

Digital Ups The Stakes For B2B Sales Pros

Vision: The B2B eCommerce Playbook

by Allen Bonde

February 13, 2019

Why Read This Report

Nearly four years after forecasting that 1 million B2B salespeople would be displaced by 2020, Forrester sees B2B buyers both accelerating their shift to self-service and demanding higher-quality interactions with sales pros. This report explores how and why leading digital business pros are automating the order-taking process and digitally enabling sales reps for unified, full-spectrum B2B commerce.

Key Takeaways

The Shift Toward Self-Service Intensifies

Today, 61% of B2B buyers prefer to research online on their own, up from 53% in 2015. Forrester sees hundreds of thousands of order-takers, and 1 million reps overall, at even greater risk of displacement by 2020.

Buyers Expect Higher-Quality Sales-Assisted Commerce

Forrester predicted in 2015 that the number of consultant sales reps would grow 10% by 2020. Today, digital business pros are making progress with self-service but struggling to deliver digitally enabled hybrid and full-service commerce.

The Digitally Enabled B2B Sales Model — 2.0

B2B companies are actively automating both self-service and full-service buying scenarios. They're also upskilling and cross-training employees as they operationalize for ubiquitous commerce.

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Related Research Documents

[Build A Seller Development Framework To Improve The Buying Experience](#)

[Digital Is Busy Transforming B2B Commerce](#)

[Digitize Your Business Strategy With A Three-Phase Road Map](#)



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Sellers Struggle To Keep Pace With Evolving B2B Buyer Expectations

Successful B2B firms will win, serve, and retain customers as effectively online as offline. Myriad tools are available to bring sellers into the 21st century, yet many organizations struggle to escape the gravitational pull of old-school offline selling and phone-based order-taking. B2B businesses no longer get to make that call. Buyers today are much more fluid: They often traverse channels and touchpoints to consume information, increase their purchase confidence, and transact; they crave an experience that is seamless. This intersection of buyers' online and offline worlds and the experiences had in each stacks the deck against today's sellers.

Demand For Digital Self-Service Speeds The Demise Of Order-Takers

In 2015, Forrester predicted that the shift from offline-only to online-only and omnichannel B2B purchasing would displace 1 million salespeople in the US between 2012 and 2020.¹ We identified the most vulnerable group as “order-takers” — sales and call center representatives who mostly deal with easily identified, low-priced items.² In 2019, we believe that order-takers are at even greater risk of being displaced, as B2B buyers increasingly shift low-consideration purchases online. Digital business pros must be responsive to buyers who:

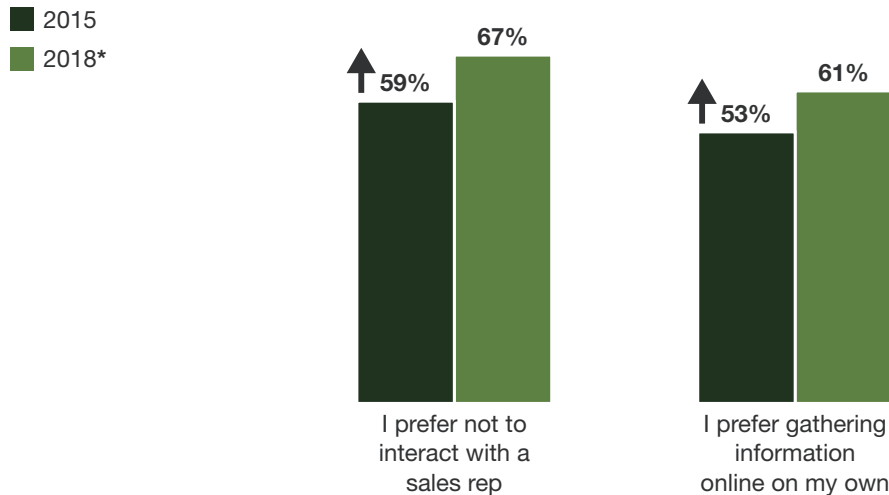
- › **Insist on doing their own pre-sales research because it's more convenient.** In 2015, 53% of B2B buyers said that they considered gathering information online on their own superior to interacting with a sales representative; in 2018, 61% said so (see Figure 1). And 67% of B2B buyers said that they do not want to interact with a sales representative as their primary source of research, up from 59%; 70% said that buying from a website was more convenient than buying from a sales rep when purchasing products or services for work.³ B2B digital pros must recalibrate their investments to match where their customers are starting their journeys, which is increasingly online.
- › **Use digital self-service and online marketplaces.** B2B buyers are increasingly routing “easy” purchases through online self-service channels for a variety of reasons.⁴ They've been helped by the entry of B2C marketplaces like Amazon into the B2B space: Amazon Business expected “more than \$10 billion in annual sales” in 2018, representing a huge growth from its \$1 billion in B2B sales in 2016.⁵ Digital business pros must offer their buyers a compelling option for self-service or risk losing them to Amazon and other web pure plays that better cater to online buying: Only 13% of our survey respondents said that the typical B2B website buying experience is better than when buying on Amazon.⁶

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FIGURE 1 B2B Buyers Intensify Their Desire For Digital Self-Service**“To what extent do you agree with the following statements?”**

(4 or 5 on a scale of 1 [strongly disagree] to 5 [strongly agree])



Base: 224 US B2B buyers and sellers

*Base: 120 US B2B buyers

Source: Forrester/Internet Retailer Q1 2015 US B2B Buyer Channel Preferences Online Survey

*Source: Forrester/B2BecNews Q2 2018 Global B2B Buy-Side Online Survey

B2B Buyers Want Skilled Consultants For Highly Considered Purchases

With high-consideration purchases, especially those that involve specialized products, solutions, or services, B2B buyers often prefer assisted sales experiences. They require help understanding product options and variants and often prefer to negotiate on price due to purchases often being larger.⁷ For these types of purchases, they expect more informed and effective consultative salespeople as opposed to sales “navigators” or sales “explainers” (see Figure 2). In 2015, Forrester predicted that the number of consultant sales reps would grow 10% by 2020 and that B2B companies would have to invest to upskill their staff.⁸ B2B buyers expect B2B sellers to:

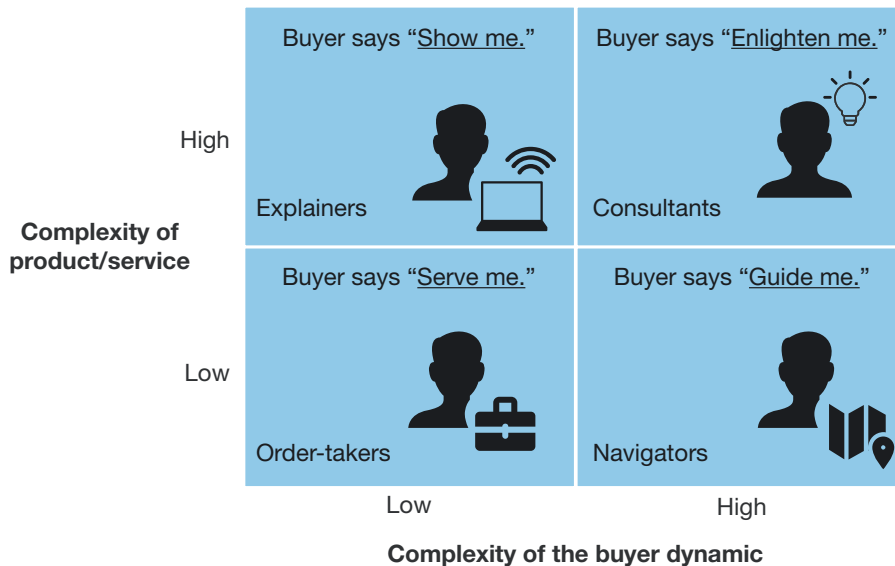
- › **Know their B2B buyers’ circumstances both deeply and broadly.** B2B buyers report that sellers do well in understanding their own products, but they lack both knowledge about a customer’s specific needs and a readiness to address those needs. B2B buyers expect sellers to do their homework ahead of time, know their prospect’s challenges, understand the competitive context, and define specifically where they can create immediate value. In addition, several interviewees said that they use salespeople now as outsourced research partners, commissioning them to provide objective data and case studies.

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- › **Be more responsive and find innovative ways to add value early in the process.** B2B buyers expect B2B sellers to engage with them early in the buying process. They also expect B2B sellers to communicate with them via digital tools like email, chat, and collaborative software rather than traditional mediums like phone and fax. B2B buyers now seek guidance in the awareness phase of buying and are willing to reward timely responses disproportionately with their business.⁹

FIGURE 2 Consultative Salespeople Are Vital For Highly Considered Purchases



Make The Case For Channel Shift And Sales Enablement

Today’s B2B buyers move freely between self-service, hybrid, and full-service commerce.¹⁰ They decide which space to operate in on the fly, based largely on whether it’s a low- or high-consideration purchase. For low-consideration purchases, digital removes costs, expands reach, drives incremental revenue, and increases customer satisfaction. For high-consideration purchases, digital improves the quality of customer engagement and enables field salespeople to earn higher margins by more effectively selling solutions, services, and subscriptions.

Channel Shifting Low-Consideration Purchases Is Both Cost- And Customer-Effective

Self-service B2B eCommerce websites have a much lower average variable cost per sale than offline models. Relatively speaking, sales forces are expensive, and companies must also support salespeople with the hidden costs of other staff, services, and materials. B2B digital business pros are accelerating their shift online because of overwhelming evidence that doing so:

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- › **Changes the cost equation.** Coca-Cola reported that it reduced its average cost per interaction by 85% by moving offline B2B customers online.¹¹ In an interview with Forrester, Levi Strauss said that its B2B online ordering system enabled it to cost-effectively capture thousands of mom-and-pop stores, expand lines of business, reduce the cost to serve, and improve its order-fill rate.¹² Several companies we spoke with indicated that digital is deflecting a growing percentage of B2B customer calls and greatly reducing the cost of ordering and the overall cost to serve customers.
- › **Increases incremental revenue.** Multibillion-dollar food distributor US Foods said that customers who buy online spend 5% more than those who only buy offline.¹³ Similarly, Coca-Cola said that migrating its B2B offline customers online increased its gross profit per outlet by 6% and its average order value by 15%.¹⁴ Further, Levi Strauss reported that shifting its B2B customers to a self-service portal increased its revenue by 10%.¹⁵
- › **Improves customer satisfaction.** A large, multinational computer hardware manufacturer told Forrester that customers who place their orders electronically give the brand a 5% to 10% higher customer satisfaction score than offline-only customers do.¹⁶ And Protolabs, a manufacturer of customized industrial products, argued that customers prefer to use an online-only site because they “don’t have to talk to anybody” and can order on their own time.¹⁷ B2B customers value efficiency, convenience, and time savings, and they will reward B2B sellers that streamline their ordering operations.

Digital Enablement Helps Sales Pros Better Serve High-Consideration Buyers

B2B buyers see little difference between channels. As such, digital plays just as important a role in full-service interactions as it does in self-service models. Digital helps sales reps create customer intimacy by understanding past customer needs and anticipating future ones. Many B2B digital business pros have focused their digital efforts on B2B eCommerce for low-consideration purchases and have yet to broaden their digital horizon to better support more complex, assisted purchases. Digital enables B2B sellers to:

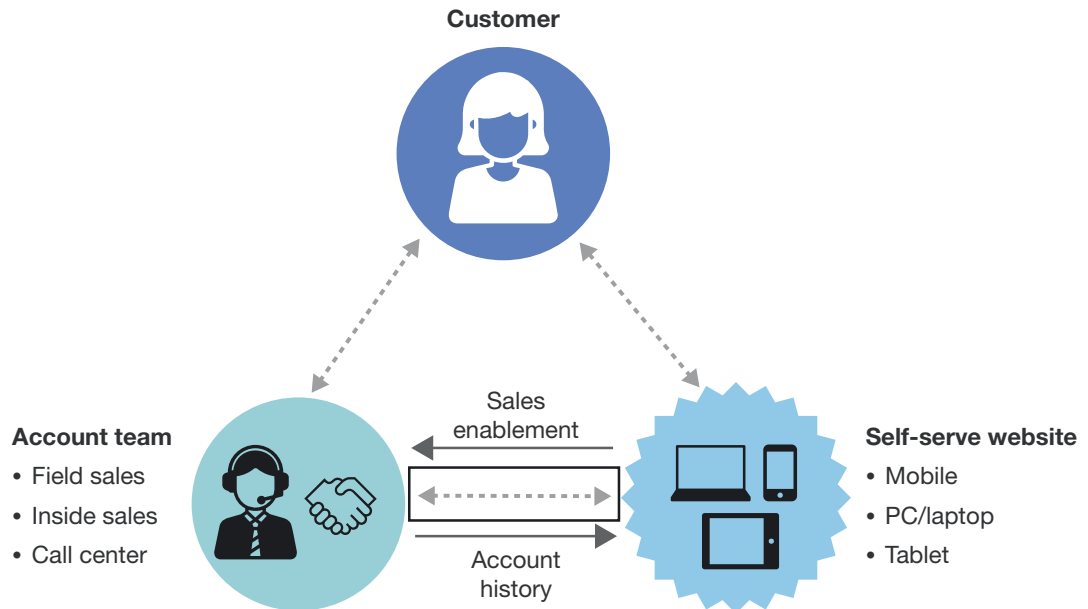
- › **Target sales interactions to be more productive.** Effective sales reps leverage tools and technology to create customer intimacy. MillerCoors sales reps use a tablet app developed by Mediafly to show bar owners how they can maximize revenue per tap-handle pull by swapping out a craft beer for MillerCoors’ premium beer Blue Moon. Such technologies enable sales reps to create proposals, show business cases, recommend products, and assemble customized financial models dynamically and in real time.
- › **Address high-consideration buyers making low-consideration purchases.** Often, initial high-consideration purchases give way to follow-on, low-consideration transactions.¹⁸ SUEZ Water Technologies & Solutions, formerly GE Water, reports that its online site cuts an average 20-minute phone reordering process down to just minutes.¹⁹ Similarly, meat distributor Porky Products gave butchers at a grocery store chain a mobile app to scan bar codes for meat reorders — saving butchers an average of 1 hour per day on ordering time. Porky Products’ sales reps now focus on large orders and seasonal buying rather than transactional purchases.²⁰

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Expand And Enhance The Digitally Enabled Selling Model

In 2015, Forrester introduced the digitally enabled B2B selling model to demonstrate that digital is a function of selling via both people and digital tools. Since then, we've observed that B2B digital business leaders have struggled to convince sales teams to embrace their self-service sites as enablement tools for enhancing their productivity. In parallel, many of those same digital leaders have failed to convince the eCommerce team to fully incorporate offline sales into the company's digital-first strategy (see Figure 3). The most successful organizations will excel at the change management initiatives to not only create organizational buy-in but shift job responsibilities.

FIGURE 3 Bridging A Critical Gap In The Digitally Enabled B2B Selling Model

Train Sales/Service Pros To Handle The Complex Requests That Automation Can't

B2B buyers expect B2B digital business pros to coordinate the efforts of their outside sales, inside sales, and contact center reps. That's forcing B2B sellers to rethink how they deliver a superior customer experience and drive agility and operational efficiency.²¹ Several B2B digital pros reported that the harder calls and transactions are now going to inside and outside salespeople and customer service reps, as the easier questions and transactions are handled online. To capitalize on the opportunities that omnichannel digital commerce enables, B2B digital professionals must work with offline sales and service leaders, as well as their ecosystem partners, to:

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- › **Upskill sales reps to handle more complicated sales scenarios.** In the age of the customer, all customer-facing professionals require sales training. Inside sales reps hold particular promise, as they can often have deep interactions with customers. Two large B2B manufacturers told Forrester that their inside sales reps scored higher in customer surveys than field salespeople for understanding the customer's business. Forrester believes that upskilled inside sales will play an even greater role in all phases of SMB and enterprise sales than we first predicted in 2015 (see Figure 4).
- › **Accelerate the cross-training of contact center employees.** Contact center agents now often represent the frontline of interaction with customers but are still largely trained like they're the reactionary call center agents of old. B2B companies must provide significantly more training so that these agents become far more adept at accessing and analyzing data as well as facilitating and placing orders for customers. Realizing that its agents talk to customers more than its salespeople do, 3M upgraded the role of agents to upselling sales opportunities, escalating leads, and closing deals.²²

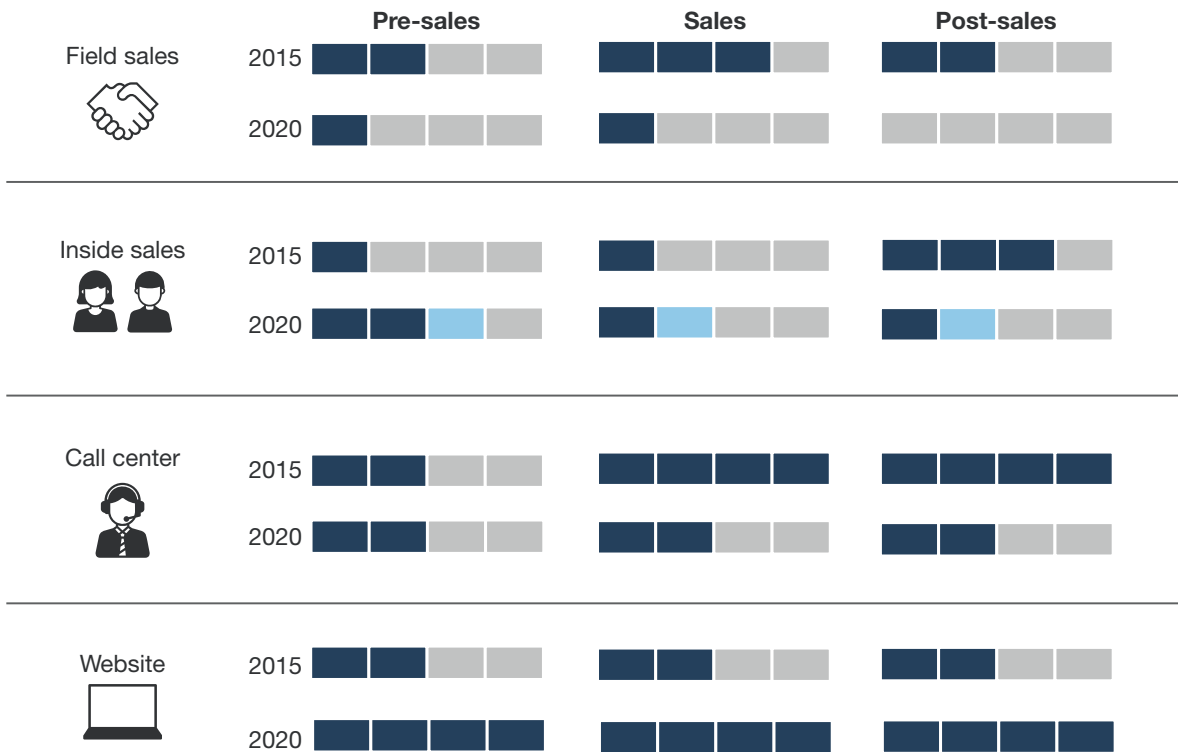
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FIGURE 4 The Digitally Enabled B2B Selling Model

4-1 Digitally enabled B2B selling model — selling to small and medium-size businesses (SMBs)

■ Expected increase from 2015 projections
 ■ Size of role

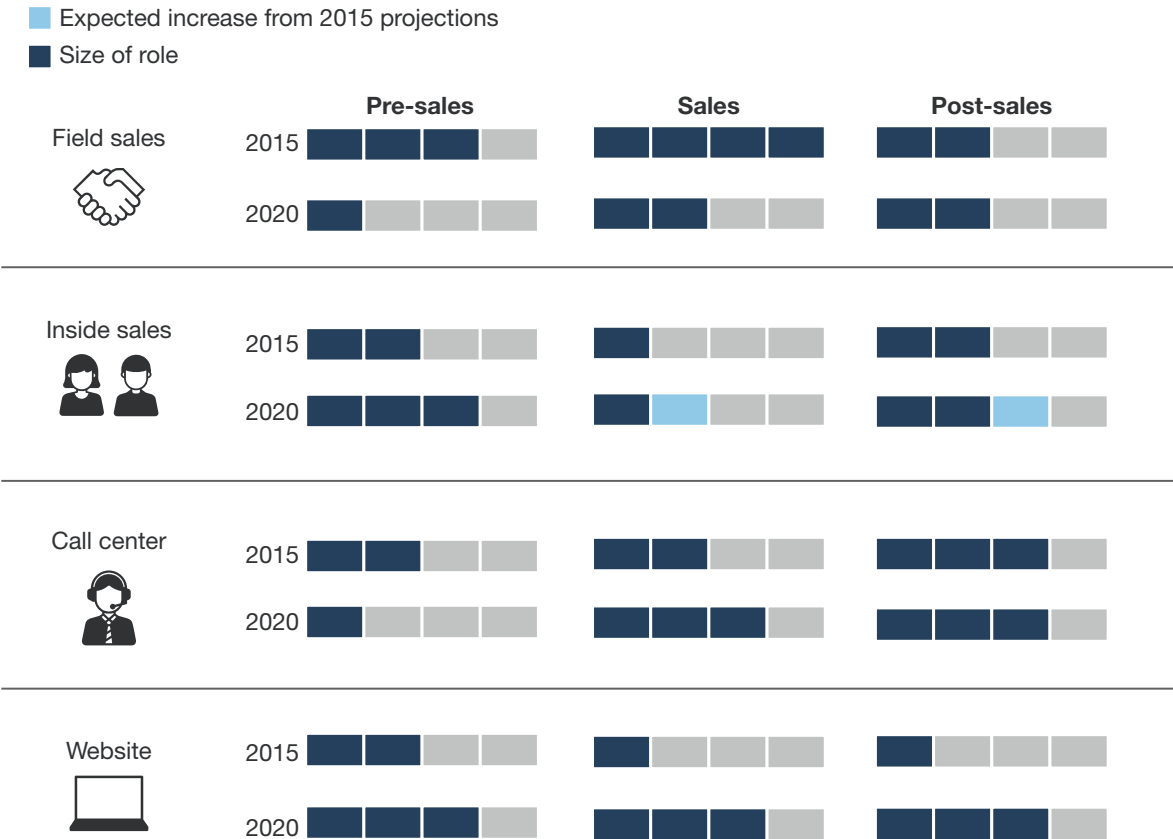


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FIGURE 4 The Digitally Enabled B2B Selling Model (Cont.)

4-2 Digitally enabled B2B selling model – selling to enterprise customers



Recommendations

Build A Unified Digital Commerce Experience

Self-service B2B commerce will continue to grow rapidly, but the role of traditional sales reps will also become more important. As sales reps and customer service agents act as the frontline of customer engagement, they will ultimately hold the key that unlocks your self-service revenue potential. B2B digital business pros must reposition themselves as more than “the eCommerce guy” if they expect their firms to thrive. They must develop a broader vision that automates low-consideration self-service transactions and digitally enhances high-consideration, complex, human-to-human engagement. They must champion their digital transformations to:

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- › **Sell more complex products across more channels.** Products are rapidly becoming commoditized as suppliers broaden their distribution and buyers seek more inventory and price transparency. In response, B2B companies must move upmarket to offer more complex products that command higher margins and leverage sales-assisted models.
- › **Offer new and differentiated value-added services.** B2B companies must continue to augment average tickets with higher-margin services, such as warranties on products, insurance for transportation and product use, and credit terms and financing. Those services are not only more differentiated but also enable digital business pros to capitalize on the value of consultative selling. Of note, B2B companies that offer value-added services have grown faster in recent years than companies that aren't focused on service-centric selling.
- › **Double down on self-service infrastructure for both outsiders and insiders.** While many B2B firms invest in eCommerce systems to support the self-service needs of their customers, support for internal users like sales and service reps is woefully lacking. In tomorrow's digital world, commerce touchpoints — be they web, mobile, and apps or emerging technologies like chatbots — need to become a two-way gateway for customer engagement and transactions. Companies like Carolina Biological Supply, VF, and Würth Electronic have implemented such B2B unified commerce systems.
- › **Expand opportunities for salesperson-free B2B business models.** Zoro Tools' web-only, off-price, 1 million SKU business is now a driving force behind W.W. Grainger's digital initiatives.²³ Similarly, Systemax books over \$1 billion in revenue per year globally selling industrial parts with its online-centric ordering model.²⁴ As neither firm relies on field salespeople to close deals and so doesn't need to pay expensive sales commissions en masse, they're able to pass along differentiated cost savings to customers.

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Supplemental Material

Survey Methodology

Forrester partnered with B2BecNews for the Forrester/B2BecNews Q2 2018 Global B2B Buy-Side Online Survey, which surveyed B2B companies that sell online about their sales and marketing benchmarks and initiatives. The research was carried out between July and September 2018. We received more than 170 complete or partial responses from a variety of B2B companies. Additional data cuts of this data set are available upon request on a consultative basis.

Forrester partnered with B2BecNews for the Forrester/B2BecNews Q2 2018 Global B2B Sell-Side Online Survey, which surveyed B2B companies that sell online about their sales and marketing benchmarks and initiatives. The research was carried out between March and May 2018. We received more than 300 complete or partial responses from a variety of B2B companies. Additional data cuts of this data set are available upon request on a consultative basis.

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Endnotes

- ¹ In 2015, Forrester predicted that 1 million B2B salespeople would lose their jobs from 2012 to 2020. The reality is that many B2B companies have already proven the benefits of self-service models and are starting to steal share from offline-only models. Plus, as retirement-age B2B buyers leave the workforce, millions of new digital-native B2B buyers are coming in and forming new buyer loyalties. In response, B2B firms are actively rethinking and restructuring their conventional selling models to focus more on selling via self-service eCommerce websites. See the Forrester report "[Death Of A \(B2B\) Salesman.](#)"
- ² See the Forrester report "[Death Of A \(B2B\) Salesman.](#)"
- ³ Source: Forrester/B2BecNews Q2 2018 Global B2B Buy-Side Online Survey.
- ⁴ When we asked respondents for the main reason they were shifting work purchases online from offline, 32% said it was more convenient as sites were available 24 hours a day; 21% said it was faster; 15% said they got more and better information online; 12% said it was cheaper; and 5% said they did so to minimize interaction with sales reps. Source: Forrester/B2BecNews Q2 2018 Global B2B Buy-Side Online Survey.
- ⁵ Amazon Business was running \$10 billion in annualized sales in September 2018. Source: "Amazon Business connects millions of business customers and sellers worldwide," Amazon Business blog, September 11, 2018 (<https://www.amazonbusinessblog.com/blog/2018/09/amazon-business-connects-millions-of-business-customers-and-sellers-worldwide.html>).

Amazon's business marketplace generated \$1 billion in sales during its first year. Source: Nandita Bose, "Amazon's business marketplace hits \$1 billion in sales," Reuters, May 4, 2016 (<https://www.reuters.com/article/us-amazon-com-business-idUSKCN0XV1J2>).
- ⁶ Source: Forrester/B2BecNews Q2 2018 Global B2B Buy-Side Online Survey.
- ⁷ See the Forrester report "[Death Of A \(B2B\) Salesman.](#)"
- ⁸ See the Forrester report "[Executive Buyer Insight Study: Defining The Gap Between Buyers And Sellers.](#)"
- ⁹ Source: Dave Elkington, "Lead Response Infographic – How Many Touches to Make a Sale," Insidesales.com blog, April 28, 2012 (<https://www.insidesales.com/insider/lead-management/lead-response-management-infographic/>).
- ¹⁰ See the Forrester report "[Make Omnichannel Real In B2B Commerce.](#)"
- ¹¹ Source: Coca-Cola presentation by Marta Dalton at Dreamforce 2016.
- ¹² Source: Interview with Levi Strauss.
- ¹³ "E-commerce has significant benefits for customers and drives incremental growth and profit for us. For example, our independent restaurant customers who use e-commerce to place orders have over 5% higher retention rates, over 5% higher purchase volumes, and an approximately 600 basis points higher NPS than those that do not." Source: "Prospectus Supplement," US Foods, September 13, 2017 (<https://www.bamsec.com/filing/119312517286343?cik=1665918>).
- ¹⁴ Source: Coca-Cola presentation by Marta Dalton at Dreamforce 2016.
- ¹⁵ Source: Interview with Levi Strauss.
- ¹⁶ Source: Forrester customer interview.
- ¹⁷ Source: Nona Tepper, "A manufacturer merges its three e-commerce sites into one," Digital Commerce 360, June 29, 2015 (<https://www.digitalcommerce360.com/2015/06/29/manufacturer-merges-its-three-e-commerce-sites-one/>).
- ¹⁸ See the Forrester report "[Make Omnichannel Real In B2B Commerce.](#)"

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¹⁹ Source: Bill Briggs, “A GE unit turns to e-commerce to manage sales and costs,” Digital Commerce 360, March 6, 2017 (<https://www.digitalcommerce360.com/2017/03/06/ge-unit-turns-e-commerce-manage-sales-and-costs/>).

²⁰ Source: Forrester interview with Handshake.

²¹ Digital business transformation is a multiyear, multidimensional challenge. Traditional wisdom encourages firms to approach such a wholesale change as a big-bang transformation program, but the reality is that too many of these large-scale change programs fail. See the Forrester report “[Digitize Your Business Strategy With A Three-Phase Road Map](#).”

²² Source: Interview with 3M.

²³ SKU: stock-keeping unit.

Grainger attributes more than half of its total sales to online transactions, with more than 65% of all orders originating online; the firm estimates that eCommerce could comprise 75% of the company’s sales by 2023. Source: Jeff Reinke, “Zoro.com Capitalizing on Industrial E-commerce Growth,” Industrial Equipment News, March 30, 2018 (<https://www.ien.com/supply-chain/article/20998837/zorocom-capitalizing-on-industrial-ecommerce-growth>).

²⁴ Source: “Systemax Inc. (SYX),” Yahoo Finance (<http://finance.yahoo.com/quote/SYX/>).

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