Ecommerce Evolution: Your Blueprint for Digital Growth

Unlock Success with Expert Strategies and Digital Insights

Introduction/

Welcome to the ultimate guide to mastering ecommerce transformation! In today's rapidly evolving business landscape, the shift towards digital commerce is undeniable. Whether you're a seasoned ecommerce professional or just beginning to explore the world of online business, this guide is your comprehensive resource for navigating the intricacies of ecommerce transformation.

Across industries, businesses are facing common pain points as they embark on their ecommerce journey. From wrestling with complex product catalogs to streamlining workflows and order processes, the challenges can seem daunting. However, with the right strategies and tools, these obstacles can be overcome, paving the way for success in the digital marketplace.

The digital revolution has reshaped the way we conduct commerce and interact with customers. With this transformation comes opportunities. That's why we've crafted this guide to serve as your roadmap, providing you with actionable insights, strategies, and best practices to guide you through every step of the ecommerce journey.

From strategic considerations and platform selection to crafting the perfect ecommerce experience and harnessing the power of personalization, each section of this guide is designed to empower you with the knowledge and tools you need to succeed in the digital marketplace.

By leveraging the expertise and advice shared in this guide, you'll be equipped to position your organization for success, drive growth, and exceed customer expectations in an increasingly competitive landscape.

So, whether you're embarking on your ecommerce journey for the first time or looking to enhance your existing digital strategy, join us as we explore the transformative power of ecommerce together.

Five Critical Challenges Manufacturers Face in Ecommerce Implementation

Manufacturers are faced with a unique set of challenges when it comes to digital transformation. Here are five key challenges to address for successful experiences.

Failure to integrate with existing infrastructure

B2B businesses have their own unique processes and policies, including how to price for customers, promotions, and much more. They may even have existing technology like proprietary accounting software or customer loyalty software. These are critical to consider when choosing an ecommerce platform because not every platform has the flexibility to integrate with every existing process, policy, or technology infrastructure.

When reviewing potential platforms, make sure you understand how easily each can integrate with essential back-office systems. If your ecommerce platform can't integrate, then you will be decreasing your efficiency and increasing your total cost per transaction. Reduce the amount of custom development required to achieve the integration you need by selecting a platform that has the most built-in integration points with your back-office. Also, make sure that you know what's involved in each integration, as some platforms work better together than others.

Inferior UX

Poor user experience is usually the result of the interface not being intuitive enough; it may be inferior on mobile, or it does not meet the expectations that B2B customers have built up using B2C platforms. But it can also be caused by the platform not meeting the buying workflows your customers are accustomed to, nor matching close enough to the personal relationships they've built up with your sales team.

Most interface issues can be fixed with a good ecommerce platform partner who has a robust testing strategy and deep usability expertise. However, you will also need to study your customers' purchase habits. The platform needs to be optimized to emulate customer requests for quoting, purchasing approval, and merchandize authorization processes to ensure their experience expectations are met.

Developing without internal buy-in

Getting buy-in from the organization is a top-down approach. A lack of internal buy-in stands in the way of developing a comprehensive ecommerce strategy and close coordination between key stakeholders in sales, IT, marketing, and ecommerce operations. IT executives, for

example, may not allocate the necessary in-house expertise and resources to support the platform. Sales representatives may feel threatened by the platform and may work against the new sales channel. Any of these problems will make it impossible for the business to extract the full value from ecommerce.

Business leaders must be aware of the impact to the organization and, depending on your project type, the changes required to implement an ecommerce platform. How can you help drive adoption?

/ **Conduct an audit to see if there are efficiencies to be gained in inventory management, shipping and/or order processing. Then determine if the new platform adds efficiencies that will benefit sales and customer service teams.**

/ **Look at the ROI of the new platform. Some questions to ask as part of that include:**

+ **Will there be cost savings resulting from automation processes?**

+ **Can you reduce printing costs with less reliance on production and mailing of catalogs?**

+ **Can you move away from legacy programs that have high maintenance costs?**

/ **Consider potential revenue gains as part of the ROI:**

+ **Increased customer satisfaction results in more frequent orders with higher purchase amounts.**

+ **An effective ecommerce platform will allow you to increase cross-sell or upsells through suggested products.**

+ **It will also free sale steams from spending time on repetitive orders and allow them to spend time developing higher value opportunities.**

/ **Work with an experienced platform vendor partner who can help identify and engage with the stakeholders to both extract their requirements and later support and train them to use the platform may incentivize stakeholders and turn them from adopters into advocates.**

Remember that the cost of choosing the wrong ecommerce platform is often much higher than the cost of choosing the right one.

Incorrect pricing of platform

Beyond development cost there are hidden costs for hosting, licensing fees, maintenance, upgrades and additional features, and PCI security and compliance. All these will drive prices up and make it difficult to justify the cost of implementation.

However, a good platform vendor will be able to structure an advantageous pricing plan, perhaps something that will keep initial investment lower and scale up as your ecommerce platform grows.

Misaligned strategic road map

It is essential to B2B ecommerce success that the development road map of the platform meets the future needs of your business. Will its development direction match your projected requirements in terms of features and other qualities?

Some of the key features and functionality you should consider are outlined later in this document, but additional features to consider are assisted sales alternatives like AI-enabled chat, innovative fulfilment options that promote channel engagement, and customer retention, as well as microservices from the platform vendor such as the ability to tweak the architecture with fluidity.

A good platform vendor will be able to share with you its development focus and other upcoming features the platform will include. It should also listen closely and be responsive to the needs of your business to improve the fit for the long term.

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Nine Criteria for Selecting Ecommerce Platforms

With so many ecommerce platforms to choose from, what criteria will you evaluate them on? Here's a list of must-have functionality to keep in mind while you are considering options.

Self-service

Instead of having to rely on human assistance to complete a purchase, customers will want to find information and solve problems themselves. The ability to self-serve 24 hours per day increases customer satisfaction and drives organizational efficiencies for your business.

Customer-specific pricing

Unlike B2C, prices for B2B ecommerce can vary from customer to customer. So, the platform must offer the ability to replicate complex pricing rules often defined by the ERP or optionally present pricing through real-time integration calls to the backend systems to retrieve and display customer specific pricing.

Catalog management

Product catalogs can become unwieldy, especially within manufacturing and distribution companies, with new product attributes, units of measure, and geographical restrictions complicating them. The platform must allow a great deal of product flexibility and intuitive navigation so customers can easily find what they want (and only what they want) without getting overwhelmed.

Mobile responsiveness

B2B customers are increasingly searching and ordering for business purchases on mobile (although they often complete purchases on desktop). Your platform must be able to accommodate this behavior and render responsively across multiple devices and operating systems.

Payment options

Existing customers may have credit lines to purchase from your business and previously negotiated pricing. Product catalogs and inventory may also change based on billing and shipping locations. Often, different rules and processes are tied to each customer. Your platform must have the ability to manage all the possible variations.

Workflow personalization

B2B customers often have multiple people involved in the commerce processes. Each of these people are important in making decisions, including selecting the correct product, securing the right price, and managing the order and delivery. You may have your own unique processes and workflows that impact theirs. Your platform needs to be flexible enough to accommodate the many workflows and complexities associated with B2B.

Hosting

There are two types of hosting. On-premise means the platform is installed on-site and you maintain your own servers that the software is deployed on. Cloud-based means the platform is hosted by the service providers, allowing access from any web browser. Hosting will affect areas such as maintenance, security, customization, and of course, cost.

If you decide to host on-premise, you need to make sure your network infrastructure is up to current security and PCI (Payment Card Industry) standards, and that you can provide a stable environment that can handle traffic loads with the highest possible uptime. You also need to have resources that are specialized in network security and administration that can manage the environment. Consider a cloud-based solution if you don't have the ability to deliver this environment in-house.

Integration

Most businesses have invested heavily in systems like enterprise resource planning (ERP), customer relationship management (CRM), and other solutions. These will contain critical customer data and product data, so your platform needs to integrate with existing systems to ensure minimal disruption to the customer experience across all your channels.

Headless

Compared to traditional architectures, headless ecommerce provides many benefits including implementation and cost efficiencies, unparalleled scalable flexibility, and complete control over the user interface. Additionally, integration with critical business systems is easier due to the API- driven nature of a headless system.

With a headless platform you're not relying on a software company to deliver customizations you need. Headless platforms provide maximum customization capability with the flexibility to deliver enhanced functionality at speed and scale. However, you may not have the development resources to build out the site components, in which case you will want to look at more traditional monolithic platforms.

Additional questions you should ask about key functionality

Plan for the future

As part of your evaluation, analyze relevant platform options to make sure you're selecting the one that is going to have 80% of what you need out of the box, and make sure it's extendable for the 20% that's not.

What APIs are available?

Most modern platforms achieve integration through APIs. Although there is certainly some customization required around the specific integration strategy, if the platform doesn't provide a standard integration point you could be looking at increased cost to build out your stack

What marketing functions are included?

Unfortunately, cornfield magic doesn't extend to ecommerce websites. "If you build it, they will come" - but only if you also let them know it's there.

Most ecommerce platforms include some level of marketing functionality, the most basic being things like abandoned cart emails. If this is what you're getting, make sure at a minimum you can customize these so you can reinforce your branding and messaging.

More advanced platforms give you the ability to do things like email campaigns, marketing automation, and personalization. Some platforms will include this functionality but will then integrate with third-party marketing tools that fill the gaps. Others require integration with a digital experience platform.

Make sure you understand what each system is capable of so that your marketing teams are set up for success rather than frustration.

What content management capabilities are included?

Until recently many B2B companies weren't really concerned about site content beyond just products and checkout pages.

Almost every ecommerce platform now includes some form of content management functionality. In the B2B space the typical platform traditionally included limited capability to design product, category, and landing pages. As customers now expect an enhanced buying experience, content marketing has become much more important and ecommerce software companies are putting out platforms with more advanced content management functionality.

> " Many potential buyers of ecommerce platforms tend to focus on the main feature points listed above. But there are other areas that are equally important, and not always considered a key area of functionality. "

For those that don't, there are integrations available that combine best-in-class content management systems with feature-rich ecommerce platforms that allow customers to deliver the ultimate personalized shopping experience.

You need to consider your audience, your marketing team's capabilities, and your marketing strategy to determine what level of content management you need in your ecommerce platform.

How usable are the OOB reports?

Detailed reporting is essential for ecommerce success because you need to understand what's selling, what's not selling, and reasons for both. Some platforms treat detailed reports as an afterthought, while others provide basic reports OOB but allow users to either build their own as needed.

You should also consider the usability of the reporting interface. You should not require extensive specialized training to build or run reports in your ecommerce platform, nor should you need to spend time waiting for

IT to build reporting datasets or structures. Reporting is one of the most important functions in an ecommerce platform, so make sure the one you choose provides the formats you need.

How usable is the platform for YOU?

Last, but perhaps most important: make sure that your internal users can be onboarded easily and can easily acclimate to the system.

Make sure that your platform doesn't exceed your team's expertise, abilities, and bandwidth. Don't get an enterprise platform when one designed for a small business is more appropriate. Does your business sell under multiple brand names or through subsidiaries? If so, make sure the platform can run multiple storefronts.

Finally - is the site easy to maintain? Can you perform bulk product updates without requiring a programmer? Can sales and customer service reps easily locate order and customer information? If the platform is difficult to use, adoption will be a major challenge.

Make sure that your platform doesn't exceed your team's expertise, abilities, and bandwidth.

Five Strategic Questions to Ask Before Choosing an Ecommerce Platform

Before you start comparing B2B ecommerce platforms, there are some fundamental questions that you need to ask yourself (and your team) to ensure you are on the right path to ecommerce business transformation.

What are the company's true business goals?

Revenue is of course, a major goal many companies have in mind when considering ecommerce. However, a strong B2B ecommerce strategy may also include goals regarding increases in efficiency, reductions in costs of sales, and enhanced customer engagement.

You need to take time to define what your organization is looking to accomplish as part of the ecommerce implementation. Maybe you're looking to automate low-value tasks so your teams can focus on activities that are more valuable to the organization. Or maybe you're looking to go completely digital and push all orders to your online channel. Whatever your goals, include them in your evaluation of each platform.

Make sure that each platform will allow you to meet those goals, or that it provides the ability for customization to meet the goals. If it doesn't, then you need to consider a different platform. Don't get bogged down in a never-ending cycle of potentially expensive fixes and customization because you purchased the wrong platform. Your ecommerce platform should be easily extensible and provide for efficient integration of new modules and functionality.

Which buying journeys do we need to accommodate?

B2B ecommerce involves more than a simple buyer–seller relationship. Every role involved in the buying cycle – from logistics to accounting and beyond – requires buy-in to ecommerce. The solution must make it easier for everyone to do their jobs.

How will the platform be tailored for our B2B business?

Many ecommerce solutions that were originally designed for simpler B2C transactions have entered the B2B ecommerce market. The reality is that B2B ecommerce is much more complex than B2C. Do your homework and ensure your platform can handle B2B requirements right out of the box.

That means it needs to handle things like simple and complex promotions, dynamic product catalogs with customer-specific pricing, advanced search capability customized for each user's unique needs, multi-site support, exact inventory levels, and reports that can be run at a product, category, or customer level.

What systems need to be integrated with the platform?

It's remarkable how many ecommerce initiatives fail because integration wasn't considered. Without a synchronous integration strategy to backend systems like ERP, PIM, CRM, and payment gateways, B2B ecommerce cannot provide the real-time data that fuels most of its benefits.

Ensure your ecommerce solution can integrate with your key back-office systems so it can leverage the crucial information that already exists within them.

Who are we partnering with?

A B2B ecommerce platform is more than technology. It needs to support an entire ecosystem, from full-service sales and support to self-service ordering and promotions.

How do you know if you need an implementation partner? Look at your organization and ask yourself the following questions:

- / Do we have B2B ecommerce experience?
- / Do we have experience with the software?
- / Do we have dedicated resources?
- / Do we have technical capabilities?
- / Will we have complete access to software vendor support?
- / Are we able to manage all aspects of the project?
- / Do we have the budget to work in-house?

Of course, all situations are different, so there may be factors not on this list that you've already applied to determine your need. However, these are the most common qualifiers and in general if you answered no to one or more of these questions, that means you need partners that understand the complexities of B2B. The right B2B ecommerce platform will have implementation partners that have demonstrated success time and again.

Key Considerations for Ecommerce Platform Selection

Evaluating platforms and partners is only part of the equation. To set your organization up for ecommerce success, you also need to look at your internal structure and processes to ensure that the business can support an additional sales channel.

While this is certainly an issue for companies just getting started in ecommerce, it's also a valuable exercise for those with mature ecommerce programs to validate that no changes need to be made.

These are some of the key areas of focus that you should review as part of any ecommerce program evaluation.

Review your tech stack

1. Do a deep dive into your existing tech stack to make sure it's scalable and future-proof. The last thing you want to do is spend time and money on a platform or ecommerce implementation that includes redundant features and functions. Make sure your stack can keep up with the ecommerce platform.

2. Make sure that your existing ERP is scalable, and that it supports long term business needs.

3. Review 3rd party applications – middleware, tax calculators, payment gateways, etc. to make sure you're moving forward with technologies that are going to require the least amount of customization (where possible).

At the end of the day, the idea is to have a holistic view of your business needs and goals, create a technology stack that works well together and allows you to grow as a company in the long term.

Review existing business processes

Review your existing business processes to determine what is essential, what can be simplified and whether there is anything that can be eradicated completely. This includes engaging with existing customers to understand what they're looking for and what is essential to them.

Identify areas of your business or processes that might be tailored to individual customer or accounts – there is a time and place for creating custom procedures to meet the needs of one or two high value customers.

However, if you find that you're tailoring underlying business requirements for many of them, look to see if there is a way to simplify the process.

/ Look at how your data is structured and whether it's ready to pull into an ecommerce platform. Is your category structure organized and relevant? Is your product data polished and consistent (titles, descriptions, attributes, images, etc.)? How much data cleanup do you have to do?

/ Is your back-office ready to handle a new line of business? Do you need to create new distribution channels in your ERP, or move product to a different warehouse to accommodate online sales distribution?

/ Is your Customer Service team ready to answer customer questions or help customers get acclimated to a new process?

/ Are inside/outside sales teams fully trained on how to get customers onboarded, and can they answer questions about how the site works? Are they prepared to support the new site? Have they overcome the fear of being replaced by a website?

Identify the ecommerce team

Having the right team in place is vital to the success of the program. If your ecommerce program doesn't have adequate and appropriate resources, you're setting yourself up for less than desirable results.

There are so many moving pieces, especially during development and roll out of a new program. Consider the different functional areas:

/ **Project leadership**
/ **Product management**
  + **Data collection & management**
  + **Data integrity**
/ **Marketing support**
  + **Product content management**
  + **Graphics, videos, product photos**
  + **SEO**
  + **Content marketing**
  + **Operations**
  + **Reporting and analytics**

You also need to consider if dedicated customer service, warehousing, or production teams are required to manage new customers and processes.

There are different strategic approaches to take when starting up an ecommerce team. Smaller companies may only fill key strategic roles as the program ramps up. If you're running a small team, look for people who have the skills and aptitude to take on multiple roles as long as that doesn't impede operational progress or produce inferior results.

Should you choose to outsource segments of the team, do so with the intent of bringing essential functions in-house as quickly as possible so you can begin to build institutional knowledge.

Regardless of the approach, you will see the benefit of developing specialized roles as the ecommerce program expands.

Define your Sales & Marketing strategy

You need to have clear goals and strategies in place for how your sales and marketing teams will approach the task of growing the business through online channels. Here are a few pointers to consider to help you better connect with your customers.

01

Make sure your pricing and logistics makes sense for ecommerce.

Don't try to fit a square peg into a round hole. If you're having to create workarounds due to a lack of flexibility in your sales model, then you're not achieving any gains from having ecommerce and you will end up frustrating your staff and your customers.

02

Do you have buyer personas? If so, are they applicable to ecommerce?

If not, then you need to spend time looking at your customers' buying journeys. Spend time talking to a cross-section of customers to see how they use ecommerce or want to use ecommerce and incorporate that information into your personas. Use this data when building your on- site and off-site marketing strategy.

03

Experiment and test with different content, colors, placement and other site elements.

Incorporate analytics tools and data into your strategy to make decisions about how you're presenting your products. Once your site is live, replicate things that work across the site, and be prepared to shift when it stops working. Don't be afraid to fail, because that's the best way to learn about what not to do.

04

Don't forget to include how you interact with your customers after the purchase.

Returns, product, and order support, restocking notifications – these all contribute to a best-in-class ecommerce experience, which allows you to nurture customers and drive repeat business. One poor online experience can destroy a relationship that potentially took years to develop.

Building the Perfect Ecommerce Experience

You've done the research, taken the necessary steps to prepare, and are finally at the point where your new ecommerce website is live and open for business. That website is now the single most important tool in your marketing toolbox. It's a digital branch for your business that most of your other marketing materials point to.

For many companies, the ecommerce website is the lifeblood of the business. As the single most important marketing investment, your new website must tell your brand story and seamlessly serve your customers.

Your website visitors expect aesthetically pleasing, responsive and intuitive websites that make the search and purchase process as simple as possible. In other words, if you provide an easy, memorable shopping experience then visitors will choose your site over others in the future.

Together, the site design and ecommerce platform must synergize to deliver the experiences that customers desire. In this section, we illustrate the ins and outs of creating a beautiful and functional ecommerce experience that wows your customers and turns them into raving fans.

First steps to synergy

Building a one-to-one relationship with customers, especially in B2B, is the key to success. To do this successfully you need to understand your buyers' needs and set your vision and goals.

STEP ONE
Understanding your customers' expectations

The first step is to gather data and mine it for customer insights. Collecting data allows you to find out how your customers are engaging with your website and helps you identify gaps in engagement delivery that you can fill to ensure they keep coming back. Customer data can come from several sources.

INBOUND TRAFFIC

There's a lot you can determine about your customers' expectations by analyzing how they arrive on your website. You can learn more about your customers' intentions based on factors like:

/ Which page they landed on
/ Search term used
/ Referral website or email
/ Device used

ONSITE BEHAVIOR

You can learn a lot about customers from their behavior on your website. To analyze onsite behavior, you should be asking questions like:

- **/ What web pages are users paying the most attention to?**
- **/ What searches are they making**
- **/ What path are they taking through the website?**
- **/ Which videos or other content are they interacting with?**

INTEGRATED DATA

This covers data from external sources such as your CRM, contact center, help system or ERP system where the customer has a buyer profile.

PROFILE DATA

Profile data is all the historical information collected on customers who can be identified, usually by an email address. This data can come from a website registration or a referral from an email. From there, more data can be collected by tracking the customer's behavior to determine what they are most interested in.

DIRECT FEEDBACK

Perhaps the most crucial source of data to help you understand customer expectations comes in the form of direct feedback. You can gather very specific information on how your customers engage and want to be engaged with through:

- **/ Surveys**
- **/ Emails**
- **/ Customer support representatives**
- **/ Voice-of-customer channels**
- **/ Forums**
- **/ Social media**
- **/ Review websites**

UNDERSTANDING YOUR VISION AND YOUR GOALS

New technologies enable competitors to enter already-saturated markets with ease. We can all agree it's incredibly noisy.

STEP TWO
Understanding your vision and your goals

With so much noise and choice available to customers why would they choose your website or offerings over everyone else? It all comes down to your differentiator.

How will you stand out? Is it your price? The customer experience? Your brand story? High quality products? Build a strategic plan focused on your vision and goals and determine how your ecommerce platform can help you reach them.

Here are a few elements to consider while crafting your strategy:

BUSINESS GOALS

- **/ What are your business goals?**
- **/ How long will you need to achieve them?**
- **/ How will ecommerce help you reach your business goals?**

VISION

- **/ What value are you seeking to provide to your customers?**
- **/ Why would they choose your ecommerce website over others?**

MISSION

- **/ How will ecommerce provide your customers value?**
- **/ How will ecommerce help you achieve business success?**

TECHNOLOGY

- **/ What technology resources will you leverage to support your ecommerce platform?**
- **/ How will they help you grow your business?**
- **/ How will they help you tell your brand story?**

STAKEHOLDERS

- **/ What partners will you turn to for support to move the business forward?**
- **/ What part will they play and how will you motivate them?**

ENGAGEMENT

- **/ How will you keep your customers engaged?**
- **/ Why will they keep coming back?**
- **/ How will you continuously improve their experience?**

> **When you understand your customers' desires and have a vision and mission in place, you can focus on building beautiful and functional experiences.**

The Beauty
of Great User
Experiences

To uncover user needs and guide them in creating a cohesive and seamless user experience, many designers create a user journey map.

Tracing the user journey

User journey maps are visualizations of the interactions between users and the website at each stage of engagement. They help identify opportunities for providing a better experience and potential pitfalls in the user journey.

Good maps indicate the pain points of each journey and help kickstart the process to brainstorm for solutions.

Ultimately, they help designers understand how customers feel at every stage of their journey, what frustrates them, and what they are happy with.

Clean design

Ecommerce websites are heavy investments, so it becomes tempting to maximize the usage of the website to get the most out of each web page. But you should not give into this pressure and instead focus on clean design.

Clean design allows visitors to easily find the things they want to focus on, engenders trust in the brand, loads faster, is easier to maintain, and creates great user experiences for visitors. elements to consider while crafting your strategy.

Whitespace

A clean design needs white space to increase content legibility and allow visitors to focus on the areas that matter most. Whitespace also provides balance and makes a website look tidy and professional.

Call-to-action

The call-to-action button has the power to make or break ecommerce conversions. With the right choice of words, colors, size, and negative space, it commands attention. When paired with an offer that is compelling, it gets people eager to act and generates sales.

Imagery

Choice of images plays a crucial role in an ecommerce website's performance and overall experience. Imagery in the form of well-shot photographs can trigger emotions, enhance trust, and tell a brand story. Well-designed icons, illustrations, and infographics can even have a direct impact on conversion rates.

Readability

If your content is not reader-friendly, no amount of witty words will get your message across. Clean design with a good selection in typography, font size, whitespace, and text placement play a huge part in ensuring readability for effective communication.

Thorough testing

If any component of the website does not work as the user expects, he or she may leave. Or worse, expose the deficiency on social media to the detriment of the brand. Therefore, it is critical that you conduct thorough testing before launch and regularly thereafter to ensure peak performance. Run tests for function, usability, security, performance, database, mobile, cross-browser compatibility, and content.

Clean design with a good selection in typography, font size, whitespace, and text placement play a huge part in ensuring readability for effective communication.
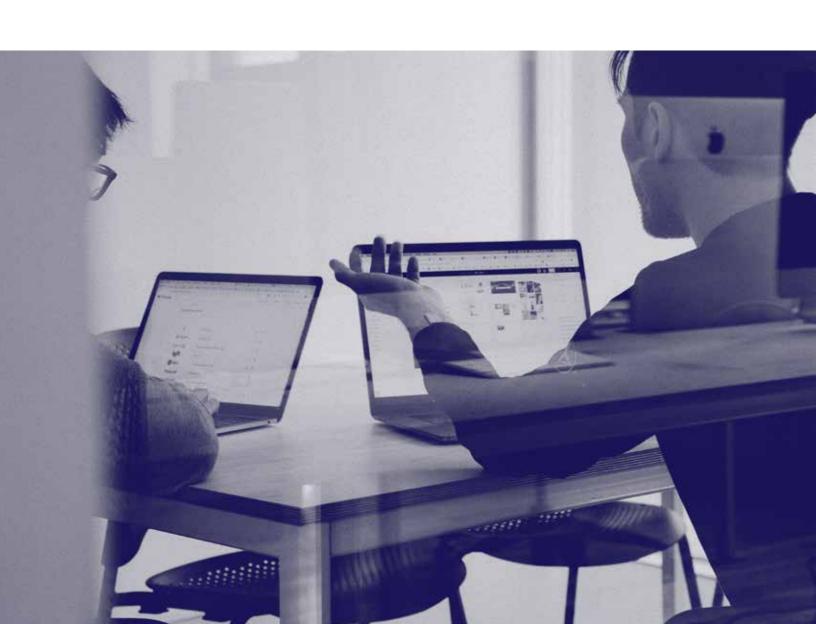
The Importance of Personalization in Ecommerce

For B2C businesses, marketing personalization is not a new approach.

The digital sphere is, after all, perfectly tailored to marketing to individuals with tools that gather and process personal data and learn from it to optimize the results.

Customers now expect recommendations with websites, emails, and content all personalized to their interests and needs, leading to stickier websites, and more email consumption and content engagement.

Yet in the B2B sector, there is still some hesitancy to adopting personalization, despite clear evidence of its utility. **Salesforce found that 84% of customers** say that the experience a company provides is as important as its products and services. Customers want companies to be aware of their buying habits and tailor their messaging accordingly - 54% indicate that they are annoyed when companies target them with content about something they've already purchased.

So, it's time that B2B marketers take a serious look at personalization.

How Personalization Works

There is a lot to consider before you get started with your personalization strategy. Here is a quick run-down of the key factors you need to ensure your personalization plan is a success.

Data Acquisition

The first step to personalization is the collection of data. The more data you collect, the better. This can come from four sources:

INBOUND TRAFFIC

There's a lot of information you can determine about a prospect when they arrive on your website. This can include which page they landed on, what search term they used, and which website or email referred them. You should also be able to tell what device they are using, which city they are in, and perhaps even which company they work for.

ONSITE BEHAVIOR

You can learn a lot about prospects from their behavior on your website: what pages they pay more attention to, what searches they make, what path they take through your website, and which videos or other content they interact with. These are the activities that give you deeper insights into their true interests and intent.

PROFILE DATA

Profile data is all the historical information collected on a prospect who can be identified, usually by an email address. This data can come from a website registration or a referral from an email.

From there, more data can be collected by tracking the prospect's behavior to determine how far into the search funnel or sales funnel the prospect is in.

INTEGRATED DATA

This covers data from external sources such as your CRM, contact center help system or ERP system where the prospect has a buyer profile.

Segmentation

An important part of your personalization strategy is segmentation, which will allow you to focus your resources on the target prospects who matter the most. Targets can be split by various criteria:

- **/ Industry vertical**
- **/ Geography**
- **/ Search funnel or sales funnel position**
- **/ Job function**
- **/ Account**
- **/ Buyer or partner type**

Segmentation will allow you to personalize messages, deliver relevant content, and track the results while executing nurturing campaigns.

Prioritization

It is not possible to target every segment at once, so you need to consider targets to prioritize. To do that, we use a simple strategic framework called **PIE.**

POTENTIAL
- / What is the revenue potential of the segment? More importantly, what is the cost-vs-benefit of targeting the segment?

IMPORTANCE
- / How important is the segment to your business? Is it a core part of your business strategy?

EASE
- / What is the propensity of the segment to buy? How easy or difficult will it be to convert?

Types of Personalization

Personalization can take several forms that you may not be taking full advantage of. Here are some examples.

Targeted emails

With precise segmentation, marketers can create and send individualized emails based on business needs, buying behavior, position in the buying cycle, business size, geographic location, and a variety of other relevant criteria.

Custom page content

Visitors to your website can be delivered unique customized messages, images, and content depending on their industry, the company they work for, and their location.

For example, visitors from the manufacturing industry would see more heavy machinery and production line images compared to visitors from other industries. They might see the same content, but with language specific to the manufacturing sector.

Product recommendations

Using relevant personal data, this type of personalized marketing determines what kind of product, service, or special offer a prospect will receive via various channels. Deals can be tailored to suit the prospect accordingly.

Real-time pricing and inventory

A B2B buyer wants to see their price when they log in – whether that be contract pricing, dealer tiered pricing, a 20% discount on top of the base price ... whatever it may be – they don't want to log in and see what everyone else sees. They also don't want to have to confirm pricing by calling into a customer service center. Pricing and inventory should be delivered online in real time or as close to real time as possible.

Personalization approaches

There are several different ways you can implement personalization in your ecommerce website. The level of personalization capability will vary based upon several factors including what ecommerce platform you are using, what functionality that platform provides out-of-the-box, or what integration you have with a digital experience platform, if any.

Rules-based personalization

Define the conditions under which content is delivered to a customer. For example, you can set rules based on the IP address or physical location of your visitors, the keywords they use to reach your site, their mobile device, or the goals that they achieve on your website to determine the content that is displayed.

Adaptive personalization

Use visitor profiles and pattern-card matching to dynamically adapt the content shown to visitors in real time.

Historical personalization

Build rules that personalize content based on a contact's historical or past behavior, rather than their actions from the current session.

Result-oriented personalization

Use A/B and multivariate testing to assess your content and use the test results to optimize for conversion rates against your site's goals. You can also use testing to assess which type of content works best with certain segments of your visitors.

Journey-based personalization

Design user journeys using advanced business logic and use them to help assess where your customers are in their journey with your brand. Then you can use triggers to advance them through their journeys in context of how far along they are.

Examples of B2B ecommerce personalization journeys

Consider these fictional, but realistic examples of how you can use personalization to improve the customer experience.

Lead from email

The marketer at computer equipment manufacturing company needs to generate more sales from large businesses. She integrates a database of purchasing agents that includes name, title, industry, and company name. She prioritizes the automotive industry because the sales team had good results with similar buyers.

Using her email platform, she can personalize each email with images tailored to the industry the target customer is in and with language specific to their industry. Since the target is in the automotive industry, the email would feature images of cars with the topic geared to an automotive manufacturing pain point.

When the prospect clicks to the website, the marketer can direct them to a customized landing page specifically written and designed for the automotive industry, with content blocks that feature special offers or products that are specifically designed for car manufacturers. The marketer can then track the behavior of the visitor and depending on what products the customer views or and search terms they enter, she can deliver personalized content suggestions to aid the visitor's search journey.

Organic lead from search

Without any kind of profile data, what kind of personalization can be done? The marketer for a commercial transport company first creates a list of search keywords related to the florist industry because that's an important segment for her company.

Using the personalization features, the ecommerce platform will automatically show any visitor arriving from a search term related to "flower delivery" or "florist" a personalized home page featuring a pre-generated banner featuring a satisfied florist. The website will also deliver recommended content in the form of a page offering preferential rates for floral deliveries. To get the deal, all the visitor has to do is enter his email address.

When the visitor leaves the website, the platform will trigger an interstitial banner reminding the visitor of the special deal. If he has entered his email address, he will automatically receive more details about the special features of the floral deliver service including special refrigerated storage services.

Lead from digital advertising

The marketer for a heating, ventilation, and air conditioning (HVAC) equipment distributor has created an industry-segmented digital advertising campaign. Among the priority industries is the maintenance, repair, and operations (MRO) industry because of its high revenue potential.

When a visitor lands on the website from a MRO-specific digital ad, the ecommerce platform will automatically show a customized homepage featuring items that HVAC professionals typically use when working at large apartment complexes.

Before the visitor leaves the website, the website will prompt the visitor to leave his email address to receive discounts on specially designed repair packages and regular tips on how to reduce costs by purchasing their supplies online.

Partner engagement

The marketer for an office supply manufacturer with an ecommerce site used by distributor partners is tasked to help improve the sales value of partners in cities across the country. How can she use profile data and personalization to help her?

When a partner visits the ecommerce site to place an order, the ecommerce platform will automatically access the ERP data to determine if the partner's business is valuable and has potential to grow. If it does, the platform delivers personalized content with a special upsell deal designed to increase the volume of products the partner already buys.

If the visitor abandons the cart or does not take up the offer within a specific time, the integrated email system will send a follow-up email with information about competitor distributors in the same city who have recently taken up the special upsell deal to give the visitor added incentive to try it.

> " **Personalization can take several forms that you may not be taking full advantage of.** "

Best Practices to Start B2B Ecommerce Personalization

Many digital marketers struggle with personalization, often not knowing where to begin or not seeing the results they expected. Hesitation and frustration set in, and personalization tends to be put to the side, resulting in poor engagement, low conversion, and a general lack of success.

To avoid getting overwhelmed, follow these guidelines when mapping out your personalization strategy.

Define objectives
You need to clearly identify the marketing objectives of personalization to ensure they are in line with the company's business strategy and to allow accountability post-campaign.

Identify PIE segments
Review the earlier section on how to prioritize using the PIE framework and map out which segment needs top priority and rank them accordingly to ensure that resources are used to proactively meet the objectives.

Connect segments to personalization goals
In addition to marketing objectives, each segment needs its own prioritization goals based on the segment's needs and lifecycle stage.

Examine existing data
Look at all data sources, internal and external, to better understand customer behavior. The more data you have the better.

Determine key insights
For each priority segment, try to discern anything that can be associated with it. Perhaps it is how they arrive at the website, what content or pages they engage with. These nuggets may be helpful in determining which content, messages, or channels to use with the segment.

Map the journey
Discover the paths that visitors take through your website after they arrive. These behaviors may uncover fresh opportunities for personalization.

Target page components

Identify components in the key pages that are easier to personalize. It could be the top banner, a word in the headline, or perhaps a block in the side column. Ease of personalization is important to ensure efficiency for scalability.

Determine personalization rules

Create and apply the rules, conditions, and actions needed to determine what content is delivered to whom, when, and how. The more specific the rules, the better. As you add more rules, you may find ways to optimize them for efficiency.

Create content

Content should be based on the prospect's situation. If they are at the top of the search funnel, deliver content that builds trust and can elicit intent. For partners and those in the sales funnel, deliver content designed to induce conversions.

Get the right personalization tool

The top reason why most B2B marketers do not start ecommerce personalization is because they do not have the right tools. Most ecommerce platforms include simple content management systems that do not meet the needs of larger, more complex marketing teams with intricate content strategies. It may be necessary to integrate a digital experience platform with artificial intelligence and marketing automation components that allow you to perform contextual marketing functions to all prospects across all channels.

Conclusion/

B2B companies must shift the way they are doing business to meet the expectations of today's customers. As the population of corporate buyers trends younger and expects a modern ecommerce experience, it's no longer acceptable for companies to rely solely on catalogs, phone calls, and business meetings to generate sales.

Companies need to adopt a digital-first mindset and provide an online shopping experience that is easy and encourages repeat purchases. Using the information in this guide will empower your organization to select the right platform and develop internal processes and strategies that will allow you to achieve your ecommerce goals. **/**

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Nishtech is a global digital experience and ecommerce consultancy that specializes in delivering innovative, scalable, and secure digital and ecommerce solutions. As a Sitecore Gold Partner and an Optimizely Platinum Solutions Provider, Nishtech has extensive experience utilizing a collaborative project approach with clients to develop rich, personalized enterprise-level B2B/B2C/B2X commerce experiences that drive business growth and perfect their digital presence.

/ nishtech.com

/ info@nishtechinc.com

/ 513-469-8500

100 E-Business Way, Suite #320

Cincinnati, OH 45241