Building The B2B Omni-Channel Commerce Platform Of The Future
New Research on B2B Buyers
Sample List Of Clients

Agenda

➢ Description of the research
➢ Highlights and findings
➢ Key takeaways
➢ Discussion
Large Scale B2B Buy Side Survey

(Numbers may not total 100% due to rounding)
*Base: 930 B2B buyers at organizations in Canada, US, UK, France, and Germany
*Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014
Large Scale B2B Sell Side Survey

*Base: 526 B2B sellers at organizations in Canada, US, UK, France, and Germany
*Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014

(Numbers may not total 100% due to rounding)
Key Findings

› B2C experiences once again driving B2B expectations

› Technology is a critical enabler for omni-channel success

› “Transformation” requires significant organizational and process change too
B2B Buyer Behavior
B2B Buyers Expect To Buy More Online

52% expect to make half or more of their work purchases online in 3 years

Base: 930 B2B buyers at organizations in Canada, US, UK, France, and Germany
Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014
Rising Expectations For Key Functionality

Cross-Channel Visibility

“How important are the following when you are making work-related purchase online?”
(B2B buyers who answered important or very important)

- Look up product information (across any channel): 74%
- View my activities across all channels: 68%
- Return or exchange across different channels: 64%
- Share unified account and order history across channels: 62%

Omni-Channel Fulfillment Options

“How important are the following when you are making work-related purchase online?”
(B2B buyers who answered important or very important)

- Buy from branch; ship direct to me: 73%
- Deliver on the same day: 61%
- Reserve online; pick up from branch: 43%
- Buy online; pick up from branch: 41%

Base: 930 B2B buyers at organizations in Canada, US, UK, France, and Germany
Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014
82% of B2B buyers would buy again from the same supplier because of that supplier’s broad selection.

Base: 930 B2B buyers at organizations in Canada, US, UK, France, and Germany
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Broadest Selection Drives Where B2B Buyers Start

“I typically start my research for products and services I buy for work on an online site because it is:”

- Where I find the broadest selection: 45%
- Easiest to use: 25%
- The most credible source of product details and information: 16%
- Where I already make my personal purchases of products and services: 5%
- Where I consistently find the lowest prices: 5%
- Other: 2%
- Don’t know: 2%
- Where I get the best customer service: 1%

Base: 110 B2B buyers
Source: Q2 2014 Forrester/Internet Retailer B2B Buy-Side Survey
84% of B2B buyers would buy again from the same supplier because of consistently low prices

Base: 930 B2B buyers at organizations in Canada, US, UK, France, and Germany
Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014
“I typically **make my final purchase** of products and services I buy for work on an online site because it is:”

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where I consistently find the lowest prices</td>
<td>24%</td>
</tr>
<tr>
<td>The most credible source of product details and</td>
<td>24%</td>
</tr>
<tr>
<td>Where I find the broadest selection</td>
<td>18%</td>
</tr>
<tr>
<td>Where I get the best customer service</td>
<td>12%</td>
</tr>
<tr>
<td>Where I get the fastest delivery/shipment</td>
<td>6%</td>
</tr>
<tr>
<td>Easiest to use</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>Where I already make my personal purchases of...</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: 94 B2B buyers
Source: Q2 2014 Forrester/Internet Retailer B2B Buy-Side Survey
The B2B Omni-Channel Imperative
72% of B2B companies said that omni-channel customers are substantially more worth to them than single channel customers.

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014
66% believe that B2B customers **expect** omni-channel capabilities today.

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014
54% believe they can drive additional efficiencies and cost savings through better inventory and assortment planning.

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014
Demands For New Platform Capabilities

› Personalization
› Reporting/analytics
› Pricing optimization
› Flexible payment options
› Back-end integration
### Personalization

**How much do you agree or disagree with the following statement? Our eCommerce platform must:**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer support for a variety of channels</td>
<td>75%</td>
</tr>
<tr>
<td>Help us serve multilingual and multinational audiences</td>
<td>74%</td>
</tr>
<tr>
<td>Support product cross-sell, up-sell, and substitute sell</td>
<td>73%</td>
</tr>
<tr>
<td>Provide flexible price lists/catalogs for different users</td>
<td>72%</td>
</tr>
<tr>
<td>Provide user account management</td>
<td>72%</td>
</tr>
<tr>
<td>Provide tools for reporting and analyzing transactions, customer interactions, and effectiveness of campaigns</td>
<td>71%</td>
</tr>
<tr>
<td>Provide product personalization features</td>
<td>68%</td>
</tr>
<tr>
<td>Provide flexible budget and spend capabilities</td>
<td>67%</td>
</tr>
<tr>
<td>Support personalized purchase approval workflows for customers</td>
<td>64%</td>
</tr>
</tbody>
</table>

Base: 526 B2B companies in Canada, US, UK, France, and Germany
Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture and hybris, August 2014
Analytics

“How much do you agree or disagree with the following statement? Our eCommerce platform must:”

- Offer support for a variety of channels: 75%
- Help us serve multilingual and multinational audiences: 74%
- Support product cross-sell, upsell, and substitute sell: 73%
- Provide flexible price lists/catalogs for different users: 72%
- Provide user account management: 72%
- Provide tools for reporting and analyzing transactions, customer interactions, and effectiveness of campaigns: 71%
- Provide product personalization features: 68%
- Provide flexible budget and spend capabilities: 67%
- Support personalized purchase approval workflows for customers: 64%

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Pricing Optimization

“In which of the following technology innovations does your firm plan invest in the future?”

<table>
<thead>
<tr>
<th>Innovation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automated pricing optimization</td>
<td>62%</td>
</tr>
<tr>
<td>Personalized recommendations</td>
<td>56%</td>
</tr>
<tr>
<td>Use of wearable computing in distribution centers</td>
<td>49%</td>
</tr>
<tr>
<td>Sensors on shipments/products</td>
<td>46%</td>
</tr>
<tr>
<td>Robots/automation in distribution center/supply chain</td>
<td>34%</td>
</tr>
<tr>
<td>Shopping cart abandonment analysis</td>
<td>32%</td>
</tr>
</tbody>
</table>

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69% of business buyers PREFER to use direct, instant online forms of payment (e.g. credit cards, payment systems) over purchase orders, invoices, and eProcurement portals.

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Back-End Integration

“To what extent do you agree or disagree with the following statement?” Our eCommerce platform must:

(Respondents who agreed or strongly agreed)

- Integrate with our back-end systems: 75%
- Integrate with our call center system: 75%
- Integrate with our warehouse, shipping, and fulfillment systems: 74%
- Integrate with our popular social media platforms: 62%

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Aligning Customer Expectations With Technology Priorities

**B2B Buyers**

"Of the following, which three features/functions would you most like your suppliers to offer?"*

- Enhanced search functionality on their website: 60%
- Showing ratings and reviews of products/services: 58%
- Improved personalized product or service recommendations on their website: 50%
- Integration with our back-end finance, accounting, OMS, or ERP systems: 42%
- Merchandising/recommending relevant products and services: 38%

**B2B Sellers**

"Based on your customers online needs, which of the following technology initiatives are a top priority over the next 18 months?"**

- Enhanced search functionality on our website: 48%
- Improved personalized product or service recommendations on our website: 42%
- Access to our website through a mobile app: 39%
- Merchandising relevant products and services: 37%
- Integration with customers’ back-end finance, accounting, OMS, or ERP systems: 32%

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Beyond Technology
New Organizational Structures
› Become intimate with the business buyer

› Weave digital into all aspects of your operations

› Leverage your partner ecosystem to support omni-channel commerce
Thank you

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Summary

Contact the study sponsors to learn more:

➤ Accenture
  • accenture.com/omni-commerce
  • @AccentureSocial or @AccentureDigi

➤ hybris
  • hybris.com
  • @hybris_software
Summary

Questions?