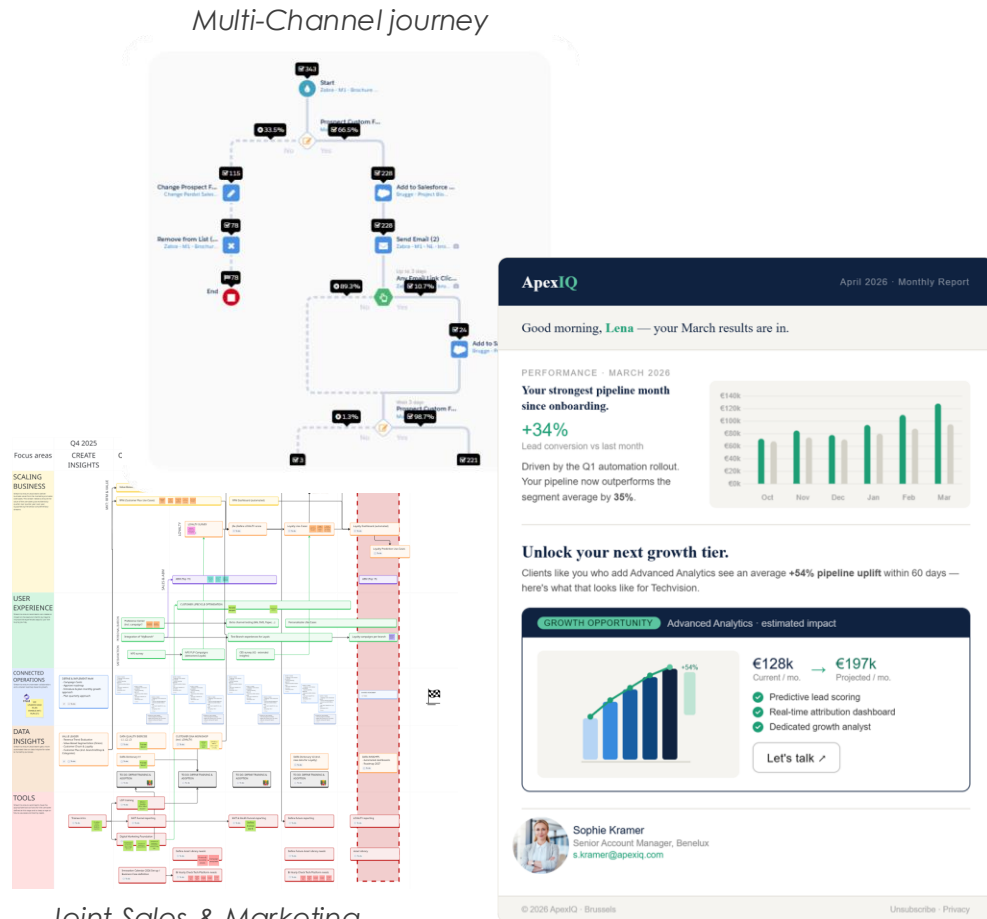


Activate the DNA to **prioritize sales visits**

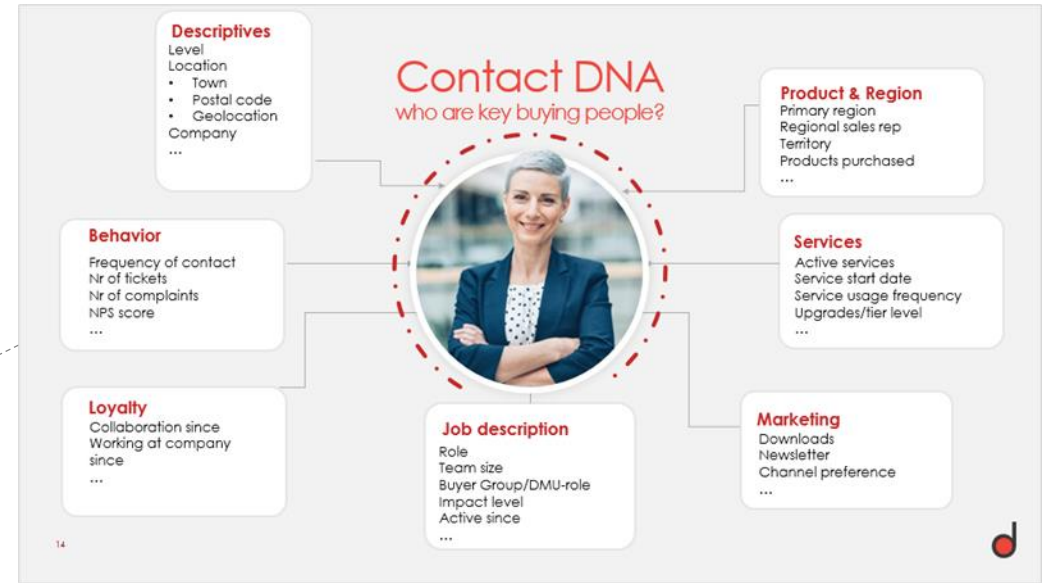


Customer DNA for Marketing:

Stop filling your marketing calendar. Start building business cases.



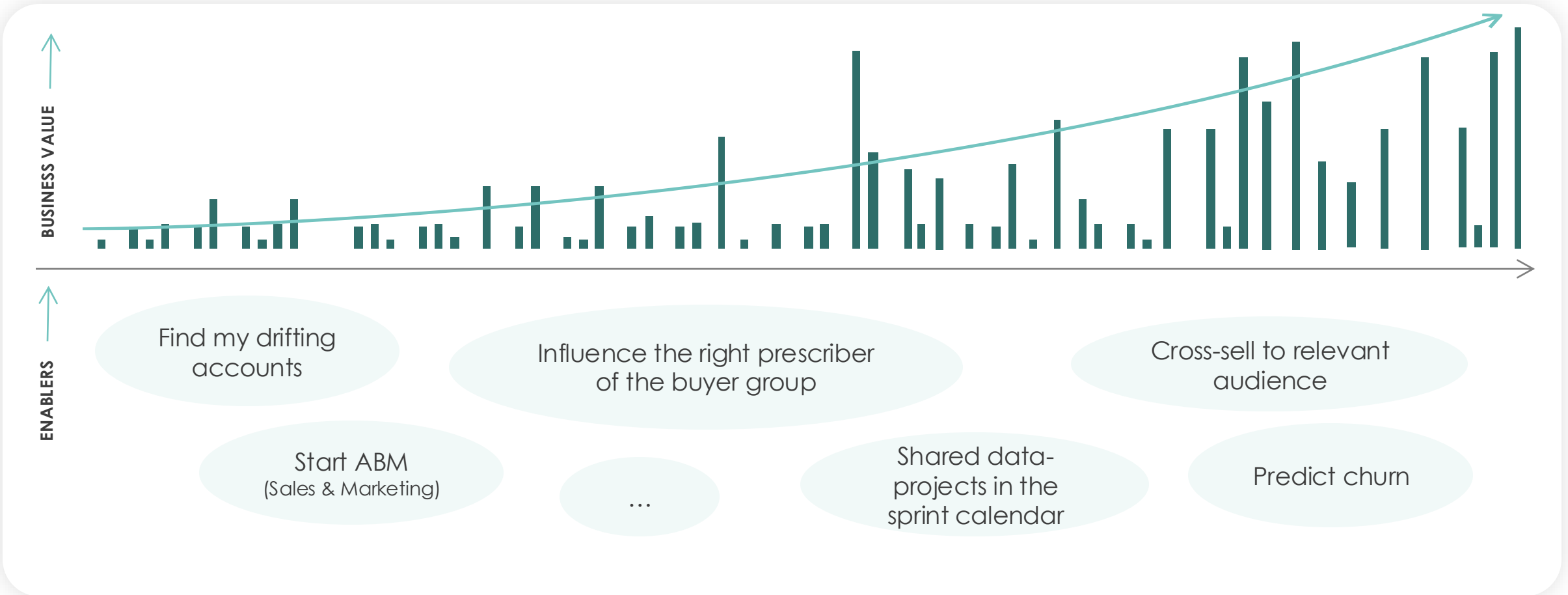
Cross-sell campaign



Activate the DNA with **'Business Cases'**



Customer DNA enables your teams to focus on the right signals & increase business impact



Customer DNA

Some examples to make it concrete

Nr of orders last 12m	Days since last order	Customer Segment	Cross-sell potential	Churn
11	18	Medium	Category 2	55%
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Flag



Meet NutriForge

- B2B manufacturer of nutritional ingredients for animal feed producers.
- They **supply clients with 3 product categories:** vitamin-mineral blends, protein concentrates & performance additives.



Meet Laura

Head of Marketing, NutriForge

Laura's job:

- ☑ I enable the sales team have better conversations,
- ☑ I make sure we reach the right people at the right moment.
- ☐ *'To do that well, I need to understand clients as well as our sales reps do.'*



Laura's 2 biggest challenges

1. We lose accounts we didn't know were drifting

- A distributor quietly shifts to another brand & we only notice when orders stopped.

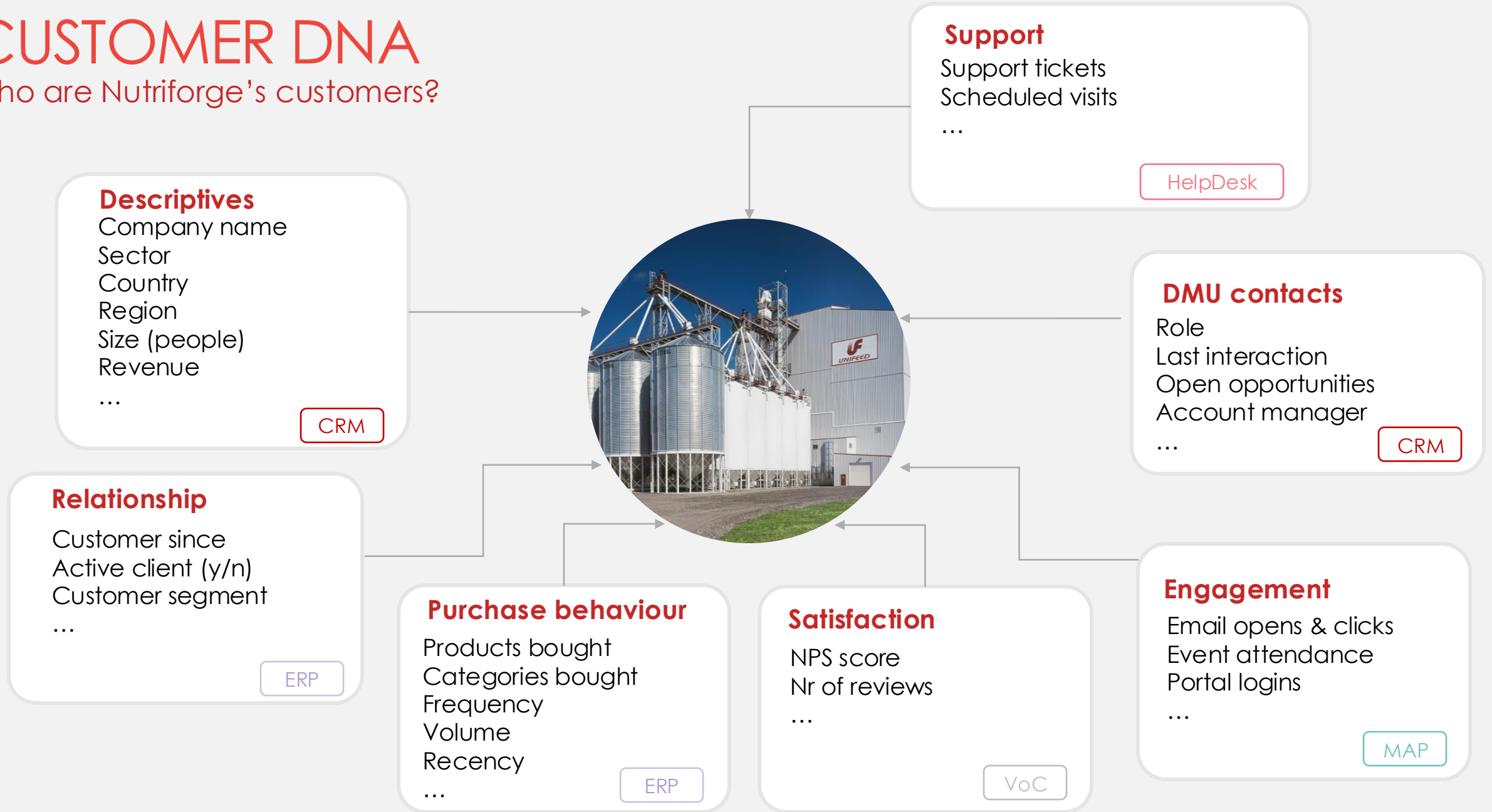
2. We don't know who actually decides

- A nutritionist, procurement manager, QA, ... they all influence a purchase.
- On top, a younger generation is taking over: more digital & harder to reach.



CUSTOMER DNA

Who are Nutriforge's customers?



‘What do I need to know about my customer to take the right commercial action?’

→ This will define your Customer DNA.



Challenge 1: Drifting clients



1. We lose accounts we didn't know were drifting

- 3 accounts that used to order monthly have gone quiet.
- She finds out too late, when the revenue disappears

Job to be done:

1. Define '**drifting clients**' (between sales, marketing & IT)
2. Check if the data is available.
3. Add the '**drift flag**' to the Customer DNA

Challenge 1: Drifting clients



ERP

Customer ID	Products Bought	Categories bought	Nr of orders last 12m	Days since last order	Customer Segment	Drifter	?	?
2514230	42	1	11	18	High	N		
2424910	247	3	47	4	Medium	N		
2568890	18	1	3	187	Low	Y		

Feature Flag Prediction

The data **EXISTED** but **EXTRA INTELLIGENCE HAD TO BE BUILT!**

Once mapped, define the approach:

- ❑ **One-shot:** Identify all current drifters + create win-back campaign (multiple tactics, incl. sales)
- ❑ **Always-on:** Campaigns when flag is triggered + alert to account when no response on campaign

Challenge 2: Reaching the DMU*



2. We don't know who actually decides

- She knows 1 contact per account, usually the procurement manager.
- A younger generation is taking over. More digital, harder to reach traditionally

Job to be done:

1. Define '**DMU-needs**' (between sales, marketing & IT)
2. Check if the data is available.
3. Add the '**DMU Complete**' flag to the Customer DNA



Challenge 2: Reaching the DMU*



CRM

Customer ID	Products Bought	Categories bought	Nr of orders last 12m	Days since last order	Procurement Contact	Executive Sponsor	Customer Segment	DMU Complete?	?	?
2514230	42	1	11	18	Peter Baskins	-	High	N		
2424910	247	3	47	4	-	Saskia Theys	Medium	N		
2568890	18	1	3	187	Amy Sando	Joel Cortez	Low	Y		

Feature Flag Prediction

The data does **NOT EXIST**, so she had to **GO OUT AND FIND IT!**

Once mapped, define the approach:

- ❑ **One-shot:** Complete roles, names, preferred channels & content
- ❑ **Always-On outreach:** start drip campaigns, personalized per profile



Customer DNA

Workshop time:
Try it yourself on a fictional company



Meet Sam

Head of Marketing, Syntix HR

The company:

- A Belgian B2B software company selling **HR tools** to SMEs.
- They sell an **HR-module**, a **Payroll Module** & a **Performance Module**

Sam's job:

- I send out weekly & monthly product campaigns to inspire our clients
- I help to feed complaints to customer service
- But to do my job well, I need to know where to focus. And prove or even increase my ROI on business!



Sam's 2 biggest challenges

1. New customer onboarding

- 40% of **new clients never fully use the product** & churn within 12 months.
- Sam wants to detect low adoption early and intervene before it becomes a cancellation.

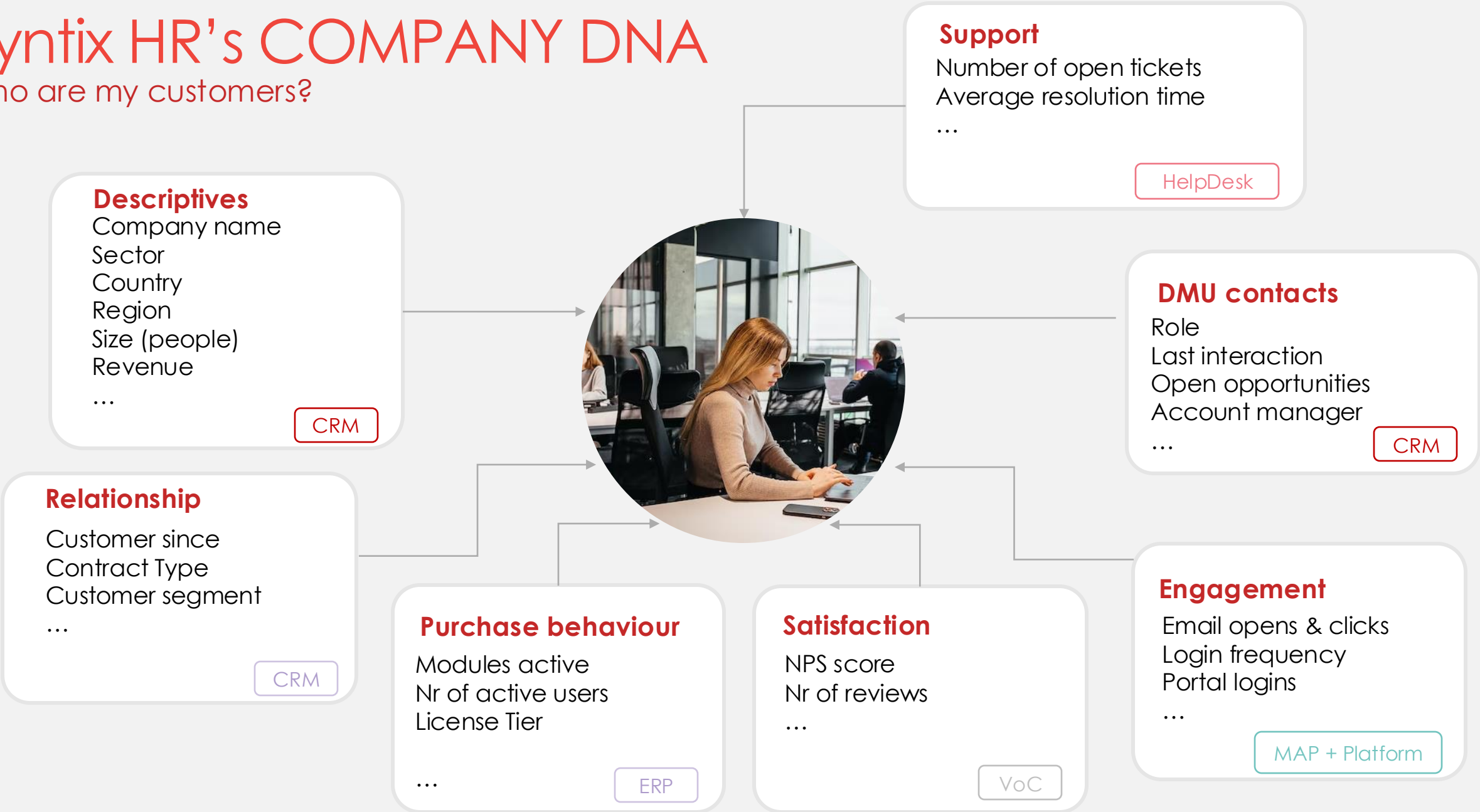
2. Cross-selling

- Sam's best accounts have been using the **HR Module** for years.
- They have no idea Syntix HR has the **payroll** and **performance** module
- Sam has purchase & usage data but **never acted on the white spots**.



Syntix HR's COMPANY DNA

Who are my customers?



Syntix HR's Customer DNA

'Add the missing flags and predictions & identify what data Sam still needs to find.'



Customer ID	Licences	Number of created users	Modules active	Days since last login	Customer Segment
2514230	16	12	1	18			Medium				
2424910	32	31	3	4			High				
2568890	20	5	1	187			Low				

Feature

Flag

Prediction

Complete Sam's DNA table

1. Which **flags** would you add & how would you define them?
2. Which **predictions** would you add & how would you calculate them?
3. Which **features** are missing today & and where would you find it?



Exercise: build Sam's Customer DNA

1. Table = your team

- Collaborate with the people at your table
- Choose one of Sam's challenges to work on



A4 hand-out

2. Complete Customer DNA on your A3-print

- Which **features**, **flags** and/or **predictions** would you add to the DNA?
- Note **difficulties** and **hurdles** that occurred during your discussions



A3 hand-out

3. Share (y)our take

- After 10 minutes, we'll introduce our take
- When ready, you can **discuss hurdles within your own company**
- If we have time, we pick 1 extra from the audience

delaware's take on this exercise



Syntix HR's Customer DNA

Challenge 1: New customer onboarding

Our answer.
What's yours?



Customer ID	Licenses	Number of created users	Modules active	Days since last login	Added		Customer Segment	Added		?
					Account Set-up complete	E-Learning track complete		Adoption %	Onboarding complete	
2514230	16	12	1	18	Y	N	Medium	75%	N	
2424910	32	31	3	4	Y	Y	High	97%	Y	
2568890	20	5	1	187	N	N	Low	25%	N	

Feature: Licenses, Number of created users, Modules active, Days since last login, Account Set-up complete, E-Learning track complete
Flag: Adoption %, Onboarding complete
Prediction: ?

The data **EXISTED** but **EXTRA INTELLIGENCE HAD TO BE BUILT!**

- **Adoption % flag** → Nr of active users vs purchased licenses (Platform)
- **Onboarding complete** → Calculated from feature usage in first 30 days (Platform)

Syntix HR's Customer DNA

Challenge 2: Cross-selling

Our answer.
What's yours?



Customer ID	Licenses	Number of created users	Modules active	Days since last login	Added			Customer Segment	Added	?
					HR Module	Payroll Module	Performance Module		Cross-Sell potential	
2514230	16	12	1	18	Y	N	N	Medium	Y	
2424910	32	31	3	4	Y	Y	Y	High	N	
2568890	20	5	1	187	Y	N	N	Low	Y	

Feature

Flag

Prediction

The data needed **EXISTED** within the company!

- **Module purchased** → In ERP per account
- **Cross-sell potential flag** → CRM + ERP reveals the opportunity



Syntix HR's example campaign

Challenge 2: Cross-selling



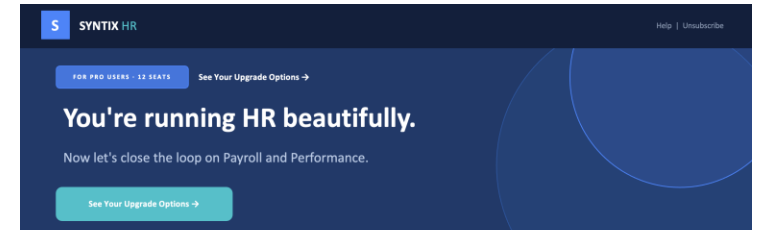
Syntix HR — Cross-Sell Opportunity - Marketing Automation Segment All accounts - Filtered by single-module usage

84 records Cross-sell: **All** Potential Y Potential N Licence: Basic Pro Enterprise All

Customer ID	Modules Active	Number of Users	Licence Tier	Days Since Last Login	HR Module	Payroll Module	Performance Module	Customer Segment	Cross-Sell Potential
1042387	1	12	Pro	14	Y	N	N	High	Y
2091845	1	28	Enterprise	5	Y	N	N	High	Y
3047291	1	7	Basic	90	N	Y	N	Low	N
4083920	1	55	Enterprise	3	Y	N	N	High	Y
5019374	1	19	Basic	22	N	Y	Y	Low	Y
6074821	1	12	Basic	14	N	N	N	Low	N
703849	1	12	Basic	14	N	N	N	High	Y
809103	1	12	Basic	14	Y	N	Y	High	Y
904783	1	12	Basic	14	N	N	N	Medium	Y
103847	1	12	Basic	14	N	N	N	Low	N
112938	1	12	Basic	14	N	N	N	High	Y
120918	1	12	Basic	14	Y	N	Y	Medium	Y
137482	1	12	Basic	14	N	N	N	Low	N
149103	1	12	Basic	14	N	N	N	High	Y
150293	1	12	Basic	14	Y	N	Y	Medium	Y
163749	1	12	Basic	14	N	N	N	Low	N
174829	1	12	Basic	14	N	N	N	High	Y
183920	1	12	Basic	14	Y	N	Y	High	Y
192038	1	12	Basic	14	N	N	N	Medium	Y
203918	1	12	Basic	14	N	N	N	Low	N
2147382	1	12	Basic	14	N	N	N	High	Y

Personalization

Cross-sell



Hi [First Name],
 Your team of 12 has been on the Syntix HR Pro plan, and your data tells us something useful: companies at your stage who add Payroll + Performance together see 40% less admin overhead and measurably stronger retention.
 We've put together exactly what this looks like for your team.

Two modules. One seamless suite.

Both connect directly to your existing HR data — no migration, no duplication.

Payroll Module

Automated. Compliant. Connected.

- Auto-calculates pay from HR hours data
- Tax filing & compliance built in
- Payslips sent directly to employees
- Multi-currency support
- Full audit trail & reporting

From €4/user/mo - 12 users = €48/mo

Performance Module

Goals. Feedback. Growth.

- OKR & goal-setting framework
- 360° feedback & peer reviews
- Manager check-in workflows
- Skills gap & development plans
- Real-time performance dashboards

From €3/user/mo - 12 users = €36/mo

Why teams like yours upgrade at 12 users

40%

Less admin time with Payroll auto-sync

2.4x

Faster review cycles with Performance

€84

Per month total for 12 users (bundle)



Customer DNA

Take-Away

Nr of orders last 12m	Days since last order	Customer Segment	Cross-sell potential	Churn
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Flag



You leave today with ...

1. What you learned today: the framework

- You now know how to think about a data-driven campaign, from signal to action.
- What you can do this week: **start your first DNA-exercise**

Try to answers these questions for your business

- “Are we taking action on our product whitespots for each customer?”
- “Are we addressing potential drifters?”
- “Do we need a framework to better align sales and marketing with IT?”

Customer DNA

Customer ID	Total Revenue	Products Bought	Categories bought	Nr of orders last 12m	Days since last order	Customer Segment	Cross-sell potential	Churn score	...
2514230	€236,750	42	1	11	18	Medium	Category 2	55%	
2424910	€735,150	247	3	47	4	Medium	/	75%	
2568890	€59,300	18	1	3	187	Low	Category 3	63%	
2744480	€1,561,680	449	2	52	6	High	/	23%	
2463790	€273,220	87	1	8	43	Low	Category 2	53%	

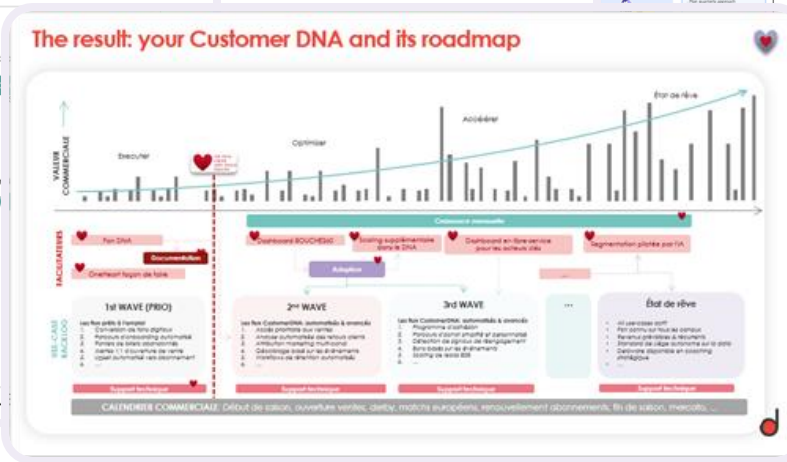
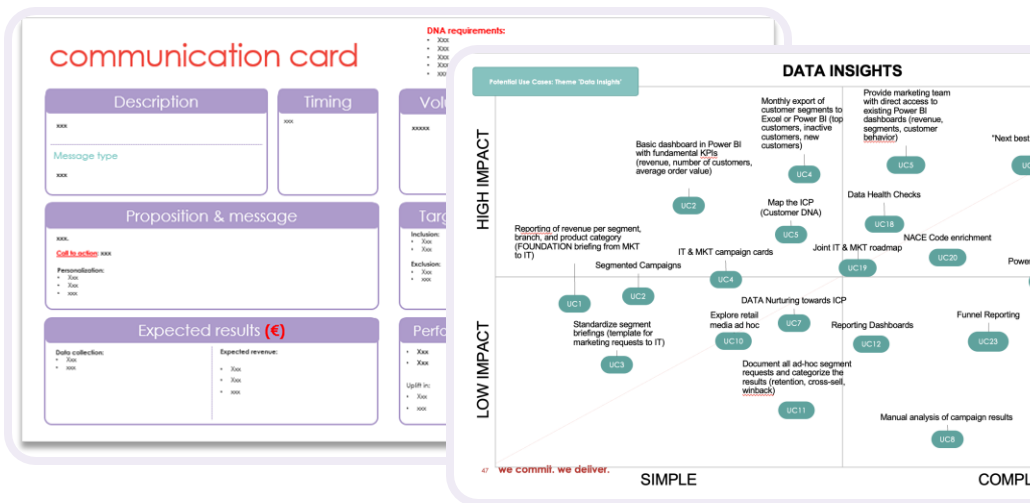
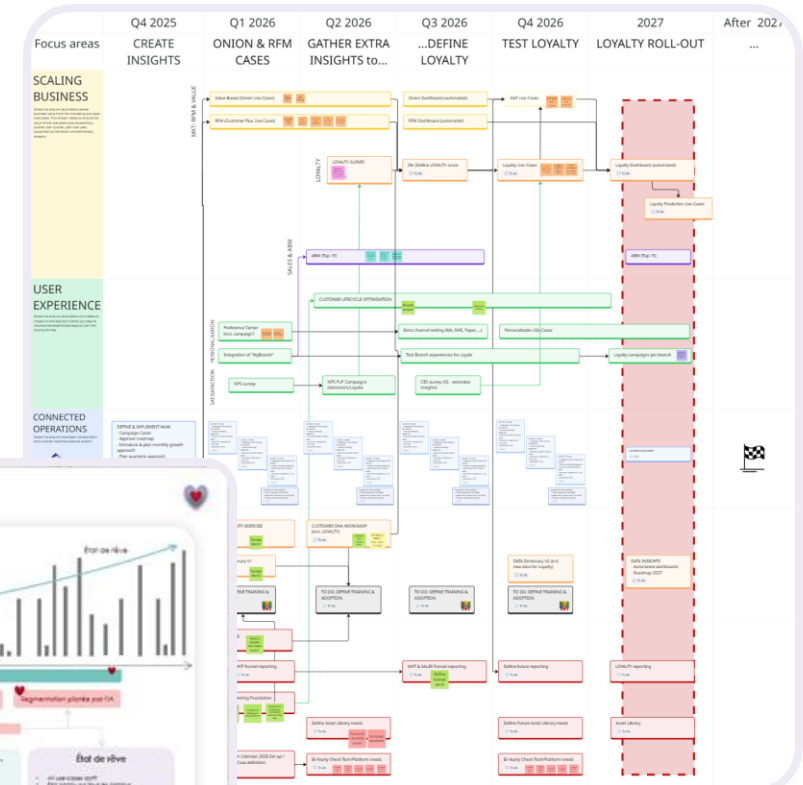
Feature → Flag → Prediction



You leave today with ...

2. Eager to make it repeatable? Let's do a Customer DNA Sprint!

- Designing is easy. Connecting the data, aligning IT and business, and making it repeatable is hard.
- That is exactly what the **Customer DNA Sprint** is designed for!



Example of an implemented DNA

delaware Customer DNA Campaign list selector

2.500K
Number of customers selected

6.19M
Total CLV selected

244.32M
Total Revenue current year selected

-1.31M
Total discounts current year selected

Email	Customer ID	Customer Name	RFM Segment	VBS	Loyalty	CLV Lifetime	Gross Sales	Favorite Br
user0000@***.be	A-0000000	VAN DE VELDE, LAURA	One timer		Loyal	1,290.51	45,027.23	Bruges
user0001@***.org	A-0000001	CLAES PRODUCTION CV	One timer		Churned	66.59	45,771.96	Hasselt
user0002@***.eu	A-0000002	WILLEMS TRANSPORT SPRL	Loyal	medium	Churned	450.65	35,078.20	Ghent
user0003@***.com	A-0000003	BROUWERS, JULIE	Lost	high	New	1,251.95	5,176.37	
user0004@***.org	A-0000004	SA BEKAERT HOLDINGS	At risk	medium	Win-Back	1,722.23	28,338.35	Charleroi
user0005@***.be	A-0000005	LECLERCQ GROUP SRL	Lost	low	Churned	4,112.97	20,015.85	Antwerp
user0006@***.be	A-0000006	BAERT, JURGEN	One timer	medium	Win-Back	3,927.81	11,118.28	Liège
user0007@***.eu	A-0000007	DESMET, JONAS	At risk	high	Win-Back	55.68	9,587.88	Mechelen
user0008@***.org	A-0000008	GCV DUMONT BAKERY	One timer	high	Churned	1,850.67	8,735.96	Namur
user0009@***.eu	A-0000009	BVBA GEORGES FURNITURE	At risk	medium	Win-Back	3,036.28	11,104.94	Hasselt
user0010@***.org	A-0000010	NV JACOBS PHARMA	At risk	medium	Churned	2,498.12	42,291.44	Mechelen
user0011@***.org	A-0000011	VOF VANHEES DISTRIBUTION	Lost	medium	New	2,408.92	27,219.80	Charleroi
user0012@***.org	A-0000012	ANTOINE, HANNE	One timer		Loyal	1,540.10	31,418.23	
user0013@***.net	A-0000013	VANDENBERGH DESIGN CV	Champion	low	Loyal	1,081.24	19,016.61	Ghent
user0014@***.com	A-0000014	VERHOEVEN, MARC	At risk	low	Loyal	3,959.42	7,858.00	Bruges
Total							6,191,706.43	

2500 of 2500 rows displayed

Right-click table to export CSV

Filters

Search filters...

FILTERS ON THIS VISUAL

- Entity Name is (All)
- Group ID is (All)
- Customer ID is (All)
- Customer Name is (All)
- Favorite Branch is (All)
- Sales Channel is (All)
- First Purchase is (All)
- Frequency is (All)
- Last Purchase is (All)
- Loyalty is (All)
- RFM Segment is (All)
- VBS is (All)

Customer DNA in **YOUR** systems



Customer DNA for B2B

From data signals to commercial impact



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A circular graphic containing a table with customer data. The table has five columns: 'Nr of orders last 12m', 'Days since last order', 'Customer Segment', 'Cross-sell potential', and 'Churn'. The second row has a '75%' value in the 'Churn' column circled in red. Below the table, a horizontal line with a red dot is labeled 'Flag'.

Nr of orders last 12m	Days since last order	Customer Segment	Cross-sell potential	Churn
11	18	Medium	Category 2	55%
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Flag

Want to learn
more on how
to scale your
CX efforts?

