

5 STEPS

TO A SUCCESSFUL B2B ECOMMERCE ROLLOUT





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INTRODUCTION

Encouraged by the growing revenue share of eCommerce transactions and a new desire among B2B buyers for the on-demand convenience reflected in their personal shopping habits, there has been a massive increase in the adoption of B2B eCommerce among manufacturers and distributors. According to Forrester, the number of buyers who make the majority of their B2B purchases online is expected to double in the next three years from 30% to nearly 60%.¹

While wholesale has traditionally been dominated by in-person sales and a reliance on one main software system--the ERP--brands are now looking to B2B eCommerce solutions to modernize their customer experiences.

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Implementing these new solutions, however, can be daunting. From deciding who will own the implementation process internally, to changing commission structures and measuring success, developing a thoughtful, strategic plan is critical. The right up-front preparation will lead to a smooth transition and minimal continued maintenance.

This guide will walk you through the keys to a successful rollout, ranging from tangible steps like identifying your project team and maintaining product data to concepts like sales team alignment and retailer adoption. You'll also learn the key metrics you should be tracking to determine whether your B2B eCommerce portal is supporting your business goals.

As more wholesalers begin to prioritize online ordering and an omnichannel sales strategy, those able to implement their portals quickly and seamlessly will maximize their return-on-investment and ensure a superior online customer experience.

¹Forrester, <https://www.internetretailer.com/2015/06/03/agility-key-capturing-b2b-customer>

STEP 1: IDENTIFY THE PROJECT TEAM

Arguably a step best done before you decide to make an investment in B2B eCommerce at all, you must first choose the right internal team to guide the implementation process. While many SaaS B2B eCommerce solutions are fairly plug-and-play, having the right project team in place is critical to ensuring the success of the project.

There are four main members of a high functioning B2B eCommerce project team:



THE PROJECT LEADER

The Project Leader is the dedicated point of contact for your B2B eCommerce provider. Traditionally from sales, IT, or marketing, this person will coordinate the moving pieces of the project, and is ultimately responsible for seeing the project through to success.

It's important that the Project Leader has influence over the other stakeholders on the project team and access to key business intelligence to be able to effectively assess the business impact of the new channel. Whether or not your Project Leader is also one of the three stakeholders listed here is highly dependent on your business' size and infrastructure.



THE DATA SPECIALIST

This person is most frequently a member of the operations or IT team. The Data Specialist is responsible for the original upload and subsequent regular maintenance of your customer, product, pricing and inventory data.

They will also coordinate and define the process for how inbound orders from the portal will be managed (for more information, see The Inbound Order Process: Options). They may also manage any integration workflows that ensure seamless transmission of data between your B2B eCommerce platform and other core business systems like your ERP or accounting package.



THE CUSTOMER ADOPTION OWNER

This person is held accountable for ensuring customer awareness, user registration and initial usage of your new B2B eCommerce portal. We suggest this person be from sales, or more specifically, a sales leader who has the ability to incentivize your rep team to encourage adoption of your B2B eCommerce portal.



THE BRANDING & MESSAGING MAVEN

Typically from marketing, this person is responsible for the visual design of your B2B eCommerce portal, including your logo, product images, and branded colors. They will also craft your customer-targeted messaging in both your portal and related email marketing campaigns.

In the initial phases of your implementation and rollout, your project team will likely be meeting more frequently. Once this phase has completed, you should determine a regular cadence of meetings for your team to review your portal's performance (see "Measuring the Success of Your Portal") and discuss any relevant issues. This could either be a weekly check-in, integrated into your scheduled sales meetings, or at a monthly executive meeting.

It is worth mentioning that unlike many many other IT projects, companies deploying B2B eCommerce with a third party vendor typically do not have a need for an IT consultant to manage the implementation. While your Data Specialist will of course be responsible for the regular upkeep of your portal's customer and product information, your SaaS vendor is responsible for product updates and the continued improvement of your portal.

THE INBOUND ORDER PROCESS: OPTIONS



BACK OFFICE APPROVAL REQUIRED:

The most common setting for inbound orders received via B2B eCommerce, this allows your back office team to modify or approve orders before they are sent out for fulfillment. This approach is optimized for back office control and order accuracy.



STRAIGHT TO ERP:

While more rare, some brands do not have a need to check or approve orders placed by their customers via B2B eCommerce. In this scenario, orders are placed by the customer and immediately fulfilled. This approach is optimized for speed.

STEP 2: UPLOAD & MAINTAIN YOUR DATA

In the world of manufacturing and distribution, the B2B buying experience is often highly personalized. Your customers are buying at specific prices, may only have access to specific products in your line, and have particular shipping and payment preferences that must be accommodated. The ability of your B2B eCommerce portal to drive return business, therefore, is dependent on the accuracy and comprehensiveness of the data in your portal, as well as your ability to provide the same tailored experience your customers receive offline.

The following data should be uploaded and maintained in your B2B eCommerce portal:

THE MUST-HAVES

The following are required for your B2B eCommerce portal rollout:



CUSTOMER DATA

Your customer list must be uploaded to your portal before you start to accept online orders. Each customer login will directly affect which pricing, products, and terms they are shown during the order placing experience.



CATALOG DATA

At a minimum, your catalog includes your product list, descriptions and pricing. Most catalogs also include product images to enable easy product identification when reordering and to provide a helpful visual reference when exploring new products. In order to provide an ordering environment optimized for success, show customers the products they have access to buy at the prices you have determined they can pay. Tailoring of your catalog data is most useful in scenarios such as:

- A** Displaying customer-specific pricing terms (for example, if you have Gold, Silver and Bronze customers); or
- B** Selling only particular product categories or seasonal items to specific retailers.

THE NICE-TO-HAVES

The following will often enhance your customer experience but are not required for your rollout:



INVENTORY DATA

Many brands find it useful to provide customers with inventory levels within the order interface. While for some, simply providing visibility to whether items are in or out-of-stock is enough, others choose to give their customers the exact number of items left for full visibility.



ORDER HISTORY

Giving your customer the ability to view their order history is helpful in multiple ways. Not only does it give your customers context on past orders, including the items they order most frequently, it also allows them to quickly duplicate past orders and use these as a base for fast, convenient reordering.

TIP

Brands that have attempted to retrofit B2C eCommerce technology to work for their B2B eCommerce needs often see that B2C portals come up short with respect to customization. Attempts to force them to work often result in messy hacks and time-consuming workarounds.

If your portal is up to date and accurate at all times across all these data types, it becomes a source of truth for your customer, leading to decreased customer service calls and emails and more frequent re-ordering.

Once your data maintenance process is up and running, and your B2B eCommerce portal is a functional ordering interface, you'll then be able to work on growing the influence of your B2B eCommerce website as a powerful marketing channel for your business (see “Maximize Your Portal’s Marketing Potential”).

STEP 3: DRIVE RETAILER ADOPTION

Once your portal is up and running, you need to drive your customers to place orders online.

Follow these recommendations to maximize customer registration and initial adoption:

DRIVING AWARENESS

1 SEND EMAIL MARKETING DRIP CAMPAIGNS

Email marketing drip campaigns are a commonly used tactic to facilitate behavior change. Sending a short sequence of emails to your customers is a great way to encourage usage of your new portal. You should consider the following 4 emails in your drip sequence:



Educate your customers about the benefits and convenience of online ordering



Announce that your online ordering portal is coming soon



Invite your customers to place an order from your portal



Follow up with any customers who have not placed an order after two weeks

2 PROVIDE CLEAR NAVIGATION TO YOUR PORTAL FROM YOUR WEBSITE

Your B2B eCommerce portal should be easy to navigate to from your current website. Many brands add a clear directive for their wholesale customers and a distinct button on their website that leads to their portal.

3 REFERENCE YOUR PORTAL IN ALL CUSTOMER-FACING COMMUNICATIONS

Add the link to your B2B eCommerce portal to the email signatures of all B2B customer-facing employees. For those brands using mobile order writing software, you should include your portal reference in your order confirmation emails.

4 INCLUDE A MAILER IN PRODUCT SHIPMENTS

Include a cardstock marketing mailer in your product shipments alerting customers to the fact that they can place reorders from your B2B eCommerce portal.

5 HAVE YOUR REPS NOTIFY YOUR RETAILERS IN PERSON

Your sales reps can be your best source of marketing for your B2B eCommerce site, as they have built long-term rapport and a sense of trust with your customers. Make sure they let your customers know that they can place orders any time at their convenience through your new portal.



For examples of drip campaign emails or suggestions for your website navigation, please contact info@handshake.com.

DRIVING USAGE

1 INCENTIVIZE YOUR CUSTOMERS

Many brands have found success in running promotions, especially initially, to encourage use of their online ordering portal. Whether it's 10% off or free shipping on the first order placed, these promotions are sometimes what it takes for your customers to try something new. It is often the case that once the order has been placed, the incentives are no longer needed.

2 HAVE YOUR REPS AND CUSTOMER SERVICE TEAM READY TO TRAIN CUSTOMERS.

Make sure reps and customer service teams have a strong working knowledge of your B2B eCommerce portal, so that if questions arise, they are quickly resolved. Just as your reps can be a great vehicle to notify your customers that your portal is available, they are the ideal people to show them how to use the portal in person.

TIP



Many brands have found success in running **promotions**, especially initially, to encourage use of their online ordering portal.

STEP 4:

MAXIMIZE YOUR PORTAL'S MARKETING POTENTIAL

Now that your portal is up and running with the correct customer and catalog data and you have a captive audience placing orders, it's time to turn up the dial on your marketing efforts.

You will be able to realize the full potential of your portal if you:



USE YOUR B2B ECOMMERCE PORTAL AS AN EMAIL MARKETING LANDING PAGE

Now that you have a dedicated destination for your customers to place orders, you can run email campaigns that announce specific promotions or a preview of your new line, and directly link your customers to specific product pages, so they can take action immediately and buy.



LOAD UP YOUR PORTAL WITH HELPFUL MARKETING GUIDES, ASSETS, AND IMAGES

Top B2B eCommerce portals provide you with the option to showcase your marketing assets, including merchandising guides, how-to videos, look-books, lifestyle images and more. This marketing collateral will support your customers in the purchase process and enable them to educate themselves on in-store best practices that maximize sell through. Make your portal a more powerful brand experience by expanding available materials beyond basic product information.



RUN TARGETED MESSAGING AT SPECIFIC CUSTOMER SEGMENTS

Your B2B eCommerce portal should ideally allow you to target messaging and promotions to particular customer segments. For example, upon login, your gold customers can be shown a banner ad for a particular promotion, while your silver customers see another.

“ NOW THAT YOU HAVE A DEDICATED DESTINATION FOR YOUR CUSTOMERS TO PLACE ORDERS, YOU CAN DIRECTLY LINK YOUR CUSTOMERS TO SPECIFIC PRODUCT PAGES, SO THEY CAN TAKE ACTION IMMEDIATELY AND BUY. ”

STEP 5: MEASURE THE SUCCESS OF YOUR PORTAL

To measure the success of your portal, it's critical that your project team is aligned on your company's overall sales strategy, whether it's increasing re-order frequency, average order value, or overall revenue. If you don't know how you want B2B eCommerce to impact your business, it will be impossible to truly measure the portal's effectiveness.

Here are some of the common KPIs that wholesale brands track to measure the success of their B2B eCommerce channels:

1 SALES

Total dollars and percentage of revenue coming from your B2B eCommerce channel, compared to other sales channels.

2 ADOPTION

Percentage of your customer base that has placed orders via your portal, tracked over time.

3 GROWTH

Total % growth in both customer adoption and total revenue from your B2B eCommerce channel over time. Number of net-new customers who have requested access to your B2B eCommerce portal.

4 AVERAGE ORDER VALUE

The average order value of orders placed via your B2B eCommerce portal compared to that of your other sales channels.

5 ORDER FREQUENCY

Order frequency by customer (and average across customer base) before and after you implemented your B2B eCommerce portal.

6 CUSTOMER RETENTION

Customer retention rate, measured pre and post-implementation of your B2B eCommerce portal.

Number of "revived" (customers that have reordered in the last month but who had not previously ordered in the last 12 months) customers and total dollars of orders placed by these customers since you implemented your B2B eCommerce portal.

7 OMNICHANNEL PENETRATION

Percentage of your customer base that has placed orders via multiple channels.

SALES	MONTH 1	MONTH 2	MONTH 3
Total Sales, All Channels (in thousands)	3000	3500	4000
\$ Sales, B2B eComm (in thousands)	300	700	1800
% of Total Sales from B2B eCommerce	10%	20%	40%
% Sales Growth from B2B eCommerce, Month over Month	0%	133%	157%
ADOPTION			
# Customers Placed Orders	40	200	500
% Customers Placed Orders	4%	20%	50%

ALIGNING YOUR SALES TEAM WITH YOUR B2B ECOMMERCE STRATEGY

While customer expectations are shifting and are driving demand for the convenience of online ordering, sales reps remain an important part of the sales operations of many wholesalers, manufacturers and distributors. It is critical to make sure the sales organization is aligned with your B2B eCommerce strategy.

KEYS TO ALIGNMENT

- 1 Hold sales leaders accountable to ensure that reps in their territory are championing B2B eCommerce.
- 2 Track B2B eCommerce orders placed by your reps' customers.
- 3 Commission sales reps on all customers orders, even if they are placed via your portal.



TIP

Field sales and B2B eCommerce represent different channels that should ultimately complement each other rather than conflict. The role of your B2B eCommerce portal is to give your customers a self-service way to access product information and easily place orders or re-orders. Your sales reps, on the other hand, are able to complement the online portal with in-person salesmanship, reiterating marketing messages and promotions, educating customers on new products and offering other value-added

services which can only be delivered in person. Offloading some of this transactional activity to your B2B eCommerce portal simply allows reps to focus on identifying new sales opportunities and build stronger relationships with each in-person interaction.

Given the aforementioned shift in the B2B world to mirror the conveniences of consumer shopping, B2B buyers want to be able to place orders based on their own preferences—whether it's with a sales rep, online, or even on a mobile device using mobile B2B eCommerce. The data supports this trend. According to a recent study by Forrester, 80% of B2B buyers around the world would buy again from a supplier with good omnichannel capabilities.² According to Accenture, 66% of suppliers have already invested in omnichannel initiatives in response to this demand.³

According to Forrester, 60% of B2B companies report that their B2B buyers spend more overall when those customers interact with multiple channels.⁴ Because the omnichannel customer spends more than the single-channel, offline-only customer and are therefore your most valuable customer, you need to cultivate an environment where your sales reps and your B2B eCommerce portal can not only coexist, but also jointly enhance the customer experience. **For this reason, it is critical that you commission your sales reps on all orders from their customers, even if the order is placed via your B2B eCommerce portal.**

Incentives need to be aligned accordingly, and this starts at the top. Sales leaders should be held accountable and incentivized to ensure that reps in their territory are championing B2B eCommerce. Efforts should be made to track and reward B2B eCommerce transactions made by your respective sales reps' customers to determine whether everyone is aligned.

In the end, in order to increase the adoption and success of your B2B eCommerce portal, your reps need to be your biggest allies. If you don't commission them accordingly, they will often serve as blockers, inhibiting the success of your portal and making it difficult to truly see the value of your investment.

²Forrester,
https://www.accenture.com/us-en/_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Dualpub_1/Accenture-Building-Omni-Channel-Commerce-Platform-Future.pdf

³Accenture,
<https://www.b2bmarketing.net/resources/news/infographic-49-b2b-buyers-prefer-making-purchases-b2c-websites>

⁴ Forrester,
http://blogs.forrester.com/andy_hoar/15-04-02-us_b2b_ecommerce_to_reach_11_trillion_by_2020?utm_source=Twitter&utm_medium=social&utm_content=Blog_Hoar_0403&utm_campaign=2015_Social

CONCLUSION

With retail buyers increasingly demanding more convenient ways to place orders, the world of manufacturing and distribution is finally moving online, and brands are looking to reap the benefits of these new omnichannel sales strategies.

To maximize ROI, however, brands must take a strategic and calculated approach to the implementation of their B2B eCommerce portals. Supporting the project with the right internal stakeholders, prioritizing awareness and adoption, and creating the right incentive structure to keep sales teams aligned with online sales strategies are key to ensuring B2B eCommerce has a lasting impact on your profits, operational efficiency, and overall customer engagement.

ABOUT HANDSHAKE

Handshake provides the B2B Commerce platform for manufacturers and distributors that powers standout ordering experiences both in-person and online. Companies using Handshake transform their sales effectiveness and drive operational efficiency, delighting customers and growing lasting relationships.

The Handshake mobile app allows sales reps to write orders faster, and gives them the product and customer information they need to have more strategic customer conversations.

Handshake Direct is a custom B2B eCommerce website that complements field sales reps by providing customers the convenience of 24x7 ordering and product education.

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