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The People of the Manufacturing and Distribution Buyer Journey

How to Engage Every Step of the Way

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Understanding the customer journey – and your internal team's journey – is critical in B2B industries like manufacturing and distribution. The B2B journey isn't identical to the B2C journey, and is much more complicated due to the number of decision makers involved. The process isn't over after a purchase it made – it's often ongoing and recurring, making the B2B journey less linear than B2C.

B2C	B2B
Decision by One	Decision by Many
Personal Budget	Company Budget
Impulse Buys	Researched and Thoughtful Purchases
Shopping	Buying
Commodities	Complex Goods and Commodities
Self-service	Sales Relationships

When you consider the B2B experience and how you can improve it, you must think about each person in the buying journey, what their job is, what their role is, and how they fit into the overall purchasing process.

This guide profiles the key people involved in the manufacturing and distribution buying journey and identifies:

- The various roles in play – both external and internal
- What each role needs to perform effectively
- How you can improve each role's buying experience

The Roles

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Role 1: The Researcher

INTERNAL AND/OR EXTERNAL

External – Subject Matter Expert

VERTICAL

OEM, Trades, Speciality Manufacturing

EXAMPLES

Engineer, Contractor, Plumber, Nurse

One of the most important roles in the B2B buying process is a researcher. This person understands their business, and is looking for a solution to a specific problem.

The researcher is the subject matter expert, but may not ever place an actual order. The more technical the job, the more likely she is to be making the purchasing decision and selecting the products.

[1] Google
[2] Google

The Search for Information

When looking for the answer to her problems, it's not uncommon that the researcher starts with a search engine. In fact, 71% of B2B researchers start their research with a generic search.[1] She is searching by product name or capability, and typically does not search by looking for a specific manufacturer or distributor. In fact, she'll typically conduct an average of 12 searches before visiting a specific brand or supplier site.[2]

Knowing she's starting her search online, you'll want to provide her with high-quality information that helps her solve her problem and find the right product. It's not enough to just create the content, it needs to be easily searchable. Consider using a combination of search engine optimization, pay per click, or a social strategy to drive a researcher to your information. The good news is, once you've established a loyal relationship with her, she'll continue to rely on you in the future, and skip the Google search.

In-person Interaction on Demand

If the researcher can't find the information she's looking for on your site, she may be forced to pick up the phone and call you. Not because she wants to, but because she has to. Your sales team may see this as an opportunity to get in front of the client, but the truth is, the researcher may not have time for that. Make in-person interactions with you something the researcher can choose to do, not be forced to do.

Support through the Purchase and Beyond

Before she's ready to buy, the researcher may have requested samples, either online or from her interaction with you, tested them out, and made adjustments. But instead of actually purchasing, she'll likely add products to a buying list or a Bill of Material.

At this point, the interaction may shift to a buyer, who will be charged with taking that list of products and purchasing them. How can you make providing that list even easier? Can you tie it directly to what you quoted the researcher? You want that handoff experience to be as seamless as possible for both personas.

The B2B buying journey never stops after purchase. It becomes a cycle of buying, re-buying, and ongoing support. If the researcher runs into challenges with the product, she should have installation guides and troubleshooting guides available on her mobile device, so she can easily access them on the job. Also, provide easy access to subject matter experts on your end to help her one on one with her purchase, whether it be by phone, online, or in person. Giving her access to interact via her preferred channel is key.

Interacting with the Researcher

What She Does

- She's a subject matter expert in her field
- She selects, tests and specifies products that are used with her projects and jobs
- She doesn't usually place orders for products but might if on a job or in a rush

What She Needs

- Searchable information that educates her on ways to solve her challenge and drives her to your site
- Access to information that helps her narrow her search and that is accurate and relevant to her buying journey
- An easy way to request samples or request a quote
- The means to move between an online and a personal experience without interruption

Where You'll Reach Her

Depending on her job, the researcher may spend more time at her desk than people in other roles. However, she most likely moves between her desk and other locations, meaning she'll need a seamless experience between her desktop and mobile devices.

What You Can Provide to Make Her Job Easier

- A good and intuitive search experience that starts at the search engine level and continues on your site
- Content that is relevant from the start of her buying journey to the end of her journey, including solution information sheets, technical specifications, MSDS, CAD and more to help her make the right decision
- The ability to create and manage lists allowing her to request a quote or order samples
- A user experience that is relevant to her needs across devices

Role 2: The Buyer

INTERNAL AND/OR EXTERNAL

External

VERTICAL

All

The buyer is one of the most common personas in the digital commerce journey. His primary role is to purchase the products he is told to purchase or is responsible for. It's not unusual to have more than one buyer at an organization, each overseeing different products.

While he is always buying, he is not always shopping. In many cases, he is not the decision maker and is only buying what the researcher tells him to buy.

Reduction in Unnecessary Communication

The buyer is often limited in the decisions he can make and often defers to a senior buyer for approvals and purchasing direction. He's interested in price, order status, and buying the products he's authorized to purchase. He may interact with the researcher in addition to a senior buyer for purchasing instructions and approvals.

He needs access to the information to do his job as efficiently as possible without having to pick up the phone or send an email. While he needs proactive communication regarding orders, shipping, and price, he wants it presented in a streamlined way with all the information he's searching for in one place, similar to a B2C experience. In fact, 73% of B2B buyers say they want a personalized, B2C-like customer experience.[3]

Familiar Tools to Improve Efficiency

The buyer commonly reorders products that are used on a regular basis. To streamline repeat processes like this, he wants the ability to easily reorder and make adjustments to his order if necessary. He may want to revise the quantity, shipping specifications, or frequency of orders without interacting with another person. He wants a system he is familiar with where he can go in, make the necessary adjustments, and reorder those products with the click of a button.

Capabilities for Collaboration

In many cases, there are multiple buyers within an organization that are placing orders with the same supplier. It's not uncommon that buyers purchase specific products, but each buyer is making his or her own individual purchase order. To streamline the purchasing process and improve engagement with that organization, the buyer would like the ability to create a shared purchase order where his items are still under his name, but he's saving money on shipping and handling by placing a shared order with other buyers in his organization.

73% of B2B buyers say they want a personalized, B2C-like customer experience.

[3] Accenture

Interacting with the Buyer

What He Does

- Buys the products he is authorized or instructed to purchase
- Commonly reorders products that his company uses on a regular basis
- Has a limit to what he can spend without requiring approval
- Enters orders and follows up on order statuses daily
- Is generally at his desk working and making purchases

What He Needs

- Access to order history and a way to quickly convert a previous order to a new order
- The ability to create a quick order by simply entering part numbers that are familiar to him
- The ability to switch from an online experience to a more traditional means of interaction, without interruption
- The ability to use the ordering system he is used to while interacting with your system

Where You'll Reach Him

He spends the majority of his day making purchases from his desk and not on a mobile device.

What You Can Provide to Make His Job Easier

- A user experience that is unique to his role as a buyer, including access to the information that is relevant to him
- The ability to convert a previous order into a new order without a lot of effort
- A way to create collaborative lists that can be shared by project or by buyer
- Proactive communication about orders, shipping, and issues
- The means to punchout within his existing ordering tools to eliminate order duplication and errors

Role 3: The Senior Buyer

INTERNAL AND/OR EXTERNAL

External

VERTICAL

All

The senior buyer has more latitude with regard to ordering, including having decision-making power over other buyers. She makes purchases for her company, but she can make larger purchases without approval. She may have more authority in selecting alternate products and vendors.

She has approval authority over less-experienced buyers and is interested in proactive communication to eliminate the need to micromanage and constantly check on orders.

Convenient Systems Operations

The senior buyer has more responsibilities than an entry-level buyer, including managing the buyers who report to her. Some of the more routine tasks she oversees are approving purchases for junior buyers, reordering items, and managing budgets. It is important to her that repeatable tasks are automated to free up her time for more critical parts of her job like searching for new vendors, negotiating prices, and managing her team.

Instantaneous Information

Easy access to relevant information is important to the senior buyer, as she shifts from responsibility to responsibility throughout her day. The thought of sifting through all of her orders is not her idea of efficiency and does not make her busy day easier.

She wants to see the orders that are coming through the buyers she oversees, and she wants an easy way to request a quote or check product availability. Eighty percent of buyers say it's important to have easy access to credible product details and information, as well as an easy-to-use website.[4] Rather than sifting through a bunch of catalogs, she wants to be able to see and filter the products that are relevant to her.

There are times when she may need to deviate from the subject matter expert's product choice and decide to buy from another vendor, or may make alterations to a junior buyer's order. She needs to be able to access the information that can help her make those decisions. In addition, the senior buyer may need to be more knowledgeable about the products she is buying. Though she can rely on the expertise of subject matter experts, she may also need to know information such as safety specifications, technical limitations, and regulatory compliances that will come with placing certain orders.

Proactive Communication

Since she is regularly interacting with the researcher, junior buyers, and vendors, the senior buyer needs a way to constantly stay informed about her orders. She's always looking for a better price and improved service, so researching other vendors is a big part of her job. She wants to be informed when current or potential suppliers have promotions or are offering deals. She wants to know when a shipment is delayed or there is an issue with an order. And most importantly, she wants this data before she has to search for it. Proactive communication is key to providing a smoother experience for the senior buyer.

[4] The Future of Commerce

Interacting with the Senior Buyer

What She Does

- Buys the products she is authorized to purchase for her company, as well as source new products and vendors
- Can make decisions regarding what she spends without getting approval from a superior
- Spends a lot of time reviewing and approving orders that have been placed by junior buyers and others within the organization

What She Needs

- Information from her vendors about ways she can save her company money
- Proactive communication regarding changes in orders status from her vendors
- An easy way to request quotes and special pricing, as well as check product availability and order status
- An easy process to approve orders that have been placed by other buyers at her organization

Where You'll Reach Her

She is generally at her desk working and making purchases. She rarely uses a mobile device to do her job.

What You Can Provide to Make Her Job Easier

- Approval workflows that make reviewing and approving others' orders easier and more efficient
- Tools like collaborative list management that allows multiple buyers to combine orders and reduce shipping costs
- Communication through vendor notifications that proactively keep her knowledgeable and informed without needing to ask

Role 4: The Field Service Technician

INTERNAL AND/OR EXTERNAL

External/Internal

VERTICAL

All

EXAMPLES

Engineer, Contractor, Plumber, Nurse

You may find a field service technician at your own organization as an internal role, or he may be an external role with your customer. Either way, his journey is very important.

He's out in the field, addressing issues and fixing products and often feels disconnected from others in his organization. He wants access to the content he needs to do his job – such as installation guides, manuals, and other content he can download to a mobile device – but it can be very frustrating when access to this information is difficult outside the walls of his organization.

[5] Field Technologies Online

An Excellent Mobile Experience

A field service technician is always on the move. He is often traveling from one location to another throughout the day, and he never knows what his schedule will look like. He's out in the field addressing issues with products or equipment, not sitting at a desk, so his mobile experience is vital. He doesn't have time to log in to a website or call in for information – he wants to find what he needs and download it to his device. So it's a wonder that 52% of service companies still do things manually with paper logs and checklists.[5]

The Right Information for the Right Job

The field service technician needs to know what equipment his customer has and what parts and information he might need for his day. He wants easy access to installation guides, manuals, and other product information without searching through multiple platforms.

Convenience is Key

As the field service technician goes about his day, he's constantly fielding calls and dealing with unexpected issues. He may need to shift his priority quickly, and he needs the tools to do it. Providing a responsive experience that can keep up with his ever-changing schedule is key. He needs an easy way to locate products, check availability across multiple locations, and choose the most efficient way to retrieve the items he needs based on his geographic location.

52% of service companies still do things manually with paper logs and checklists.

Interacting with the Field Service Technician

What He Does

- Addresses issues with products and/or equipment in the field
- Fixes problems as they come up, and may not have a lot of control over his day and where he will be from moment to moment
- He may work for a manufacturer, distributor, or for a customer

What He Needs

- Access to relevant information from his mobile device, including the ability to download content
- The ability to use the tools at his disposal to scan a barcode or snap a picture for help ordering the right replacement part
- An easy way to shift from an online mobile experience to a personal experience when he needs help
- An easy way to locate product availability across warehouses based on his geographic location

Where You'll Reach Him

He is usually out in the field addressing product and equipment issues. He is rarely sitting at a desk and thus relies on mobile devices.

What You Can Provide to Make His Job Easier

- An easy way to access information that relates to the equipment or products he is servicing
- Complete and accurate product information including technical specifications, troubleshooting guides, and more
- The ability to see product availability near to where he is and if it is available for pickup
- A mobile app that allows him to narrow his search by scanning barcodes or snapping pictures

Role 5: The User in the Field

INTERNAL AND/OR EXTERNAL
External

VERTICAL
Trades

EXAMPLES
Plumber, Contractor, Builder, etc.

You never know where you'll find a user in the field. In fact, even he usually doesn't know where he'll be on a daily basis. A common role in the trades, he is usually out working on a job. He may begin his day going to a supplier or picking up materials. He primarily relies on a mobile device to do his job, as he's rarely at a desk.

Easy Access to Information

A user in the field has many different responsibilities, and his day is never the same as the one before. Maybe he's a researcher when he's at his desk, but out in the field, he's a user who needs to access information quickly and efficiently. On site, he may need manuals, installation guides, or other content that could help with the product he's working with at that moment. He may need to look up product availability across various warehouses or view a customized catalog for easy reordering. He doesn't want to sift through a bunch of irrelevant content; he wants the information he's looking for to be available and easily accessible on any device they may be using. He is often on a mobile device, so he would benefit most from a customized user experience or a mobile app. Mobile use by B2B workers is expected to increase from two hours a day to three by 2020.[6]

Communication on the Job

The user in the field spends a lot of time away from his desk, and he often encounters unexpected situations that need immediate attention. Maybe he runs out of an item on the job site, or a location changed and he needs to reroute a delivery. Whatever the case, he wants to be able to communicate his needs to the rest of his team or his supervisor. It's not uncommon for a user in the field to be writing down items to be reordered as he goes about his day. He needs a quick way to relay those needs to his supervisor without having to give him a piece of paper or send an email. A system where he can put in requests, document order needs, and keep in touch with the rest of his team will go a long way in streamlining his day-to-day tasks.

A Buying Process That Fits His Needs

A user in the field may have relationships with people at the physical office location. He may start an order online, hit submit, and move on. Or, he could begin his order online, print his order list, and abandon his online cart to take the printout to your city desk in person. Why didn't he finish that order online? Because maybe part of his day is going to the office and interacting with the team in person. If he's constantly on the move, it may be more convenient for him to order in person.

He wants the ability to make his purchase wherever and whenever he wants. That's why you need to look at your customer data both online and offline to really understand your individual customers' buying process. Step back and look at the whole picture, rather than assuming cart abandonment or lack of online ordering is a failure. Providing a personalized purchasing journey is essential to the user in the field's overall experience.

[6] Google

Interacting with the User in the Field

What He Does

- He is a subject matter expert in his field
- Is often sent to a job site by his supervisor
- Carries his equipment and supplies with him, but others might need to be picked up or delivered to the site

What He Needs

- Availability of the parts and supplies needed for the job
- Manuals and installation guides when he is dealing with something new
- Access to information on a mobile device
- An easy way to determine product availability across warehouses based on his geographic location

Where You'll Reach Him

Most of his day is spent working at a job site. He is rarely sitting behind a desk and must rely on mobile devices. He may not know where he will be from one day to the next.

What You Can Provide to Make His Job Easier

- Collaborative project lists that are accessible from his computer and mobile device
- The ability to access manuals and product-specific content and download it to his mobile device
- The ability to quickly reorder a product without a lot of effort

Role 6: The Manufacturing Sales Rep

INTERNAL AND/OR EXTERNAL

External Sales

VERTICAL

Manufacturing

A manufacturing sales representative is an independent seller who represents manufacturers and their products, but is not a direct employee of any manufacturer. He often represents a series of complimentary manufacturers, but generally not competitors.

An integral part of the business, he has the best interests of the manufacturers he represents in mind. He is very knowledgeable about the products he represents, and is often considered to be a trusted advisor by both customers and the sales channel.

Easy Access to Internal Information

Since he isn't an internal team member, the manufacturing sales representative doesn't automatically have access to the information he needs. He needs to be able to search for and utilize data that isn't on a public-facing website, so he really needs some kind of portal experience to help him do his job.

His clients want instantaneous information, but without access to product information and data, he'll have to contact multiple people in the organization to gather what he needs. This creates transactional intensity and wastes time and resources. You need to look at him as an extension of your business, and provide an internal system for him to access what he needs in an easy format.

Equipment to Do the Job

In addition to his need to access data, the manufacturing sales rep will also need the materials to support his job functions. He may need to request samples, get quotes, or check out demo equipment. He needs access to sales materials and product information so he can best represent your product. Requesting demo equipment or samples is not something an outside customer may ask for, but a manufacturer's rep may require those capabilities. You need to think about how your commerce and digital experiences can support those needs. But because of their reliance on channel partners, B2B vendors are having difficulty delivering a more personalized, B2C-like experience. In fact, 84% don't have visibility into sales partner opportunity pipelines, and just 21% have total control over their sales network and overall customer experience.[7]

The Data to Back it Up

In addition to product information, your manufacturing sales representative needs relevant customer information. He needs easy access to see what is happening with your customers in person and on your site. What are those customers ordering? When did they order? This data will help him do his job more effectively and provide custom experiences for your customers.

[7] Martech Series

Interacting with the Manufacturing Sales Rep

What He Does

- Works for an external organization as a sales representative
- Represents a select group of manufacturers as an external part of their sales team
- Only gets paid when he sells products – he can sell them himself as a direct transaction, or through a channel that he works with
- Many manufacturers he works with consider him to be part of their internal team even though he is not

What He Needs

- A single system to connect to that gives him all the information he needs to do his job
- An easy way to request samples, quotes, and other relevant information
- An easy way to order demo equipment when he needs to show a customer or train the channel
- Access to customer data and ordering that is happening both online and offline

Where You'll Reach Him

He is often in the field and may be interacting with the manufacturer's CRM, commerce platform, and other tools the manufacturer provides.

What You Can Provide to Make His Job Easier

- A commerce portal with access to information that makes it easy for him to do his job
- Complete and accurate product information including images, documentation, and more
- An easy way to prepare a list of products that a customer should use on a project or products that are new
- The ability to self-serve to see order history, product availability, and other data this is relevant to him and the customers he serves
- The ability to see sales information relevant to his customers

Role 7: The Direct Sales Representative

INTERNAL AND/OR EXTERNAL
Internal

VERTICAL
Manufacturing and Distribution

A direct sales representative works for a manufacturer and represents only that organization. Her role is to meet with customers, support the distribution channel, and sell her organization's products. It is common for the direct salesperson to go on joint sales calls with her channel partners, or even make sales calls herself. After all, her only responsibility is to sell the products she represents.

The direct sales representative spends a significant amount of time supporting the distribution channel as it is really an extension of herself. If the channel is engaged and focused on selling his products, she is able to cover more ground than she would be able to on his own. Knowing what her customers are purchasing is often reported through a point-of-sale report that confirms where products are being shipped.

Accessible Information

A direct sales representative is often out in the field working with customers and supporting her channel partners. She often uses her laptop to do product demonstrations, but she'll use her mobile device when on the move. She also needs a way to request samples and request quotes for her customers. Eighty-two percent of B2B decision makers think sales reps are unprepared, and she needs to have the right information at the right time to ensure she appears capable and prepared.[8]

Providing Personalized Data

The direct sales rep only needs visibility to her customers and channel partners' sales data. Providing access to relevant product information is critical, as is access to the customers she's allowed to work with and the information and supporting content she needs to make the sale.

The Tools to Market Smarter

Tools like promotions, thought leadership content, and a list of potential products are good assets for a direct sales representative to present when meeting with a repeat customer. But she may also have products that could appeal to other areas of that customer's organization. Without having a relationship established, it can be difficult to know how to appeal to other groups. She wants the ability to market more efficiently to groups like engineers, buyers, and subject matter experts by presenting information that is relevant to them. She wants a commerce site that can help her sell more products by utilizing it as a tool to expand her relationship with an organization. The ability to use marketing to more strategically target prospects is very important to her.

82% of B2B decision makers think sales reps are unprepared.

[8] Sirius Decisions

Interacting with the Direct Sales Rep

What She Does

- Works directly for the manufacturer
- Only sells products that the manufacturer she works for produces and makes available in her territory
- Gets paid regardless of if she sells products or not, but sales performance is an important part of her job

What She Needs

- Access to information and sales content that helps her sell the products she represents
- An easy way to request samples, quotes, and other relevant information
- An easy way to order demo equipment when she needs to show a customer or train the channel
- Access to customer data and ordering that is happening both online and offline

Where You'll Reach Her

She is usually out in the field working with her customers and channel partners. When not in the field, she is often working at out of a remote office, including her home if necessary. She uses her laptop to access data, as well as her mobile device.

What You Can Provide to Make Her Job Easier

- Access to sales data that is relevant to her and her customers is key, including notices and communication about her customers' orders
- Complete and accurate product information including images, documentation, and more
- A list management tool that makes it easier to share new products with customers, or prepare a list of products for a project
- Solutions that are optimized for both her laptop and mobile device

Role 8: The Distribution Sales Representative

INTERNAL AND/OR EXTERNAL
External

VERTICAL
Wholesale Distribution

A direct employee of a distributor or wholesale organization, the distribution sales representative is responsible for selling the products her company sells. She is often responsible for a specific territory and the customers that reside within that territory.

Distributors generally represent multiple manufacturers with different product types and lines, so she may not be very familiar with all of the products she is trying to sell. She needs quick and easy access to extensive product information so she can present accurate and detailed facts to her customers.

Less Reactive, More Proactive

As the liaison between her customers and the manufacturers she represents, the distribution sales rep spends a lot of her time chasing orders, checking on deliveries, and doing other, non-sales-related activities. Studies have shown that reps spend only 32% of their time selling, with the remainder spent on admin tasks.[9] Responsibilities such as these can take up a lot of her time, and she isn't able to be as proactive as she'd like. To improve her experience, she needs a way to automate redundant tasks, improve communication channels with her customers, and access information quickly. So rather than fielding calls from annoyed customers wondering where their orders are, she can provide updates before those questions come in. She needs a 360-degree view of all the orders she's overseeing and answers to the questions before her customers ask them.

Data to Improve Personalization

Product and customer data are major assets to the distribution sales representative. When representing a manufacturer, she often has to sell the majority of the products they produce. It's impossible for her to be an expert on every product and each line, so manufacturers need to ensure they can make it easy for her to get the right information to sell better and answer the questions of her customers. She is always wondering if her customers are happy and how she can provide even more support.

Extra Capabilities

When presenting products to her buyers, the distribution sales rep may have additional needs beyond product specs and the content that is accessible in the eCommerce site. She needs the ability to request samples, get custom quotes and special pricing, or check out demo equipment to strengthen her sales strategy. These capabilities are not commonly available to other members of the distribution team, but to enable her to do her job and improve her relationships with the organizations she's selling to, there needs to be a system in place where she can easily make these requests.

Reps spend only 32% of their time selling, with the remainder spent on admin tasks.

[9] Docurated

Interacting with the Distribution Sales Representative

What She Does

- Works for a distributor that sells many different products from different manufacturers
- Is responsible for sales that occur within her geographic region
- Is out in the field working with her customers and manufacturing partners
- Uses her laptop to access data, but also uses her mobile device
- Spends most of her time chasing orders, checking on deliveries, and other unproductive activities

What She Needs

- To feel supported out in the field with an easy way to access the product information and sales content that is necessary for her to do her job
- An easy way to request samples, quotes, and other relevant information
- An easy way to order demo equipment when she needs to show a customer
- Access to customer data and ordering that is happening both online and offline

Where You'll Reach Her

She may be at her desk, but she is most often out in the field working with her customers and manufacturing partners. She uses her laptop to access data, as well as her mobile device.

What You Can Provide to Make Her Job Easier

- A commerce system that provides access to relevant product information including sales materials
- A solution that makes it easy to request quotes in real-time and order product samples
- An easy way to prepare a list of products that a customer should use on a project or products that are new
- The ability to see the sales information relevant to her customers

Role 9: The Customer Service Rep

INTERNAL AND/OR EXTERNAL
Internal

VERTICAL
Manufacturing and Distribution

EXAMPLES
Inside Sales Representative
Customer Service Representative

A customer service rep (CSR) is a typical role at both manufacturing and distribution companies and is the center of a B2B buyer's journey. The CSR supports the outside sales team and communicates with customers through multiple channels.

This person may be very knowledgeable about the products they sell, but easy access to information is a crucial component to her customer support initiatives.

[10] Drift

Accessible Data at Every Touchpoint

The CSR is talking to customers all day long. She's constantly reacting to issues and tracking down information, and she needs a way to access the data she needs without flipping between multiple data systems.

To provide a better customer experience with more efficiency, she needs a complete view of customer data and orders that are taking place both online and offline. Think about all the data and different systems that she accesses and see what integrations can be made on the back end to present relevant data from multiple systems in one complete view.

Technology to Get the Job Done

There's a lot of redundancy in the tasks the CSR handles on a daily basis. When orders are placed over the phone, via email, or through fax, she is responsible for re-entering those orders into the manufacturing and distribution systems to be fulfilled. Introducing a system that can digitize tasks such as these will reduce unnecessary calls and tasks and allow her to focus on more high-value client inquiries.

Identify which technologies can help the CSR accomplish these high-value tasks. What types of programs can you implement to help her cross-sell and up-sell? How can she better introduce customers to new products? How can you help her target the right customers with the right products? Many customers don't want to have to pick up the phone to interact with a service representative, but also dislike how long email communicatoin can take. New technology such as live chats are an effective way to enable customers to interact with CSRs the way they want, when they want. In fact, 22% of the fastest-growing B2B companies have a live chat widget on their website.[10]

Streamline with Self-service

Digitizing order information and eliminating redundant tasks into a system not only impacts the CSR, but the customers she serves. By creating a holistic view of data and order information, customers can better self-serve. Rather than calling, emailing, or chatting with the CSR, they can access the information they're looking for such as order status, availability, and history.

By simplifying the transactional intensity that the CSR faces with these multiple communication channels, she will be able to dedicate her time to helping more high-priority customers with more complex problems. If a customer is experiencing issues with your commerce site or cannot find the information they need there, they may need to interact with a CSR for more advanced help. If she's tied up with low-value tasks, she won't be available at those critical times, and that customer's journey will be negatively impacted.

Interacting with the Customer Service Rep

What She Does

- Spends her day at her desk dealing with the order issues of customers and salespeople
- Addresses issues via phone, fax, email, chat, and more
- Gets interrupted all day long and is often putting out fires
- Serves as an internal team member supporting the outside sales team
- May be very knowledgeable about the products she sells, especially if she is at a city desk

What She Needs

- An easy way to access the information she needs that is often spread across multiple systems
- A better way to process orders and provide information to customers so she can help with higher-value interactions
- A way to automate manual orders that eliminates the need to re-enter orders that come in through fax and email
- Access to customer data and orders that happen both online and offline

Where You'll Reach Her

She is at her desk most of the day dealing with customer issues, salespeople, and checking information on order inventory, availability, and pricing. She may be using multiple systems across multiple screens, and communicating with customers through a variety of channels.

What You Can Provide to Make Her Job Easier

- A simple interface that provides a 360-degree view of the customers she serves
- Tools like PunchOut or order automation to eliminate the need to re-enter manual orders
- The ability to interact with customers on their terms via phone, chat, email, and more
- Tools like list management that allow her to help the customer along the buying journey

Role 10: The Financial Team Member

INTERNAL AND/OR EXTERNAL

External

VERTICAL

All

EXAMPLES

Accounts Payable

The financial team member is a crucial part of every B2B business. He steps in after the purchase has been made and shipped, and is interested in whether that order was received, the order was correct, and that the agreed-upon price was upheld.

He is less interested in how the order was placed, and he focuses more on the monetary consequences associated with each order. He needs to have access to information across multiple channels to keep the books accurate.

[11] DemandGen

Finding the Right Information

Inaccurate data is a hindrance to the financial team member, and 30% of B2B organizations say that internal finance teams are most impacted by unreliable data.[11] The financial team member needs access to the information relevant to his job without having to search through multiple systems and unrelated information. He is interested in order history, payment confirmation and invoices, and delivery confirmations, and he needs this information to be readily available and accurate.

A commerce solution can help him get that information quickly and efficiently so he can move on to the next task. He has to keep track of financial data from multiple organizations, and that means the information he needs is often spread across multiple systems. The information he's looking for needs to be presented to him in a more condensed way so he doesn't waste time sifting through irrelevant data.

Self-service for Efficiency

It's crucial that this individual be able to access information without picking up the phone and asking for assistance. If he needs to pay an invoice online, get a copy of an old invoice, or view updated invoices that have changed since his last review, he wants to be able to easily find those documents in one platform.

By enabling him to self-serve and eliminate the unnecessary task of tracking down disparate information, he can devote more time to tracking spending and ensure no pricing mistakes are made.

Influencing Commerce Change

Making a case for adapting to an eCommerce system can be difficult without internal buy-in. The financial team member can be one of the most influential champions for this transition. He needs to ensure that all financial transactions are being carried out without error and are well documented. An eCommerce solution can be a powerful tool for him because he will have access to all the information necessary to do his job. He can help with the adoption and onboarding as you move to a digital channel and increase your availability to your customers.

30% of B2B organizations say that internal finance teams are most impacted by unreliable data.

Interacting with the Financial Team Member

What He Does

- Reviews purchase invoices and compares what the company is being charged to what the company has received
- Works to ensure that the company is paying the right price and will often compare invoices against quotes
- Deals with late payments and other issues when there is missing information

What He Needs

- The ability to self-serve with the vendors he is responsible for paying without doing a lot of extra work
- An easy way to verify that everything was received as expected and that the charge price lines up
- An easier way to get copies of invoices that don't make it to his desk or perhaps change because of a return

Where You'll Reach Him

You'll often find the finance member at the customer's location. He may be an accountant, an end user, or a part of the original equipment manufacturer organization. He's often accessing various systems and using multiple screens to get information.

What You Can Provide to Make His Job Easier

- Access to order history in order to verify past purchases, pricing, and delivery information
- An easier way to access invoices and the means to pay them online
- A way to review quotes to verify the price charged matches the invoiced price

Role 11: The Merchandiser

INTERNAL AND/OR EXTERNAL
Internal

VERTICAL
Manufacturing and Distribution

EXAMPLES
Product manager, Product marketer, Marketer, etc.

The B2B merchandiser role can be filled from many different functional roles within an organization, including marketing, product marketing, or even product management. The more complex the products, the more likely this role will be filled with a technical resource rather than someone from marketing.

In a manufacturing organization, the role of the merchandiser may include the design and build of the actual product itself, all the way down to releasing the product for sale, training, and the total product lifecycle. This same person may be responsible for defining the product family hierarchy, inventory levels, and product accessories.

A Way to Manage Relevant Product Data

The merchandiser is responsible for really managing and merchandising products, whether in the form of digital or traditional catalogs. He may be involved in designing the products, or may just handle the aspects of the products they manage, including content, video, and product details and copy. He's working in the digital commerce solution or in a product information management (PIM) system within your organization, so it's important that when laying out your system, you think about your merchandiser and how his role fits in. Think about how he will interact with the system and create an experience that is easy for him to work in to provide the critical product information that makes your customer experience the best it can be.

Reducing Redundancy

The data he works with will need to be accessible across multiple platforms for different use cases throughout the buying journey, and it's his job to ensure it's presented in a way that best fits the needs of the user at that time. He doesn't want to manage product information in multiple systems; he wants to input data in one system and then allow it to be distributed, updated, and edited across the other integrated platforms. Eighty-seven percent of shoppers stated that they have left a B2B site to conduct research around a product, usually because the product description or information did not meet their needs.[12] He wants to be able to minimize the redundant functions that come with entering data into multiple systems to reduce the margin for error.

Easy Catalog Creation

One of the things a merchandiser needs to be able to do is to make customer-specific catalogs that showcase approved products with specialized pricing for those customers. He needs a system that enables him to create multiple variations of these catalogs to fit specific organization needs, price restrictions, and industry. Providing a system that allows him to sort and categorize his products with tags and make edits when creating these catalogs is a vital part of providing a personalized customer experience.

87% of shoppers stated that they have left a B2B site to conduct research around a product.

[12] Forrester

Interacting with the Merchandiser

What He Does

- Is responsible for all aspects of the products that he manages including content, videos, images, and more
- Sets the new products up in the ERP, PIM, or other systems where he manages product information in his organization
- Decides the sales information about his products for both online and traditional channels
- Trains sales teams and others about his products to enable them to sell them

What He Needs

- A single location to manage product information and data to make his job easier
- The ability to add and modify product information and keep track of the revisions
- The ability to create both digital and print catalogs for sales and his customers
- The ability to create catalogs that are relevant to customers and his sales team by product line, customers, vertical, and more

Where You'll Reach Him

He is often working at his desk, and rarely relies on a mobile device to do his job.

What You Can Provide to Make His Job Easier

- A PIM solution that is designed to manage all aspects of the product data
- An eCommerce tool that allows him to introduce and promote new products

Role 12: The Marketing Manager

INTERNAL AND/OR EXTERNAL

Internal

VERTICAL

Manufacturing and Distribution

The marketing manager plays an important role in the B2B eCommerce journey at both manufacturing and distribution companies. She is most interested in how marketing efforts directly impact both online and traditional sales efforts.

She may run campaigns and assist with promotions as well as help with SEO and other advertising mediums to drive traffic and engagement.

Connection Between Marketing Efforts

Part of her job as a marketing manager is to look for new ways to drive traffic to her site using content and other marketing efforts, while attempting to attract new customers in addition to existing ones. She may oversee the production and management of content, be responsible for advertising efforts, and take the lead in driving traffic to the site. She wants to reduce the redundancy of some of her tasks and streamline her marketing efforts with a marketing automation solution. It's important that she can tie that marketing automation system to promotions, offers, and other content she is producing. It's critical that she is able to connect all the marketing avenues she is managing to ensure that the information she presents to each customer is relevant. The ability to integrate the various systems she uses with her CRM will be instrumental in helping her manage customer data and tying all those experiences together.

Measuring Success and Tracking Results

The future of commerce is all about driving engagement to a site and being able to create connections between every customer experience. The marketing manager wants to know which campaigns are resonating and leading to conversions. She wants to know where the disconnects are happening and why. She is constantly thinking about SEO and how to generate more leads and more opportunities. It's important to her that she find ways to get people onto the site and perhaps order samples or request more information. She wants to engage in some way to feed those opportunities to the sales team. The ability to track and validate that her marketing efforts and budget allocations are driving results is crucial to accessing her success.

A 360-degree View of Data

Having extensive customer data is crucial to a marketing manager. Driving prospects or customers to a site is one thing, but once they log in, she loses visibility. How can she continue to monitor and guide that person's journey? How can she understand if those people are truly abandoning their carts, or if they're actually fulfilling their order through a traditional salesperson, or checking out as a guest? She needs a way to connect all the customer data possible to understand these buying journeys to figure out how she can continue to serve her customers. She's interested in an easy way to manage SEO, pay-per-click, and other marketing activities that are directly tied to commerce activities. Perhaps she wants to see what content a customer accessed before deciding to purchase. Maybe she needs the ability to view what other site activity that customer had before their decision. Giving the marketing manager a global view of customer data will help her streamline her campaign efforts, find disconnects in the marketing strategy, and better target content and promotions to customers.

Interacting with the Marketing Manager

What She Does

- Has the responsibility to drive traffic to the site and increase conversion rates
- Looks for ways to drive more traffic to the site using content and other marketing efforts
- Uses both digital and traditional marketing efforts to drive awareness about her business and get people engaging with the site

What She Needs

- The ability to market to existing customers as well as attract new ones
- A way to tie her marketing efforts to website traffic
- Defined KPIs that help her validate her marketing efforts and budget
- To drive more leads to her business to increase sales

Where You'll Reach Her

She is usually at her desk working within a CRM or commerce system.

What You Can Provide to Make Her Job Easier

- The ability to conduct marketing campaigns that are aligned to content, product, and promotions on her commerce site
- Access to a customer and prospect database that allows her to market
- An easy way to manage SEO, PPC, and other marketing activities her website
- The ability to create landing pages that support her marketing efforts

Role 13: The eCommerce Admin

INTERNAL AND/OR EXTERNAL

Internal

VERTICAL

All

Responsible for the daily operations of the digital business, the eCommerce admin spends most of his day in the back end of the commerce system. He is managing website content and information, managing configuration and parameters, and acting as a liaison between the digital commerce site and the rest of the organization.

He may also be making suggestions for improvements and working with both internal and external technical teams to improve the functionality of the site. He is most concerned with the overall success of the site, as well as transactions and conversions.

An Intuitive eCommerce Solution

As the manager of the eCommerce site, he is very involved in the selection of the commerce technology. He's often responsible for the day-to-day operations of the site, and wants the ability to quickly make and adjust things easily. When choosing a system, he is not only concerned with its ability to provide an exceptional eCommerce experience, but also how intuitive the program is so he can streamline his processes.

Communication is Key

An eCommerce admin's work is never done. Things break, glitches happen, and it's his job to figure out how to fix them. He needs a way to communicate with others in his organization as well as external resources that he relies on to make the site work. He wants to avoid crashing web pages and broken links, and needs to be able to touch base with his team and to do so.

The Ability to Evolve

The eCommerce admin is always looking for ways to improve the eCommerce experience he's providing. He is expected to always align the eCommerce experience with the business needs, and thus he needs the technology to continue to evolve site capabilities to provide customers with the experience they want and need. Seventy-six percent of customers say the most important factor in a website's design is "the website makes it easy for me to find what I want,"[13] and the eCommerce admin wants to ensure the site experience is as intuitive and user-friendly as possible.

He wants the ability to add pages or make changes without relying on an IT professional to do it. He is very involved in not only the success, but also the continual monitoring of the experience that the platform is providing.

> 76% of customers say the most important factor in a website's design is "the website makes it easy for me to find what I want."

[13] Hubspot

Interacting with the eCommerce Admin

What He Does

- Has responsibility for the day-to-day operations of the eCommerce sites he manages
- Adds content and information to the site to improve the overall experience and success of the site
- Works with the product teams to define and manage product information and make sure images are included
- Serves as the commerce liaison between internal and external resources to increase sales on the site

What He Needs

- An easy and efficient way to manage the day-to-day changes on the site
- Tools that make his job easier and give him the means to be successful
- A way to communicate with others in his organization as well as the external resources he relies on to make the site work
- The ability to grow the commerce business and convert more business online

Where You'll Reach Him

He spends the majority of his day working from his desk in the back-end administrator console of the commerce site he manages.

What You Can Provide to Make His Job Easier

- An eCommerce solution that provides him with the tools he needs to manage the day-to-day changes that occur on your sites
- A CMS that makes it easy for him to make ongoing changes
- A solution that makes it easy for him to manage content and information

Those Are the Roles. Now, What's Next?

As you can see, there are many roles involved in B2B industries like manufacturing and distribution, and understanding the various buying journeys is critical. There are multiple decision makers involved, and you need to consider how they each fit into the overall purchasing process.

But understanding the different roles is only one step towards a solution. You also need to:

1. Understand which roles are key to your specific journey
2. Start gathering data to identify roadblocks and find solutions

Are you ready for the next step? We can help.

About Perficient Digital

Perficient Digital blends the strategic imagination of an agency with the deep technical acumen of Perficient's established consultancy background to deliver exceptional customer experiences for the world's biggest brands.

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Karie Daudt has more than two decades of experience in digital commerce, management, and business development in the manufacturing and distribution industry. She helps clients identify problems and works to align them with the right technology solution to fit their needs.