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The Guide to

Building a Tech Stack for B2B Omnichannel Buyer Journeys

It's hard to imagine a millennial or Gen Z buyer picking up the phone to call their sales representative and make an order. These younger buyers, who now make up two-thirds of B2B buyers, expect the same convenient, relevant buying journey as they do as a consumer.

As a result, B2B companies need to re-think their sales and customer retention strategies to cater to both the younger, digitally native buyers and the older generations who still want that human, personal experience.

According to Forrester's Buyer's Journey Survey, 2022, B2B buyers expect a self-guided experience, from early to late sales stages. They demand the ability to research, compare, and purchase products or services across multiple channels, from websites to mobile apps to social media platforms. Crafting the ideal tech stack to support these experiences requires careful consideration of various factors, including scalability, integration capabilities, and user experience.

This guide aims to navigate the complexities of selecting and assembling the perfect blend of technologies—eCommerce, order management, and subscriptions—to empower businesses in building robust, customer-centric omnichannel strategies that drive growth and foster lasting relationships.

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Assessing Your Omnichannel Needs

Determining what technology your company needs to deliver seamless and consistent omnichannel experiences is crucial to stay competitive and achieve long-term success. Here are steps your company can take to ensure you invest in the right technology:

Assessing your company's goals and objectives

What are your company's goals for implementing or expanding an omnichannel strategy? Consider factors like expanding into new sales channels, lowering the total cost of ownership (TCO), improving customer satisfaction, and increasing sales.

Map out the buyer journey

Map out the current buyer journey across different touchpoints (online and offline) and identify any pain points or areas where buyers may encounter friction during their interactions. Consider how a buyer may start their shopping journey online and complete the purchase in-person with a sales representative or through a self-service portal.

Analyzing your technology infrastructure

Determine whether your current systems can support omnichannel capabilities or if you need to invest in new technology solutions. The bar for meeting buyer expectations is high, requiring IT and digital commerce leaders to determine how to best marry the solutions powering the frontend experience (i.e., CMS, search, merchandising, PIM, etc.) and the systems driving commerce operations (ERP, OMS, inventory visibility, CRM, etc.).

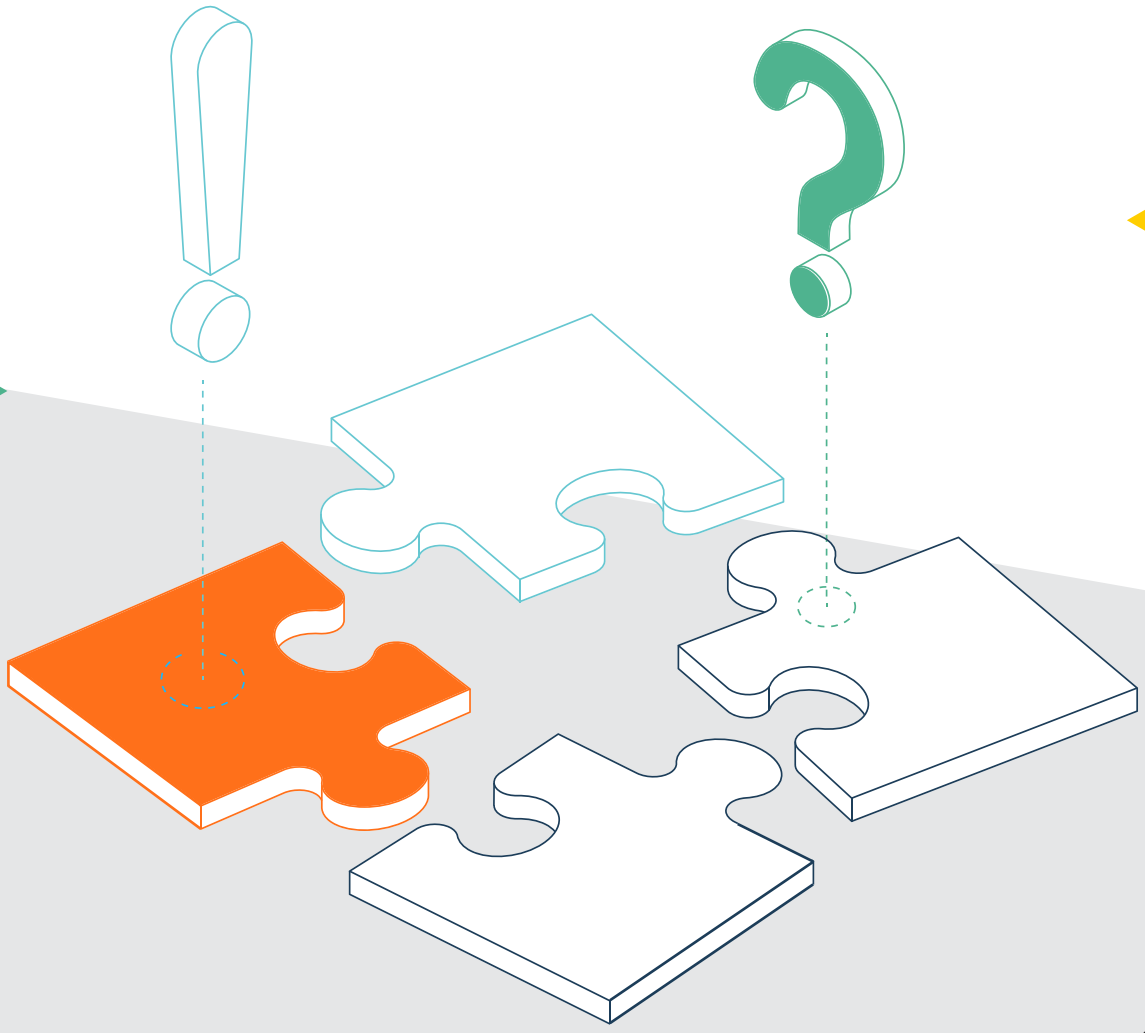
Know your target audience

By analyzing your buyers' preferences, shopping behaviors, and buying patterns, you gain valuable insights that can inform your omnichannel strategy. This data will help you decipher where and how your audience shops, whether it's through online channels, third-party vendors, mobile apps, or a combination of these. Once you've identified key trends, you can use this information to determine what technology you need to enhance the omnichannel experience.

Platform Architecture: Unified Experiences, Composable Architecture

Composable architecture serves as the cornerstone for achieving omnichannel experiences. By breaking down complex systems into modular components that can be easily customized and integrated, you'll be able to swiftly adapt to changing buyer preferences and market dynamics.

This flexibility allows for the seamless incorporation of new channels, technologies, and services into the overall buyer experience, ensuring a consistent and responsive approach across all touchpoints. As a result, you can better connect with customers and respond rapidly to market shifts, ultimately leading to a unified and harmonious omnichannel experience that drives customer satisfaction and loyalty.



Key criteria of a composable platform:

Flexibility: A platform that allows you to cherry-pick modules or capabilities means you can avoid a complete system overhaul. For instance, you can start with basic catalog features from one vendor and seamlessly transition to a best-of-breed PIM from a third-party when needed.

Scalability: Assess the platform's ability to handle increased traffic, expanding product catalogs, and the addition of new brands or global sites. Ensure it can scale both vertically (adding more resources to a single server) and horizontally (adding more servers) as your business grows, maintaining fast page load times during peak traffic periods.

Unified Interface: A single user interface with shared data and reporting simplifies commerce and fulfillment operations, empowering both technical and non-technical users to work efficiently, enhance customer service, and adapt to changing demands.

Extensibility: A solution with rich out-of-the-box functionality and comprehensive API coverage allows you to extend platform features without incurring significant development costs. This ensures a seamless front-end and back-end integration.

Integrations: Verify the platform's compatibility with various systems like ERP, marketing automation, or personalization engines. Ensure it facilitates real-time and accurate data flow through robust orchestrations, not just point-to-point connections.

Microservices-Based: Ecommerce and order management solutions with a microservices-based architecture promotes reusability for future custom developments without disrupting the core code.

API-First: An API-first vendor with comprehensive API coverage and accessible documentation enhances productivity, scalability, and agility, ensuring adaptability as your business integrates new technologies.

Modularity: Modular capabilities reduce dependencies between services, allowing for phased implementations and platform maintenance without risking the entire solution's stability.

Create Fulfilling Buyer Experiences with an Order Management System

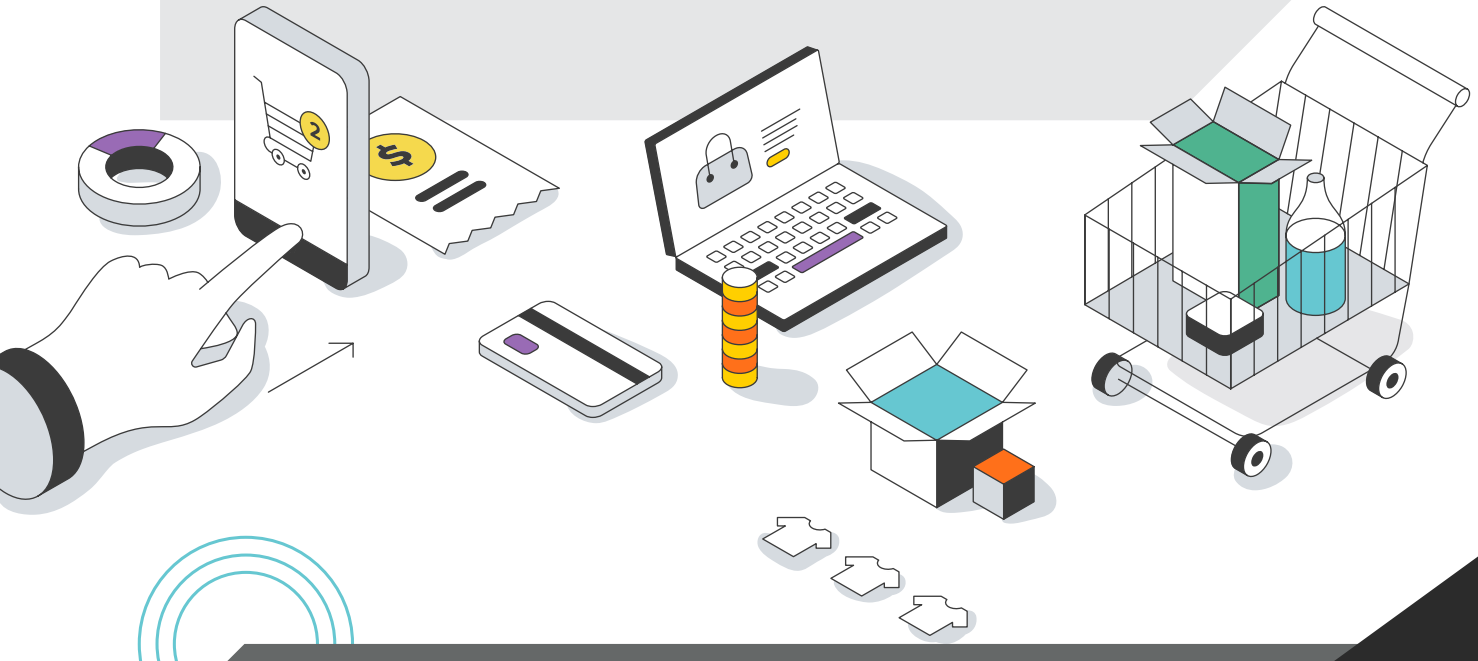
McKinsey & Co. Found that from 2016 to 2021, the number of channels B2B buyers used to complete a purchase doubled from five to ten channels. The arrival of omnichannel and multichannel means that B2B companies must be able to fulfill orders from multiple channels.

An OMS serves as a central repository of all orders captured across multiple sales channels. It means everyone can access the same information easily, reducing the chances of errors and making the whole process much smoother. For companies selling products through various online and offline channels, an OMS consolidates and manages orders from different sources more effectively, ensuring seamless order fulfillment. Your sales reps now have a single place to check order details, status, and tracking.

A dedicated OMS provides several advantages, particularly in the omnichannel context. It reduces errors in order fulfillment, speeds up processing for faster delivery, and integrates seamlessly with inventory management to optimize stock levels, preventing costly overstocks or stockouts across various channels

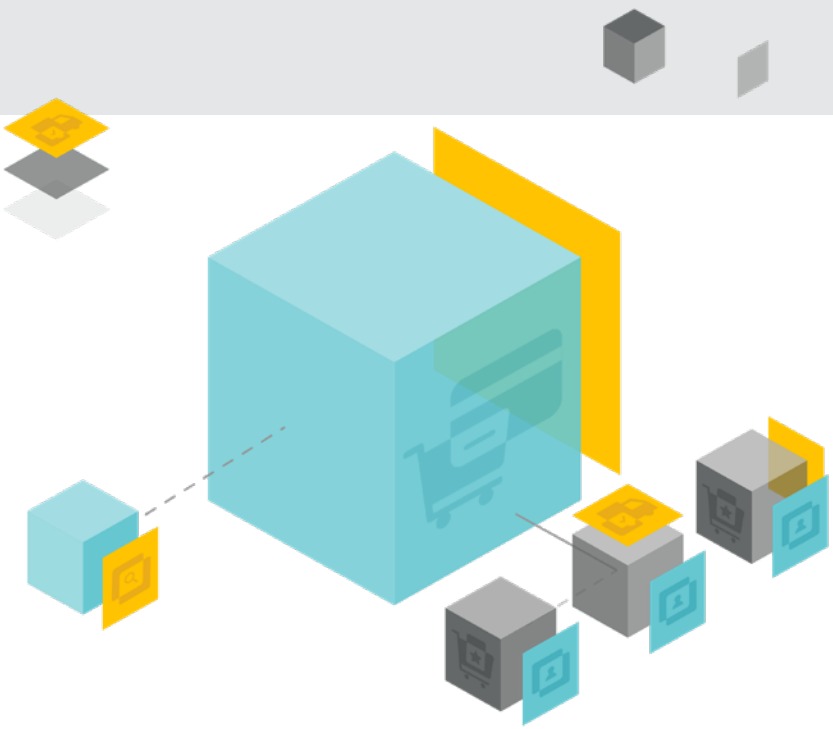
As businesses expand, order management complexity often increases, leading to inefficiencies when relying solely on an Enterprise Resource Planning (ERP) system or a combination of tools such as spreadsheets and databases.

The next page outlines criteria to look for in a vendor, including key capabilities and use cases.



Key Capabilities to Look for in an Order Management System

- **Inventory management:** Enabling global inventory visibility, managing safety stock across locations.
- **Supports flexible payment options:** Buy now, pay later, recurring subscription payments, digital wallets, etc.
- **Distributed order routing:** Ability to allocate inventory optimally from across the supply chain to fulfil an order, manage 'split shipments' to fulfil an order from multiple locations in the supply chain, and support customer returns across channels.
- **Multiple fulfillment options:** Last mile delivery, BOPIS, curbside pick-up, ship-from-store, drop shipping.
- **Customer service empowerment:** : Enabling customer service representatives to capture orders, track orders in near real-time (such as inventory location, fulfillment event updates, etc.), and adjust orders.
- **Flexible scheduling:** Supports changes in delivery dates by customers for products, gifts, and value-added services (e.g., installing appliances at home or a personalized styling session).



Order Management Use Case Checklist

When evaluating OMS vendors, it's critical to ensure it can meet your company's unique use cases. Take a look at use cases under two broad pillars: buyer experience transformation and unlocking supply chain efficiencies. Below is a checklist of key essential use cases.

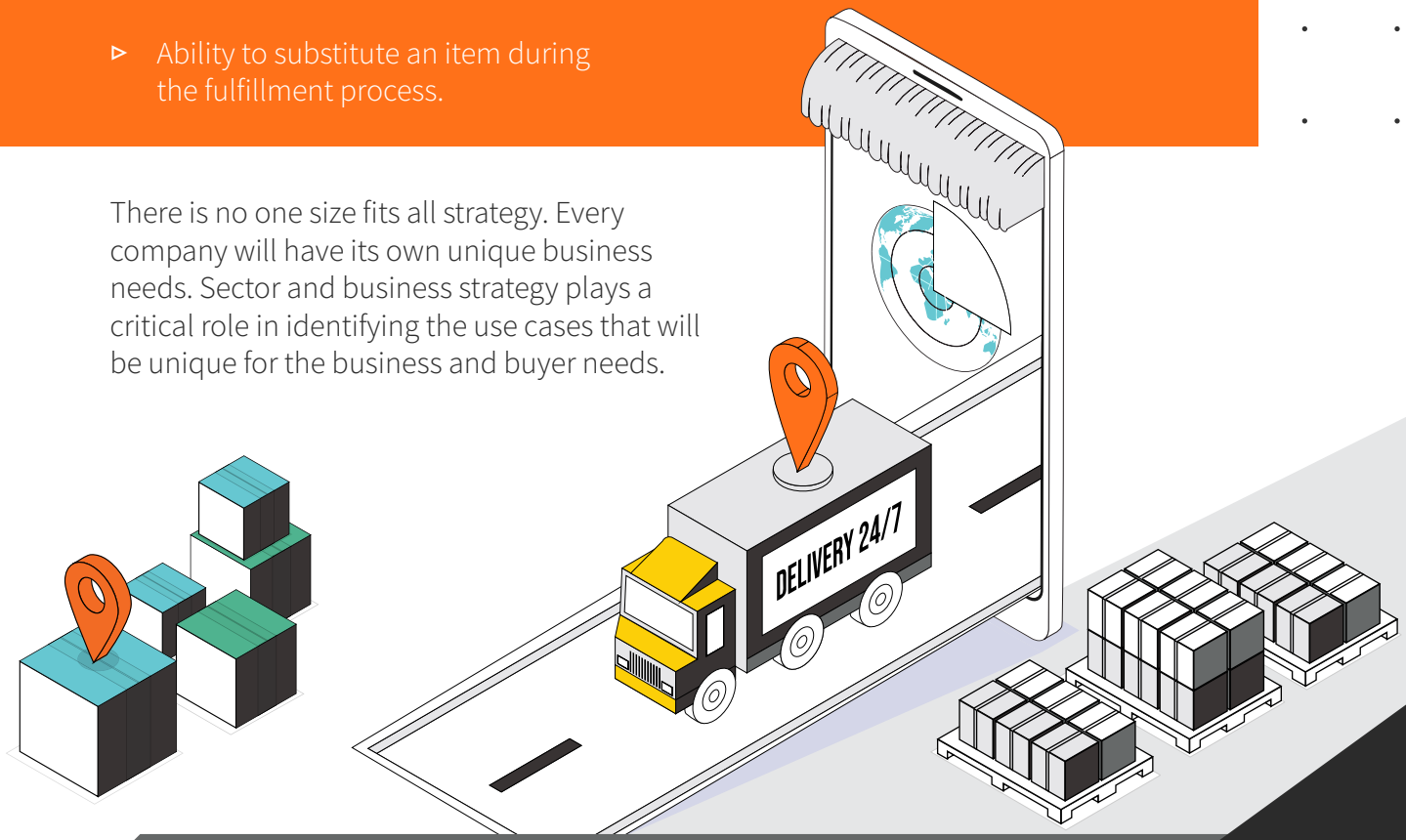
Customer Experience Transformation

- ☑ Providing visibility to global inventory and fulfillment ETA.
- ☑ Bring inventory data to site search to ensure relevant results and boost product discovery.
- ☑ Supporting flexible payment options, such as credit cards, wire transfers, ACH payments, and more.
- ☑ Offering multiple fulfillment options, such as split shipments or pick up in-store.
- ☑ Enabling perks like 'early access to inventory,' or 'exclusive access to merchandise' to loyal buyer segments or certain affinity groups.
- ☑ Allowing buyers to modify delivery dates after placing order and releasing the updated order to fulfillment centers as per the new date and time slot.
- ☑ Managing capacity and scheduling of value-added services for specific sectors.
- ☑ Allowing buyers to return products by various modes, such as online return shipping, in-store returns, etc.
- ☑ Empowering customer service reps with key capabilities such as capturing an order, modifying order information (e.g., delivery dates, address, fulfillment mode, etc.), ability to track inventory and fulfillment updates in near real-time.
- ☑ Empowering buyers with self-service portals that allow them to view real-time inventory levels, check order statuses, and retrieve and pay invoices.
- ☑ Order customization to enable sales teams to configure and quote orders with precision, split those items into custom shipping groups, and set different attributes on them.

Unlocking Supply Chain Efficiencies

- Providing business users global inventory visibility (across stores, DC's, in-transit, suppliers, and channels), allowing them to manage Future ATP (Available to Promise) and safety stock across different channels and fulfilment locations (DCs, stores, etc.), ability to pool inventory across locations.
- Ability to extend custom order routing attributes without needing IT help and have the flexibility to align order routing with organizational goals and supply chain operations.
- Fulfilment from multiple locations via 'Order Splitting' and 'Shipment Consolidation' — this makes it possible to fulfil one buyer order from multiple locations - by splitting an order into multiple shipments that can be routed via different locations.
- Ability to use stores as fulfilment centres to support logistics options like Ship From Store, implying ability to generate pick lists for fulfillment associates.
- Ability to integrate with supplier inventory to handle drop-ship orders.
- Ability to support reverse logistics by accepting returns initiated by customers, and orchestrating return orders with other ERPs such as WMS & TMS.
- Ability to substitute an item during the fulfillment process.

There is no one size fits all strategy. Every company will have its own unique business needs. Sector and business strategy plays a critical role in identifying the use cases that will be unique for the business and buyer needs.



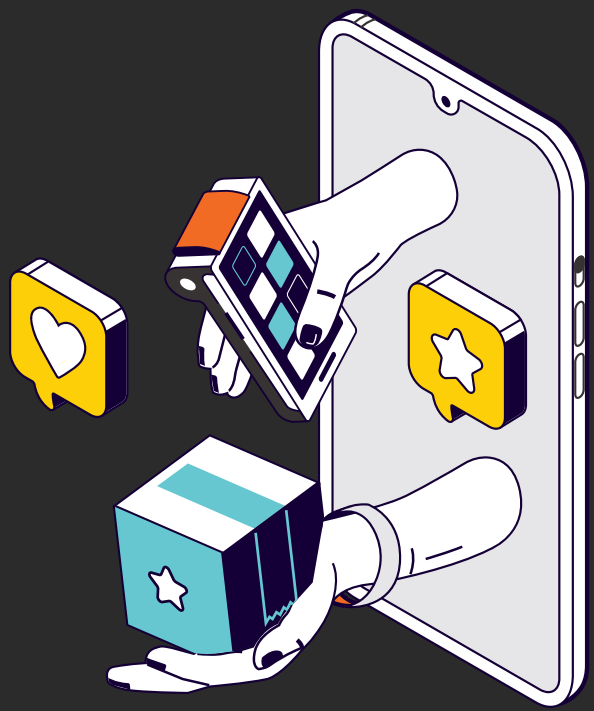
Essential Commerce Functions for a Seamless Purchase Experience

At its core, an ecommerce platform enables businesses to sell directly to consumers across physical and digital channels for omnichannel sales and marketing. Some solutions provide the basic functionality needed to sell online with minimal supporting capabilities, while others come with a depth of functionality out of the box and intuitive business-friendly UIs.
To simplify the process, we've outlined the top B2B ecommerce platform functions and capabilities to look for when evaluating vendors. For each function, we provided the top features to look for to ensure it can meet your company's requirements.

Unified UI for Streamlined Operations

There are many complexities in managing B2B ecommerce operations, from managing large and detail-rich product catalogs and pricelists to customer management and shipping automation. We recommend looking for an ecommerce platform that makes daily operations smoother with a unified dashboard:

- Aggregate and analyze data across all inventory locations, sales channels, and customer accounts in real-time.
- Track & manage revenue, inventory, fulfillment rates, product performance, and more.
- Receive automated alerts when your named conditions on a given report are met.



Multi-Site Management

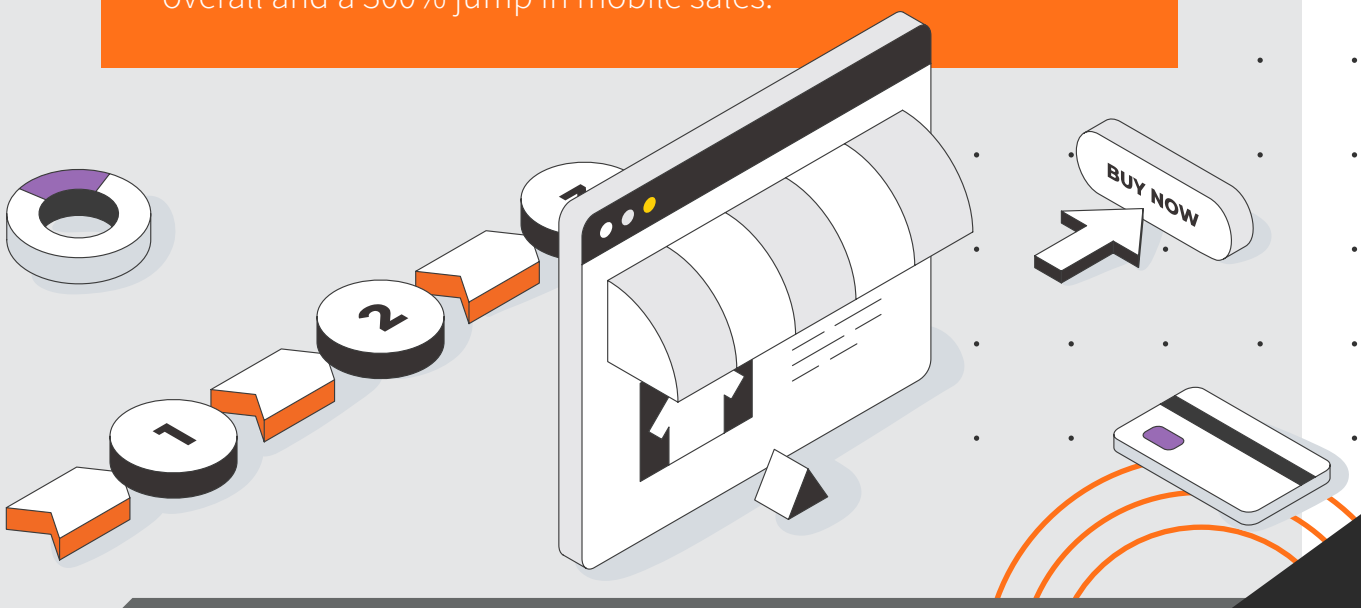
With multi-site management, B2B buyers can manage multiple websites or online stores from a centralized location, making it easier to update product information, pricing, and promotions across multiple sites.

Some of the benefits include being able to:

- Mirror the in-store and online experience by enabling store-level pricing and catalogs.
- Eliminate the burden of managing multiple channels with automated workflows & processes, pre-built integrations, and reliable solutions.
- Provide a holistic view of business performance across channels to facilitate better visibility and data-driven decisions.

In addition to centralized management, you gain the benefit of streamlined operations by sharing resources and reducing duplication efforts across sites. This can lead to significant cost savings and improved efficiency.

Candy maker **Jelly Belly** migrated from a home-grown system to Kibo's solution. It now manages offerings across more than 45 sites for both B2B and B2C audiences through a single interface. As a result, it achieved a 21% increase in web traffic overall and a 300% jump in mobile sales.



Product Catalog

The product catalog manages detailed product information, such as specifications, pricing, and availability, and supports other functions, such as site search, to improve product discovery. B2B companies often have large, complex product catalogs to accommodate detailed product information, specifications, and a large number of SKUs. When evaluating a product catalog for a B2B company, there are several important factors to consider.

Comprehensive and Accurate Information:

The product catalog should provide detailed and accurate information about each product, including specifications, features, pricing, availability, and any relevant technical data.

Rich Media and Visual Content:

High-quality product images, videos, and other visual assets play a crucial role in B2B buying decisions. A good product catalog should include visually appealing and informative media that effectively showcases the products from different angles, highlights key features, and demonstrates their practical applications.

Integration and Real-time Updates:

Seamless integration with other systems, such as inventory management and pricing databases, is essential for maintaining accurate and up-to-date information.

Visual Merchandising:

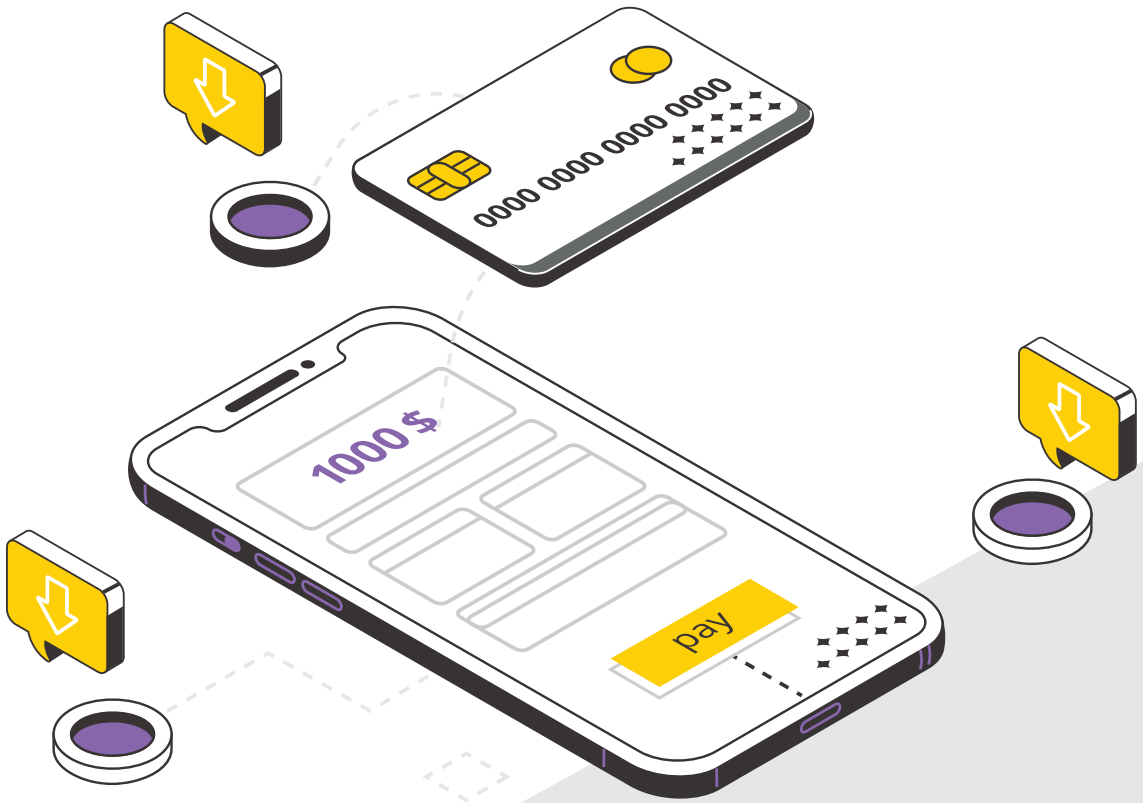
Merchandising plays a crucial role in B2B ecommerce, serving as a powerful tool to engage customers, optimize sales, and drive business growth. By strategically curating and presenting products in a compelling manner, merchandising enhances the overall user experience and influences purchasing decisions.

Secure Payments

Integrating functions such as PO processing, credit authorization, and stored card information enables B2B buyers to complete purchases seamlessly and comply with their own internal purchasing rules and PCI regulations.

Here are a few key features to look for:

- Security and Fraud Prevention: Look for a payments solution that prioritizes robust security measures to protect sensitive customer payment data. Ensure it complies with industry standards such as PCI DSS (Payment Card Industry Data Security Standard).
- Payment Options and Flexibility: Consider a payments solution that offers a wide range of payment methods, including credit cards, debit cards, ACH transfers, and digital wallets.
- Scalability and Future Growth: Ensure the payments solution is scalable and capable of handling increasing transaction volumes as your B2B business grows.



Search Capabilities

B2B companies often have large product catalogs, but they can use site search to help buyers narrow down their search and filter through thousands of SKUs. For buyers, time is money, which means anything you can do to hasten the search process will improve the likelihood of a satisfied customer.

Here are a few key features to make the search experience as convenient as possible:

- Accurate results: The search results should be relevant to the keywords entered by the buyer and provide the most relevant product options available. It's also important to allow buyers to search for products based on SKU or part number.
- Filter options: Filtering results based on product category, price, product specs, and industry ensures the buyer finds a product that best matches their needs.
- Educational content: Buyers will use the search function for more than finding a product. It can be useful to include educational content, such as installation instructions or how-to videos, that will help the buyer make an informed decision.
- Leverage inventory and fulfillment data: With a seamless integration between the eCommerce platform and order management system, you can present relevant inventory data to help buyers make informed decisions.
- Keep in mind that buyers won't be the only people using the search function. Think about how you can optimize search for your sales reps to help them find in-stock products for buyers in real-time.



Complex Pricing & Discounts

An ecommerce platform that can handle complex pricing and discounts can offer a clear and transparent pricing structure, leading to a better customer experience and improved customer loyalty.

Look for an ecommerce platform that can handle:

- Custom pricing: B2B transactions often involve custom pricing structures based on factors such as volume, frequency, region, industry, and specific customer needs. An ecommerce platform that can handle complex pricing allows B2B companies to offer customized pricing options to their customers.
- Negotiated pricing: B2B transactions often involve price negotiations between buyers and sellers. An ecommerce platform that can handle complex pricing allows B2B companies to offer and manage negotiated pricing agreements with their customers.
- Pricing transparency: An ecommerce platform that can handle complex pricing allows B2B companies to provide detailed pricing information to their customers, including discounts, promotions, and other pricing factors.

Account Management Tools

Customer-specific catalogs and pricing add another layer of relevance to the buyer experience. Vendors should also look for capabilities that enable assigning purchasing roles for employees of customer companies, with authorizations and spending limits set at the individual user level.

Specifically, look for a B2B eCommerce platform that allows you to:

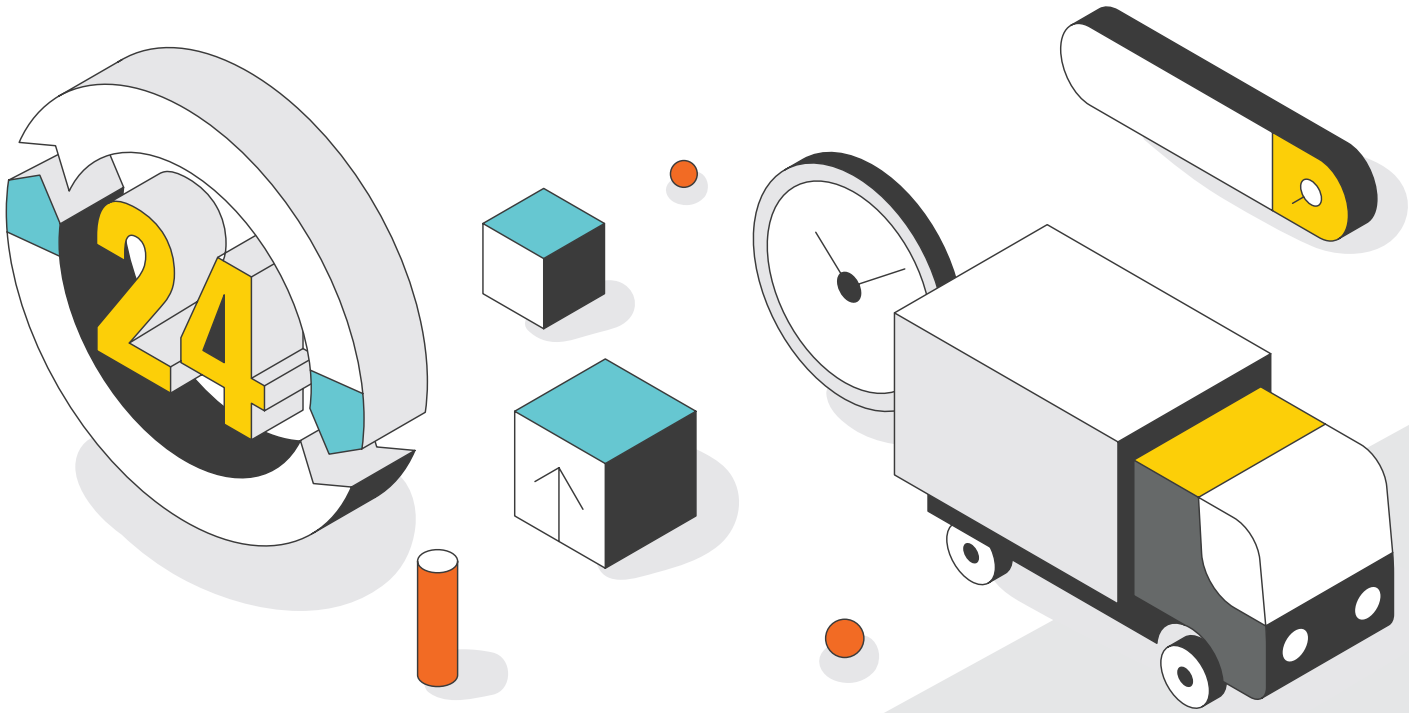
- Set permissions to view, edit or approve customer account data, quotes and contract management.
- Create orders, complete draft carts, or allocate inventory in transit for purchase.
- Enable sales reps to handle replacements, offer substitutions, and give appeasements.

24/7 Self-Service

According to Mckinsey & Company, 71% of B2B buyers are willing to spend more than $50,000 and 27% are willing to spend more than $500,000 in a self-service model. With a significant portion of orders and reorders occurring without the assistance of live sales reps, vendors that offer end-to-end ecommerce enable B2B buyers to buy whenever is most convenient and efficient for their schedules.

A self-service corporate account feature provides important functionality that enables sellers to create and manage corporate accounts for multiple buyers across an organization. Buyers can access specific pricing and purchasing options unique to their account and assign user roles to various buying team members within their organization.

Self-service accounts empower buying groups to independently manage their buying needs. By providing account and order data in one central location. It's all about simplifying the purchase process so that complex orders that require multiple decision makers can be completed more quickly.



Checkout Built for B2B Buyers

Integrating functions such as PO processing, credit authorization, and stored card information enables B2B buyers to complete purchases seamlessly and in compliance with their own internal purchasing rules. Stored order histories streamline replenishment ordering.

Quotes

Quotes serve as customized offers or proposals provided to potential customers or existing clients, outlining the pricing, product details, terms, and conditions specific to their requirements. A quotes functions allow buyers and sellers to create, request, and negotiate quotes based on roles and permissions, even multiple quotes at the same time.



Bulk Order and Quick Order

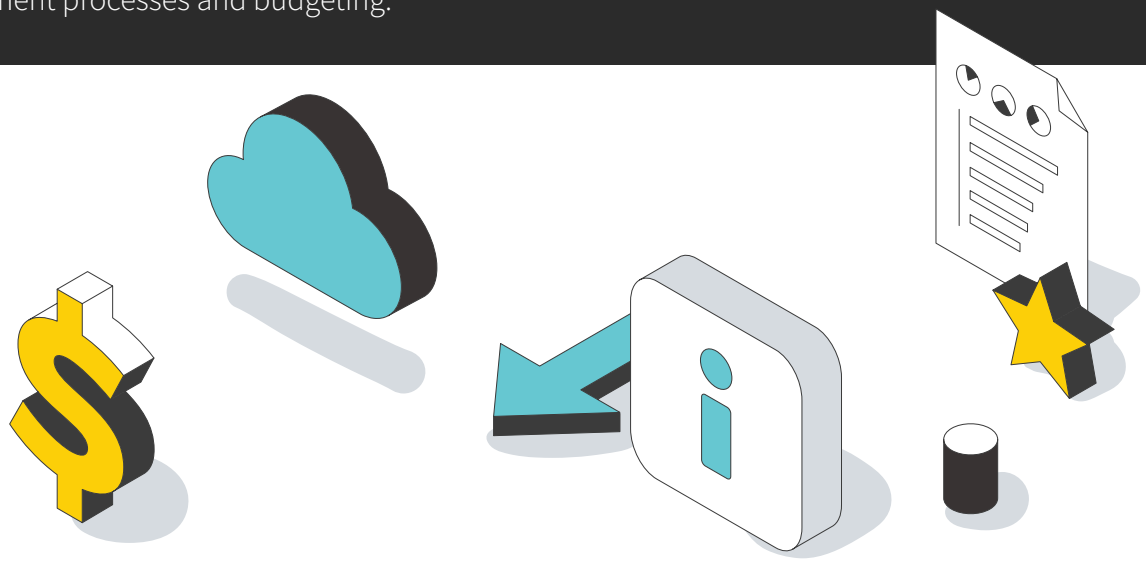
B2B buyers are looking for a seamless purchasing experience. Bulk order and quick order features can help businesses differentiate themselves by offering a convenient and efficient ordering process, leading to higher customer Loyalty and satisfaction.

One of the most significant benefits of these features is time-savings. B2B buyers often need to purchase large quantities of products on a regular basis. Bulk order and quick order features allow them to quickly add multiple items to their cart and checkout in a fraction of the time it would take to individually select each item.

Subscription & Recurring Orders

A B2B subscription model allows buyers to pay a recurring fee to access a specific product or service. The subscription may cover various offerings, such as software licenses, cloud-based services, professional memberships, maintenance and support contracts, content subscriptions, or access to specialized tools or resources.

The benefits of the B2B subscription model include predictable and recurring revenue streams for the provider, as well as convenience and cost-effectiveness for the customer. B2B buyers can access the subscribed products or services on an ongoing basis without the need for frequent repurchasing, streamlining procurement processes and budgeting.



Leverage Backend Systems to Drive Better Frontend Experiences

Buyers are placing greater importance on transparent and accurate delivery experiences, which requires seamless integration between ecommerce platforms and order management systems. When evaluating ecommerce platforms, look for a solution that seamlessly leverages backend operations to drive better frontend experiences with features like:

- **Prioritizing real-time delivery information and cross-channel inventory visibility.**
- **Supporting intelligent order sourcing and orchestration.**
- **Improving order fulfillment and leverage analytics for operational efficiency.**

Conclusion

Building a robust tech stack for B2B omnichannel buyer journeys is pivotal for ensuring seamless transactions and unparalleled buyer experiences. By integrating scalable and composable order management and ecommerce solutions tailored to the unique needs of B2B interactions, businesses can streamline operations, enhance visibility across channels, and foster long-term relationships with clients.

Embracing innovation in technology not only optimizes order fulfillment processes but also empowers enterprises to stay agile and responsive in the dynamic landscape of modern commerce. Ultimately, the strategic implementation of a tailored tech stack not only drives efficiency but also positions businesses at the forefront of innovation, poised for sustainable growth and success in the competitive B2B marketplace.

About Kibo

Kibo Commerce is a composable commerce platform for retailers, manufacturers, distributors, and wholesalers who want to simplify the complexity in their businesses and deliver modern customer experiences. We are the only modular commerce platform supporting experiences that span Order Management, eCommerce, and Subscriptions. Companies like Zwilling, Ace Hardware, and Coastal Construction trust Kibo to bring simplicity and sophistication to commerce operations and exceed customer expectations.

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