Magento
An Adobe Company

12 Things You Must Know When Choosing a B2B eCommerce Platform.

Include these essential questions in your next eCommerce RFP.



Choosing an eCommerce platform is an important business decision.

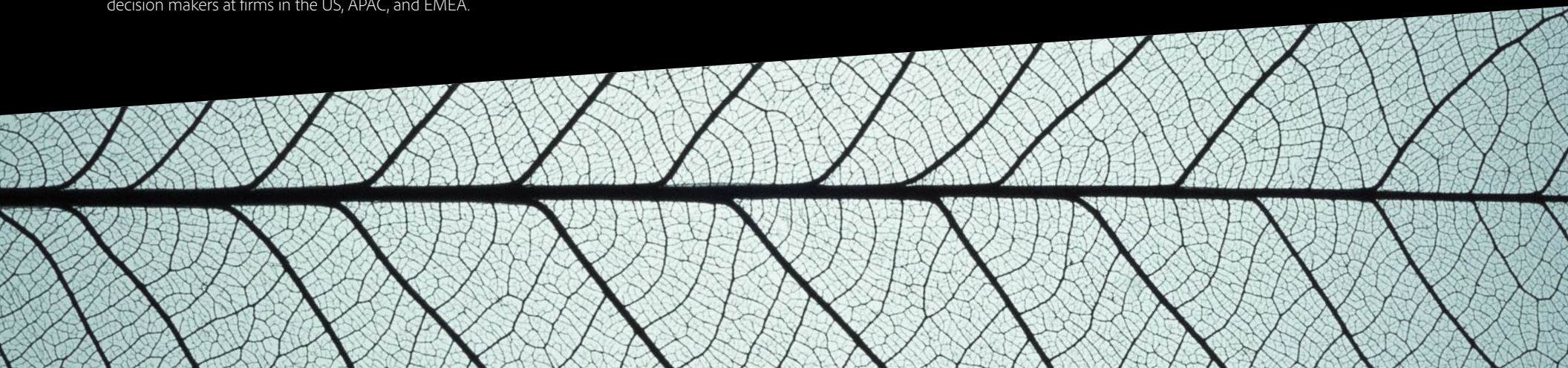
49 percent of B2B businesses expect their eCommerce platform to both increase revenues and improve customer satisfaction.[1] To make sure they choose the right platform, many B2B companies get bids from vendors through an RFP (request for proposal) process. An RFP is usually a very detailed, standardized vendor questionnaire. The idea is to get an apples-to-apples comparison of features and functionality that really matter to business success.

But RFPs can take weeks or even months for vendors to complete, and they can overwhelm reviewers with too much information. And an eCommerce RFP developed for B2C use cases may not tell you if a platform you're considering includes all the B2B functionality you need. You can potentially spend hundreds of hours reviewing data and still not be sure.

Fortunately, you can get better results by asking better and more B2B-focused questions.

This eBook outlines 12 important questions you should include in your next B2B eCommerce RFP.

[1] A commissioned study conducted by Forrester Consulting on behalf of Magento, March 2018. Base: 320 IT, eCommerce, sales, and line-of-business (LOB) decision makers at firms in the US, APAC, and EMEA.



HELPFUL HINTS FOR A SHORTER, SANER RFP PROCESS

The average B2B software 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.

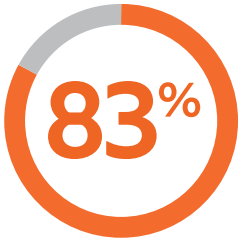
Research + RFI + RFP
Upfront research using objective sources like market analyst reports can help narrow the field early on. Once you have selected a handful of potential matches, you can send them a short RFI (request for information). Based on the RFI responses, you can choose two or three finalists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

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



RFP question #1 Is your platform 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.[2] You will probably need to migrate to the cloud sometime soon, if you're not there already. What does that mean for your next eCommerce platform? You will want one that combines cloud-native software with managed cloud services.



of enterprise workloads will be in the cloud by 2020.[2]

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- In general, answers should be "yes."
- Vendors should describe their cloud platform infrastructure and services, including hosting, content delivery, auto-scaling, and monitoring.
- They should include uptime SLAs, PCI compliance information, performance data, and other relevant metrics.
- They should identify the locations of major data centers.
- They should cover tools for managing your cloud deployment.
- They should provide details on technical and account support available to help companies get their sites up and running.

[2] Louis Columbus, "83% Of Enterprise Workloads Will Be In The Cloud By 2020," Forbes, January 2018.

RFP question #2 Can your platform be easily customized?

Most B2B organizations want to design their own experience and offer special options for large accounts. And almost all B2B companies will need to tweak their business model over time as they expand into new regions and markets or acquire new businesses. This means it's important to choose a flexible eCommerce platform that can evolve with your business.

Most B2B organizations want to design their own experience and offer special options for large accounts.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- Customization is possible through no-code configuration options, but it will almost always require at least some code.
- Ideally, your platform's code should be fully accessible to your developers.
- Answers should cover available programming languages, how changes can be previewed and rolled back, and how product data is stored.
- They should also provide information about the platform's developer community and how active it is, as well as how frequently the base code is updated.
- They should explain if different parts of the system can be used separately. For example, some platforms allow a "headless" configuration in which packaged eCommerce workflows are connected to a custom CMS.

RFP question #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 often include custom pricing. If this applies to you, the ability to support custom catalogs and pricing should be a top requirement for your next eCommerce platform.

B2B companies don't just have one product catalog.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- Answers should generally be "yes."
- They should explain how to set up custom catalogs and unique pricing and how these are reflected in the site experience.
- They should explain how much customization is possible both with and without code.
- They should explain how to efficiently manage and make updates to multiple custom catalogs.
- They should explain how the solution integrates with ERP systems to enable custom catalogs and pricing online.

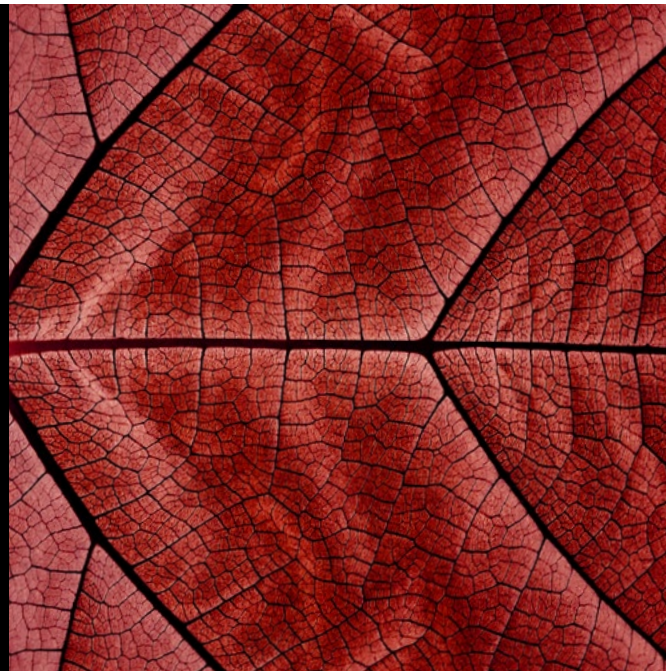
RFP question #4 Does your platform support personalization for different roles, like "buyer" and "procurement manager"?

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 eCommerce platform should support personalized content. It should also give different permissions to different user types.

B2B sales today involve more people than ever.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- In general, answers should be "yes."
- They should explain how the platform supports personalization, including native functionality and extensions.
- They should explain how user profiles work and how they support personalization.
- They should describe options for configuring different buyer roles and permissions to control who can submit quote requests, place orders, or access specific account information.



RFP question #5 Does your platform support multichannel sales and order management?

B2B businesses are reaching customers through more channels. 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 eCommerce platform must have a full range of multichannel order management capabilities.

B2B businesses are reaching customers through more channels.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- Answers should describe multichannel capabilities such as inventory tracking, intelligent fulfillment, and support for marketplaces like Amazon Business.
- They should also highlight cross-border options like support for local languages, payments, taxes, and shipping providers.
- If you have outlets, warehouses, or other physical locations, they should explain how the solution can help better integrate online and offline experiences by allowing buyers to purchase online and pick up in store, or ship online orders from stores for faster fulfillment.
- For each key feature, they should explain how much customization is possible and how other customers may be using it.

RFP question #6 How does your platform make it easier for customers to buy?

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

The easier it is to buy, the more customers tend to do it.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- Answers should describe features that make it easier for customers to buy.
- At a minimum, they should cover:
  - 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



RFP question #7 Does your platform provide self-service account management tools?

B2B customers want visibility into their accounts, and they want it now. Before eCommerce, 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 eCommerce 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.

B2B customers want visibility into their accounts, and they want it now.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- Answers should describe available self-service management tools your buyers can use to manage their accounts.
- They should explain how account dashboards can be customized for multiple requirements, such as showing orders across channels, scheduling deliveries, looking up warranty information, paying invoices, etc.
- At a minimum, account management functionality should include:
  - Managing buyers, including assigning roles and permissions
  - Managing shipping addresses
  - Tracking shipping status
  - Quote and order tracking
  - Activity reports sorted by individual buyer
  - Purchase reporting, including purchases made on credit
  - Historical reports for all buyers and transactions

RFP question #8 How can I speed up content updates?

B2B companies are reliant on content to support the entire customer journey. New 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 eCommerce platform should make content updates as simple as possible, even for non-technical teams.

In short, the faster you can publish new content, the faster your business can move.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

Complete answers will cover:

- 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
- Support for images, videos, documents, promotional banners, etc.
- How quickly new content can be deployed
- Staging capabilities that make it easy to schedule and manage content updates
- Preview capabilities that allow producers to review and test content updates before they go live

RFP question #9 Does your platform integrate with CMS, CRM, ERP, PIM, and other systems?

Your eCommerce platform should not operate in a vacuum. It needs to communicate with existing CMS, CRM, ERP, PIM, and other systems for data synchronization and business intelligence reporting. According to a recent Forrester report, "easily integrated with other existing business systems" is the fourth most popular criterion for choosing a B2B eCommerce system.[3]

For your RFP, make a list of the existing platforms you may need to communicate with your eCommerce platform, and include them in your question.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

In general, answers should cover how companies typically integrate with each key system and should include:

- Systems architecture, specifically how it's designed to connect with other systems and data sources
- Relevant APIs and what kinds of documentation, tutorials, and developer support are available
- Existing off-the-shelf connectors

According to a recent Forrester report, "easily integrated with other existing business systems" is the fourth most popular criterion for choosing a B2B eCommerce system.[3]

[3] A commissioned study conducted by Forrester Consulting on behalf of magento, March 2018. Base: 320 IT, eCommerce, sales, and line-of-business (LOB) decision makers at firms in the US, APAC, and EMEA.

RFP question #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, REMEMBER:

- Answers should explain how the platform supports responsive web design, native apps, and Progressive Web Apps.
- They should also recommend a "best possible approach" for different mobile use cases.

RFP question #11 Is there an extensive network of solution partners who understand your platform?

In general, the more solution partners that work with your platform, the better. Engaging a solution partner is especially important if your IT organization is limited and doesn't have experience with eCommerce deployments.

The more solution partners that work with your platform, the better.



WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- Answers should call out the overall number of solution partners and where they are located.
- They should also 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. Ideally, they should include details on relevant training and certifications.

RFP question #12 Does your platform come with business intelligence capabilities, like easy-to-use analytics and reporting tools?

Business intelligence reporting can be a big competitive advantage. It can help you understand customer buying patterns, identify most and least profitable accounts, and uncover missed opportunities. Your eCommerce platform should come with business intelligence reporting built in.

Business intelligence reporting can be a big competitive advantage.

WHEN CONSIDERING RESPONSES TO THIS QUESTION, REMEMBER:

- Answers should generally be "yes."
- They should cover key features, such as:
  - A centralized dashboard
  - An easy-to-use report generator plus a library of pre-built reports
  - Ability to consolidate data from your eCommerce 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
  - Identify top-selling brands and products

Magento
An Adobe Company

ABOUT MAGENTO

Magento, an Adobe company, is a leading provider of cloud commerce innovation to merchants and brands across B2C and B2B industries and was recently named a leader in the 2018 Gartner Magic Quadrant for Digital Commerce. In addition to its flagship digital commerce platform, Magento boasts a strong portfolio of cloud-based omnichannel solutions that empower merchants to successfully integrate digital and physical shopping experiences. Magento is the #1 provider to the Internet Retailer Top 1000, the B2B 300, and the Top 500 Guides for Europe and Latin America. Magento is supported by a vast global network of solution and technology partners, a highly active global developer community, and the largest eCommerce marketplace for extensions, all available for download on the Magento Marketplace.

www.magento.com

© Magento, March 2019