

# B2B ONLINE

## B2B Under Quarantine



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## INTRODUCTION

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The clinical, logistical and social challenges imposed by the ongoing novel coronavirus (COVID-19) pandemic are being felt by organisations in every sector of commercial life. With lockdowns imposed on more than three billion people in almost 70 countries, we're seeing a new emphasis on eCommerce. B2B sellers are having to think carefully about how they can meet the high expectations set by B2C eCommerce.

In Q3 of 2020 Adobe commissioned WBR Insights to survey 100 CEOs, CTOs, CDOs and VPs of Marketing and Digital, Global Heads of eCommerce, and those of a similar standing from B2B companies across Europe to find out more about the challenges they face and the innovative solutions being brought to the table.

The survey was conducted by appointment over the telephone. The results were compiled and anonymised by WBR Insights and are presented here with analysis and commentary by the B2B Online community.

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# CONTRIBUTORS



**Jean-Louis Keraudren,**  
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**Hilti**



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Former Global Head,  
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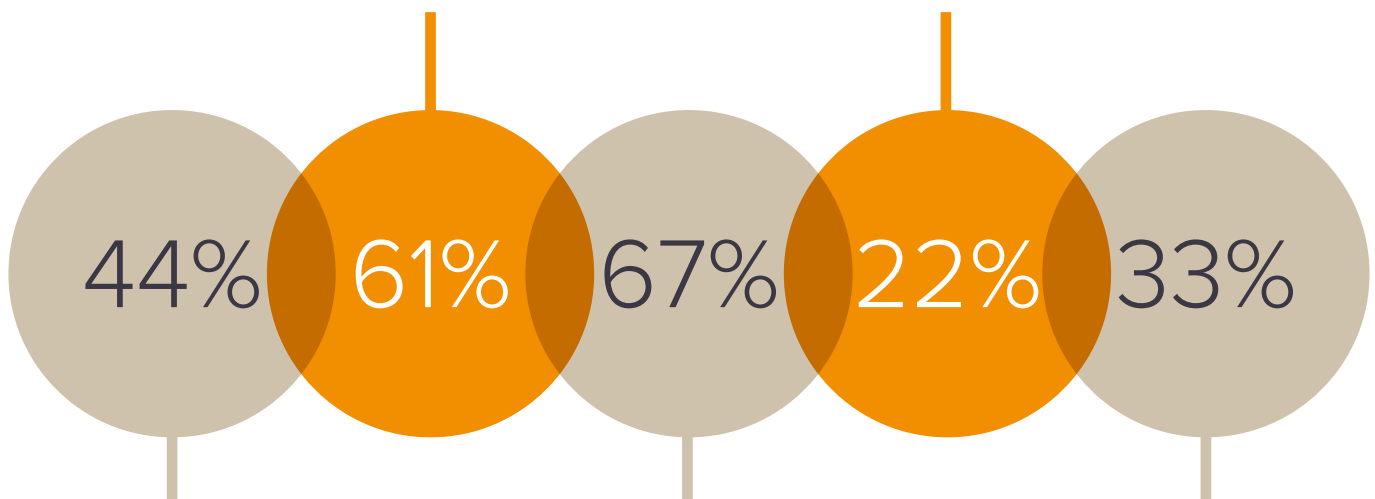


**Brian Green,**  
Head of Commercial Sales  
& GTM, EMEA,  
**Magento**

# KEY FINDINGS

**61%** are concerned  
about communication  
deteriorating due to  
remote working models

Respondents have  
seen a **22%** rise in  
eCommerce since  
lockdown began



**44%** of respondents  
have introduced new  
tech and infrastructure  
to run operations under  
social distancing rules

**67%** are implementing  
more self-service  
options for customers  
as a result of the  
pandemic

**33%** have upgraded  
their online payments  
solution as a result of  
the pandemic

# THE RACE FOR DIGITALISATION

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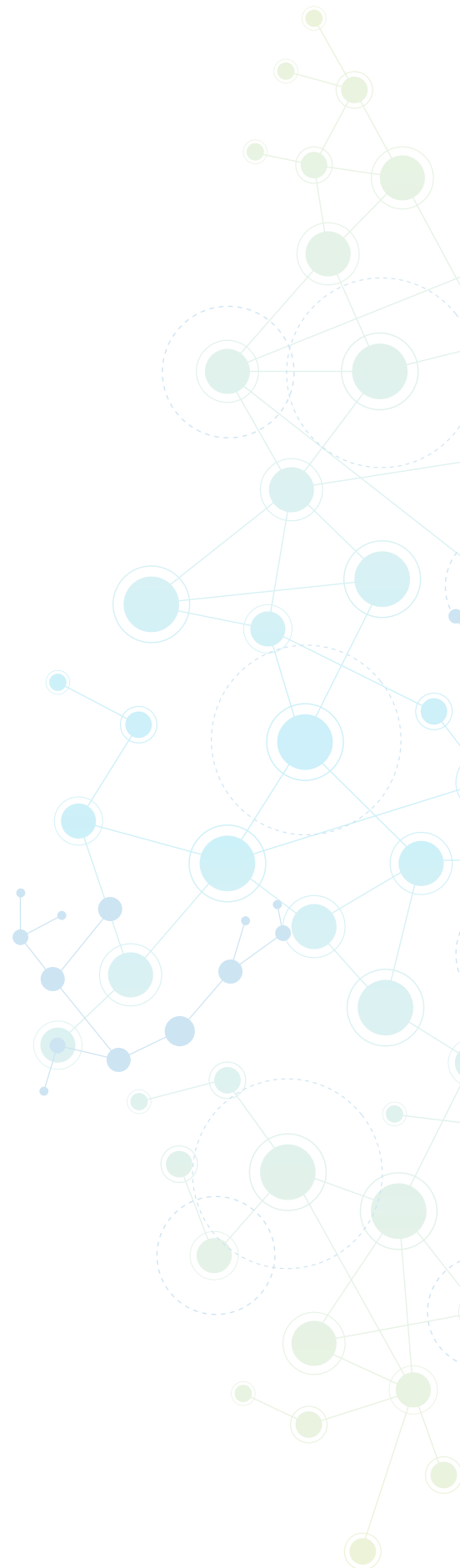
Many have observed that in 2020, time sped up. Years of digital transformation have been forcibly condensed into only a few short months. As B2B merchants and their customers shifted from working in offices to their guest bedrooms, home offices and dining room tables — the priorities of the entire commerce ecosystem rapidly shifted alongside them.

Data from the Adobe Digital Economy Index shows that since March, eCommerce volumes have been higher than peak holiday months with both new and loyal shoppers buying online more than ever before.

Disruptions to daily life have meant that many B2B merchants have had to quickly modify existing operations: from adopting a direct-to-consumer offering, to managing social distancing regulations in warehouses, to enabling faster and more flexible online self-service options. And even before the pandemic, B2B commerce was quickly adapting to changing customer preferences, becoming more attuned to digital processes, tools and technologies.

Whatever the 'new normal' brings, one thing has been proven in 2020 — whether you are a manufacturer, distributor, wholesaler or retailer, digital customer experience is what sets you apart from your competitors and ensures the long-term viability of your business, so getting it right is business critical.

Adobe was thrilled to partner with WBR on this report to bring first-hand feedback and insights from B2B leaders on the challenges they have faced so far in 2020 as well as their areas of focus for the near future.





# PART ONE

## ADAPTING TO LOCKDOWN

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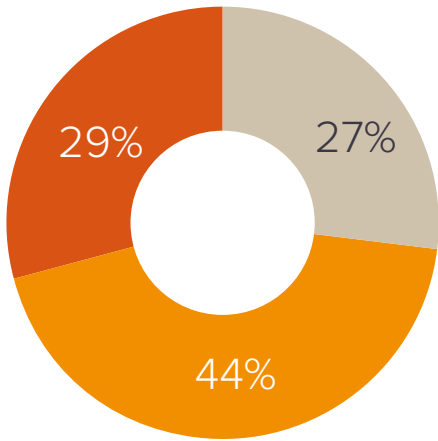
Lockdown has stress tested organisations' technological infrastructure like never before. While digitalisation has been on the cards for a while, an overnight shift to remote working has made this the top priority in order to keep operations running.

While many expected this shift to lead to a deterioration of communication, our research has shown a remarkable resilience among B2B organisations, who have been tackling the challenges of remote working head on.



### Are you currently able to run online deliveries and warehouse operations under social distancing directives?

**44% of respondents have introduced new tech and infrastructure to run operations under social distancing rules**



- Yes, our infrastructure was in place beforehand
- Yes, but some new infrastructure/tech had to be introduced
- No, there are some functions we're not able to carry out

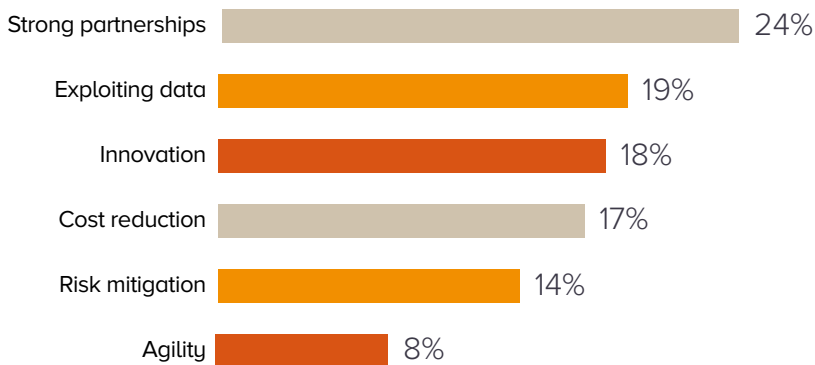
“We have taken many corrective measures to run our supply chain and sales operations while ensuring the safety of our team members and the best possible level of business continuity. The biggest challenge for our direct selling model has been addressing the various local governmental measures affecting the construction industry, especially with regard to the accessibility of job sites and offices of our customers.”



**Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti**

### Which of these do you consider most important in order to keep your revenue as high as possible during this crisis?

**Strong partnerships are the most important factor to keep revenue high during the pandemic**



“Strong partnerships are crucial. Surge demand for safety, sanitary, and healthcare products requires nimbleness in both public-private partnerships and manufacturing to meet demand, ensure products get into the right hands, and deal with exploitative grey market issues.”



**Carlos Abler, Former Global Head, Content Marketing Strategy, 3M**

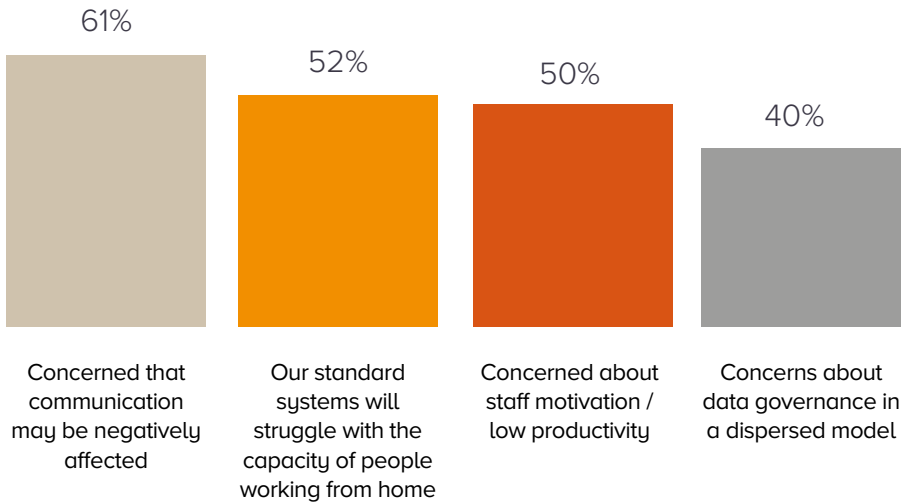
“In the Hilti direct selling business model, our most important partners are our customers. We have made an exceptional effort to listen to their specific needs during the pandemic, and have empowered our local teams to adjust our processes and requirements to maintain a relationship based on trust.”



**Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti**

### What impact do you think a sudden shift to remote working could have on your team?

**61% are concerned about communication deteriorating due to remote working models**



“In a pre-pandemic world, commutes and separate life / work architectures did our boundary management for us. Random socialising provided emergent collaboration and knowledge sharing. Fortunately, for many forms of knowledge work and collaboration, early adopters of digital collaboration tech have been realising the efficiencies of remote and asynchronous collaboration for a decade or more.

Change management and employee digital citizen initiatives now need to address factors such as personal information management for documents; better managing communication threads in right-fit to topics and teams; internal social network outreach in lieu of ‘the water cooler’; time-and-attention management in lieu of separate work/life architectures; becoming faster at typing and more comfortable with reading, and using their personal lives for having a personal life versus relying on offices for this purpose.

Many of the arguments against remote work tie back to these human behavioural factors rather than any actual superiority of physical space. Change management will need to overcome these barriers lest digital-savvy become the paramount hiring criteria going forward.”



**Carlos Abler, Former Global Head, Content Marketing Strategy, 3M**

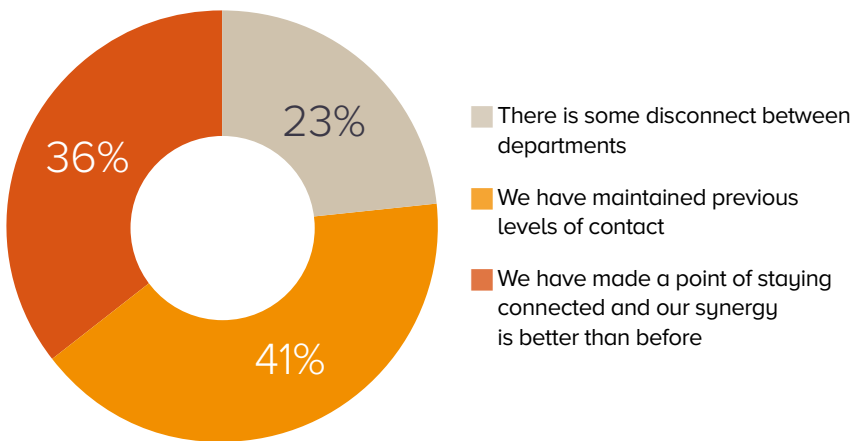
“Luckily, the quality and the coverage of our IT and communication systems has always been very high. Hence, everyone in the organisation has been very proud to see a quite seamless transition to remote work in comparison with many other firms. We have even used this opportunity to accelerate the deployment of certain upgraded solutions and IT security features. With these in place, business teams can best focus on adjusting leadership and communication style to make people feel safe, connected and engaged while working from home.”



**Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti**

### How has the lockdown affected synergy between sales and marketing?

**36% say the working relationship between sales and marketing is better than it was before lockdown**



“Some furlough measures have been implemented and teams have had to get used to the new context. We have taken the bold decision to use the lockdown period to accelerate the deployment of new CRM and marketing collaboration platforms between marketing and sales channels to turbo-charge our sales force for the post-lockdown phase. During summer more than ten thousand sales people will be introduced to a new way of working.”



**Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti**



# PART TWO

## RETHINKING CUSTOMER EXPERIENCE

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For organisations who sell via multiple channels, the pandemic has put eCommerce centre stage. The surge of online traffic is creating opportunities for B2B organisations to reach new customers.

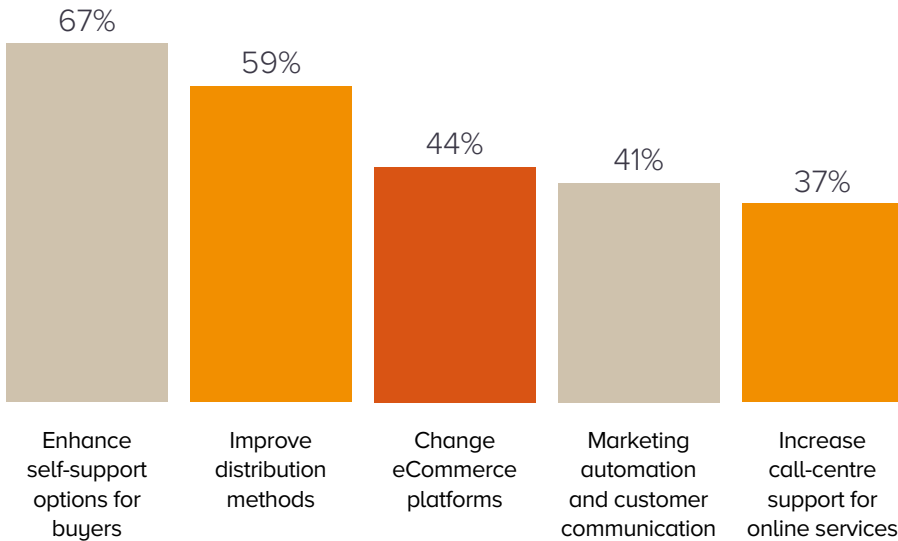
Expectations for the online customer journey have been set high by B2C players, and B2B professionals are looking to emulate a similar experience with self-service technologies and partner portals that meet customer demands for ease of use.





**As a result of the pandemic, which (if any) key changes are you looking to make to your business?**

**67% are implementing more self-service options for customers as a result of the pandemic**



Minus things like sanitation regimes and exit-entry protocols, many changes in response to the pandemic are digital transformation steps involving areas of business that have underinvested in foundational capability or lagged in value-realisation for previous investments due to slow change-management. The pandemic is largely an “I told you so” for numerous transformational applications. This was predictable. The harder question is how abnormal the new normal will be, and what opportunities or mandates for innovation exist within this for given sectors. The capability to scale-up digital compared to physical offerings may require a modularisation of product and process with far-ranging transformational consequences.



**Carlos Abler, Former Global Head, Content Marketing Strategy, 3M**

Self-service capabilities are core to a good online customer experience. Every merchant should think about the buying experience from the point of view of their customer. How easy is it to search for products and find answers to questions? Taking it a step further, we saw many merchants implement a chatbot/messaging feature on their website which allowed shoppers to get answers early in the sales funnel; basic questions without needing to interact with a sales representative. It's a win-win for both shoppers and merchants.



**Brian Green, Head of Commercial Sales & GTM, EMEA, Magento**

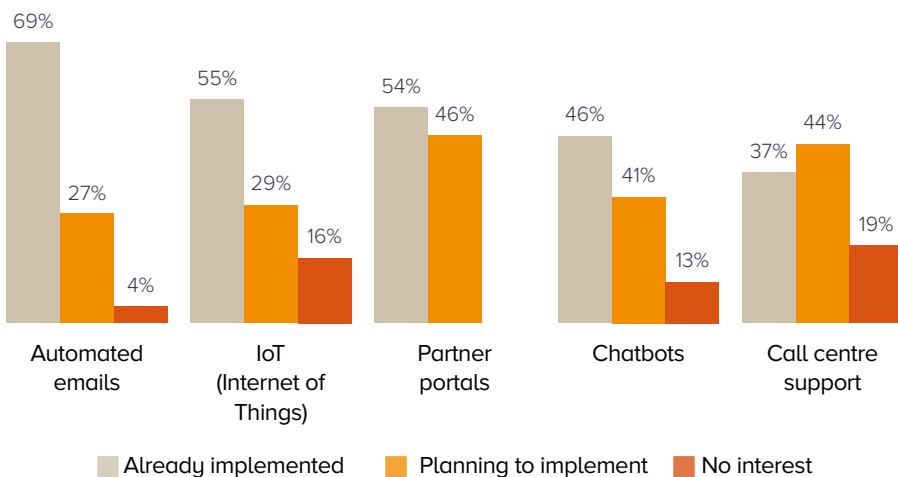
We have been massively investing into digital sales and marketing solutions over the past years. Our focus has been on improving customer experience, and we're accelerating those plans now as we upgrade our eCommerce platform to improve self-service customer portals and deploy more customer event triggered marketing automation flows.



**Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti**

**What solutions do you have in place to improve online customer experience?**

**46% plan to introduce partner portals to improve online experience**



We have built a good understanding of our customers' needs via personal and customer journey mapping. We have multiple scrum-teams in place which are working in parallel to further enhance the online customer experience along the entire journey, from the awareness phase to the post-purchase experience.

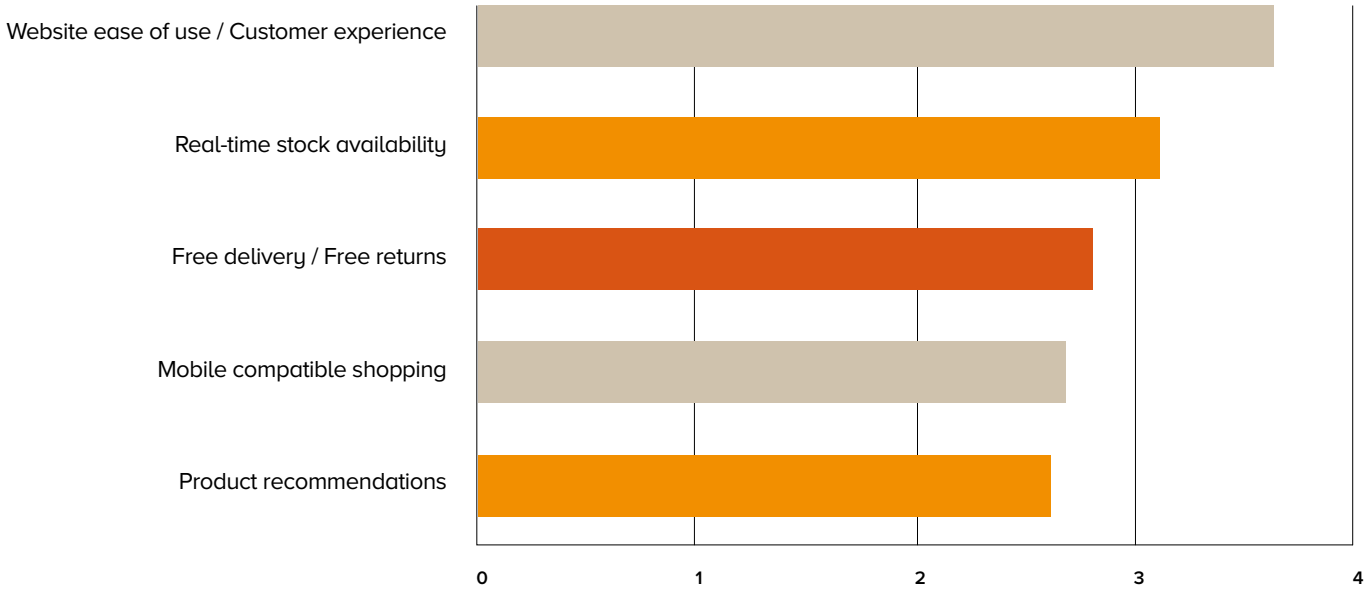


**Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti**

### Which traditionally B2C eCommerce features do you feel are important for the success of your B2B business?

(rank from most important - 5, to least important -1)

**When it comes to applying elements of B2C to their strategy, ease of website use is the top priority for the Heads of eCommerce we surveyed**



“With onsite sales visits becoming ever more restricted, opportunities will diminish for consultative selling that diagnoses customer needs.

**It will be increasingly crucial to use complex product data to support your customer’s ability to self-specify complex product requirements,** and to rapidly identify who should be escalated up the support ladder from eCommerce interactions to more high-touch and personalised forms of support.

Identifying basis points that measure personalisation intimacy from more sophisticated content interactions will increase pressure for creating data-signal rich interactions with alerting for real-time response. Once the fish is in the net you’ll actually have to catch it. It helps if you know the fish is there in the first place.”



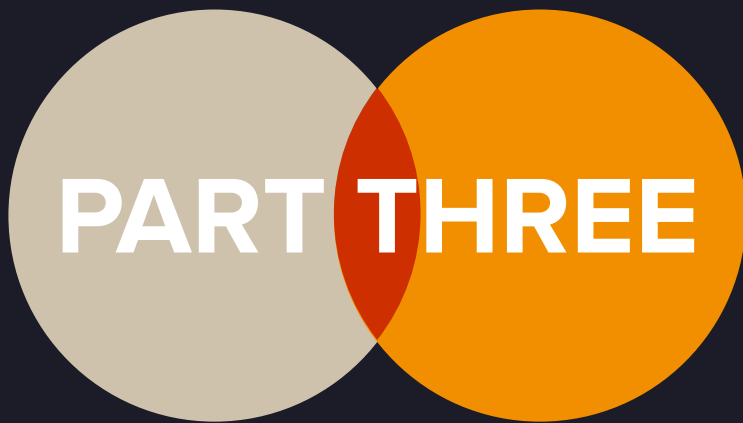
**Carlos Ablar, Former Global Head, Content Marketing Strategy, 3M**

“Ease of use can be a challenge, as the bar has been set high by B2C giants. Customers expect speed, product recommendations, stock availability and estimated time of delivery. At Hilti, we also see mobile usability as a crucial part of the customer journey, even if sales transactions remain dominantly on PC/laptop, and we focus then on self-service and information consultation.

Specific features are by nature more complex in B2B than in the B2C world. For instance, simplifying the connection of a user with their company account could create more opportunity for fraud and even hacking.”



**Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti**



# PART THREE

## NEW OPPORTUNITIES

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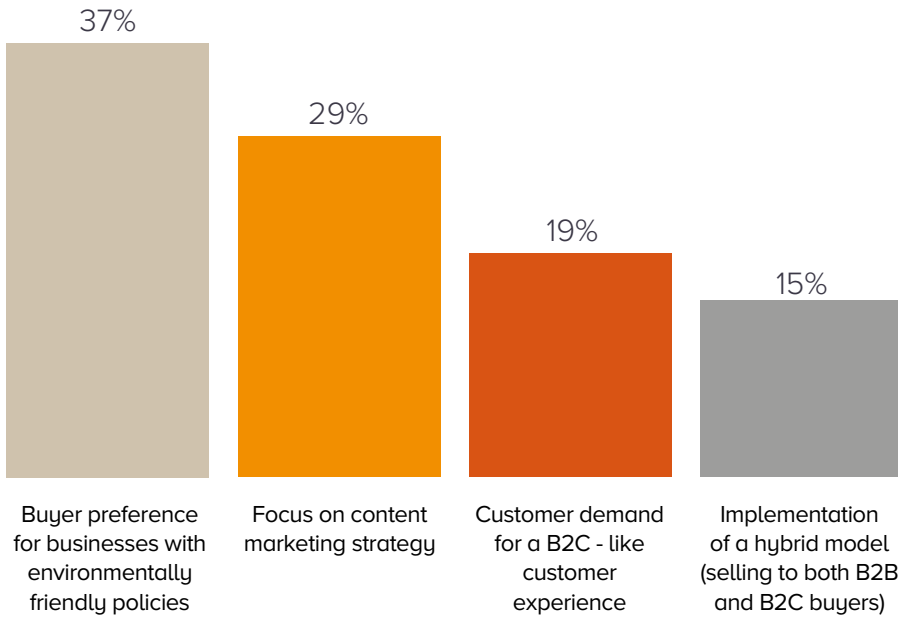
Opportunities are opening up for online sales, and B2B organisations are keen to capitalise. Subsequently, we've seen the pandemic catalyse purchases of solutions to sustain increased online capacity, and create a personalised journey in lieu of the face-to-face customer service that lockdown has reduced.

Innovation has gone from a priority to a necessity, and with the help of digital transformation consultants, more agile B2B players are currently thriving.



### What key B2B trends do you expect to intensify most in the coming year?

**37% of respondents expect to see B2B strategies focus on environmentalism in the coming year**



The uptick in interest in environmentally friendly business is consistent with the macro-trend of focus on social impact, and blends well with the increased interest in content marketing strategy. The reason many content programmes fail is that they don't solve critical problems people actually have.

Social impact innovation provides methods for identifying competitive content-driven services that will empower people with outcomes which ladder up to the UN Sustainability Development goals. For example, reducing infant and maternal mortality via an SMS based health information service delivered to 700 million women can be a far more effective platform for customer relationship development and GDPR-friendly first party data cultivation than other channels.

The impact of purpose-driven content marketing both delivers real value and communicates brand value because contributing to human sustainability and prosperity shows that the brand has values.



**Carlos Abler, Former Global Head, Content Marketing Strategy, 3M**

This corresponds to a recent consumer preferences report run by Adobe where we found that 85% of respondents cited at least one environmental policy that would make them choose one merchant over another. The top reasons were environmentally friendly packaging, transparency about where products were sourced and reduced use of single use plastics in products. This will continue to be a key differentiator for merchants when consumers choose one over another.



**Brian Green, Head of Commercial Sales & GTM, EMEA, Magento**

Sustainability and social responsibility are more important than ever before for most citizens and companies. We are indeed accelerating our effort to make our business better for the planet and people. For us in construction, the specific topic of safety for our customers and employees is our clear priority.



**Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti**

### We asked respondents "How has your content strategy adapted to address the COVID-19 crisis?" Here's what they had to say...

*Our content strategy is trying to inspire a new and disruptive way of utilising digital technology as a powerful marketing source during the pandemic crisis.*

*Our strategy now leans more towards customisations depending on the region and client data.*

*Our content has made subtle changes to include solutions for the current situation. For example, we have made additions of products and content that give solutions for home office lighting.*

*Our content strategy is more proactive than responsive right now.*

*Our content has been revolving around rebuilding during and after the pandemic.*

*Our content strategy has changed completely to show the world that we have products that can support them in these conditions too.*

### What percentage of purchases were happening online before the pandemic compared to now?

Respondents have seen a **22% rise in eCommerce** since lockdown began



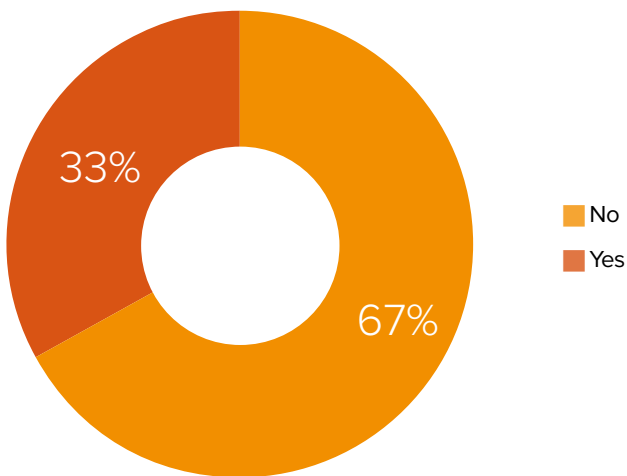
“We have been selling online for as long as Amazon has existed! Along with the execution of our digital transformation strategy initiated in 2016, we are significantly improving the eCommerce and e-procurement customer experience. We believe in the ultimate differentiation with a powerful combination of innovative digital interfaces and our fantastic team members in the physical channels. We go all-in to engage our customers!”



Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti

### Have you upgraded your online payments solution as a result of the pandemic?

**33% have upgraded their online payments solution as a result of the pandemic**



“We have improved our online payment solutions in several countries in 2020, especially in Asia, but this was not as a result of the pandemic. We’ve been working to integrate the leading payments solutions in the relevant markets. The key is to find the right partners who can help you deploy effectively and broadly the set of payment solutions your customers need, without compromising on security, reliability, and flexibility to adapt to rapid FinTech changes.”



Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti

### We asked respondents “We asked what changes respondents had been making to their payments solutions” Here’s what they had to say...

*These new online payment updates have made sales faster in a time when our products are marked as essential.*

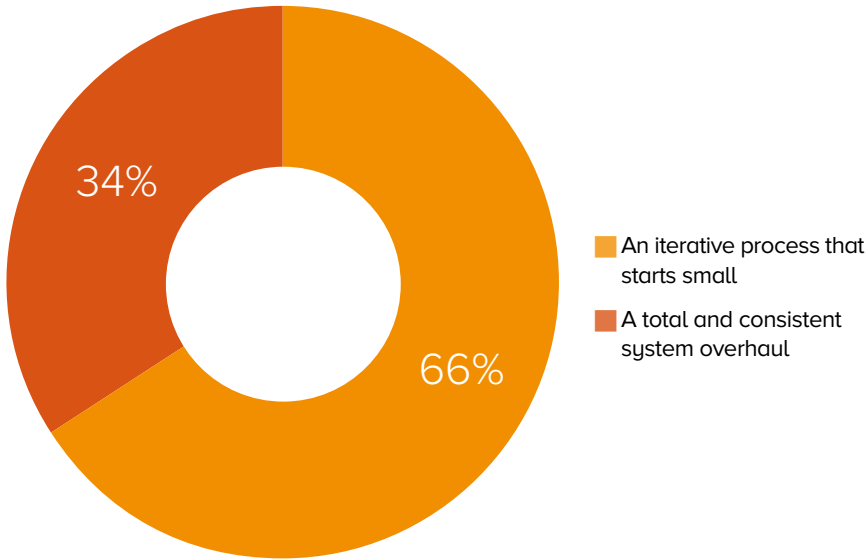
*New region specific payment options are being used to facilitate sales in these tough times.*

*We have been working hard on creating an omnichannel system with multiple options even in terms of payment.*

*We now have payment solutions with higher security components.*

### When implementing an innovative solution, which approach do you prefer?

When it comes to implementing innovative solutions, 66% said this should be an iterative process rather than a complete overhaul



“Iterative methodologies are a virtue when applying continuous feedback loops to identify what is and isn’t working. But ‘iterative’ becomes a vice when used as a fancy word for chronic incrementalism, and as a cover for avoiding implementing accountable change management to ensure optimal and timely value realisation from the deployment of an innovative approach. **‘Let’s start small’ is all-too-often code for ‘let’s not start at all.’**”



Carlos Abler, Former Global Head, Content Marketing Strategy, 3M

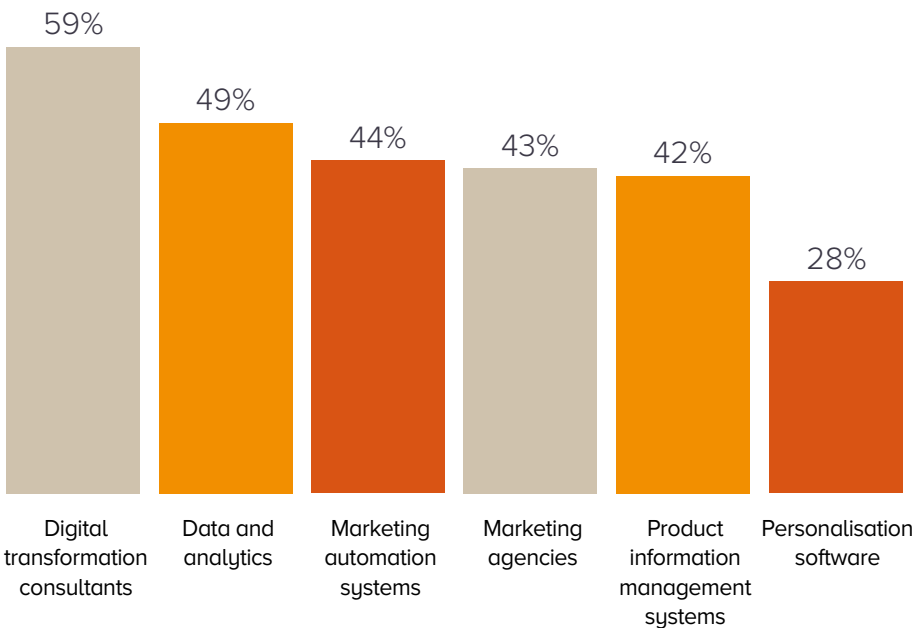
“We’ve been undergoing transformation for a few years now in order to make solution development more agile. For instance, in the customer-facing digital product development, we use a scrum team model. Overhauling major systems like our CRM involves a more hybrid setup.”



Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti

### Which of the following marketing solutions have you implemented?

59% have hired digital transformation consultants to make sure they get their strategy right



“We have decided to build-up all these capabilities in-house, because we believe it is mission-critical for the sustainable differentiation we strive for. We have a premium positioning in the products, services and software portfolio we offer, and we’re focusing on reinforcing this ambition to offer the best customer experience in the industry. Customers hold the key external opinion we need to measure the CX we deliver.”



Jean-Louis Keraudren, Global Corporate Head of Customer Experience, Hilti

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# ABOUT ADOBE, MAGENTO COMMERCE

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Magento Commerce, which powers Adobe Commerce Cloud, is the leading eCommerce platform for brands of all sizes that support B2B, B2C and B2E use cases. Magento Commerce boasts a strong portfolio of cloud-based omnichannel solutions, integrating digital and physical shopping experiences and powering \$155 billion in gross merchandise.

# ABOUT ADOBE COMMERCE CLOUD

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Adobe Commerce Cloud, part of Adobe Experience Cloud, makes every brand interaction personal and every experience shoppable. Built on Magento Commerce, Adobe Commerce Cloud deeply integrates with Adobe Analytics Cloud, Adobe Marketing Cloud and Adobe Advertising Cloud.

Tailored to the needs of global B2C and B2B companies to support multiple brands, sites and countries and to orchestrate commerce across every channel, Adobe Commerce Cloud provides a highly customisable and scalable end-to-end platform to manage, personalise and optimise the commerce experience across every touchpoint.

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# ABOUT ADOBE

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# ABOUT WBR INSIGHTS

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We use research-based content to drive conversations, share insights and deliver results. Connect with our audience of high-level decision-makers in Europe and Asia from industries including: Retail & eCommerce, Supply Chain & Procurement, Finance, as well as many more. From whitepapers focused on your priorities, to benchmarking reports, infographics and webinars, we can help you to inform and educate your readers and reach your marketing goals at the same time.

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