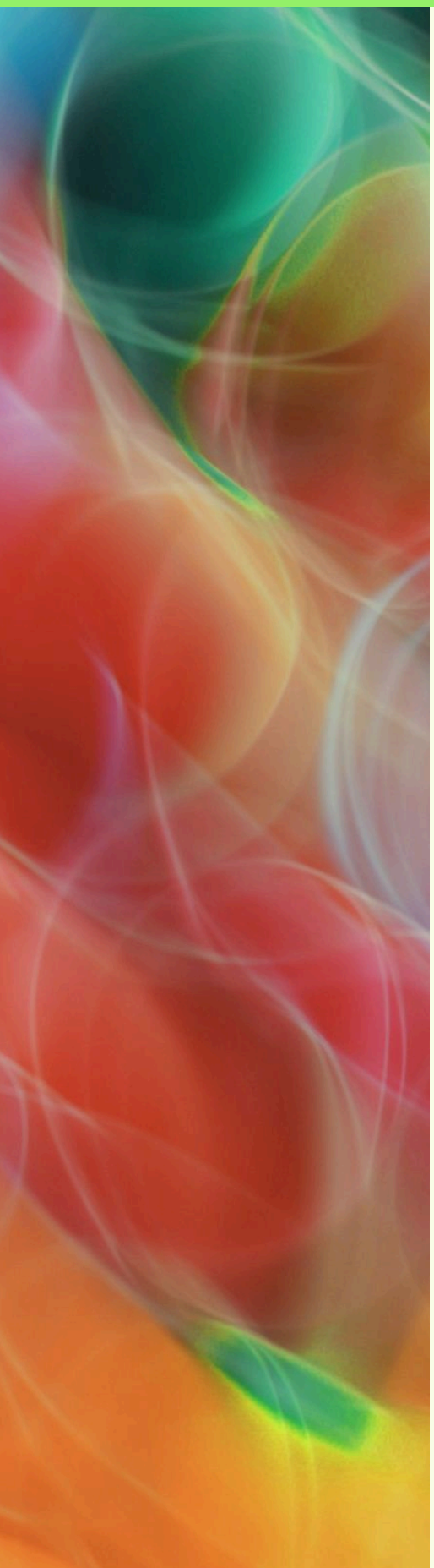
Who should own customer insight in B2B?

Grndworx

Focus on what counts

Contents



Who should own customer content in B2B	3
The consultancies broadly agree, but with nuances	4 - 6
Table: Comparing the consultancies	7
Company size determines the right structural model	8 - 9
Why sales cannot be the primary insight owner	10- 11
Failure modes that destroy insight value	12- 13
Reasons marketing is the natural strategic owner	14-16
Conclusions strategic ownership and collaborative execution	17
Sources	18
Bibliograhy	19
About the author	20

Who should own customer insight in B2B?

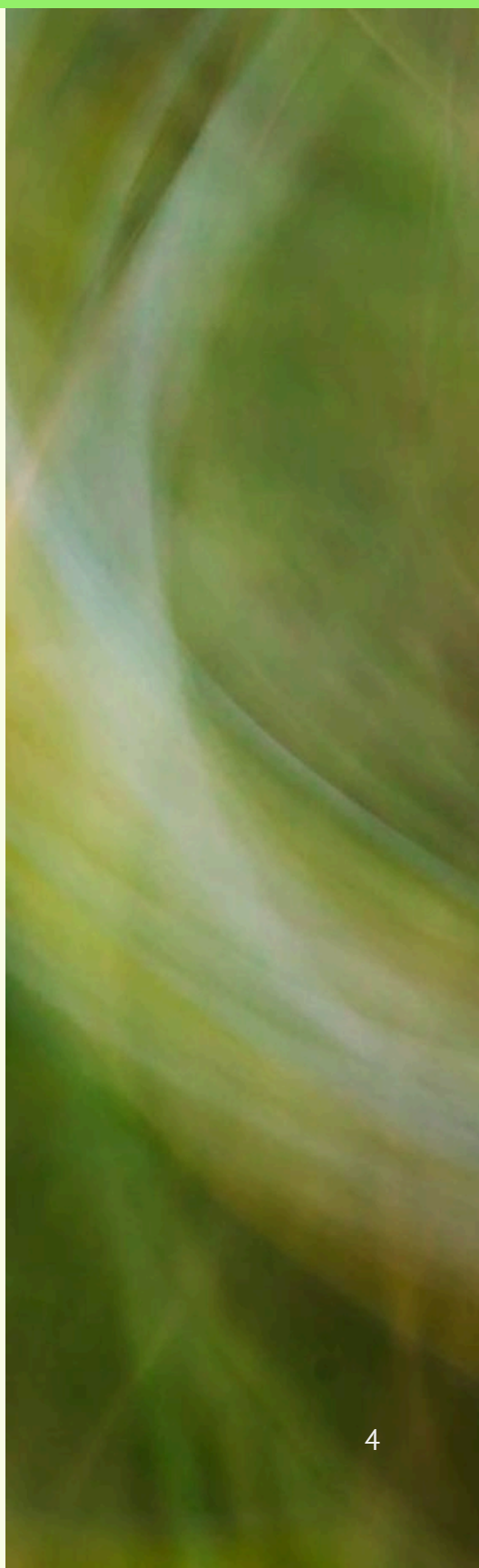
Marketing is the natural strategic owner of customer insight in B2B organisations — but not in isolation, and not as a siloed research function. The weight of evidence from major consultancies, industry surveys, and B2B thought leaders converges on a model where marketing serves as the primary custodian and synthesiser of customer insight, while insight gathering itself requires structured cross-functional collaboration.

This distinction matters because the alternative — leaving insight to sales anecdotes, distributing it across functions with no clear owner, or building a disconnected research silo — produces well-documented failure patterns that afflict the majority of B2B companies today. Only **20–22% of B2B organisations** have mature, actionable customer insight capabilities, according to independent research from BCG and Bain respectively. [1&2]

The practical challenge is that no single model fits all B2B organisations. Company size, product complexity, and go-to-market structure all shape the right approach. What follows is a synthesis of the best available frameworks, data, and senior-level thinking on how to get this right.

> *"Only 20–22% of B2B organisations have mature, actionable customer insight capabilities."*

The consultancies broadly agree, but with nuances



Six major consultancies have published frameworks on customer insight ownership, and their recommendations cluster around two poles: a dedicated centralised function, or a marketing-led model with cross-functional integration. None recommend sales as the primary owner.

BCG built the most comprehensive maturity model, based on benchmarking nearly 650 respondents from 90+ enterprises. [3] They identify four stages of customer insight maturity, from reactive market research (Stage 1) to competitive advantage (Stage 4). Their striking finding: **only 20% of CI functions operate at the strategic or competitive-advantage stages,** despite more than 75% of CEOs believing customer insight is critical to growth. [4] BCG explicitly recommends a dedicated, centralised CI function with its own leadership, budget control, and direct CEO access — arguing the CI lead should be "a commercial thinker more than a technical expert" who operates as a peer to marketing leadership, not a subordinate within it.[5]

BCG - Only 20% of customer insight functions operate at a strategic level, highlighting the need for a central CI function with leadership access to the CEO.

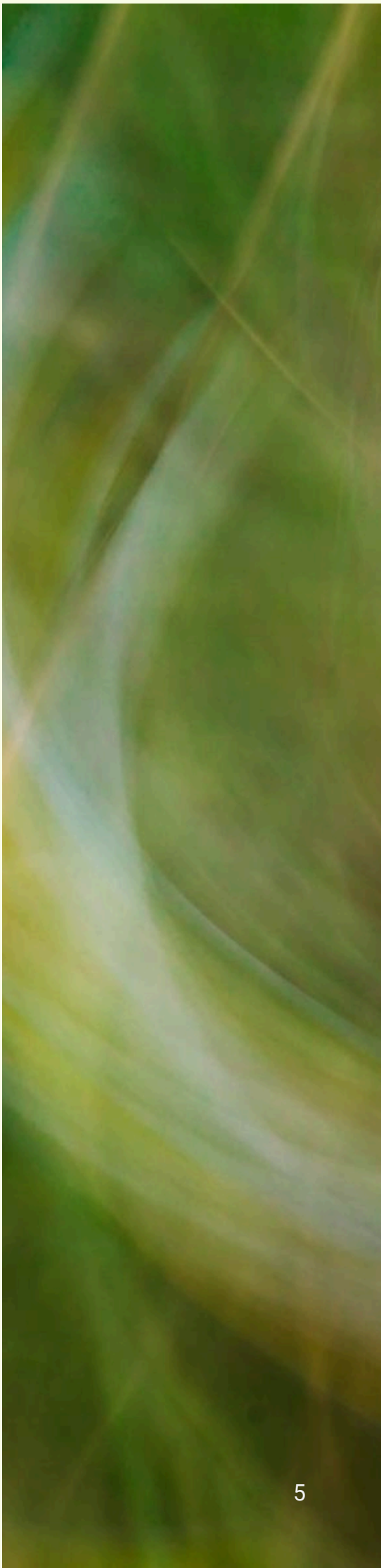
Gartner takes a more marketing-centric position. Their 2023 guidance explicitly recommends merging fragmented insight teams into "one centralized insights unit" under the CMO, to bolster strategy, innovation, and customer experience. [6]

Gartner identifies **customer understanding as a top-three capability gap** among CMOs — suggesting this is aspirational for most B2B marketing leaders rather than current reality. [7]They warn that **"platforms that cater only to the needs of a single function risk perpetuating the creation of insight silos."**

Forrester (incorporating SiriusDecisions) occupies a middle ground. They recommend that **portfolio marketing should own the creation** of buyer personas, audience frameworks, and journey maps, while demand marketing and sales teams consume and operationalise those insights. [8]

Forrester's B2B customer obsession research found only **27 companies** across their entire sample met the criteria for being truly customer-obsessed. [9] Their analysts note that "CX and marketing are really starting to blur" in organisational structures, with CMOs increasingly housing CX teams beneath them, or vice versa. [10]

"Only 27 companies in Forrester's entire B2B sample met the criteria for being truly customer-obsessed."

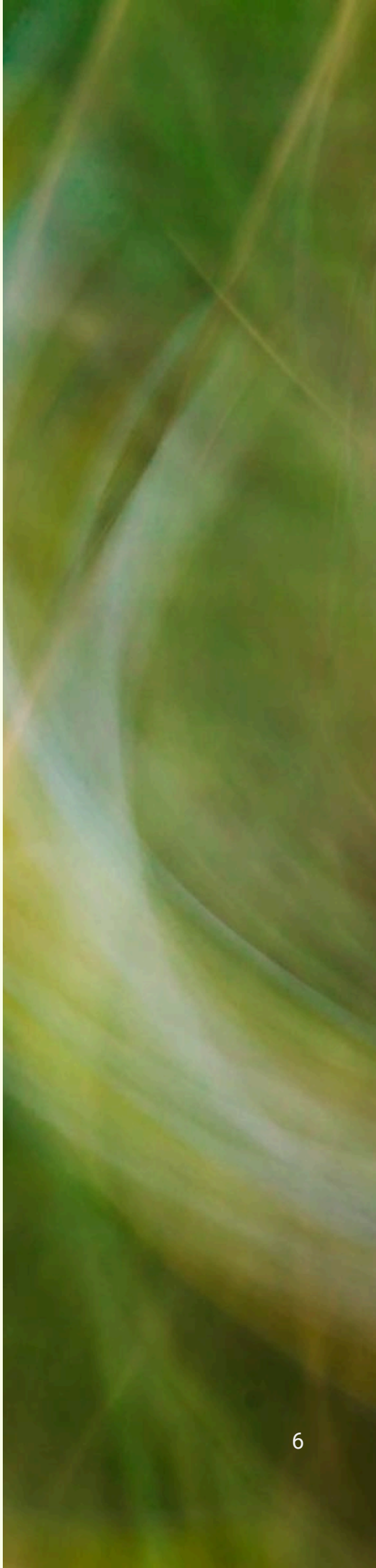


McKinsey avoids naming a single owner, instead advocating CEO-led, cross-functional CX transformation. Their B2B data is sobering: B2B CX index ratings average **less than 50%**, compared to 65–85% for B2C companies. [11]They document cases where marketing provides insights and sales acts on them, but emphasise that without CEO commitment, no functional owner can drive change.

Bain similarly recommends embedding insight into the operating model using a universal metric like NPS, rather than assigning ownership to one function. Their research shows B2B loyalty leaders **grow 4–8 percentage points above market** annual growth rates.

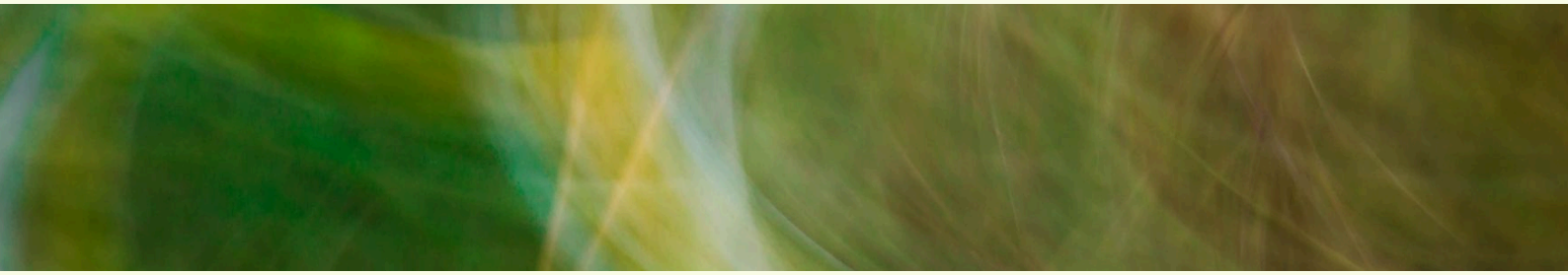
Deloitte frames the challenge as building an "Insight-Driven Organisation" — an enterprise-wide capability resting on three pillars: data and tools, talent, and culture. Among companies using a single common analytics toolset across the enterprise, **80% exceeded their business goals.** [13]

McKinsey -"B2B CX index ratings average less than 50%, compared to 65–85% for B2C."

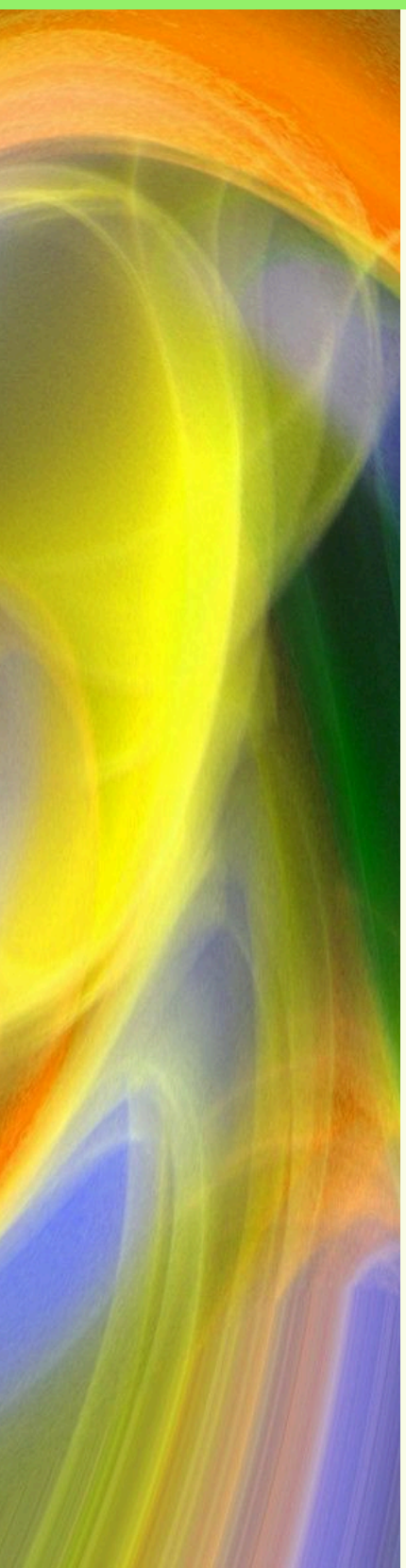


Comparing consultancies

Consultancy	Recommended owner	Key nuance
BCG	Dedicated centralised CI function	Not a sub-function of marketing; needs own budget and CEO access
Gartner	**Centralised unit under the CMO**	**Merge fragmented teams; avoid insight silos**
Forrester	Portfolio marketing creates; cross-functional consumption	Audience frameworks owned by marketing; operationalised by sales and product
McKinsey	**CEO-led cross-functional model**	**Marketing provides insights, sales acts; no single owner**
Bain	Embedded across the operating model	Universal metrics (NPS) owned organisation-wide
Deloitte	**Enterprise-wide capability**	**Data, talent, and cultures are three pillars**



Company size determines the right structural model

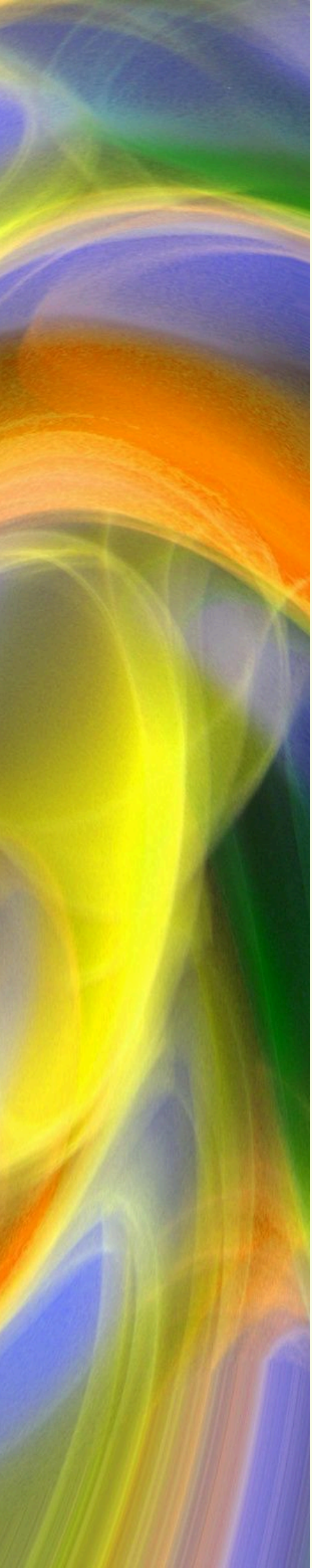


The optimal insight structure follows a predictable evolution tied to organisational complexity. Five primary models exist, each suited to different stages of growth.

Centralised teams work best for SMBs and early-growth companies. A single insights group serves the entire organisation with consistent methodology. Netflix maintains this model deliberately — CTO Elizabeth Stone explained in 2024 that they "resisted" embedding data teams across the business, keeping a centralised team that is "both functionally diverse and works on nearly every area of the business." The downside is scalability: as demand grows, the central team becomes a bottleneck, and business units may commission rogue research, creating invisible costs.

Hub-and-spoke (hybrid) models suit mid-market and growing enterprises. A central hub sets strategy, standards, and governance; embedded "spoke" analysts deliver business-unit-specific work. Mondelez uses this approach, enabling "capabilities at scale, as well as the standardization of approaches" while maintaining "business proximity for the most impact." [15] This model requires sufficient team size — you cannot run both a hub and spokes with fewer than **7–9 FTEs**, according to BCG's benchmarking.

> *"You cannot run both a hub and spokes with fewer than 7–9 FTEs."*
> *— BCG*



Centres of Excellence work for large enterprises seeking to mature their capabilities. Forrester's research finds that **CI teams with higher customer obsession maturity operate in a CoE model**. [17] The CoE sets standards and enables the organisation without conducting all research itself. Colgate-Palmolive's CoE "provides the seed for experimentation, with funding and heavy lifting for experimental new approaches" across 200 countries, while avoiding becoming "a pseudo ivory tower operation." The Zappi framework usefully distinguishes three roles: Architects (the CoE, setting standards), Owners (business units running and interpreting research), and Builders (research operations managing systems and vendors).

Qualtrics XM Institute's 2024 survey of B2B organisations provides the most current structural data: **75% of B2B firms now have a centralised CX group**, with 41% having teams of 10+ FTEs (up from 31% in 2022). Yet **70% remain in early maturity stages**, and the biggest obstacles are competing organisational priorities (66%) and poor integration across systems (54%). [20]

For B2B SaaS specifically, **product marketing** has emerged as a natural insight owner, sitting at the intersection of product, sales, marketing, and customer success. The Product Marketing Alliance's 2025 data shows 78.7% of product marketers now own sales enablement, with customer research as a foundational responsibility. [21] In more sophisticated B2B tech organisations, the trend is shifting from product marketing toward "solutions marketing" — grouping products to solve business challenges rather than promoting features.

> *"75% of B2B firms now have a centralised CX group. 70% remain in early maturity stages."*

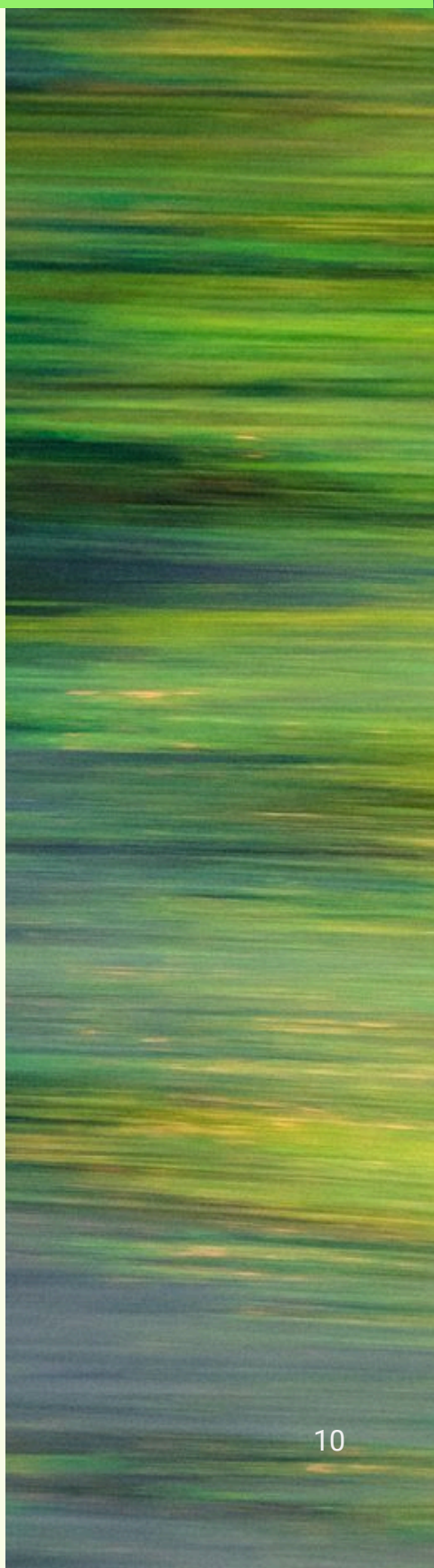
Why sales cannot be the primary insight owner

The marketing-versus-sales debate is the most practically consequential dimension of this question. The evidence strongly favours marketing as the strategic insight owner, with sales as a critical but inherently limited input source. The distinction hinges on the difference between **relationship-level knowledge** and **pattern-level strategic insight**.

Sales teams hold invaluable relationship-level knowledge: they know individual accounts intimately, understand personal dynamics within buying committees, and hear real-time signals about competitive threats and shifting priorities. This knowledge is irreplaceable and must flow into any insight function.

However, sales-sourced insight suffers from five systematic biases that make it unreliable as the primary basis for strategic decisions. **Anecdotal bias** means sales reports individual deal stories rather than patterns across the market. **Recency bias** means the last conversation dominates the narrative. **Relationship bias** means salespeople see accounts through the lens of their personal contacts, not the full buying committee — and LinkedIn/Bain research shows **over 40% of B2B deals fail specifically because "hidden buyers"** in legal, procurement, and finance raise concerns that the sales team never anticipated. [22] **Selection bias** means sales talks to existing contacts, not the silent churners or non-customers who could reveal the most. Agenda bias means sales conversations serve deal-specific purposes, not open-ended discovery.

"Over 40% of B2B deals fail because hidden buyers raise concerns the sales team never anticipated."

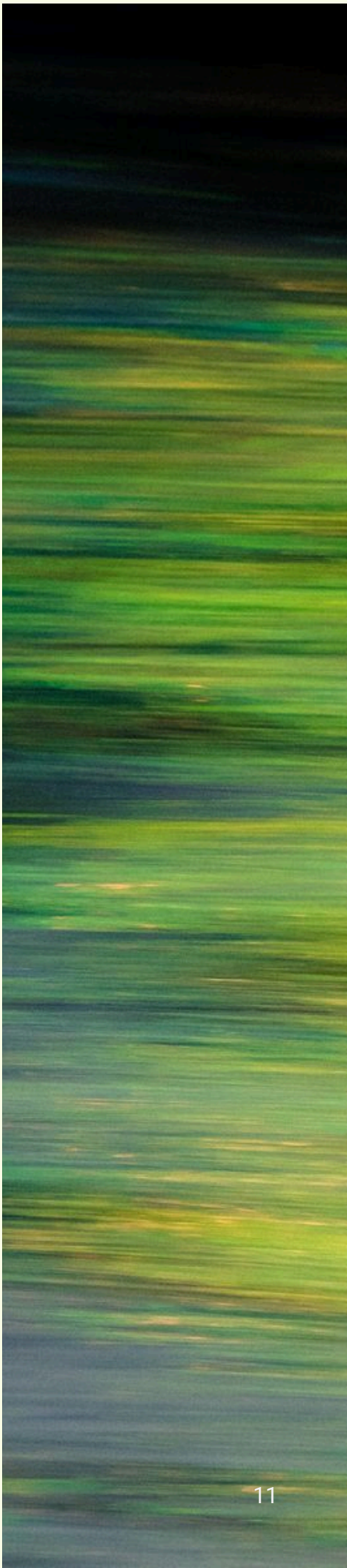


Alan Hale, who has led 250+ B2B voice-of-customer projects over 40 years, captures this bluntly: "It is VOC — voice of the customer — not VOR, voice of the rep. Why would you want filtered and biased input?" It distorts strategic decisions. [23] Isoline Communications documented a revealing case in which a technology brand's sales and marketing team believed their value proposition lay in differentiated products, while customers felt that "most global brands provided products at par" — the actual differentiator was the company's organisational culture. **Sales-filtered insight had been fundamentally wrong about what mattered**. [24]

Jason Ball's B2B Effectiveness Engine research, drawn from over 1,000 senior B2B marketers, quantifies the performance gap: **the most effective B2B marketers are 50% more likely to invest in systematic customer research** than their less effective peers. [25] Ball draws the line precisely: "All too often, these 'insights' are actually assumptions — things we believe to be true because that's how it looks from within the organisation, or because that's what the sales team tells us."

Marketing's structural advantage lies in its ability to see patterns across the full customer base, the full buying journey, and the full competitive landscape. As the LinkedIn B2B Institute's 95-5 research demonstrates, **95% of potential buyers are not in-market at any given time**. [26] Sales only sees the 5% in active buying cycles. Understanding why and when the other 95% will enter the market — what the Ehrenberg-Bass Institute calls "category entry points" — is inherently a marketing capability requiring systematic research, not relationship management.

> *"Sales only sees the 5% of buyers in active buying cycles. The other 95% are invisible to them."*



Failure modes that destroy insight value

The research reveals consistent patterns of failure that organisations should recognise and guard against.

-1- **When nobody owns it**, insight becomes everyone's responsibility and therefore nobody's. B2B International found only a quarter of corporates have a dedicated CX expert, [27] while CustomerGauge data shows **32% of B2B companies have no formal team** responsible for customer sentiment and **42% don't set goals** for their CX programme. [28] Accenture research deepens the paradox: 90% of B2B leaders call customer experience crucial, yet 72% say they have no control over CX programme direction.

-2- **When sales is the sole source**, the organisation operates on filtered, biased intelligence. Technology companies are particularly susceptible because they "typically rely on sales teams to provide the necessary customer insights," but sales teams lack the time, incentive structure, and analytical mindset to develop consistent, organisation-wide customer understanding. [29] As Isoline Communications observed, "deeper understanding of customers requires information beyond the context of direct interaction with the sales or even the product and service team — it needs an insights mindset to derive insights."

-3- **When insight sits in a silo,** data accumulates but decisions don't improve. Nearly **47% of organisations cite siloed data as their primary obstacle** to gaining customer insights, and 97% of executives acknowledge silos damage operations. [30] The most common manifestation is dashboards that update instantly but lack decision rights — what CMSWire describes as "insight dying in reporting." Companies detect churn, intent, and friction in real time but lack clear intervention pathways.

-4- **When VoC** (Voice of the Customer) **programmes are mechanistic, they produce metrics without meaning.** CX Pilots' analysis of hundreds of B2B VoC initiatives found that "the vast majority of B2B companies are pouring significant investments into feedback systems that not only fail to deliver value but actively mislead decision-makers." A law firm with **92% satisfaction scores** saw 18% client defection. An insurance carrier's NPS (net promoter score) promoters renewed at 84% versus passives at 81% — statistically insignificant despite massive investment. More than **two-thirds of VoC programmes fail to deliver actionable insights**, [32] and 84% of B2B brands still don't calculate their VoC return on investment.

-5- **When growth outpaces governance,** the problem compounds. Isoline Communications described a common trajectory: "When tech companies are small, teams work closely together with a reasonable understanding of the customer. As companies grow, sales, marketing, customer success and product teams begin to operate in silos. Distancing of teams leads to the brand distancing from the customer." [33] One ed-tech enterprise spent months unable to agree on positioning because "every stakeholder had his own interpretation of what the customers needed" — until systematic customer research broke the deadlock.

"A law firm with 92% satisfaction scores saw 18% client defection."

Reasons marketing is the natural strategic owner

The case for marketing ownership rests on structural advantages that no other function possesses in combination.

-1- **Cross-journey visibility** is the most fundamental. DemandLab's analysis states it clearly: "Marketing is the only function with the most holistic view of the customer. While other customer-facing functions such as sales, product, and support all have a unique perspective, marketing touches customers first, interacts with them more frequently, and supports them across a longer stretch of the journey." [34] Sales owns the customer experience for the brief period between lead acceptance and close; customer success owns post-sale. Marketing operates across the entire lifecycle.

-2- **Executive voice** matters for insight to drive decisions. The CMO is typically the only customer-facing function leader with a permanent seat at the executive table. Ricky Abbott of Transmission Agency argues that "marketing is the only function that can truly own the customer as they have the widest and deepest insight. Sales own customer conversations, but they can be a smaller universe that sometimes skews insights to fit their needs." [35]

-3- **Research methodology and analytical capability** sit naturally within marketing. Marketing teams own the tools and frameworks for systematic customer research — voice-of-customer programmes, buyer persona development, market research, competitive intelligence, and journey mapping. Forrester explicitly calls on B2B CMOs to become "custodians of customer insight," transitioning teams "from list managers and campaign number crunchers" to strategic insight generators. [36]

-4-**Technology infrastructure** increasingly gives marketing the data backbone. CMOs now outspend CIOs on technology in many organisations, and the martech stack — CRM, marketing automation, analytics platforms, intent data — provides the infrastructure to collect, analyse, and activate insight at scale. Directive Consulting's model positions marketing operations at the centre of insight distribution, with RevOps owning definitions and schemas. [37]

-5- **Pattern recognition across markets** is marketing's unique analytical contribution. Individual salespeople see their accounts; marketing synthesises signals across the entire customer base, competitive landscape, and market trajectory. This is the capability that produces genuine strategic insight — the kind that identifies unmet needs, reveals positioning opportunities, and informs product strategy. [38]

> *"Sales owns the customer experience for the brief period between lead acceptance and close. Marketing operates across the entire lifecycle."*

-6- **Definitional alignment** seals the argument. The Chartered Institute of Marketing defines marketing as "the management process responsible for identifying, anticipating and satisfying customer requirements profitably." [39] The American Marketing Association's definition similarly places customer understanding at the centre of the marketing function. Customer insight isn't an add-on to marketing's remit — it is the foundation of it.

The strongest evidence comes from performance data. Marketing Week's 2024 survey of 600 B2B marketers found **customer insight rated as the single most critical skill** for future success at 54.4%, ahead of commercial focus, creativity, and collaboration. [40] The B2B Effectiveness Engine's research across 1,000+ senior marketers shows that the "big three" of strategy, differentiation, and customer insight have a "significant impact on everything else" — they are upstream foundational factors, not downstream tactics.

"54.4% of B2B marketers rated customer insight as the single most critical skill for future success — ahead of creativity, commercial focus, and collaboration."

Conclusion: strategic ownership & collaborative execution

The evidence points to a clear model. Marketing should own the strategic insight function — the synthesis, interpretation, and organisational dissemination of customer understanding. This is distinct from being the sole collector of customer data, which must be a collaborative effort across sales, customer success, product, and support. The practical implication is that marketing needs both the mandate and the capability to aggregate signals from across the business into coherent, actionable strategic narratives, while maintaining its own direct-to-customer research programmes that bypass the filters inherent in sales-mediated feedback.

The right structural model depends on scale. **SMBs** should centralise insight within marketing. **Mid-market companies** should build a hub-and-spoke model with marketing as the hub. **Large enterprises** should consider a Centre of Excellence that sets standards and enables organisation-wide capability, with marketing as the primary strategic consumer and distributor of insight. In **B2B SaaS**, product marketing is often the practical home for this capability.

Three conditions must hold for any model to work. First, **executive sponsorship** — BCG warns that "companies whose CEOs are not committed to a fundamentally different CI operating model should not undertake a CI transformation." Second, **budget control** — the insight function must own its research budget, not depend on business units to fund work that may challenge their assumptions. Third, **decision rights** — insight must be wired into specific business decisions with clear accountability for action, not produced as reports that accumulate on SharePoint. Without these conditions, even the best-placed insight function will join the **80% of B2B organisations** that remain stuck in the earliest maturity stages.

Core actionable:

1. Excecutive sponsorship
2. Budget control
3. Decision rights

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Grndworx is a strategic B2B marketing agency. Neither management consultancy nor pureplay creative agency, we support our clients to sharpen their strategic marketing focus and support them right the way through the value chain to execution and implementation. We serve as your partner for achieving growth, helping to declutter your strategies, sharpen your focus, align your efforts, and transform your initiatives into tangible results.

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If this paper made you rethink how your organisation interacts with customers, let's explore what that could look like for you.

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