

## B2B Ecommerce Best Practices

1. **Don't duplicate everything you do offline, reengineer some to fit the online channel.** Many B2B companies have complex processes and many business rules. Building a site to do exactly what is done offline will make the ecommerce site a monstrous development project.
2. **Figure out what system does which tasks.** Having multiple systems in place, each managing some aspect of the B2B business may not be a bad thing. It may simplify the ecommerce site by having the ecommerce site just integrate to your credit system, to your customer database, etc.
3. **Consider how your customers need to buy from you.** Your customers have buying patterns unique to your product lines. Do they buy the same products every month? Do they buy durable goods? Do they call to place orders or do your sales reps sell to them? Build tools to enable how they purchase from you.
4. **Use your ecommerce to automate B2B type workflows.** B2B ecommerce needs workflow capability to automate and track common practices. Quote Request and Tax Certificate Management are two key workflows that should be built to reduce manual intervention. Credit request, invoice view/payment, and account management/user management are others that should be considered.
5. **Build tools for outside and inside sales reps.** Outside and inside sales reps need different tools. You may want to build tablet apps for your outside sales reps and a CRM / OMS for inside sales reps to tie in to your ecommerce site.
6. **Manage your inventory and customer expectations.** Many B2B sites use drop shippers or share their inventory with their B2C. Surprise backorders on the B2B site can run out of control. If you can't have accurate, online only inventory, then try to implement frequent inventory batch updates or real time checks. If neither are possible, e.g. unknown drop shipper inventory, then clearly communicate lead times and changes to order ship dates to your customers.
7. **Rethink how you manage your customer data.** B2B customers always have several people within each company that can purchase. They sometimes have different locations and divisions, each with different purchasing rules and processes. Your ecommerce site needs to understand this account hierarchy to facilitate workflows and approvals.
8. **Consider offloading some customer management tasks to your customer.** Use the ecommerce site to empower your customers to manage their users, check availability, view and pay invoices online, request credit, manage tax certificates, etc. Take the burden of management of these tasks off your team and empower your customers.
9. **Build your business by helping your customers (resellers) build theirs.** Create a white label site system that allows any of your customers to create their own ecommerce site. These white label sites can be branded to the individual reseller's URL and content, but orders would come directly into your warehouse to send to their customers.
10. **Expand your drop ship use and usability.** Distributor type B2B ecommerce sites pull their products from the manufacturer's or their own warehouse. Expand your drop ship use to get more products from new manufacturers or other drop shippers and empower resellers to use your facilities as their drop shipper.
11. **Watch the B2C space.** Just because you built a great B2B site does not mean you can sit back and relax. Watch the trends in the market, especially B2C apparel, for trends that you need to consider using within a year or two. If your competition is ahead of you, watch them as well to see what works in your space.
12. **Create niche microsites to compete against your site/your competition.** Creating a series of microsites, each targeting a distinct market segment/product line, is useful to gain market share. If that market share comes from your main site instead of your competition, it is time to rethink how you created those sites and distinguished them.
13. **Consider using the same platform for both B2C and B2B.** An omnichannel approach will combine all transactions in the same data store and use customer and order source configuration to differentiate selling channels.
14. **If the salespeople don't buy in, B2B is doomed to languish.** Pay attention to sales force adoption of electronic channels and make sure they see them as an ally and not an enemy.

# ecommerce Diligence™ Checklist

## B2B Ecommerce Key Questions to Ask Providers

### Company

---

1. How long have you been in this business? How many clients? How many have you lost?
2. What clients fall into your “sweet spot”?
3. What peripheral or supporting services do you offer (e.g., design, email marketing, product feeds, SEO/SEM, customization, gateways)?

### Products/Services

---

1. Is your solution offered as perpetual licensed software or on-demand multi-tenant solution?  
**If perpetual license:**
  - a. What are the hosting requirements?
  - b. What should I expect regarding upgrades (both timing and pain)? Cost?
  - c. Do you provide customization & implementation service? Can outside third parties be used?**If SAAS/ASP:**
  - a. Do all tiers include maintenance and support?
  - b. How often are new features introduced?
  - c. What do I do if I need a feature you don't have or plan to have soon?
- d. Define your redundancy / disaster recovery.
2. What is your solution built on (which OS, code base and database)?
3. Please describe your architecture.
4. How long to launch a basic site? A complex site?
5. Can third-party products be used within your platform in place of the capabilities your product offers
6. What skills does my organization (or hired third party) need to implement this platform?
7. What is your SLA for support issues?
8. What technical support services are available?

### Features

---

1. What key features are included in your solution?
  - a. Is there a key feature that only you have?
  - b. What features are currently missing that many of your competitors have?
2. What is your product's competitive advantage over other packages? Why?
  - a. Price? Dashboard? Ease of use? Flexibility? Don't say “all of the above”.
3. Is your platform geared strictly to B2B sales or is there special B2B functionality available as well?
  - a. Describe your B2B features.
  - b. Workflows? Account Hierarchy? B2B Payment methods?
4. How can you integrate data (product, order, customer, etc.)?
  - a. Is real-time integration possible? How?
  - b. How effective are your import tools at uploading hundreds (or thousands) of products/images at a time?
5. How easy is it to create microsites or to build overseas sites in other currencies / languages?
6. Do you have a staging or test environment and a data/content migration tool to push data and content to live?
7. What about your platform makes it search-engine friendly?
  - a. How can we use your platform to improve our search rankings?
8. How does your platform integrate with other systems (fulfillment, CMS, analytics, social, back-office systems, etc.)?
9. What third party tools do your customers normally add on? Why?
10. Do you have a management console?
  - a. What can I manage with it? Is it web-based, application-based, other?
11. Please describe your reporting capabilities, ad hoc reports, etc.
  - a. Please provide a list of standard reports.
12. Does your platform come pre-configured for shipping, tax and payment processing integration? If I don't want to use the providers you selected, what are my options?
13. What integrations exist to other systems?
14. What analytics tools does your platform include? Does it provide the ability to analyze cart abandonment, quantify browser searches, tie product purchases to search terms, etc.?
15. Is it PCI compliant and certified?

### Pricing

---

1. What is the license fee (if perpetual license)?
2. What are the pricing schedules and what features do they include? On what are they based? Provide an annual estimate of cost, based on some performance metrics.
3. How do you charge for annual support? What about maintenance?
4. Are there any hidden fees (e.g., implementation, transaction costs, revenue sharing)?

For 1000s of Best Practices and Advice across 100s of topics:  
Join eCommerceKnow-How.com!

©FitForCommerce

ecommerce  
**KNOW-HOW**.com™  
by Fit for Commerce