

CHEAT SHEET: 5 STEPS OF A B2B ECOMMERCE ROLLOUT

STEP 1: IDENTIFY THE PROJECT TEAM

- The Project Leader
- The Customer Adoption Owner
- The Data Specialist
- The Branding & Messaging Maven

STEP 2: UPLOAD AND MAINTAIN YOUR DATA

The Must-Haves:

- Customer Data
- Catalog Data

The Nice-to-Haves:

- Inventory Data
- Order History

STEP 3: DRIVE RETAILER ADOPTION

Drive Awareness:

- Send email marketing campaigns
- Provide clear navigation from your website
- Reference your portal in all customer-facing communications
- Include a mailer in product shipments

Drive Usage:

- Have your reps notify retailers in person
- Incentivize customers
- Ensure reps and customer service are portal experts

STEP 4: DRIVE RETAILER ADOPTION

- Use your portal as an email marketing landing page
- Load up your portal with helpful marketing assets
- Run targeted messaging at specific customer segments

STEP 5: MEASURE THE SUCCESS OF YOUR PORTAL

Metrics To Track:

- Sales
- Adoption
- Growth
- Average Order Value
- Order Frequency
- Customer Retention
- Omnichannel

For more rollout best practices, download the 5 Steps to a Successful B2B eCommerce Rollout guide [here](#). For information on getting started with B2B eCommerce, contact Handshake at info@handshake.com or +1-855-532-9044 (+1-646-434-2553 intl).

ABOUT HANDSHAKE

Handshake provides the B2B Commerce platform for manufacturers and distributors that powers standout ordering experiences both in-person and online.