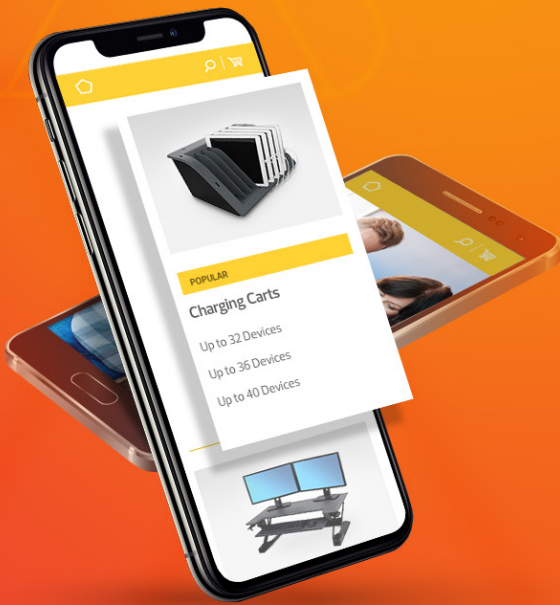# Choosing the right
B2B e-commerce platform.

Twelve questions to ask to maximize your business's shopping experience.

Your e-commerce platform is a *critical business decision.*

According to a Forrester study, <u>49 percent</u> of B2B companies expect their e-commerce platform to both increase revenues and improve customer satisfaction. To meet your goals, it's imperative that you develop a request for proposal (RFP) that speaks directly to your long-term B2B e-commerce strategy. You'll need an RFP that covers all your criteria, but also a process that is streamlined**.**

Helpful hints for a shorter, saner RFP process.

The average B2B solution RFP process can take weeks or months to complete. While RFPs can help ensure you're choosing the right product, they can also spiral out of control. Receiving highly detailed RFPs from five or more vendors often means information overload.

A phased approach to your RFP process can help you make a great decision in less time.

Research + RFI + RFP

Upfront research using objective sources like market analyst reports can help narrow the field early on. Once a handful of potential matches have been selected, you can send them a short RFI (request for information). Based on the RFI responses, you can choose two or three finalists to receive the complete RFP.

Ask your solution partner

If you work with an e-commerce solution partner you trust, you may be able to streamline the RFP process even further. Ask your solution partner to recommend two or three e-commerce platforms they think are a good fit with your business model. Then send your RFP only to those vendors.

This eBook outlines 12 important questions you should include in your next B2B e-commerce RFP.

#1: <u>Is your platform</u>
in the cloud?

Most businesses are in the cloud, no matter how big they are. In fact, 83 percent of enterprise workloads will be in the cloud by 2020. And if you haven't already, you'll probably need to migrate to the cloud sometime soon. For your next e-commerce platform, that means you'll want one that combines cloud-native software with managed cloud services.

When considering responses to this question, vendors should do the following:

- Describe their cloud platform infrastructure and services, including hosting, content delivery, auto-scaling, and monitoring.

- Include uptime SLAs, PCI compliance information, performance data, and other relevant metrics.

- Identify the locations of major data centers.

- Cover the tools for managing your cloud deployment.

- Provide details on technical and account support available to help you get your sites up and running, including the availability of fully managed service options.

83%
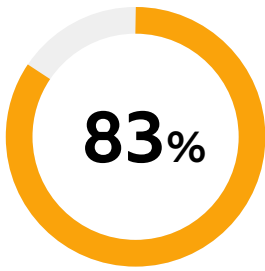
83% of enterprise workloads will be in the cloud by 2020.

Source: Forbes

#2: Is your platform *flexible and scalable?*

B2B commerce is not one-size-fits-all. Most B2B organizations want distinctive experiences for their accounts and have unique business processes that must be followed. You need a platform that can scale with you as you grow, and the flexibility to tweak your business model over time—from new digital channels and strategies, to expanding into new regions, and marketing or acquiring new businesses. This means it's important to choose an e-commerce platform that fits your business requirements and can evolve as your strategies change.

When considering responses to this question, vendors should do the following:

- Offer customization via no-code configuration options, and custom code or off-the-shelf extensions code.

- Provide your developers with access to their platform's code.

- Cover available programming languages, how changes can be previewed and rolled back, and how product data is stored.

- Present information about the platform's developer community, it's size, areas of expertise, and how active it is in contributing to the code base.

- Explain if the platform allows a "headless" configuration in which e-commerce services are connected to a custom CMS or other omnichannel applications.

#3: Can your platform support *customer-specific products and pricing?*

B2B companies don't just have one product catalog. Instead, they create different versions of the catalog for different customers. And these versions include carefully negotiated custom pricing. If this applies to you, the ability to support custom catalogs and pricing should be a top requirement for your next e-commerce platform.

When considering responses to this question, vendors should do the following:

- Explain how to set up custom catalogs and unique pricing and how these are reflected in the site experience.

- Clarify how much customization is possible both with and without code.

- Present how to efficiently manage and make updates to multiple custom catalogs.

- Reveal how the solution integrates with ERP systems to enable custom catalogs and pricing online.

#4: Does your platform support *personalization for different roles?*

B2B sales today involve more people than ever. And these people have different interests. For example, buyers may want product information while procurement may care about pricing. To help you sell to larger groups of stakeholders, your e-commerce platform should support personalized content. It should also give different permissions to different user types.

When considering responses to this question, vendors should do the following:

- Explain how the platform supports personalized content, product recommendations, and offers.

- Cover how user profiles work and how they support personalization.

- Describe options for configuring different buyer roles and permissions to control who can submit quote requests, place orders, or access specific account information.

#5: <u>Does your platform support</u> *multichannel sales and order management?*

B2B businesses are reaching customers through more channels than ever before. You can sell in store, online, through distributors, and across multiple countries. You can also become part of Amazon Business and other emerging marketplaces. To make this work, your e-commerce platform must have true multichannel order management capabilities.

When considering responses to this question, vendors should do the following:

- Describe multichannel capabilities such as central order management, inventory tracking and allocation, and intelligent order fulfillment for all channels.

- Offer tools to easily list and sell products through marketplaces like Amazon Business.

- Highlight cross-border options like support for local languages, payments, taxes, and shipping providers.

- Explain how buyers can purchase online and pick up in store, or ship online orders from stores for faster fulfillment (if applicable to your business).

- Present how much customization is possible for each key feature and how other customers may be using it.
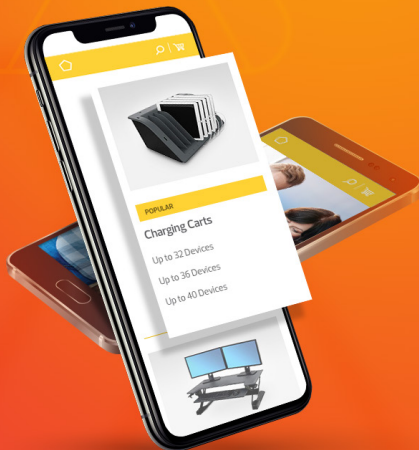
#6: <u>How does your platform</u> *make it easier for customers to buy?*

One of the main reasons B2B customers like e-commerce is that it can be easier than traditional purchasing processes. And the easier it is to buy, the more customers tend to do it. That's why your e-commerce platform should support a wide range of fast and flexible buying options.

When considering responses to this question, vendors should do the following:

- Describe features that make it easier for customers to buy.

- Go over the following:
  - Online price quotes
  - Fast ordering—where customers can enter or upload a list of SKUs
  - Requisition lists
  - Easy reordering from past orders
  - The ability for sales reps to create orders for their customers

#7: Does your platform provide *self-service account management tools?*

B2B customers want visibility into their accounts, and they want it now. Before e-commerce, they used to call an account manager or call center for day-to-day tasks and status updates. But now they'd rather log in to their account portal and get instant access to the information and services they need.

As long as you have an e-commerce platform with self-service account management tools, this is good news for your business. Your account reps will field fewer support calls and spend more time on strategic sales.

When considering responses to this question, vendors should do the following:

- Describe available self-service management tools your buyers can use to manage their accounts.

- Explain how account dashboards can be customized for showing orders across channels, scheduling deliveries, looking up warranty information, paying invoices, and so on.

- Ensure account management functionality can do the following:
  - Manage buyers, including assigning roles and permissions.
  - Manage shipping addresses.
  - Track shipping status.
  - Track quotes and orders.
  - Sort activity reports by individual buyers.
  - Produce purchase reporting, including purchases made on credit.
  - Manage credit status.
  - Create historical reports for all buyers and transactions.

#8: How can I *speed up content updates?*

B2B companies are reliant on content to support the entire customer journey. Fresh content is necessary to launch new products, make seasonal changes to products and messaging, and highlight special promotions. It's also how you can respond to market changes and emerging customer concerns. And it's essential to any SEO strategy. In short, the faster you can publish new content, the faster your business can move.

Your e-commerce platform should make content updates as simple as possible, even for non-technical teams.

When considering responses to this question, vendors should do the following:

- Explain low-code and no-code page development options that allow non-technical users to add content to your site, including visual WYSIWYG tools that allow users to drag and drop text, images, videos, and more in flexible page layouts.

- Review support for rich content like images, videos, documents, promotional banners, and so on.

- Present how quickly new content can be deployed.

- Review staging capabilities that make it easy to schedule and manage content updates.

- Describe capabilities that allow producers to review and test content updates before they go live.

- Clarify how well the platform can be integrated with their preferred CMS solution.

#9: <u>Does</u> <u>your</u> <u>platform</u> <u>integrate</u> *with CMS, CRM, ERP, PIM, and other systems?*

Your e-commerce platform should not operate in a vacuum. It needs to communicate with existing CMS, CRM, ERP, PIM, and other systems for data and business process synchronization. In fact, according to a recent Forrester report, the fourth most popular criterion for choosing a B2B e-commerce system is easy integration with other existing business systems.

For your RFP, make a list of the existing platforms you may need to communicate with your e-commerce platform, and include them in your questions.

When considering responses to this question, vendors should do the following:

- Explain their system architecture, specifically how it's designed to connect with other systems and data sources.

- Describe relevant APIs and what kinds of documentation, tutorials, and developer support are available.

- Review existing off-the-shelf connectors to popular business systems.

- Present examples of customers who have integrated with the systems used in your business.

#10: How does your platform *handle mobile commerce?*

Mobile is no longer optional. It's increasingly important for B2B sales as more and more professionals do business on their mobile phones. Buyers increasingly research and want to buy using their phone. And sellers want to use tablets and phones to configure products and place orders while they're at customer sites.

Today, most businesses use responsive web design or native apps for their mobile experience. Both can pose challenges. Responsive web pages can't access native smartphone functions like push notifications. And native apps must be downloaded and require periodic updates. Progressive web apps (PWAs), which are responsive pages that act like apps, represent a new approach to mobile that promises the best of both. Today, most businesses use responsive web design or native apps for their mobile experience. Both can pose challenges.

When considering responses to this question, vendors should do the following:

- Explain how their platform supports responsive web design, native apps, and PWAs.

- Recommend a best possible approach for different mobile use cases.

- Show examples of mobile experiences created by customers.

#11: Is there an extensive network of expert solution partners *who understand your platform?*

I n general, the more expert solution partners that work with your platform, the better. Having choice is imperative. The more options you have, the better the global coverage. And the more likely you'll match with experts in your industry or particular product, budget, and timeframe. Engaging a solution partner is especially important or supporting your internal IT teams and providing them with expert commerce insights needed to get to market faster.

When considering responses to this question, vendors should do the following:

- Call out their overall number of solution partners and where they are located.

- Highlight solution partners that could be a good match for your team based on their location, industry expertise, and understanding of your core business systems.

- Include details on relevant training and certifications.

#12: Does your platform come with *easy-to-use analytics and reporting tools?*

Business intelligence reporting is critical to running your business and accelerating growth. It can help you understand customer buying patterns, identify most and least profitable accounts, and uncover missed opportunities. Your e-commerce platform should come with business intelligence reporting built in.

When considering responses to this question, vendors should cover key features like these:

- A centralized dashboard

- An easy-to-use report generator and a library of prebuilt reports

- The ability to consolidate data from your e-commerce site and other business systems to get a holistic view of your business and deeper insights

- Support for sales metrics, such as revenues, orders, AOV, quote-to-order conversion rates, etc

- Personalized KPIs for sales reps

- The ability to quickly see sales data by customer account, including lifetime customer value
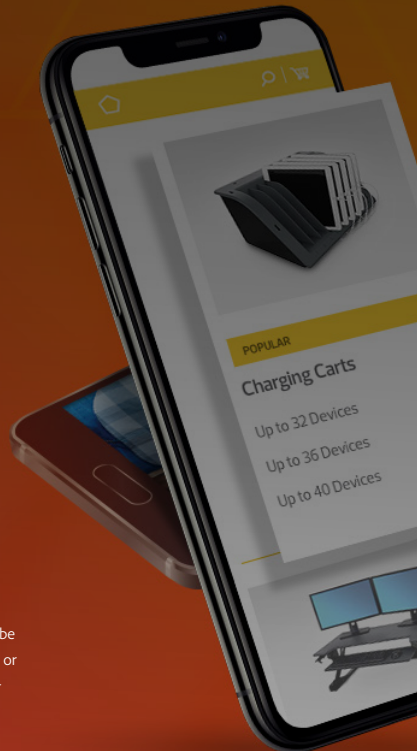
Adobe can help.

Adobe Commerce Cloud is built on Magento Commerce and comprises products from Adobe Analytics Cloud and Marketing Cloud. This flexible, scalable commerce platform is designed to optimize the customer journey from the first click to checkout, and beyond. Packed with integrated tools and value-added services, Adobe Commerce Cloud delivers experience-driven commerce at every touchpoint, reaching your customer anytime, anywhere.

Sources

Louis Columbus, "[83% of Enterprise Workloads Will Be in the Cloud by 2020](#)," Forbes, January 7, 2018.

"[What it Takes to Be a Leader in B2B eCommerce](#)," Forrester Consulting, commissioned by Magento Commerce, June 2018.