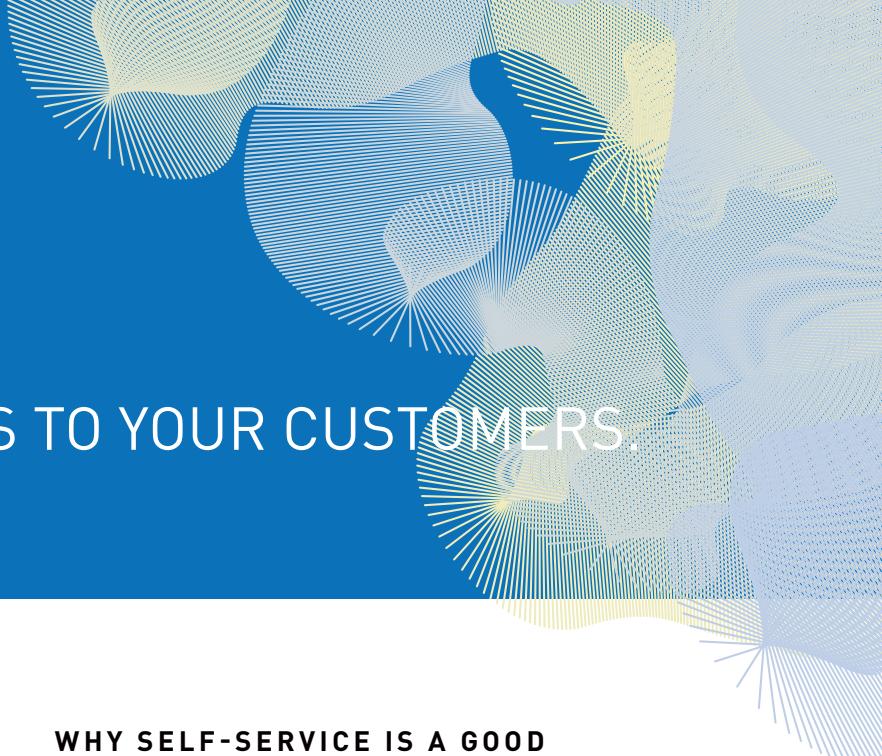




Outsource your  
sales to your  
customers...  
they'll love it.

HOW CUSTOMER SELF-SERVICE  
IS REVOLUTIONIZING B2B





# OUTSOURCE YOUR SALES TO YOUR CUSTOMERS. THEY'LL LOVE IT.

## IN THE B2C WORLD, MANY CUSTOMERS VALUE AND PREFER SELF-SERVICE CHANNELS TO HUMAN INTERACTIONS.

Think about it. Our ability to self-serve is in almost every aspect of our daily lives, from checking out at the grocery store to banking, checking in at the airport, to even ordering lunch via a mobile app.

By contrast, many B2B customers still use “live” service channels for procurement – even if these experiences require significantly more time and effort on their part. And many of these individuals have an ingrained habit of thumbing through a catalog and picking up a phone to place an order. They may even enjoy having a relationship with the sales rep at the other end of the line.

Unfortunately for these B2B holdouts, their work styles have become very old school. According to Forrester, “Across all demographics, channel usage rates are also quickly changing: we’ve seen a 12% rise in web self-service usage.”

## WHY SELF-SERVICE IS A GOOD DECISION FOR THE B2B CUSTOMER.

One question B2B companies should ask themselves: what is more important, a relationship or a satisfying user experience? Most people want a good experience when they buy or use something. They want low-friction transactions, and they want to accomplish them now. Evidence shows that a well designed self-service scenario tends to deliver a better user experience. Consider a few of the comments from a Harvard Business Review article entitled *“Why Your Customers Don’t Want to Talk to You”*:

- “ “ Apart from the time it saves me, I also feel assured that no mistake has been made with my order”
- “ “ Dealing with a human at a company is nearly always slow”
- “ “ More and more customers are looking for better and smart self-service, they don’t want to simply have to wait in line to get a product and/or a service.”
- “ “ People don’t want to be harassed. They also want to be in control. Those are two powerful desires leading to a preference for self service.
- “ “ Bingo! For the transactional daily business I conduct most often, I want to accomplish it myself without having to defend, justify, or put up with an agent. It’s called independence.”
- “ “ Much of the problem is how companies have defined “relationship,” and many of them simply meant “some way to stay in contact with the customer, to sell more stuff.”

What is it that makes self service so appealing? It's probably a compound effect of all these advantages:

- Efficiency of the interaction
- Satisfaction of being in control
- Ability to "time shift" the service experience to fit the customer's schedule, not the provider's
- Fear of high pressure sales tactics
- And maybe most frightening of all to corporate executives, the reduced importance of the "relationship" in comparison to the "experience"

**FORRESTER FOUND THAT THE OFFLINE CUSTOMERS WHO CHANGED TO AN ONLINE PURCHASE ENVIRONMENT SPENT MORE MONEY PER TRANSACTION AFTER THE SWITCH. THE SAME RESEARCH ALSO SHOWS THAT CUSTOMERS ARE LESS EXPENSIVE TO SUPPORT ONCE THEY MIGRATE ONLINE.**

## WHY SELF-SERVICE MAKES SENSE FOR B2B COMPANIES

Companies are realizing that enabling self-service support is good for business and good for customer satisfaction. First and foremost, buyers who go online and order for themselves have higher order value. Forrester found that the offline customers who changed to an online purchase environment spent more money per transaction after the switch. The same research also shows that customers are less expensive to support once they migrate online.

By spending less time on tasks such as basic re-ordering, salespeople have new freedom to spend their valuable time building new relationships within the company, prospecting other accounts, or pursuing other high value activities such as training and more premium sales.

Online self-service also allows firms to attract and service a new class of customers, who are profitable to them only as online customers. It wouldn't make sense for the company to dedicate sales resources to personally call on this group of smaller-volume purchasers. But in a self-serve environment, these relationships can be very low maintenance and ultimately profitable.

## A SUCCESSFUL SELF-SERVICE STRATEGY ELIMINATES CHANNEL CONFLICT BY BEING THOUGHTFULLY APPLIED THROUGHOUT THE PURCHASING LIFECYCLE

It should be noted that the realization of a self-service strategy does not just magically happen within an organization. Sales, marketing, eCommerce, distribution partners and customer service departments have to work together cohesively to successfully deliver on these strategies and optimize the customer experience. Channels have to be aligned, and incentives need to promote the cross channel activity, and not create conflict among them.

Self-service can occur throughout the entire purchase lifecycle but it makes most sense the further down that funnel the customer is. In many cases, especially with high value or specialty products, high touch interactions may be necessary.

However, when a decision is made, future interactions can become more "transactional." Once customers are buying, it's a good idea to introduce product assortment, and let customers educate themselves with rich product information, interactive videos, etc. The same goes for reordering, replenishment, accessories, shipping, tracking - those are routine activities customers enjoy doing on their own and at their own convenience.

# SELF SERVICE IN ACTION

**Below are few everyday scenarios where self-service saves time, increases accuracy, and puts both the sales team and customers in control.**

## THE FACILITY MANAGER

While a facility manager is on the phone, he realizes he is low on parts for upcoming machinery maintenance. He goes online to his parts provider, views his previous orders, and re-orders exactly what he needs. The system also recommends the appropriate accessories and installation tools, and he realizes he could use those too. He places his order and is back on track with his day in minutes.

## THE MARKETING MANAGER

The marketing manager for an insurance company needs to order logo gear for the sales team across the country. He's able to log on to the seller's system, see his company's logo wear, and the contractually agreed product assortment and price schedule. He can see that they have available inventory and places an order for 100 golf shirts and 100 boxes of their logo pens – and selects from the different locations in his account history to have them sent to all the separate appropriate field offices.

## THE SALES REP

A sales rep is onsite speaking with a plant manager at a manufacturing facility and is telling him about a new piece of safety equipment. Instead of pulling out a printed catalog, the sales rep is able to pull up the online catalog of all the new products using her iPad to show the new product. There is so much more information available online, including pictures, specifications, and videos, that the customer makes a decision on the spot to place an order.

## THE RESEARCHER

A university researcher is in need of some specific virus samples. She needs to have the authorization from the department chair to place the order but she can go online to the supplier, set up the order according to the department's agreed upon pricing, and route the order to department chair to authorize and place the final order.

## KEY ELEMENTS OF A “BEST PRACTICES” APPROACH TO ONLINE SELF-SERVICE

One of the largest inhibitors to B2B self service, is the quality of the self-service experience provided by the B2B website. Because of their everyday experiences as consumers, customers have low thresholds for frustration when it comes to search, navigation, ordering and tracking. Instead companies should strive to create a user experience that makes them get excited by your products or services. Here are some key elements to incorporate:

- Easy, filterable and guided navigation
- In-site search
- Rich product displays
- Detailed product information (with specifications, multiple product views, pricing, etc.)
- Recognize “me” with my account information and order history
- Click to chat
- Merchandising: similar products / alternative products; cross-sell / upsell; kits and bundles
- Stock status (in stock, out of stock, back-order)
- Ratings and reviews
- Access to orders, ability to repeat orders, and to schedule continuity/reorder programs
- Shipment tracking
- Returns management
- Contact sales
- Request for quote (if pricing is not directly available)
- Configurable products (build your own, or build your bundle)



### APPLE GENIUS BAR CUSTOMERS ORDER UP THEIR OWN SELF-SERVICE

When it comes to service, nothing peeves customers more than having to wait in line or have technicians unable to help them when they finally do interact in person. B2B companies can learn a lesson or two from the customer experience at Apple.

Apple has done a great job of creating online self-service options that enable their customers to accomplish the majority of their ordering and service on their own (and there are few more passionate groups of customers than Apple's). And when it does come time to interact with a trained representative of the company, the Apple Genius Bar has taken the pain out these scenarios, also through a level of self-service.

Customers go online to schedule a service appointment at a time and place convenient for them. At the same time, they also outline their problems. Appointment times are scrupulously adhered to, so there is little wait. Apple technicians know what products the customer has before they show up, and they frequently have already researched solutions. Many times problems are resolved on the spot. NPD Group has found that of the Apple customers who have taken devices to the Genius Bar, 90% came away “extremely” or “very satisfied” with the service they received.

The takeaway: Creating complementary online and offline self-service and web-assisted service scenarios will be successful. If it eliminates waiting times and frustration, customers are happy to self-serve and will reward those who give it to them in a convenient, easy to use way.



## HOW TO CONVINCE YOUR SALES TEAM SELF-SERVICE IS GOOD FOR THEM

Sales people can frequently be the last holdouts in an organization when it comes to moving forward with customer self service. Why? They may fear losing customer control, a diminished customer relationship, as a precursor to reduced commissions, or simply a process change that will require extra work on their behalf. Here is how to convince them otherwise:

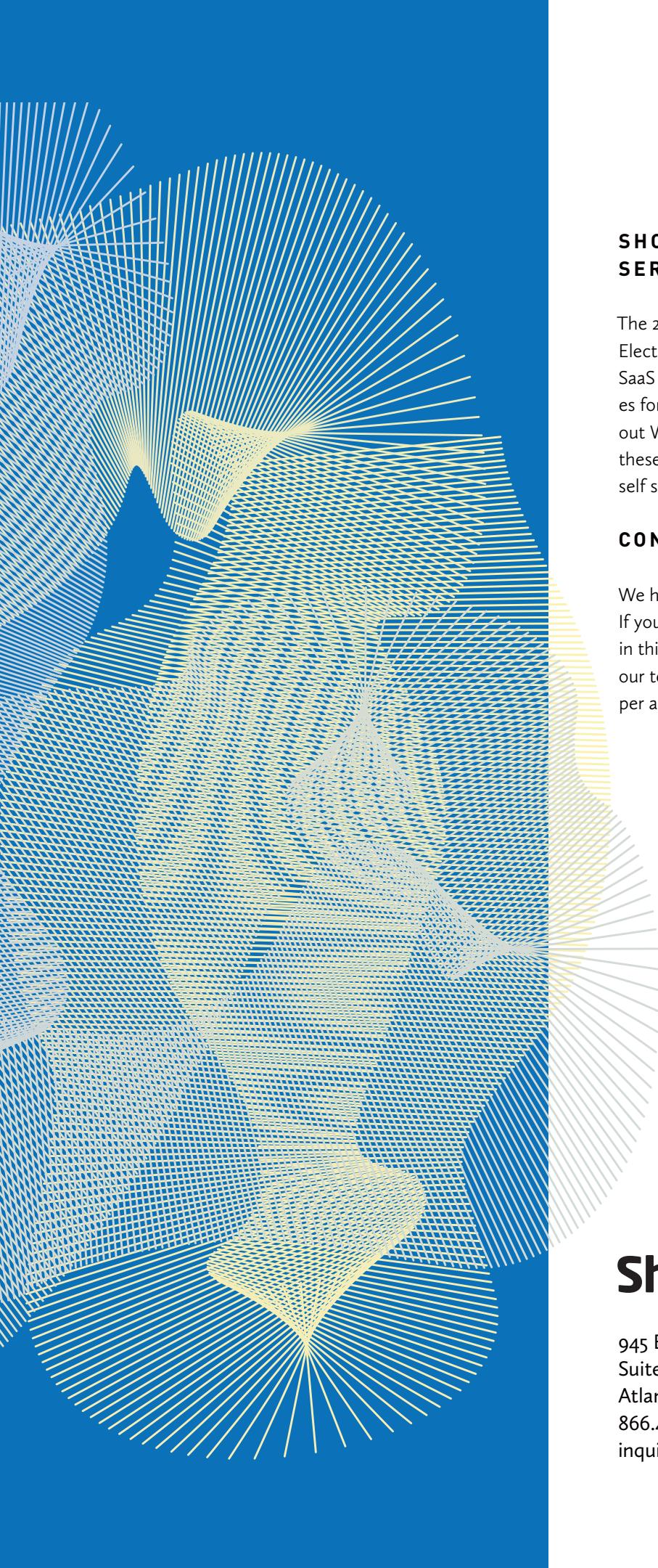
- They will spend less time supporting lower value customers, more time on higher value customers.
- They can “outsource” annoying paperwork to the customer, who will be less likely to make data entry errors and reduce returns.
- They will have more time available to pursue new accounts, or new contacts within existing accounts.
- Research shows customers who self serve spend more and are more satisfied.
- Organizational structure/process won’t penalize sales commissions for online sales.

## CONCLUSION

From a business standpoint, B2B companies should welcome self-service with open arms. Customers who go online and order for themselves are happier, and have higher order value. For sales personnel, the time it takes to service customers is now lower. High value sales time can now be spent building new relationships, selling bigger ticket items and helping customers understand these new ways of ordering and reordering.

A caveat: customers value effective, well-designed self-service, not just anything a company slaps together.

Ultimately, if you do a good job and give them a good experience, they will be more satisfied, more loyal, and more likely to refer your company to others.



## SHOPVISIBLE IS YOUR SELF SERVICE PARTNER

The 2012 recipient of the SIIA CODiE award for Best Electronic Commerce solution, ShopVisible is an end-to-end SaaS commerce platform that powers shopping experiences for both B2C and B2B commerce environments. Check out West Music and New England Biolabs to see how these B2B sellers effectively allow their customers to self serve through great interactive experiences.

### CONTACT US

We hope you've enjoyed this paper on B2B eCommerce. If you'd like to discuss any of the approaches or insights in this white paper, we invite you to call to speak with our team. Register to get notified of our next white paper at [inquiries@shopvisible.com](mailto:inquiries@shopvisible.com) or contact ShopVisible

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