

A Forrester Consulting  
Thought Leadership Paper  
Commissioned By CloudCraze, A Salesforce Company  
June 2018

# B2B Embraces Its Omnichannel Commerce Future

How B2B Companies Plan To Leverage Online  
Selling To Drive Better Results And Growth

# Table Of Contents

- 1 Executive Summary
- 2 B2B Sellers Must Adapt To Meet Buyers' Digital Demands
- 4 Fewer Than Half Of Sellers Meet Omnichannel Commerce Standards
- 6 B2B Sellers Turn To Integrated SaaS Solutions To Drive Omnichannel Efforts
- 8 Sellers See eCommerce As Primary Driver Of Future Business Growth
- 9 Key Recommendations
- 10 Appendix

**Project Director:**

Nicholas Phelps,  
Senior Market Impact Consultant

**Contributing Research:**

Forrester's eBusiness & Channel  
Strategy research group

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit [forrester.com/consulting](https://forrester.com/consulting).

© 2018, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to [forrester.com](https://forrester.com). [1-168Y8JD]



Omnichannel B2B commerce is an integrated approach for selling to and servicing customers across physical and digital channels.

## Executive Summary

With US B2B eCommerce sales growing from \$777 billion in 2015 to \$1.2 trillion by 2021<sup>1</sup>, sellers cannot ignore the value in creating streamlined customized experiences for their buyers. Companies need to optimize the online experience and adopt an omnichannel strategy. To do that, companies must merge their previously siloed selling methods (online, in-person, and/or on the phone), customer data, and activity to ensure a well-rounded experience. In the age of the customer, a poor selling experience can lead to immediate loyalty and sales losses, while a positive experience will lead to sustained loyalty and increased revenue.

In January 2018, CloudCraze, now Salesforce B2B Commerce, commissioned Forrester Consulting to evaluate the state of omnichannel B2B eCommerce adoption. Forrester conducted an online survey with 315 eCommerce and sales strategy decision makers at manufacturing and consumer goods companies to explore this topic. We found that as B2B sellers turn to eCommerce selling, they must leverage technology to help overcome cultural and legacy business process obstacles. Doing so is key to their future, as many firms see eCommerce as critical to growth.

### KEY FINDINGS

- › **Omnichannel strategies begin and end with the customer.** A third of sellers have implemented an omnichannel selling strategy, and most of the remaining firms are taking steps to do so soon. Customer expectations and experiences must take center stage in how sellers form and optimize these strategies.
- › **B2B sellers need to optimize their omnichannel selling solutions.** B2B companies are behind B2C and B2B2C omnichannel commerce standards. Fewer than 50% of surveyed companies are meeting best practices for people, process, technology, and culture.
- › **B2B sellers strongly prefer integrated software-as-a-service (SaaS) solutions.** More than two-thirds of sellers in our study prefer SaaS solutions for their eCommerce strategy, citing a SaaS approach's advantages in speed-to-implementation, faster and ongoing innovation, and better cost effectiveness.

# B2B Sellers Must Adapt To Meet Buyers' Digital Demands

Out of necessity, B2B businesses are fast becoming digital businesses. In the age of the customer, business buyers form demands and expectations via the full extent of their online shopping experiences — at work and at home. That means B2B sellers aren't just competing with their direct competitors, but against the experience benchmarks set by leading B2C companies as well.<sup>2</sup>

## SELLERS UNDERSTAND THE DIGITAL IMPERATIVE

At a basic level, this means that B2B sellers must make themselves available to customers online, in a digital context. The sellers in our study understand this: 73% of sellers sell through an eCommerce or online sales portal today — with an average of 27% of revenues coming from digital channels (see Figure 1).

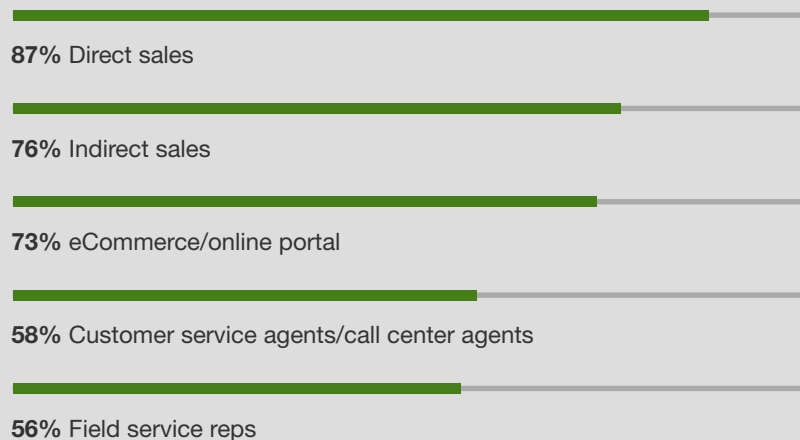
But ultimately, it's not sufficient to simply put products up on a website and call it a day. B2B sellers must take full advantage of their digital opportunity by turning to a truly omnichannel selling strategy. Under an omnichannel B2B commerce strategy, each customer touchpoint, whether online, via phone, or in-person, is informed and responsive based on customer interactions across channels, and each touchpoint is continuously optimized based on customer behavior and company goals.



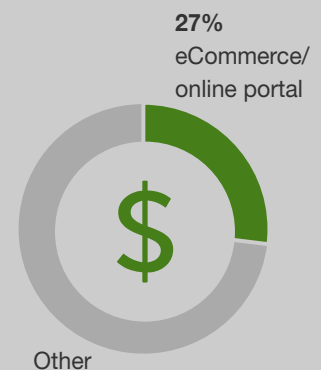
Digital businesses win, serve, and retain customers by continuously creating and exploiting digital assets to simultaneously deliver new sources of customer value and increase their operational agility.

Figure 1

“Which of the following channels do you sell through today?”



Base: 315 eCommerce and sales strategy decision-makers in the US, Benelux, Germany, France and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of CloudCraze, March 2018



Sellers reported on average that 27% of revenues come from eCommerce or online portals.

## B2B FIRMS PREPARE FOR OMNICHANNEL SELLING

Approximately one-third of the firms in our study are executing or optimizing their omnichannel strategy — with most remaining firms either planning or implementing one soon. Overall, only 3% of firms have no active plans to implement an omnichannel strategy (see Figure 2). These firms are driven to omnichannel for two primary reasons:

- › **An obsession with improved customer and business outcomes.** Firms in our study understand their online selling initiatives must begin and end with the customer. When asked to pick two primary business objectives for online commerce, firms are most likely to say they are motivated to improve buyer satisfaction (25%) and improve their responsiveness to buyer needs (23%). Firms also show that happier buyers link up to better business results — with 23% also saying they expect to sell to/reach more buyers with their online strategy and 22% saying they expect to drive deeper buyer loyalty and repeat business.
- › **Concern over the fallout from missing customer expectations.** If happier customers are the proverbial carrot driving online adoption, firms are well aware of the sticks at play in the shift to online selling, too. Namely, failing to meet your buyers where they want and need you will lead to lower buyer satisfaction (56% of sellers agree with this premise), will make it more difficult to attract new buyers (56%), and will lead to lower buyer loyalty and buyers choosing to shop with competitors (50%).



In an increasingly competitive B2B selling landscape, firms cannot afford to give up ground to competitors that are meeting buyers' digital needs.

Figure 2

“Which of the following best describes your company’s B2B omnichannel commerce capabilities?”



Base: 315 eCommerce and sales strategy decision makers in the US, Benelux, Germany, France, and the UK  
 Source: A commissioned study conducted by Forrester Consulting on behalf of CloudCraze, a Salesforce Company, June 2018

# Fewer Than Half Of Sellers Meet Omnichannel Commerce Standards

Creating and implementing an effective B2B omnichannel commerce strategy is about more than just selling on a website — it requires that firms shift their staff, their technology, their processes, and their culture to support the buyer when and where needed. Sellers divulged the degree to which their companies are properly set up to execute their omnichannel strategies across four primary dimensions :

- › **People.** How confident are sellers that they have the staff, skills, and role alignment necessary to execute their strategy? Forty-eight percent of B2B-only sellers said they met this criterion.
- › **Process.** Do sellers have the clearly defined responsibilities and processes needed to execute their strategy? Forty-one percent of firms in our study said they met this criterion.
- › **Technology.** Do sellers have the tools and platforms necessary to execute their strategy? Forty percent of firms in our study said they met this criterion.
- › **Culture.** Do sellers prioritize omnichannel commerce and ensure their culture, behaviors, and incentives are properly aligned? Forty percent of firms in our study said they met this criterion.

In many cases, B2B sellers are playing catch-up to meet the customer experience standards set by B2C sellers. Indeed, companies in our study that sell both to other businesses and to consumers (B2B2C) are generally more advanced than B2B-only sellers, particularly in the people and technology dimensions (see Figure 3).

**Figure 3**  
**Percent of firms that meet omnichannel B2B commerce standards for each key dimension:**



Base: 315 eCommerce and sales strategy decision makers in the US, Benelux, Germany, France, and the UK  
 Source: A commissioned study conducted by Forrester Consulting on behalf of CloudCraze, a Salesforce Company, June 2018

B2B sellers face challenges internally driving their organizations to adopt digital commerce and bridging online and offline selling.

For B2B omnichannel commerce strategy, sellers struggle with realizing time-to-value and a lack of budget. These are common challenges with many technology initiatives .

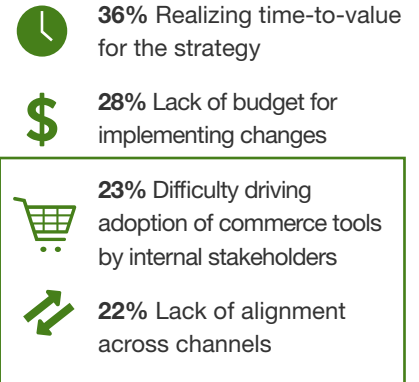
Sellers also cite a lack of alignment across channels and difficulty driving adoption of commerce tools (see Figure 4 ). These issues mirror a cultural shift that Forrester believes all B2B organizations face. Forrester's research shows that B2B digital leaders have struggled to convince sales teams to embrace self-service digital sites as an enablement tool for enhancing productivity, while eCommerce teams have struggled to incorporate offline sales into the company's digital strategy.<sup>3</sup>

Ultimately, sellers must balance the benefits offered by digital automation (greater sales velocity, opening opportunities to focus upmarket), as well as a more consultative person-centric selling approach (deepening relationships and supporting higher-cost and consideration buying). They must develop a broader vision that automates low-consideration, self-serve transactions and digitally enhances high-consideration, complex, in-person engagements.

## B2B sellers face challenges internally driving their organizations to adopt digital commerce and bridging online and offline selling.

Figure 4

**“Which of the following are the top challenges your company faces today in creating or executing your B2B omnichannel commerce strategy?”**



Base: 315 eCommerce and sales strategy decision-makers in the US, Benelux, Germany, France and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of CloudCraze, March 2018

# B2B Sellers Turn To Integrated SaaS Solutions To Drive Omnichannel Efforts

Bridging divides across different sales approaches and groups is a significant challenge: Modern B2B sellers require support from technology partners to successfully bridge their digital and traditional sales channels into a coordinated, omnichannel approach.<sup>4</sup> Sellers in our study seek partners and tools that emphasize simplicity and ease of use — characteristics that help address the challenges they raise around stakeholder adoption.

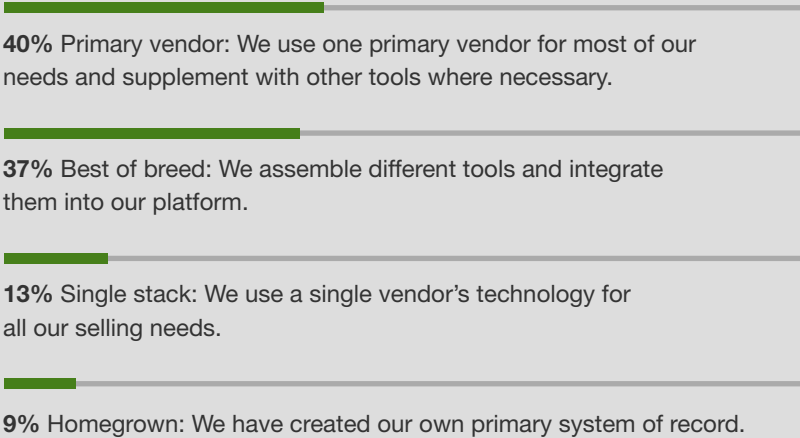
## CHOOSING ONE PRIMARY VENDOR WITH SUPPLEMENTAL TOOLS IS THE LEADING APPROACH

Many sellers in our study use a primary vendor for most of their online selling needs and supplement it as needed with other tools. Sellers are most likely to have adopted three primary technologies as the core of their selling stack — a customer relationship management (CRM) platform, an eCommerce platform, and an enterprise resource planning (ERP) system (see Figure 5).

Figure 5

“Which of the following best describes how the tools you use for your company’s selling efforts are set up today?”

(“Don’t know” response excluded)



Base: 315 eCommerce and sales strategy decision makers in the US, Benelux, Germany, France, and the UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of CloudCraze, a Salesforce Company, June 2018



Over half of sellers have invested in a CRM platform, an eCommerce platform, and an ERP system to aid their online selling.



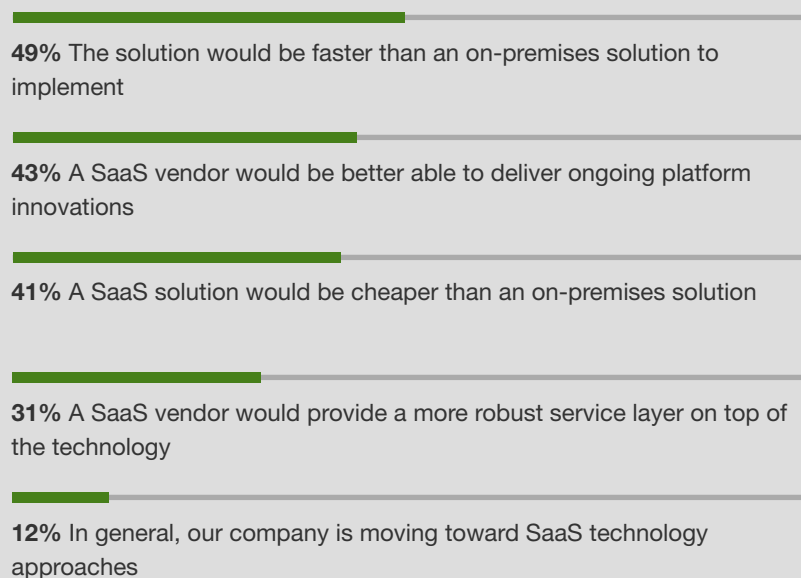
## SELLERS EXPRESS STRONG PREFERENCE FOR SAAS IMPLEMENTATIONS

B2B sellers have an even stronger preference for software-as-a-service implementations, with over two-thirds of study participants indicating it is their ideal implementation for an eCommerce solution. When asked to choose the top reasons for their SaaS preference, those buyers indicated a belief that this approach offers faster speed-to-implementation, would better drive ongoing innovation, and would be ultimately more cost-effective than an on-premises solution (see Figure 6).

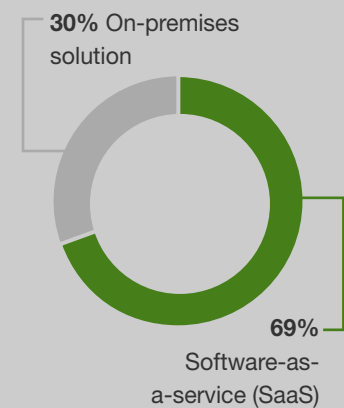
Indeed, easy integration and solutions that foster quicker stakeholder adoption meet B2B sellers' list of critical must-haves when making technology purchasing choices. Thirty-nine percent of sellers told us that easy integration with front-office systems like CRM is critical to their business — the top criteria chosen by sellers — while 38% said integration with ERP and other back-office systems was critical. Sellers also prize tools that can provide support staff with specific domain expertise, tools that feature a fast initial deployment, and partners that provide support staff with specific domain expertise. Thirty-five percent marked at least one of these options as critical.

Figure 6

**“What are the top two reasons you prefer to take a SaaS implementation approach for an eCommerce solution?”** (Choose two)



Base: 315 eCommerce and sales strategy decision-makers in the US, Benelux, Germany, France and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of CloudCraze, March 2018



More than two-thirds of B2B sellers say their ideal eCommerce implementation would take a SaaS approach.

# Sellers See eCommerce As Primary Driver Of Future Business Growth

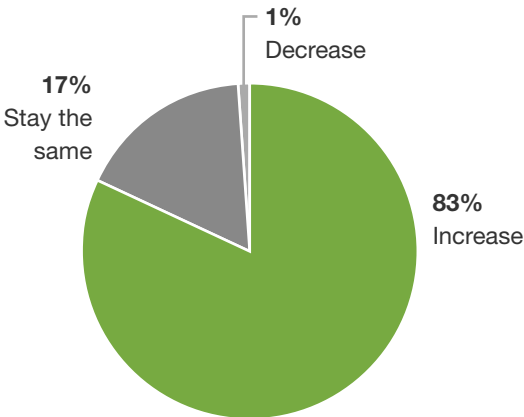
The businesses in our study are getting ready for an omnichannel selling future, with 83% saying they expect to increase the volume of eCommerce sales over the next three years (see Figure 7).

As they do so, business buyers are likely to see significant benefits. For example, companies that sell online cited increased bottom-line revenue, more effective pricing and product catalog optimization, and an improved customer experience as top benefits for buyers. They also expect that online selling will help open new markets and move simpler functions like reorders and rote processing functions to a lower-cost online channel.

B2B sellers are moving toward eCommerce adoption, and this shift is only set to accelerate and deepen in the coming years. It's essential for B2B sellers to recognize the opportunity that B2B eCommerce represents and create a robust road map for how their business is going to adapt to an omnichannel selling future.

Figure 7

“How do you think your company’s sales over eCommerce will change in the next three years?”



Sellers plan to continue shifting to eCommerce in search of efficiencies and growth.

Base: 315 eCommerce and sales strategy decision makers in the US, Benelux, Germany, France, and the UK

Note: Percentages may not total 100 because of rounding.

Source: A commissioned study conducted by Forrester Consulting on behalf of CloudCraze, a Salesforce Company, June 2018

# Key Recommendations

Forrester's in-depth survey of eCommerce decision makers yielded several important recommendations:



**As you prepare your omnichannel strategy, focus on the entire buyer journey, not just discovery and buy phases.** B2B sellers must understand that buyers who are online, or offline customers who are influenced by online information, are very likely to exhibit different buying behaviors and preferences compared to their offline-only customers. To ensure a high-quality omnichannel experience, sellers must identify their key segments and highest-value customers and then map out their buyers' journey — before, during, and post-sale. Doing so ensures your critical customers and evangelists are well supported throughout their whole journey in a way that best reflects their needs and preferences.



**Align your organization to take maximum benefit from omnichannel selling.** B2B buyers expect sellers to coordinate sales efforts across online and offline channels — so you must prioritize overcoming internal barriers to collaboration between eCommerce and traditional sales teams. Make commerce interactions and data available to the sales teams and encourage low-consideration, order-processing activities to migrate online. Your sales teams will be able to focus on deepening relationships and consulting for higher-consideration products or services.



**Seek partners that can shrink omnichannel adoption barriers.** Struggles with eCommerce adoption and a lack of alignment across channels are two of the most significant challenges sellers face when trying to execute their omnichannel selling strategies. These sellers seek partners and tools that emphasize simplicity and ease of use and are most likely to prefer a primary vendor approach leveraging SaaS implementations.



**Make sure your capability requirements span all customers.** To carry over context from a self- to assisted-service approach, sellers (or other customer engagement professionals) need to access and leverage the same systems. As you gear up for omnichannel, ensure you understand the functional requirements from sales and service to deliver on your omnichannel experience.

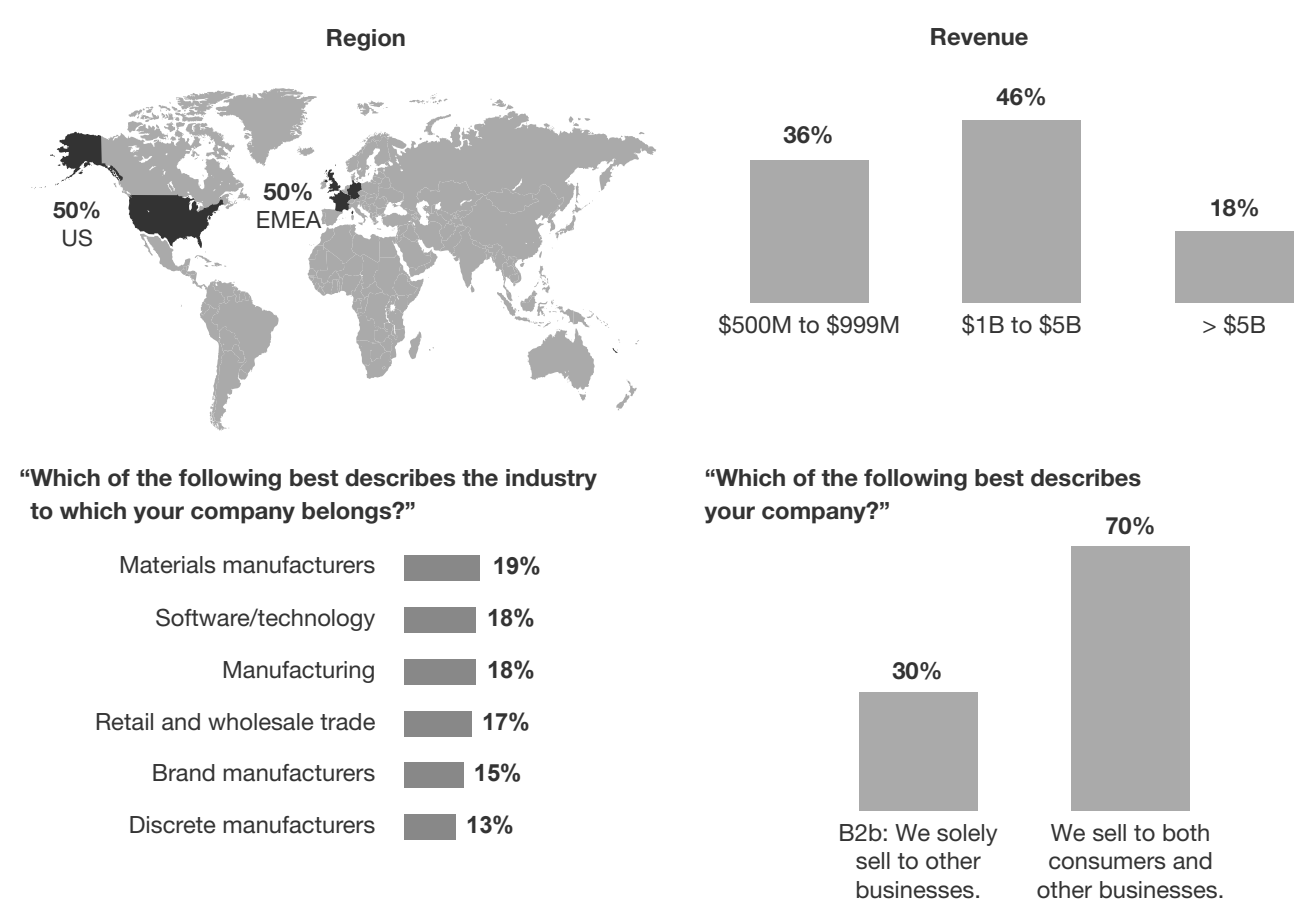


**Adopt a culture of continuous and iterative improvement.** Omnichannel isn't just a lot for businesses to digest; it's often a brand-new approach to customer engagement. Take a phased approach to such a large undertaking. By focusing on a specific geography or line of business, firms can implement more quickly, measure the business impact, and establish the requirements for change management to more continuously refine the approaches best fit for their organizations to seamlessly roll out omnichannel strategies to the rest of the business.

# Appendix A: Methodology

In this study, Forrester conducted an online survey of 317 B2B seller organizations in Benelux, France, Germany, the UK, and the US to evaluate the state of B2B omnichannel commerce. Survey participants included decision makers in IT, marketing, operations, product teams, and sales/eCommerce. Questions provided to the participants asked about their firms' approaches to omnichannel selling. Respondents were offered a small monetary incentive as a thank you for time spent on the survey. The study began in January 2018 and was completed in May 2018.

# Appendix B: Demographics/Data



Base: 315 eCommerce and sales strategy decision-makers in the US, Benelux, Germany, France and UK  
 Source: A commissioned study conducted by Forrester Consulting on behalf of CloudCraze

# Appendix C

## ENDNOTES

- <sup>1</sup> Source: “US B2B eCommerce Will Hit \$1.2 Trillion By 2021,” Forrester Research, Inc., June 5, 2017
- <sup>2</sup> Source: “Make Your B2B Business A Digital Business,” Forrester Research, Inc., September 1, 2017.
- <sup>3</sup> Source: “Death Of A (B2B) Salesman: Two Years Later,” Forrester Research, Inc., March 29, 2017.
- <sup>4</sup> Source: “It Takes A Village To Deliver World-Class B2B Commerce,” Forrester Research, Inc., May 1, 2017.