

# B2B Ecommerce Requirements Guide

Creating B2B Ecommerce Requirements to Achieve Business Goals



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## Introduction

There's a cliché in the technology industry, "no one ever got fired for buying IBM." Purchasing committees of enterprise-level ecommerce platforms have applied similar logic to selecting Adobe Commerce (Magento), Salesforce Cloud Commerce or Oracle ecommerce platforms.

However, with IBM no longer having an ecommerce platform and 72% of ecommerce implementations are [replatforming efforts](#), were those initial ecommerce platform selections the wrong choice? With ecommerce being a non-negotiable component in modern business-to-business (B2B) enterprises, selecting the correct platform that meets the needs of all stakeholders is key. If done wrong, it is a fireable offense. If done wrong, it is a fireable offense.

# Requirement Selection for B2B Ecommerce Matters More Than Ever

Ecommerce impacts every industry, no industry is exempt. As of February 2021, ecommerce is the most effective sales route according to 41% of leaders surveyed by [McKinsey](#). With a [market size of \\$2.19 trillion](#) at the end of 2020, B2B ecommerce is just beginning its hockey stick growth projection.

There are clear indicators of the progression of B2B ecommerce. The primary indicator being the change in buyer behavior. Amazon has fueled the consumerization of the B2B buying experience and the COVID-19 pandemic exponentially increased the importance of a seamless digital customer experience. According to [Gartner](#), 89% of businesses soon expect to compete mainly on customer experience.

Customer experience is determining which manufacturers and distributors are winning in the market. Those that have not maximized their customer experience must quickly determine the B2B ecommerce requirements needed to differentiate.

## How Did B2B Ecommerce Get Here?

Taking a quick look in the past reveals that monolithic ecommerce platforms like Magento were adopted by B2C fashion brands and gained rapid adoption. Platforms created for B2C ecommerce began to be customized in unsustainable ways to meet B2B demands. Manufacturers were digitizing their distribution relationship and distributors sought to take advantage of territory-free markets as both progressed through their digital transformation. As the market for ecommerce expanded monolithic ecommerce platforms, now including SAP Hybris, could no longer scale and address the complexities of modern business models with customization.

Now B2B organizations can rely on technology advancements to customize customers' experiences. The API economy and reduced tech-stack complexity has sustainable means. Manufacturers and distributors looking to remain competitive must act fast and thoughtfully to remain relevant with their customer's buyers.

## 5-Step Process of Defining B2B Ecommerce Requirements

The goal of defining B2B ecommerce requirements isn't to create requirements. It's to ensure the company's complex business model can be delivered through an ecommerce system. Beyond aligning to a business model, the flexibility to be successful in B2B ecommerce is needed. Everything else is noise. These five steps are designed to eliminate the noise and achieve success.

### 1. Setting B2B Ecommerce Goals

There are key components that make up goal setting for a B2B ecommerce replatforming effort being such a large capital investment. Measuring success with clear key performance indicators (KPIs) is core to determining goals of immediate and long-term strategy success. Goals can also be structured in an immediate (short-term) and long-term fashion. There are common goals with B2B ecommerce strategies:

- Increasing revenue
- Increasing number of customers
- Increasing wallet share of existing customers
- Improving customer experience
- Reducing costs
- Reallocating resources to add more value
- Improving order efficiency

Understanding that “Rome wasn’t built in a day” and getting buy-in from leadership that B2B ecommerce takes time to hit revenue goals is important. In the meantime providing leading indicators of customer adoption rates, customer satisfaction scores, tech-stack cost savings and other KPIs that show the immediate impacts of a B2B ecommerce strategy set the framework for long-term revenue growth success.

## 2. Customers Requirements First

While goals provide a target, requirements provide the route to get there.

There is no better place to start than with the customer. Creating customer requirements is often overlooked as businesses think of themselves first since the investment comes from their budget. That mindset must change to be successful. Customers are the ones purchasing from a B2B ecommerce platform.

It is easy to over complicate customer requirements, speaking to target customers, not the outliers, is a great way to garner their feedback and requirements. Through focus groups, Zoom meetings or surveys, ensures that customer requirement input is captured in a similar format (see the [“B2B Ecommerce Requirement Categories”](#) section below for more detail) and can be weighted appropriately as requirements are prioritized.

## 3. Business Complexities

As mentioned before, business requirements are typically the first thought of a buying committee in search of a B2B ecommerce platform. As a manufacturer or a distributor evaluates B2B ecommerce requirements, there are core areas to look at such as marketing capabilities, sales team support and inclusion, existing technology stack integration and more.

Consolidating business requirements from an enterprise can be a challenging task for those on the purchasing committee. Aligning requirements from all stakeholders to user stories can determine importance and uncover gaps not typically uncovered till the discovery process with a platform.

Regardless of the platform selected, it must meet common B2B ecommerce requirements. There will be a level of configuration and/or customization needed to align to the ideal experience for customers and business users. Seek a platform with more native B2B functionality to reduce the need for customization. Customization can then be reserved and prioritized to align to specific use cases.

## 4. Sustainability Requirements

While it's easy to consider integrations a business requirement and move on, if an organization is serious about B2B ecommerce, it must think beyond typical plugin style integration frameworks. Developing a B2B ecommerce platform that is part of a sustainable technology ecosystem is the only true route to scalability.

Multi-store ecommerce often creates a common area of challenge when looking to achieve sustainability in B2B ecommerce as monolithic platforms were developed for one customer base, the consumer. Modern B2B ecommerce requirements must consider multiple customer segments especially when serving business models like D2C and B2B2X.

Having an extensible architecture allows for manufacturers to integrate their ERP to ensure the materials or products are available to produce customers' orders. That same integration reassures the customer that the product is available. B2B organizations should be able to customize their B2B ecommerce platforms to meet their specific requirements when the 80% of the 80/20 principle does not cover a specific customer use case.

## 5. Selecting the Right Partner

A B2B ecommerce platform makes up just one component of a technology stack. The ecosystem needs to be able to deliver full service sales and support as well as self-service functionality. While the customer is interacting with the B2B ecommerce platform throughout their journey it is typical that multiple business systems are allowing for a seamless experience.

Choosing the right partner to support such an ecosystem is critical. A partner will act as a sherpa as the organization climbs the mountain that is digital transformation guiding teams though each summit to the peak. The right partner will be able to uncover opportunities to deliver more value through the appropriate feature prioritization for B2B ecommerce.

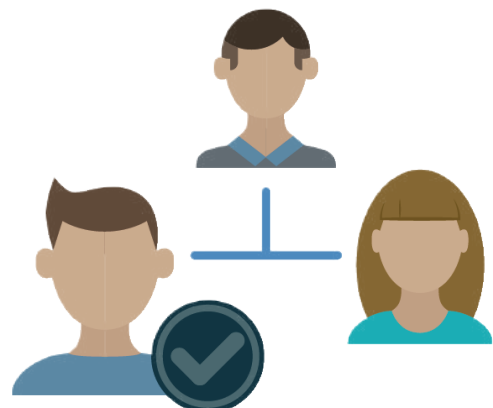
These five steps are a framework for the discovery and development of a B2B organizations B2B ecommerce requirements in digital transformation.

# B2B Ecommerce Requirement Categories

Developing B2B ecommerce requirements is the next step after defining business ecommerce goals. Start with customer orientated requirements. Then business related complexities can be aligned. Organizing requirements in categories allows for the development of an RFP, below is a list of categories to consider for requirement categorization:

### Account/User Management

In B2B ecommerce the capabilities of managing customer accounts and users assigned in those accounts is the most important functionality as it enables everything. This category contains features that allow accounts to view specific pricing and users to purchase specific products.



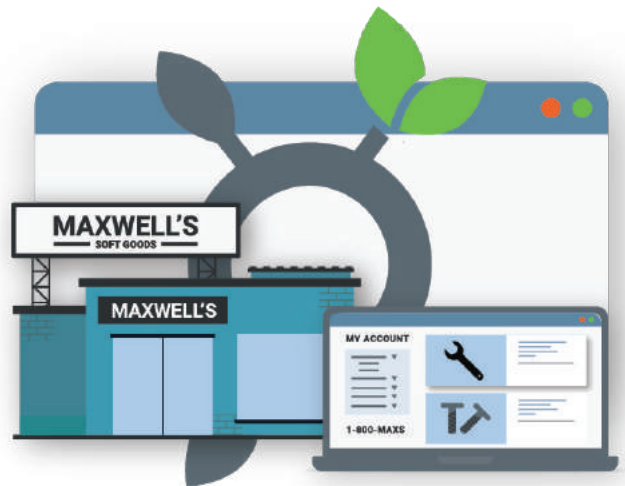


## Personalization

Being able to personalize a B2B buyer's experience is core to increasing conversion rates. [73% of B2B execs say](#) that customer expectations for personalized experiences are higher today compared to just a few years ago. In B2B ecommerce the personalization that is key is delivering account specific catalogs and corresponding product recommendations.

## Multi-store

Multi-store ecommerce is a common B2B ecommerce requirement. Whether the business is looking to develop separate shopping experiences by customer segment, brand, industry vertical, etc. The ability to create multiple ecommerce websites is the first phase of personalization for the customer experience. It is very important to understand the "How" in relation to an ecommerce platform's multi-store capabilities. There is a difference in checking a requirement box and managing multiple websites through a single platform login.

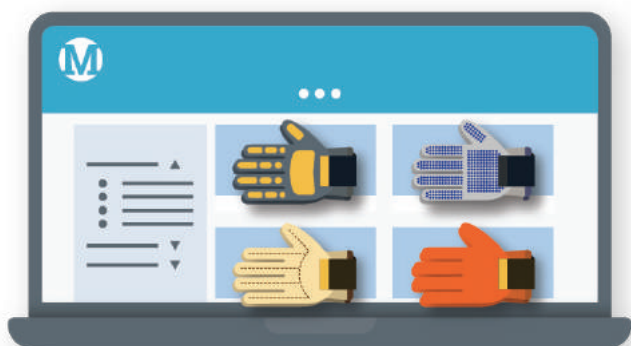
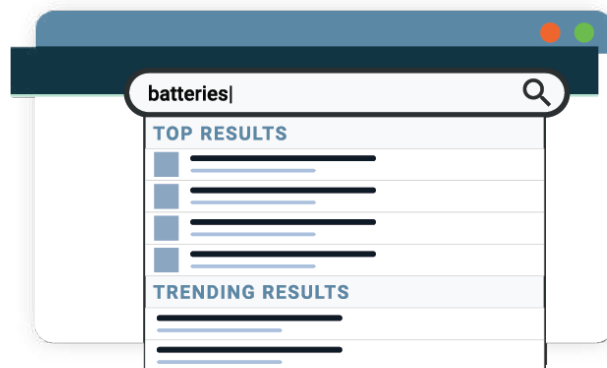


## CMS

If an ecommerce platform does not offer content management system (CMS) capabilities it is a punchout catalog at best. A CMS allows for the development of the brand story and controls the execution of the user experience. The development of segment landing pages and management of SEO across multiple websites are just a few components to maximizing a modern customer experience. Even if the ecommerce platform is being utilized headlessly the CMS will allow for the management of brand and product content.

## Onsite Search

Search is the most widely utilized feature of an B2B ecommerce website and the number one driver of customer experience. It directs users to products, enables the filtering of results and showcases content about queried topics. Having the capability to configure the onsite search results for specific queries can be the difference between product sales and “No Results Found.”



## Catalog Management

Offering customers personalized product catalogs with curated product sets aids in the speed of which buyers can interact with an B2B ecommerce platform. Aligning customer’s expectations with the product catalog is important when a company offers a diverse range of products.

## Product Management

Showcasing all variables impacting product data is important in B2B ecommerce. Controlling product information including all product values that can be used from attribution, faceting and filtering requires a robust product information management (PIM) system within the B2B ecommerce platform.

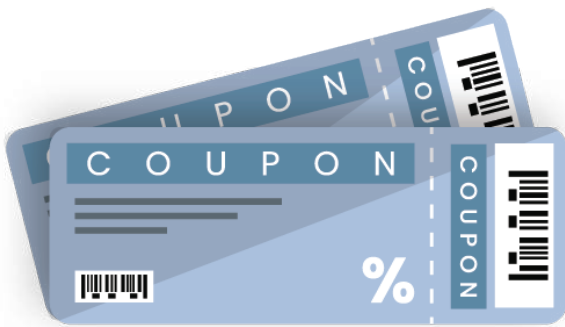


## Pricing

Product prices typically vary from account to account in B2B ecommerce. Having the capability to manage prices via price list and the account level is just one of the features required.

## Merchandising

Merchandising in B2B ecommerce is showcasing the right products in the right way to increase conversion. Whether bringing more eyeballs to new products or bundling existing products for service packages – merchandising assists buyers.

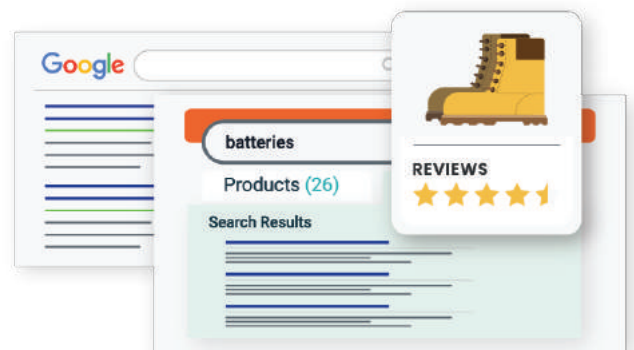


## Promotions/Discounts

Replicating account contract terms so that discount thresholds are applied or providing the marketing team the capability to increase adoption, discounts have many uses in B2B ecommerce. Having a variety of levels for qualification and application of promotions and discounts increases, or decreases, the effectiveness of them.

## Marketing

The marketing team is responsible for the customer experience. Having capabilities to improve it is important in B2B ecommerce. Whether supporting search engine optimization (SEO) efforts to drive more traffic to the platform or ensuring the brand is accurately conveyed in transactional emails, marketing features are a large qualification set in B2B ecommerce platform selection.

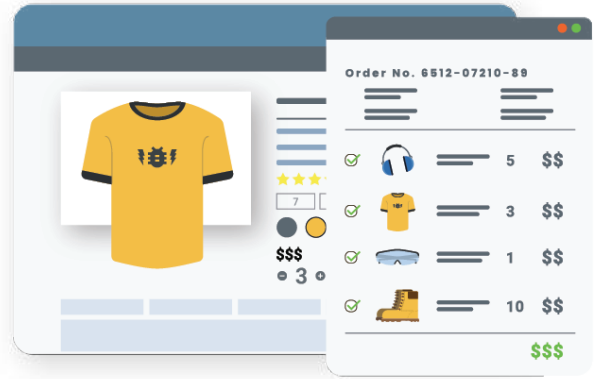


## Quoting

A B2B ecommerce platform that does not offer quoting capabilities is not a B2B ecommerce platform. Quoting is a native capability within business-to-business sales. It is a requirement to ensure that the customer experience is consistent from offline to online.

## Ordering

Ordering is at the core of B2B ecommerce. The variability of how a buyer can order online lies with the flexibility of the ecommerce platform. Ensure customers can order in the ways comfortable with them, but also evaluate the ways new markets may order. Make sure the total addressable market (TAM) has a route to order online.



## Checkout Process

Reducing friction within the last step of the order process is important. Aligning a B2B ecommerce platform to the smoothest path to order placement depends on numerous different variables. Those variables can include session device, customer type, complexity of products, etc.

## Customer Service

Customer service representatives (CSRs) can assist customers in making the transition from offline ordering to online. Whether through impersonation or additional feature sets, CSRs play a pivotal role in B2B ecommerce.



## Payments

B2B ecommerce platforms should allow varying types of payments.

## Taxes

Allowing for the tax complexities of cross border sales and tax exemption status are just a few of the features required to be successful in B2B ecommerce. An ecommerce platform must allow for configurability and/or integrations to meet many different tax regulations.

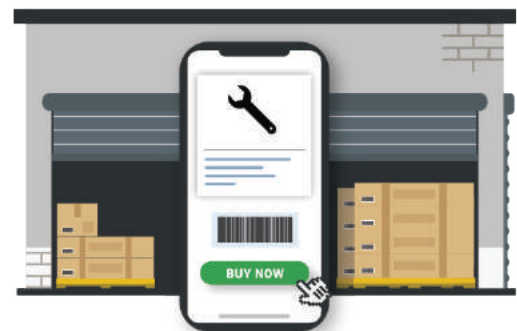


## Shipping/Fulfillment

Manufacturers and distributors often have varying vendors for shipping and fulfillment. Integrating to the most popular carriers and regional providers will be needed as business models scale and adapt to new market conditions.

## Inventory/Warehousing

Organizations that have significant product mix often have a multiple warehouse supply chain. Integrating the existing supply chain infrastructure to B2B ecommerce operations delivers more transparency to customers.



## Sales Enablement

Arming the sales team with not only data from B2B ecommerce but ability to act should be a consideration in B2B ecommerce. Gaining support for an ecommerce strategy goes beyond initial buy-in. Empower the sales team.

## Returns

A widely adopted feature of Amazon's business model is the ease of product returns. As the consumerized shopping experience becomes more of the norm in B2B ecommerce the adoption of return merchandise authorizations (RMAs) has increased. It pays to think long term, especially, if a company's business model is impacted by a market in constant evolution.





## Analytics Reporting

The level of analytics and reporting capabilities often depends on the scale of the business, a B2B ecommerce platform should have corresponding scalable reporting capabilities.

## Integrations

One of the main differences between B2C and B2B ecommerce is the complexity of the supporting systems. A B2B ecommerce system must be extensible enough to integrate into any needed business system. Requirements should be written to align to existing business systems.



## Technology

A B2B ecommerce platform should be able to scale as a business changes (eliminating the need to replatform). Scalability is directly correlated to the technology the platform is created upon. Additional technology features include the flexibility of a platform to align to existing business processes.

## Security

In the modern age of digital sales, having a secure ecommerce platform is not just important for a business but can also be an evaluation fact of potential customers. Security related features should be configurable to multiple levels of access restriction.



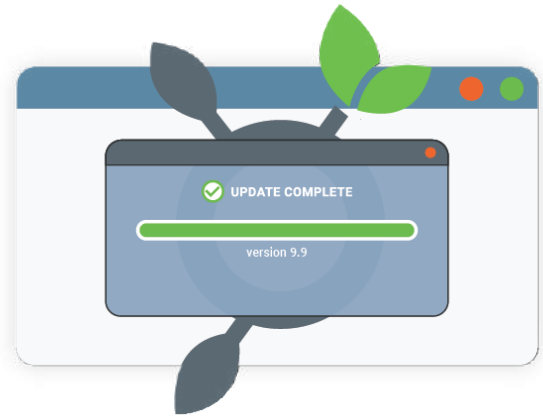


## Hosting

Identifying what type of hosting options are available are critical in the B2B ecommerce platform selection process. It will impact cost and extensibility of the platform. A B2B ecommerce platform should be able to mimic offline business capabilities.

## Updates

It's common in software to have some type of update or upgrade path. Is the platform a Software as a Service (SaaS)? How are those updates offered? Identifying the "How" is important as it will allow for the evaluation of the sustainability of the platform.



## Support

Enterprise-level software platforms are expected to offer support. Platforms should be evaluated for the depth of available support provided including documentation, live support and more.

Organizing B2B ecommerce requirements into categories allows for teams to quickly review feature requests that will impact them. It is important to not forget to guide product requirements with ecommerce use case stories.

## B2B Ecommerce Requirements Misconceptions

With any purchasing decision, a buyer comes in with preconceived ideas of what the purchased item will deliver. This could not be more true for enterprise-level software, especially as enterprise-level ecommerce platforms are typically purchased by committee. Here are a few common preconceptions that are misguided regarding B2B ecommerce requirements:

- **It's better to ask for the moon and scale back the requirements list later.** Taking the “found it on Google” approach to developing B2B ecommerce requirements is not effective on its own. Manufacturers, wholesalers and master distributors often have highly complex business models. Starting with the business model will quickly allow for feature alignment when developing an RFP.
- **A cloud-based implementation means no maintenance.** There are still resources required to manage platform maintenance regardless of the location of hosting, maintenance is still built into the cost of the cloud hosting. Don't discount the flexibility of “on premise” hosting.
- **One team can create the requirements list.** An ecommerce platform implementation is a component of an enterprise-wide digital transformation. The idea that one team in an organization can provide all the requirements needed is false. The entire organization is impacted by an ecommerce strategy so each team providing input to the requirements that can align the platform to team processes is core to adoption of the platform internally and success of the organization's ecommerce goals.
- **Implementation partners do not provide more resources than an internal team.** Large manufacturing organizations typically have large internal IT teams to support the business needs and keep the ERP running. However, these internal teams haven't implemented an enterprise-level ecommerce platform multiple times and do not have insights from those implementations across many different business models. Implementation partners bring an unique understanding of blending the complexities of a business model with the flexibility available in an enterprise-level ecommerce platform.

## Creating a List of B2B Ecommerce Platforms

When creating the list of B2B ecommerce platforms that can fulfill the business's ecommerce requirements there are many sources. Below is a list of comprehensive research tactics for B2B ecommerce platforms:

- **Software recommendation websites.** Websites like Gartner's Capterra, Software Advice as well as others like G2 and TrustRadius provide buying committees information about the B2B ecommerce platform's capabilities. These recommended sources also provide user reviews allowing for first-hand information from those that have utilized the platform.
- **B2B ecommerce consultants with practitioner EXPERIENCE ON MULTIPLE ECOMMERCE PLATFORMS.** This research tactic is often one of the best at identifying a platform. However, it can be challenging to find a consultant that fits this model and understands specific industry related requirements, two to consider are [FitforCommerce](#) and [Beck Ecommerce](#).

If speaking with a platform implementor ensure the platform selection process is encompassing and is agnostic. Otherwise, choose a Magento partner and by default Magento will be the recommendation regardless of fit.

- **Existing technology stack user group referrals.** Distributors and manufacturers are never absent from other technology platforms when searching for a B2B ecommerce platform to implement. Typically a B2B ecommerce platform will integrate into a ERP at the minimum and other technology stack components may include a CRM platform, a PIM system, and a marketing automation platform. All of these business systems will have recommendations regarding B2B ecommerce platforms, a few may even offer native integrations resulting in significant cost savings.

- **B2C ecommerce requirements will NOT work for a B2B ecommerce RFP.** An ecommerce RFP developed for B2C use cases will not consider the B2B ecommerce functionality required for success with complex B2B business models. Start with the business model, and then align business goals to ecommerce requirements.

## Executing a B2B Ecommerce RFP

The execution of a B2B ecommerce request for proposal (RFP) solidifies the seriousness of the company's goals in an ecommerce strategy. Now that the requirements are aligned to business goals and agreed upon across departments the next step is packaging them. Once packaged the distribution and decision can be made. So how should the requirements be packaged in an RFP? An RFP template can be a great way to start.

There are plenty of RFP templates out there for ecommerce requirements, unfortunately many focus on B2C features. There are even platforms out there that claim to deliver B2B ecommerce functionality yet have "B2B" separated in [their RFP](#) template, for example, BigCommerce. Other ecommerce platforms are providing RFP templates that do not get at the value of the features being requested, for example, HOW. How are these features achieved in the ecommerce platform? Oro Commerce [does not seem to care](#).

If the RFP is already prepared, [request a demo of Znode](#). Discover how business model complexities can align to capabilities with the right B2B ecommerce platform.