The Changing Landscape of B2B Commerce

Presented by ZOEY

What's in This Book

Introduction

B2B eCommerce for many years was in some ways the forgotten side of eCommerce. While tools for B2C eCommerce stores proliferated, B2B eCommerce was often forced to evaluate wildly imperfect solutions, build something of its own or continue to rely on older techniques such as EDI or even more traditional forms of sales that pre-date eCommerce itself.

Changes in B2B Tech

Many B2B businesses are now taking a fresh look at eCommerce, and fortunately things have dramatically changed in recent years, with evolution happening rapidly and in favor of B2B businesses.

Business cases that previously required custom solutions can increasingly be performed by off-the-shelf solutions with a minimum of customization. Third-party tools to manage aspects of eCommerce are now supporting B2B use cases, as they have for some time on the B2C side.

Sales Moving Online

An increasing number of B2B businesses are realizing the value of B2B eCommerce as a sales and customer acquisition tool. Multiple surveys of B2B businesses in recent years have confirmed the vast majority of B2B manufacturers and distributors planned on increasing their investment in B2B eCommerce due to its importance.

Meanwhile, sales on B2B eCommerce sites have grown by at least 10 percent per year in recent years, according to reporting by Digital Commerce 360.

We've Got Answers

B2B eCommerce best practices and techniques are evolving faster than many businesses can keep up with them. As such, it helps to understand what types of problems are commonly being addressed today by B2B businesses and ways they can be managed. This eBook aims to assist with just those issues.

Inside This Book

Inside you'll find recommendations and solutions for a variety of B2B eCommerce business needs and situations, and how you can address them in a variety of ways. You might not find that every scenario or solution makes sense for your business — that's OK. Every business can find some opportunities within this eBook, and can tackle these issues easily with solutions on the market today.

Who We Are

The recommendations you find in here come from the team at Zoey, a B2B eCommerce solution that simplifies the setup and management of B2B eCommerce. We offer a variety of capabilities and solutions within our framework, and can help solve many of the challenges outlined here.

If you find yourself curious about some of the recommendations here, please feel free to reach out to us, and we can help you learn more and show how we can help. If we're not the right solution for your particular issue, we're also happy to point you in the right direction.

We hope you find the tips and solutions referenced in here valuable, and would love to hear your feedback about how you've put these into practice! Feel free to email me at josh@zoey.com with your thoughts.

Thanks,
Joshua O'Connell
VP of Marketing, Zoey

By the Numbers: eCommerce Buyer Expectations

80%
OF BUYERS HAVE SWITCHED FROM VENDORS THAT CAN'T MEET EXPECTATIONS

19%
OF BUYERS SAY POOR COMMERCE FUNCTIONALITY LED TO A CHANGE IN VENDORS

15%
OF BUYERS SAY A POOR WEBSITE LED TO A CHANGE IN VENDORS
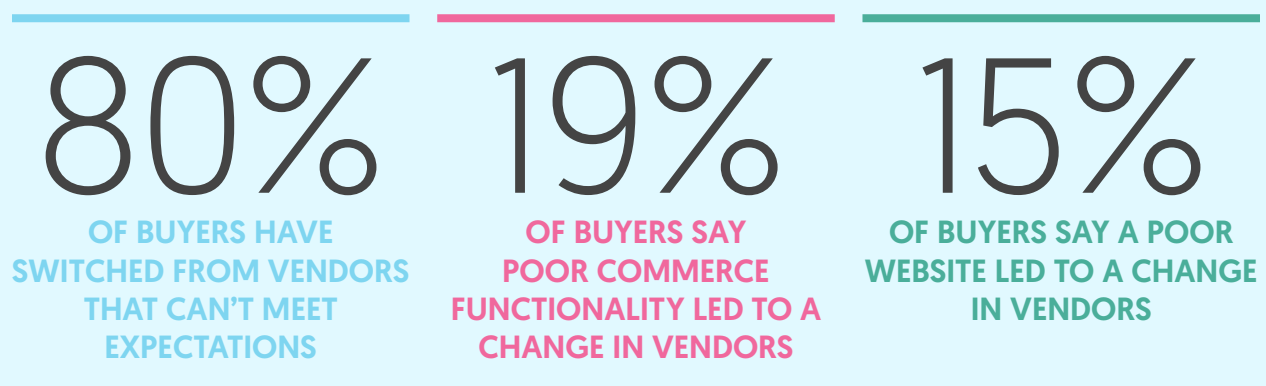
SOURCE: Accenture

Supporting Self-Service Buyers

I t's now been more than 20 years since companies like Amazon established what are now normal and expected tenets of B2C eCommerce.

While the B2B eCommerce space has its own requirements, B2B customers by day are B2C customers when they get home, and as such there's a growing expectation of what eCommerce looks like for a segment of your customers.

Ease of Shopping

Part of the allure of sites like Amazon is the ability of customers to quickly locate and order items that they know they need.

If you're in an industry where your customers know what they need to order, or reorder the same items regularly through your business, self service solutions that make ordering quick, easy and efficient will help you support your customers, while providing a pleasant shopping experience that will maintain their loyalty to you.

B2B-Specific Needs

You can't just clone the Amazon experience — B2B businesses have their own requirements around functionality, business logic and experience.

Whatever solution you select should factor in that functionality as well.

In this chapter, we explore self-service capabilities to consider for your eCommerce business if this order pattern is common for you, covering a mix of best practices from B2C eCommerce, as well as B2B-specific aspects that ensure your business is properly represented.

Streamlined Ordering Interface

Central to a self-service model is most often an ordering portal. Such a system is stripped of a lot of the bells and whistles commonly found on B2C-focused sites with an eye toward making ordering as obvious, simple and straightforward as possible.

PRODUCT	COLOR	SIZE	SKU	PRICE	QTY
🔴	Red	Small	configurable-to-red-small	$10.00	1
🔴	Red	Medium	configurable-to-red-medium	$15.00	2
🟢	Green	Small	configurable-to-green-small	$10.00	3
🟢	Green	Medium	configurable-to-green-medium	$15.00	
🟠	Orange	Small	configurable-to-orange-small	$10.00	
🟠	Orange	Medium	configurable-to-orange-medium	$15.00	
🔵	Blue	Small	configurable-to-blue-small	$10.00	
🔵	Blue	Medium	configurable-to-blue-medium	$15.00	
⚫	Black	Small	configurable-to-black-small	$10.00	
⚫	Black	Medium	configurable-to-black-medium	$15.00	
🟡	Yellow	Small	configurable-to-yellow-small	$10.00	

3 Items Selected with a total quantity of 6.   Add All To Cart

A table view can offer a more straightforward approach to ordering by offering an easily skimmable list of products for purchase, not unlike a print catalog.

Catalog is presented most often in list format, with various speed-up techniques we'll explore in this chapter.

Another way to simplify ordering is to provide a robust array of ways to piece together an order. Some examples:

Table Catalog or Product View

The ability to see a variety of products in a quick, skimmable list, akin to the paper catalogs of yore, is a B2B-specific method of surfacing products and key information on them in a format that's familiar and comfortable to your buyers.

Matrix Product Screens

For products with a couple of variable data points, you can offer a matrix view that makes it easier to enter all the variations you need of a product at once.

If you use the example of a T-shirt, you could have size and color, and a matrix of choices that mix and match the various sizes and colors.

Bulk Add to Cart

Table and matrix formats also facilitate being able to set quantities on multiple items on the list and adding all to cart at once, which reduces clicks and avoids having to travel to each product page.

Quick Order

For customers who know what SKUs they need, a quick-order screen can speed up the ability to enter SKUs and quantities to move to the cart quickly. An ability to have a pre-populated quick order SKU with commonly ordered items can speed up the shopping experience even more.

Make customers' jobs easier: Offer a variety of ways to build complex orders, like pasting CSV information.

CSV Import or Copy/Paste

Another option is to allow for a copy/paste of CSV values for businesses that retain that information in Excel or other data formats, which can help bridge the gap for customers who relied on older methods of managing core purchase lists.

Save SKUs to List

For customers who order the same SKUs reliably, the ability to save SKUs to a list for purchase, such as Wish List or Saved Items functionality, can provide customers a quick way to get back to items they need.

Recently Ordered

A Recently Ordered screen can show SKUs they've purchased in recent orders and allow them to quickly add those items back into a cart. This can be found in the form of a Reorder option on existing orders or a list of SKUs contained in those orders.

Express Checkout

Reducing friction to complete checkout can assist those merchants with a focus on self-service. Here are ways to streamline the checkout process:

Saved Addresses

Allow your customers to put addresses for billing and shipping on file. Self-service sites allow for easy management of addresses, as well as other key business information, which make placing orders themselves easier by selecting previously entered information.

Saved Payment Types

For sites that take credit cards or PayPal, the same can be done through tokenization, which basically creates an authentication method to use a credit card without having to save the actual credit card information. Major payment gateways offer this service to allow customers to use a payment on file without having to enter it for each purchase.

Skip the Cart Page

More and more sites are skipping the cart screen in favor of mini-carts, which allow you to move directly to checkout once a cart is built. Reducing the number of clicks and moving things along reduces the falloff possible as a transaction proceeds. You can still offer the ability to view the full cart for those who need a review step, without requiring it.

Diverse Payment Options

B2B businesses rely on a larger complement of payment solutions than their B2C counterparts, which tends to revolve most strongly around the credit card. While credit cards will certainly continue to play a key role in B2B Commerce, other payment types are gaining popularity.

Net Terms (Buy Now, Pay Later)

Many B2B businesses will offer Buy Now, Pay Later offerings for orders, including Net Terms, which can speed up ordering by allowing that selection to avoid payment entering, and the customer has a window of time in which to pay the invoice.

Credit/Spending Limits

Connected to purchase types like Net Terms is the ability to set a spending limit to avoid overexposure to customers who are effectively buying with a promise to pay later. Smart systems will block new orders until past due orders are paid

as well, further reducing exposure to unexpected losses.

Purchase Orders

Many larger companies will require the ability to tie a Purchase Order to an online purchase, for payment through normal accounting methods. At minimum the ability to enter a Purchase Order should be supported.

Deposit/Balance Billing

The ability to divide payments into multiple installments for your own business requirements, or payment terms negotiated with your buyers, will allow for more flexibility than a monolithic payment of some sort.

Automated Clearing House (ACH)

The ability to take bank payments without having to wire money is a growing part of the online Commerce industry, and in particular B2B buyers are beginning to adopt ACH as a way to avoid the costs associated with other transaction types, like credit cards.

Net Terms Without Risk

Newer services are cropping up that allow merchants to get paid instantly but still provide customers net terms for a fee, providing instant cash for the merchant instead of having that cost tied up in an invoice for a window of time. The fee also covers any risk the financier takes on your behalf, meaning if the customer doesn't pay, you're still covered.
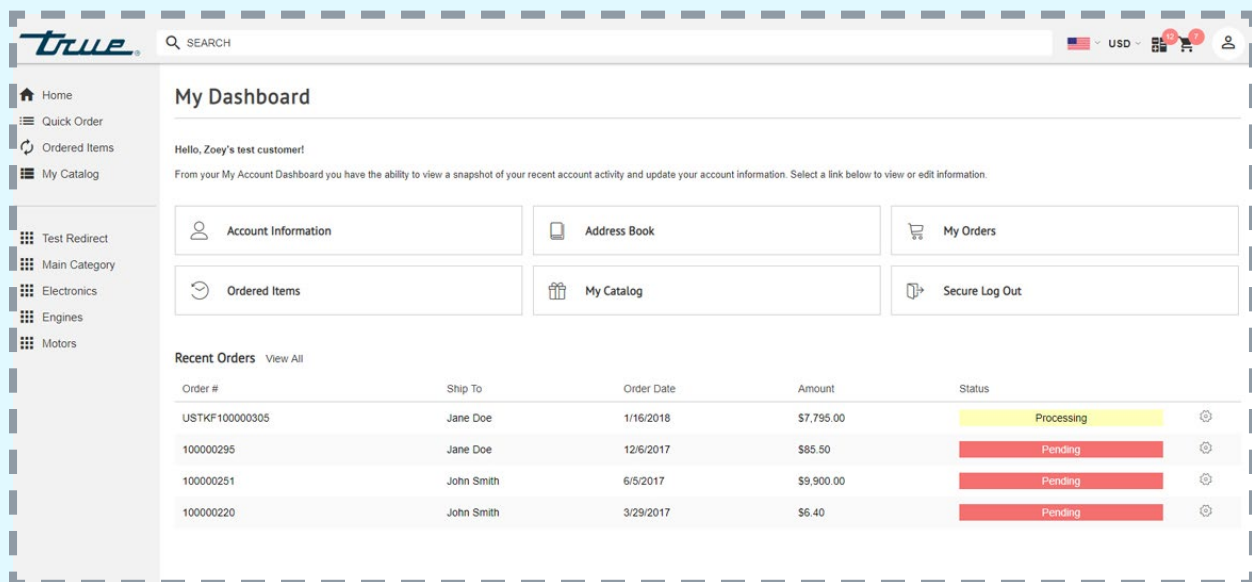
A robust My Account section can make it easy for customers to complete a variety of self-serve options, such as checking order status, updating customer information, tracking shipping and reordering.

Robust My Account Section

Providing self-service tools includes covering standard capabilities found on B2C sites today, like the ability to see previous orders and get shipment information for those on the way. It also incorporates more B2B-centric needs like paying open invoices. Features include:

Order History

Customers can see what they've previously ordered in case they can't remember what SKUs they need to get.

Reorder

Leveraging existing orders and building a fresh order around them can make things easy for customers who regularly order the same or similar items and quantities.

Shipment Tracking

Customers can see if their order has been shipped and where in the process it is for delivery. This is one of the most common needs customers have, yet many B2B business don't support it.

Information Management

As noted in the checkout section, buyers can set up their billing and shipping addresses, and save payment information when allowed, to make checkout simpler by having that information readily available.

Being able to manage customer information within the store also reduces the number of customer service tickets or calls, as customers can easily keep pertinent information current for purchasing.

Bill/Invoice Payments

For orders where buyers have a Net Terms or Buy Now/Pay Later arrangement, or have installments to pay based on an order agreement, a My Account section will allow acceptance of payment for those bills and invoices as well.

Multi-Buyer Accounts

One area where B2B eCommerce diverges is many businesses have the need for multiple people to place orders on the company's behalf.

Having the ability to have multiple buyers tied to an account is a helpful capability that allows order histories to be pooled and monitored more effectively by the company.

Order Approval Workflows

Connected to multi-buyer accounts is the ability for one or more people within the buyer company to be able to review orders being requested by other employees, and approve or deny orders, allowing for a validation step before orders are processed and fulfilled.

By the Numbers: Do-It Yourself Buyer Expectations

Buyers surveyed who had an expectation from B2B and wholesale sellers included:

44%
PERSONALIZED PRICING

41%
SELF-SERVICE ECOMMERCE FUNCTIONALITY

33%
ONE-CLICK ORDERING

31%
PRODUCT RECOMMENDATIONS

SOURCE: Episerver survey of approximately 700 buyers

Abandoned Cart and Marketing Automation

Setting up marketing automation to engage self-service customers and remind them to come back is one last best practice to pull from B2C sites. One of the most critical is Abandoned Cart.

Customer Reminders

This will take the form of an alert if they placed items in the cart and never completed their purchase. Like with B2C customers, unexpected distractions or questions may cause an order to not be completed at the time it was initiated; Abandoned Cart reminders can help encourage customers to come back to complete the order.

Merchant Data

For merchants, having an Abandoned Cart system in place means knowing how often orders are abandoned and by whom, as well as if certain items are being left behind more often than others.

It could provide an early clue that something is holding customers back and allow for changes that improve conversion rates. For instance, you might learn that a competitor's pricing has changed and suddenly certain items are being left behind as a result.

Automated Emails

Setting up automated email interactivity can be great for keeping customers engaged with you and encouraging them to come back. If you see that there's an order pattern to your customers, you can set reminders if their last order was longer than the average. If you have customers that reorder on a cycle, marketing automation can send a reminder that they're due for their next reorder.

For customers who take care of themselves, technology can be a driver to ensure that they don't get lost in the shuffle, without adding additional burdens on your customer support and sales teams.

Supporting Full-Service Buyers

While it would be great for all customers to be self-serve, it's definitely not the case. For a variety of reasons, a lot of B2B eCommerce business is still conducted with human interaction. While the situation is slowly evolving, and technology is becoming more prominent when it comes to B2B eCommerce, there are still a lot of customers who prefer picking up the phone and talking to someone, have concerns about their technological prowess and making a mistake, or are just more comfortable with other forms of doing business.

eCommerce as Support

As B2B eCommerce solutions evolve, so does their ability to still add value to those customers. Just because they may not be building and managing orders themselves, your website can still provide value to them in a number of different ways. In this chapter we'll take a closer look at ways you can leverage the same solutions to support those customers.

Browsable Online Catalog

One of the obvious use cases for all of your customers, whether they buy through the website or not, is to offer the online catalog as a replacement for the print catalog, which many B2B businesses relied upon during a different era. The cost of designing, printing and mailing a catalog has only become more expensive with time, while the ability to leverage a digital catalog, which can be updated in real time as new products launch or are discontinued, offers an efficiency that modern technology can provide.

For customers who are less tech savvy, the key is to provide a number of ways to find the products they are looking for, aiming for the most robust browsing experience possible. Examples could be:

Browsable

Strong product categorization and hierarchy to make it easier to browse the catalog.
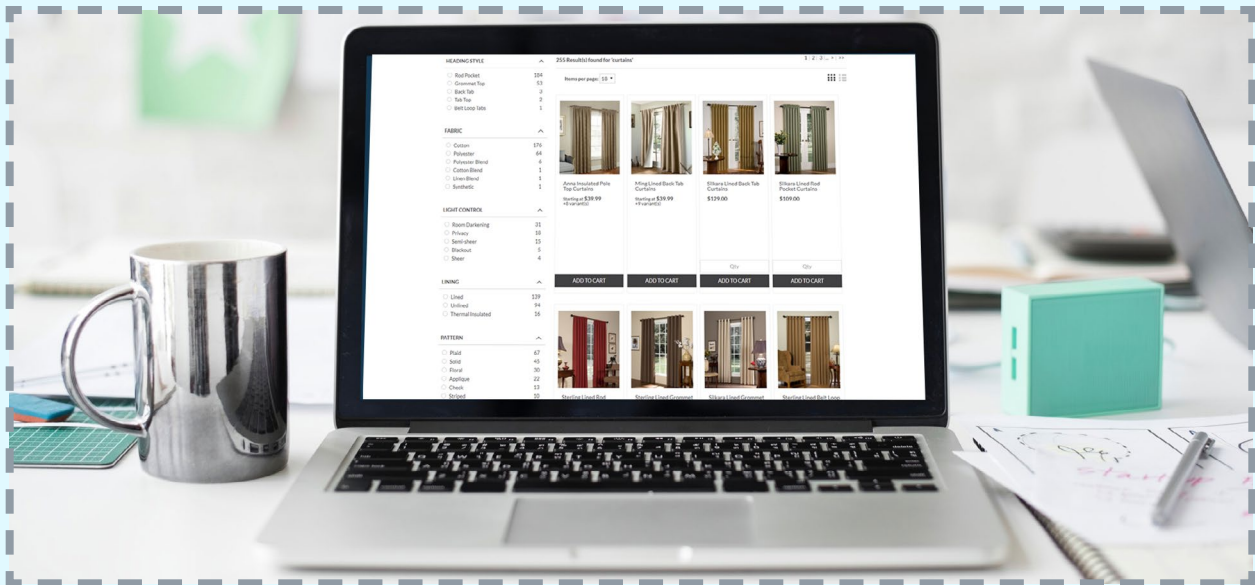
Because catalog presentation is critical, a strong search experience is required, including fuzzy search, which can account for common typos, and multifaceted search, allowing for drilling quickly down to the types of products required.

Product Metadata

In-depth product tagging tied to category and/or search filters makes it easier for a customer to define what they need and see the applicable products that meet their parameters.

Fuzzy Search

Since fuzzy search can work through typos to find the appropriate products, it can reduce frustration for those who may not know the precise spelling.

Product Parts Finder

For parts sellers, a Product Parts Finder can be a helpful tool to enter the model or device that they need the accessories or parts to support, and then see what is compatible with that item.

SKU Search

Allow search by SKU to immediately bring up a product, and the ability to then see the broader product family as appropriate, whether through a configurable product with selectable options or a category page that shows the options.

Website as a Salesperson Tool

Many B2B eCommerce businesses have salespeople who interact directly with customers. Some salespeople fear the self-service nature of eCommerce as potentially taking away their job role, but when used properly, an eCommerce site can actually empower salespeople and help them become more efficient, allowing them to help more customers and drive more sales.

Shareable Product Info

Some businesses simply do not have tech savvy employees. In other cases, purchases are discussed at in-person meetings where handouts prove helpful. Offering shareable product information, like a spec sheet or a one-pager with basic product information, can assist.

Print Options

Most commonly you'll see a printable PDF, but Excel, Word and other formats can also do the trick. It's best to select formats with broad compatibility across devices.

Electronic Options

Some who are not as web-savvy may find email less intimidating. As such, an email share feature where you can email a colleague product details directly from the site can also prove helpful in getting information to a team member.

The key to the website for salespeople is tools to help collaborate with customers whether in person or remotely, and helping to get customers to convert more frequently and efficiently. Here are some ways a B2B eCommerce website can be built to support a salesperson:

Tablet/Mobile Friendly

This is important when you have salespeople out in the field working with customers. If your website is responsive and optimized for mobile devices, including tablets, it can facilitate the conversation and the creation of orders and quotes on the spot.

Order Approval

When an on-site visit isn't practical or possible, the website can bridge the gap between salesperson and customer.

A salesperson can log into the administration area to process the order for a customer, or create a quote or draft order to send to a customer for review and approval. Salespeople with customers who place regular orders can proactively send draft orders or quotes for a customer to edit or approve as well.

Stay Connected

Offering a simple and effective way for customers to reach out to your sales and/or customer service teams with inquiries or needs can keep your customers feeling connected and accessible to you. Various tools, many times pioneered by B2C eCommerce, can guide the way when it comes to these capabilities, such as support ticket systems, online chat or VOIP phone systems with customer support capabilities.

Generate Sales Quotes

Sometimes buyers need to review pricing and orders with other team members, or wish to confirm the details, before finalizing an order. Sales Quotes can act as an approval step, sending a draft order to buyers and letting them complete the conversion to an order immediately when they're ready to move forward.

Sales Rep App as a Sales Tool

Another modernization of salesperson tools has been the introduction of a Sales Rep App that focuses the functionality on what salespeople need to work with customers wherever they are, whether at home taking a phone call or on the go.

There are a few key aspects and benefits of such an approach over simply leaning on an eCommerce website.

Product Info and Pricing

Be able to pull up product information and customer specific pricing while talking with buyers to have the latest, most accurate information available.

Create Orders and Sales Quotes

Salespeople can build orders or sales quotes for their buyers on the app in a quick and efficient manner, making it easier to capture buyers' needs in real time. This reduces data entry errors caused by transcribing orders from other sources and gets the order into the system faster.

By the Numbers: Many B2B Buyers Seek Help

88%
EMAIL THE SELLER

71%
USE LIVE CHAT

60%
LEVERAGE SALES REPS

41%
HAVE IN-PERSON CALLS

SOURCE: B2BecNews survey of 125 purchasing managers and corporate buyers

Save Carts for Later

You can start an order and put it down if a customer isn't ready to finish things up, and come back to it when things are finished. This ensures that you don't have to start over, or take notes that could be lost or lead to mistakes later.

Online or Offline Functionality

Salespeople can look up information and accept orders even when in a limited connectivity area such as a conference salesfloor or more rural areas with less dependable service. The app can sync to submit orders and pull down the latest product information when service improves.

Stepping Stone to Self-Service

As more of your customers get comfortable with your web offerings, they may find themselves inclined to start taking their own steps.

That's why B2B businesses with full-service customer requirements are well advised to factor in at least some of the self-service tips we shared earlier in this book. Some customers, over time, will find themselves sliding closer to being fully self-sufficient, and that should be encouraged, as you can take on more customers with the same size team.

Migrating Buyers Online

If you're new to having a B2B eCommerce business, or if you're still taking a lot of manual orders from your customers or leveraging salespeople to complete orders, there are a variety of ways you can make your business more efficient by leveraging your B2B eCommerce capabilities with success.

As your customers see the value of what's being offered, you'll find them taking more initiative, and requiring fewer labor hours, freeing up your team to acquire new customers or drive additional sales with your existing ones.

Here are some ways that you can leverage the tools within your store to encourage your customers to take the plunge online with you.

Order History

Depending on your approach, you may cut over cleanly to a new website and draw a line in the sand when order history begins. It also may be possible to carry over order history from a previous platform.

Services like Cart2Cart can sometimes facilitate this process, but it's not a perfect approach, and any data migration will have its own challenges.

If you are able to take this approach, however, having order history available to your customers is an easy way to entice them to check out the website. Many B2B businesses appreciate having access to this information for a variety of reasons, whether it be seeing what items they previously purchased, or locating an order if needed internally for reporting.

My Account and Tracking Orders

Once you're using an eCommerce solution as a communication channel for your customers, getting real-time updates via email and through the website of order tracking information and status updates will get customers engaged with their My Account capabilities.

It's one of the easiest and most efficient ways to get customers to begin exploring what your site can offer them.
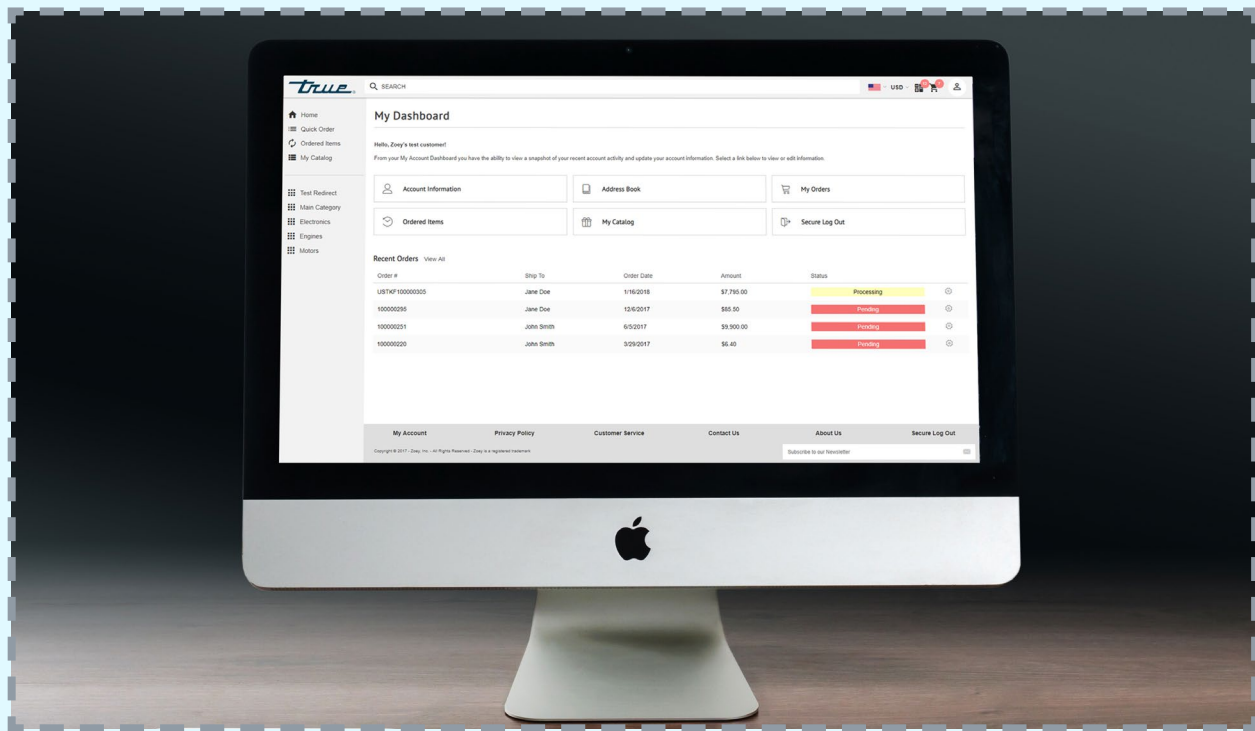
A robust "My Account" experience can be a great first step to getting less tech savvy customers acclimated to your website, with valuable information on hand for easy access, such as order tracking and history information.

Order Comments

Order comments can be leveraged when there are delays or additional information to provide. That information, which can also be sent out by email, would further encourage customers to check in on the site for information throughout the life cycle of an order.

The Dashboard

Once in My Account, they can discover other features provided to make their lives easier, so it's important to make sure My Account offers additional value for your customers as well. Such options may include:

- Reordering capabilities using an existing order as a basis.

- The ability to see which items were most recently purchased.

- The ability to manage lists of items for retention for the future, such as for quick ordering.

- Payment, billing and shipping information settings, including the ability to add/edit/delete information from each.

Merchants who have customers placing frequent orders of similar items will particularly find these helpful in making your site valuable.

QUOTE #Q-20182006 - QUOTE AVAILABLE

About This Quote

Print | Cancel | Duplicate

Quote Created:	6/7/2018
Quote Name:	Sample Quote
Quote Expires:	July 6, 2018 2:03:19 PM EDT
Quote Comments:	sample@zoey.com: 6/6/2018 2:03:19 PM EDT
	This is my sample quote comment

ADD COMMENT

Shipping Address: Sample Address
315 W 36th Street
New York, New York, 10018
United States
T: 1231231234

Shipping Method: Not Provided

EDIT SHIPPING ADDRESS

Quick-Add item by SKU

Enter a product SKU | ADD TO QUOTE

PRODUCT	PRICE	QTY	DISCOUNT	SUBTOTAL	
SAMPLE SIMPLE PRODUCT 97 SKU: sample-simple-product-97	$100.00	1 EDIT	$0.00	$100.00	⊗
SAMPLE SIMPLE PRODUCT SKU: sample-simple-product	$130.00	6 EDIT	$0.00	$780.00	⊗

Allowing customers to request quotes online encourages further adoption of your B2B eCommerce platform.

Customer inquiry

Customers also should have the ability to request their own sales quote, a step toward taking matters into their own hands by being able to build a draft order or quote on their own without salesperson interference. Salespeople can review and adjust the quotes, either in terms of items or pricing, to send back to a customer based on the order specifics and the customer in question, maintaining that hands-on touch that some customers will certainly appreciate.

As customers get more comfortable with the technology, they can start to be more self-sufficient, freeing up salespeople to drive additional new sales as well, instead of just serving the existing customer base.

Approval of Draft Orders and Sales Quotes

For those customers who are reliant on salespeople, getting them comfortable with the website may be as simple as having them work with their salespeople and using the website as a bridge to review orders before purchase.

Salesperson Support

Salespeople can have conversations with a customer, and then set up a sales quote, or draft order, for their customer to review. The customer receives an email asking them to do so, and if they're happy with what they see, they can complete the order right then and there. If there's something they'd like to change, by editing quantities or items, they have the option to do so within the same screen or they can call their salesperson.

Replacement of Paper Catalogs

B2B businesses in many industries used to leverage paper catalogs to help customers understand what's available for purchase and the different options available in a product line. Print catalogs are very expensive to develop and mail, so many businesses are leveraging their websites as a replacement.

Stepping Stone

For customers who are not as comfortable yet with online shopping, encouraging them to browse and use the website as a replacement for that catalog can be another way to begin getting them comfortable with online shopping.

Your online catalog can provide a number of ways to leverage your existing website to satisfy print catalog users:

- Searchable database of existing products.

- A compare feature that lets a customer see the differences between two items in the catalog line-up.

- The ability to filter the catalog by specific traits, if a customer is looking for a product that fits certain parameters.

- The ability to download one-pagers that might have previously been included in the catalog, to allow for printing/sharing of content with those who are not technically savvy.

- Share features that allow emailing of products or product lists to other members of the customer's team.

By the nature of technology, the online catalog will provide a stronger offering than the paper catalog it replaced. Having a robust online catalog will encourage adoption faster as customers find ways to make shopping easier.
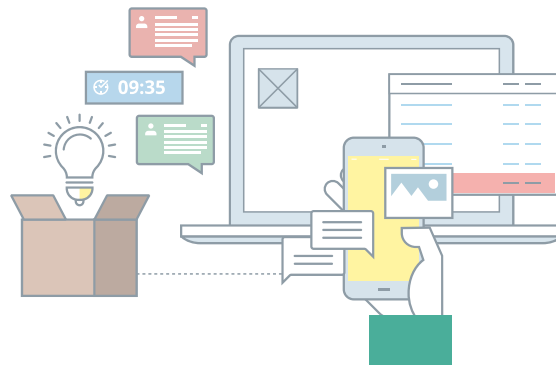
By the Numbers: The Online Shift

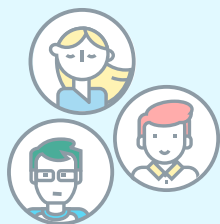## 13%
OF ALL B2B COMMERCE SALES WERE ONLINE IN 2019

17%
OF ALL B2B COMMERCE SALES WILL BE ONLINE IN 2023

10%
ANNUAL B2B ECOMMERCE SALES GROWTH, AT A MINIMUM, EACH OF THE PAST THREE YEARS

SOURCE: Statista, Digital Commerce 360

Leveraging Customer Segmentation

B2B eCommerce businesses many times segment their customers into different buckets. There are a variety of reasons this is the case:

- A business sells different product lines, and customers are grouped by which line to which they belong.

- Customers order in different volume levels, and their pricing is determined by how much they order.

- Some customers are B2C and some are B2B.

- Geographical considerations where certain products aren't available everywhere.

eCommerce Groupings

As such, having an eCommerce platform that can support such segmentation is an important first step. But segmentation can take a variety of forms when it comes to presentation and customer management.

So in this chapter, we'll look at a variety of ways segmentation can come into play in making your website more personal for each of your customer segments.

Custom Catalog

One of the more obvious ways a customer segmentation program can work on your website is ensuring that customers of one segment are focused on the products that segment can buy. Meanwhile, products that are unrelated to the group are not shown, avoiding irrelevant items or recommendations. And once a customer comes to a page in your catalog, they may see pricing that differs from customers in other groups.

Here are ways your catalog can be customized for your customers to have a more personalized shopping experience:

Different SKUs

Some stores sell to both B2C and B2B/wholesale buyers. This can sometimes mean different SKUs for different groups, with a completely different catalog presentation. In other scenarios, it could be the same SKUs with different quantity minimums and maximums. Ideally, your eCommerce platform has the flexibility to handle either scenario easily based on how products and Customer Groups are configured.
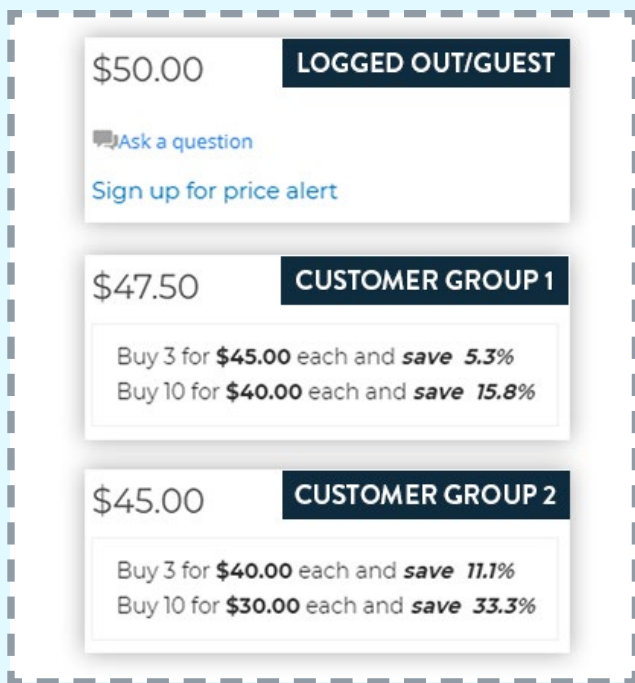
Showing different pricing to each customer, including tier pricing, offers a more personalized experience.

Bespoke Pricing

Different segments of your customer base may qualify for different pricing scenarios. In those cases, you may be presenting the same baseline catalog but need to show pricing based on the assigned Customer Group. This may include:

- Base price - the cost for one item.

- Tiered pricing - the price as customers hit certain quantity levels.

- Sale pricing - discounts for certain customer groups to move inventory.

- Promotional pricing - Pricing scenarios based on certain quantities or combinations of quantities to be purchased.

In all these scenarios, a modern B2B eCommerce solution should be able to provide the flexibility to ensure that a customer assigned to a specific group sees the relevant pricing for them, offering a more personalized touch than a catalog where pricing has to be requested or is adjusted via a quote.

Search with Pricing

Because of these SKU and pricing scenarios, search is a critical component to be customized, ensuring that it can properly pick up on the same scenarios above, and present accurate catalog and pricing information. It is very easy for search to fall out of alignment if not properly set up and maintained, so a proper B2B eCommerce solution will help manage this.

Given that the online catalog is a key part of your presentation to your customers, ensuring that the information is accurate and relevant for each customer group is a good first step.

Registration Needs

With such a use of groups throughout your shop, it can become harder to have customers self-register and immediately be dropped into the shopping experience. Some industries require a customer to provide information at the time of becoming a customer to be able to assign them pricing and other rules.

With modern eCommerce stores, this process can be smoothed out a bit by having the ability to ask questions and offer document upload capabilities to get what is needed upfront. If certain registration or certification documents are required to order, or some sort of proof or identification is needed to set up an account, this can be done upfront to avoid back and forth with a new buyer.

Different Content and Merchandising

Aside from just making your catalog accurately represent what each segment requires, the rest of the site should be in lockstep, too.

There are a number of aspects of this that should be visited, including:

Policy Differentiation

Ensure that the various store policies presented are relevant to each group. If return/exchange policies differ between B2C or B2B customers, or between customer groups, or other legal terms or requirements only impact certain groups, you should ensure that the right information is present for each of the groups.

Merchandising Segments

You may find a different landing page upon login, or merchandising techniques, are required between B2B and B2C in particular, but sometimes between different B2B groups as well, such as when the products sold are different per group and a different merchandising approach is needed. You may even find that different page designs per group may be valuable in certain situations, where you can have a category presentation that's laid out differently for surfacing products for purchase.

Functionality

You might find that certain groups needs quick ordering or other capabilities, while others will find such features confusing. Or you might want a quick-order form with different prepopulated capabilities. Ultimately, your eCommerce platform should be able to keep up with the competing needs of your various customer types.

Payment and Shipping Options

Aside from the actual catalog and pricing, the way you allow orders to be placed, and how they're fulfilled, may vary greatly from one group to another.

Here are other considerations:

Restrict Payments

You may require the ability to offer certain payment types only to certain customers, such as Net Terms or Buy Now/Pay Later, PayPal, credit cards or checks/money orders. As such, setting up customer segments where you can determine which payment types each group can utilize can help manage those scenarios.

Shipping Limitations

You might have shipping policies that differ by customer group, particularly if you have freight scenarios for larger customers, or perhaps free shipping policies that vary by group (different minimum levels, or some don't get it all). Customer Groups can help manage those scenarios.

Sales Tax

B2C customers may need to be charged sales tax, depending on the scenario, where a B2B transaction in the same location may not. Properly configuring your store and setting up groups to properly manage each scenario are critical to ensuring you're in compliance with tax collection laws.
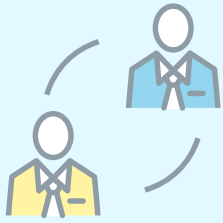

By the Numbers: Key Features for eCommerce

In the coming years, sellers see the following as critical to their success:

50%
PERSONALIZED ECOMMERCE EXPERIENCE

40%
ONLINE MARKETPLACES

32%
BIG DATA ANALYTICS

SOURCE: Unilog Content Solutions Pvt Ltd. survey of 244 companies

B2B and B2C Customers On One Store

In previous chapters we discussed that many B2B best practices had their start as a standard issue feature for B2C customers. That said, B2B businesses have their own requirements, which mean just applying B2C solutions generally doesn't work.

But what happens when you still need to serve B2C customers? In this chapter we'll briefly touch upon managing scenarios where B2B and B2C customers are serviced, and how to manage both within the same website.

Public Catalog vs. Private Wholesale

Many B2B businesses opt to lock down their eCommerce sites, requiring a login to see the catalog. This doesn't work for B2C shoppers, who will go to your site or search on Google, expecting to see a shoppable catalog when they arrive.

Fortunately, modern B2B eCommerce platforms have you covered:
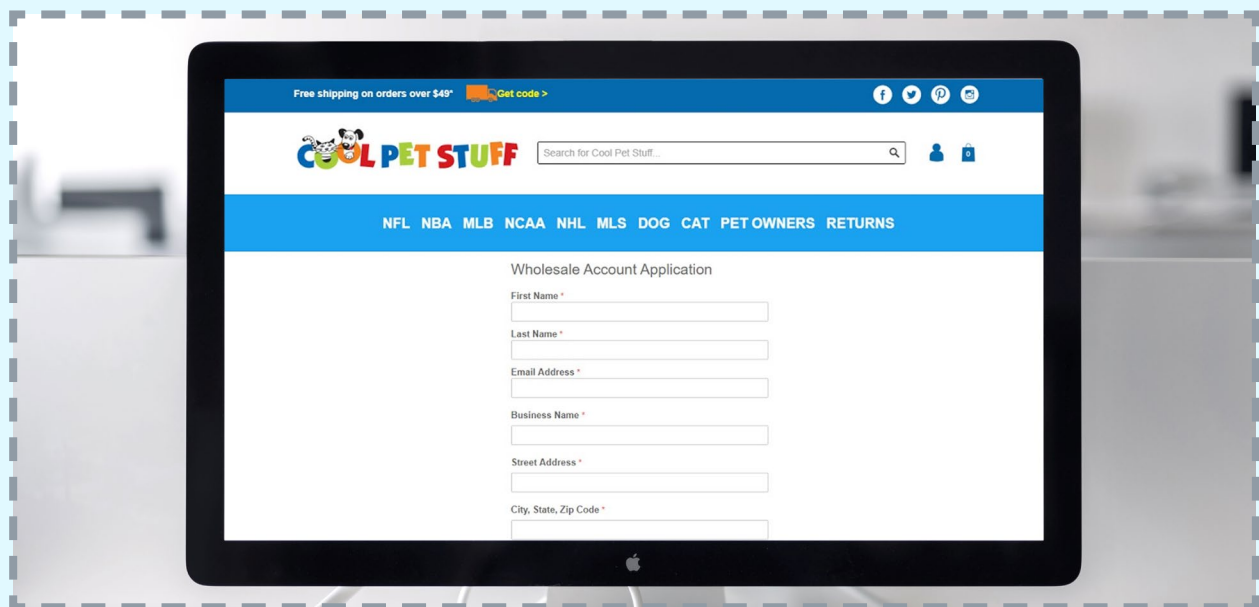
A wholesale registration form can be a great way to allow potential customers, or existing offline customers, the way to express interest in buying from you, while capturing upfront the critical information needed to establish the account.
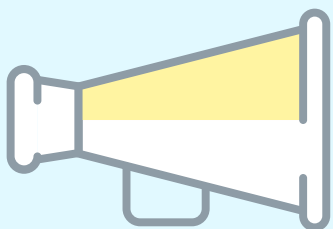
Channel Marketing

Properly segmenting your customers means you can leverage channel-specific marketing. For B2C, that may incorporate things like email or social media marketing, or offers and bundles that can be applied to just guests or B2C customers.

For B2B, it may be price breaks or promotions on volume purchases to support the higher volumes they're buying or to clear out inventory. Marketing and messaging flows through channels like LinkedIn, plus customer service or salesperson outreach.

Retail Pricing Publicly

The public-facing catalog can be of a B2C variety, with standard retail pricing, for those who are B2C customers and just looking to make a purchase.

B2B Prices Via Login

For existing B2B customers, a wholesale login screen can be presented, and when wholesale customers log in they can see their customized catalog and pricing, as outlined earlier in this eBook.

Sales Quotes for Acquisition

For prospective B2B customers, you can have a public Sales Quote feature to allow customers to submit a potential order for pricing as a way of expressing interest and generating sales leads. Customers can convert a reviewed quote into an order and become a registered customer, offering a smooth way of bringing new customers on board.

Protect your Pricing

For B2C customers who may qualify for special pricing, they can log in as well, hiding from competitors, along with wholesalers that resell your products, what deals you may be offering certain customers, avoiding marketplace friction.

In the next chapter, we'll discuss SEO considerations that can help drive potential customers to visit your site.

Managing Separate Experiences

Ensuring the B2B experience and information is locked to certain logged in accounts will ensure your distributors don't feel you're in competition with them and who they sell to, especially when your site has standard retail pricing for B2C customers. You also will avoid tipping your hand to any competitors who may try to use any information you put out on your website to their competitive advantage.

But by offering an open website experience with entry points for B2B customers, you'll be able to still recruit those B2B customers through:

- Wholesale registration forms that let customers get access.

- Request a Quote that allows a prospective customer a chance to see what a given order will cost, and immediately convert if they accept it.

- Site inquiry options that allow a customer to contact customer service or sales via inquiry form, chat or email.

Best of Both Worlds

In the meantime B2C customers can immediately get started with the publicly available catalog and pricing. For a B2C customer it's like any other eCommerce website, while B2B buyers can find what they need to get inside.

By the Numbers: Customer Interaction Tracking

Percent of B2B eCommerce sites that tracked:

55%
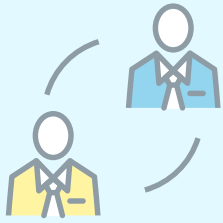**CONVERSION RATES**

36%
ONLINE FORM SUBMISSIONS

36%
CUSTOMER SERVICE ENGAGEMENT

30%
PRODUCT INFORMATION DOWNLOADS

SOURCE: B2BecNews

Search Engine Optimization

Historically, B2B eCommerce has been a "behind the curtain" operation. Catalog, pricing and other information were in a "walled garden" model which required a login and password to access. While this was helpful for protecting information that was proprietary, increasingly it's at the cost of discovery of a merchant's catalog by new customers.

Some companies would solve this by having a content-driven public facing site that would be maintained separately, but that now means doing twice the work to represent the same product information. In this chapter we'll discuss some of the techniques modern B2B eCommerce sites can leverage to get the best results using their own product catalog and eCommerce capabilities as a natural Search Engine Optimization (SEO) building solution.

Catalog as SEO

Your product catalog is a rich set of information, with names and keywords that your customers are probably looking for on search engines all the time. If your catalog is walled off, you lose out on that avenue for drawing in customers. A more modern approach leverages a permissions-based system to leverage your catalog without giving out information. Here's how it works:

Public-Facing Catalog

Your product catalog structure, and products within, are made publicly visible instead of being hidden. This opens up your product names, descriptions, images and other supporting information available to search engines.

Multiple Purposes

With this content public, customers, industry journalists and others can link directly to products, building their visibility in search engines and improving your standing within search engines by building backlinks to your site.

Hide Selective Info

Product pages can hide information that varies by customer, or is proprietary, such as pricing, quantity requirements and more by leveraging permissions-based settings. You can also disable add to cart for guests if shopping requires being registered. This is also helpful if you want to discourage one-off or B2C purchases, for instance. You can replace the Add to Cart with an Add to Quote button if you'd like guests or potential customers to request pricing via a quote.

Product descriptions and other product page content are helpful in providing search engines with content, which in turn helps visitors find your store.

Unique Descriptions on Your Site

Some B2B businesses are selling wholesale products that are then redistributed elsewhere. As such, it's critical to ensure that the copy you're using for your product descriptions is as unique as possible, so you're not putting up the same information that your resellers or competitors are using. You can be penalized for this by search engines for not having enough unique content. There are a number of ways to minimize issues:

Different Descriptions

If you are the provider and you have resellers, provide them with a different description than you use for yourself. This may be easy to do since you're selling in volume and the resellers are less likely to be doing so.

Make Your Site Original

If you are selling goods that other wholesalers are selling as well, try to not use the default information provided by the manufacturers you're sourcing the items from, but instead leverage a description of your own. This can also serve to help you stand out if you optimize for the important keywords in your copy. If you don't know how to do this, there are SEO tools for finding that balance, as well as companies that specialize in SEO.

Unique Copy = Success

The key is to make sure your copy is unique enough — you can rewrite sentences with different adjectives or synonyms at a bare minimum to create some diversity in your copy vs. the source material. The more unique your content is, the more likely a search engine will identify the information on the site as helpful and useful, and use it toward the results it serves.

File Attachments

Search engines can now scan more than just the copy on the page. If you're uploading images, documents like PDFs and other standard file attachments, many times they're analyzing and reading them, too. If you've ever searched on a search engine and been given a PDF as a result, it's the end result of the engine analyzing what's inside that document and recommending it as an option.

Content Diversity

Many B2B businesses have file attachments that serve as marketing one-pagers, or spec sheets with information that can be beneficial for those who need a printout for other stakeholders. Those documents can not only be helpful for prospective customers, but also search engine optimization.

If you have those documents available, and they do not contain information that you'd deem proprietary, there is SEO value to having that as part of a more complete product page.

Not only can search engines crawl many attachment types, but the information is valuable for your customers.

Sitemap Submission

It helps to submit a sitemap to Google's and Bing's Webmaster Tools. This gives the search engines a list of pages to index, so they know how to get your site's information into their engines.

Without such information, they'll visit your site and look around, but they'll only grab so much at a time. If you have a complex category structure or just a lot of pages, they may not find everything.

Many modern B2B eCommerce tools will have sitemaps that are built to the specification of the search engines so they can quickly provide the information necessary. They automatically update when pages are added, updated or removed, so search engines also know when to come back.

Built for Search Engines

Now that you've loaded up your product page with all this great information, it's important to confirm whether your site has been built to make it easier for search engines to find information.

Google, Microsoft, Yahoo and others (covering the vast majority of the world's searches) maintains a standard markup system at schema.org that helps site builders place tags in their pages that tell a search engine where they can find information such as the product name, description, price, and so on.

Schema.org is also a helpful tool for voice navigation on websites — many of those tools will leverage that data when available to help visitors reliant on that technology with a way to navigate the site.

With more and more B2B eCommerce solutions now appearing on the market, it's a fair question to ask if they support those capabilities. If they do, they're helping a search engine better understand the information being presented. And you'll also be ahead of many other eCommerce stores; recent research shows that the majority of websites are not optimized with schema.org tagging, which means that you'll be ahead of a lot of your competition.

By the Numbers: B2B Marketing Lead Sources

Percent of B2B eCommerce sites that generated leads by source:

73%
EMAIL

70%
ORGANIC SEARCH

54%
PAID SEARCH

37%
DISPLAY ADVERTISING

SOURCE: DemandWave

Other Considerations

While much of the focus of other chapters has been on the purchasing experience for your buyers, your internal team will have requirements too.

Managing Commerce

Whether you're reliant on an eCommerce website, a Sales Rep App or both, the administration component of your solution is going to be heavily leveraged by a variety of stakeholders on your team, including:

- Sales Team

- Marketing

- Customer Service

- Warehouse/Fulfillment

- Finance/Accounting

So ensuring your solution is robust enough to provide these tools and give you what you need to function well as a business is an important aspect of the equation.

Staff Account Restrictions

Not every member of your team will need access to certain components of the software.

The marketing team doesn't necessarily need to be able to edit customer information; salespeople may not need to access marketing assets. Finance/accounting may need to see certain reporting that others don't.

So the ability to decide what each employee can access through Staff Account Restrictions, not unlike the ability to set customer grouping on the buyer side, can help provide a more granular outcome that keeps everyone focused on their own information.

Staff Data Restrictions

If you have a sales team that has a set of customers for which they are responsible, a good administration toolkit will let you limit what each sales rep sees to their customers' data, for instance, to keep them focused on what matters to them, while tucking away information that's not relevant to their day-to-day workflows.

Promotions Engine

Your marketing team may wish to run various promotions, such as free shipping or price breaks on certain sized orders, just like B2C stores would provide, so having a promotional engine that allows for various pricing scenarios to be fleshed out can be helpful.

Split Orders

If you're working with vendors for fulfillment, having the ability to configure rules to automatically split up an order to properly divide the purchase based on which vendors are involved can facilitate how to get the right orders in front of the right providers for processing and fulfillment.

Integrations

Virtually all solutions today have the ability to integrate with other solutions - it's going to be a standard part of the conversation. But each solution will have their list of supported solutions, whether it be accounting, CRM, ERP and so on. Most will also have APIs to theoretically allow integrations to anything else, although that's not always the case.

Regardless of the scenario, most businesses should not have to have separate silos of information nowadays - integrations can make moving data back and forth much simpler than before, and it's worth understanding how you can benefit from that.

By the Numbers: The Digital Migration

The COVID-19 pandemic accelerated a digital transformation of B2B Commerce:

61%
OF TRANSACTIONS START ONLINE

80%
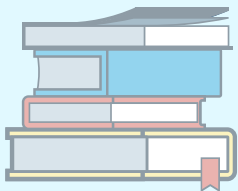**OF SALES INTERACTIONS ARE DIGITAL**

33%
WANT A SELL-FREE SALES EXPERIENCE

44%
OF MILLENNIALS PREFER NO SALES REP

SOURCE: Accenture, Gartner, Forrester

Conclusion

B2B eCommerce, just like its B2C counterpart, continues to evolve quickly with technological breakthroughs, continued product and tool development by a variety of companies, and the establishment and iterations of best practices based on customer feedback and buying habits.

The eBook that you've just finished reading summarizes many, but not all, of the ways that you can enhance your site by either moving to an eCommerce solution that supports these capabilities, or enhancing your existing site using tools that may now be available.

Don't Be Complacent

It's important to be constantly evaluating and iterating on your eCommerce capabilities and customer options — customers are increasingly familiar, and comfortable with, buying online, and as they continue to get more so, they'll be more demanding of you as an eCommerce business to provide them the tools they need to buy quickly and efficiently. In turn,

your sales team will also expect that they be equipped with best-in-business tools to ensure they can be efficient in their sales efforts.

Leverage Modern Tools

If you're on an older eCommerce platform, whether an off-the-shelf or homegrown solution, moving to a new solution may give you the ability to establish stronger best practices while giving your customers better tools to succeed.

Ready for a New Home?

If you're ready to begin that process or wish to understand what a move can provide, we at Zoey are here to help! Just click the button below to contact us. We'll schedule a time to go over what we have available, learn more about your business, and give you a walkthrough of our advanced B2B eCommerce capabilities. If we're not the right company for you, we can also point you in the right direction.

Request a Demo
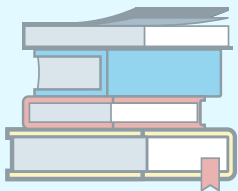
About Us

About Joshua O'Connell

Joshua O'Connell is Zoey's Vice President of Marketing. Josh has been an online entrepreneur for more than 20 years, helping to build multiple online businesses successfully, all of which provided solutions to help other online businesses succeed. Josh has developed websites for a number of prominent online brands and entrepreneurs, and has advised and overseen the builds of many others. Today at Zoey, he helps merchants be successful through sharing best practices, and helps online businesses understand how Zoey can help them reach the next level.

About Zoey

Zoey supports B2B and wholesale businesses and their ability to take orders anytime, anywhere, on any device. Our cornerstone offerings are a mobile app for the sales team to take orders or generate sales quotes wherever they are, and a self-service web portal for accounts to log in, see customized catalog and pricing options, place orders, and track already placed orders. To complete the solution, a web-based admin allows companies to manage their products, customers and orders.

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