

White Paper

Digitalization in the Wholesale Industry

Challenges | Opportunities | Strategies





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Executive Summary

In 20 years, how will people look back on today's wholesale industry? Will they view it as a business model from a bygone era, long since superseded by more modern alternatives? Absolutely not. Instead, what they will see is the precise moment when the wholesale industry set a bold new course for the future. Our current era will be remembered as a time of change and upheaval, driven by the wider digitalization of society. A period with fundamental implications for our personal lives, for how we collaborate at work, and for the way companies interact with each other.

It is vital that wholesalers confront these changes now, given their profound impact on business models and defining importance for the way wholesalers communicate and cooperate with their customers in the future. In order to remain competitive in the medium to long term, it is essential that wholesalers embrace digital transformation and fully utilize the new opportunities that e-commerce presents. In short, there is a great deal of work to do—with many issues to address:

- ▶ Customers have been exposed to mainstream e-commerce for years and expect the same standards of convenience and service from their business procurement processes. For younger generations of customers and buyers in particular, shopping online is as natural as using a smart phone.

- ▶ New competitors are penetrating markets that were previously dominated by wholesalers. Platforms such as Amazon not only have sophisticated digital know-how, an extensive technical infrastructure, and logistical expertise, they also have the necessary financial firepower.
- ▶ As the Internet continues to boost transparency into both offer content and pricing, customers are becoming increasingly sensitive to price, service, and quality. If any of these elements are lacking, the usually tech-savvy and well-informed online consumer is just a few clicks away from choosing a competitor.
- ▶ More and more manufacturers are now selling directly to consumers. As they bypass traditional, multi-tiered distribution channels, they are eating into wholesalers' revenues.
- ▶ Although many companies continue to operate highly efficiently via traditional processes, that efficiency will decline in relative terms as the world around them goes digital. Companies that embrace digital transformation now will have a clear competitive edge.

The good news is that by leveraging their existing core competencies and adopting the right digital strategy, wholesale companies can not only keep pace with the changes outlined above, they can turn them to their advantage. Using a tailored digital strategy, it is possible to achieve faster growth, create more efficient business processes, stabilize profit margins, and open up new channels and customer groups.

The focal point of this strategy should be the customer base with its various needs and expectations. Wholesalers can accelerate sales by catering to that base with a B2B e-commerce platform that is both deeply integrated into all relevant business processes and capable of delivering a consistent and personalized shopping experience across all available touchpoints. The continuous availability of customer-specific information on products, inventories, and delivery or account status, combined with user-friendly self-service options and 24/7 after-sales service, are just a few examples of the added value that will strengthen and maintain customer loyalty over the longer term.

In this white paper, we examine various aspects of digitalization with reference to the wholesale industry.

What Is the Future of Wholesale – The Way of the Dinosaurs or Giants of the Future?

Since the advent of digital commerce in the 1990s, the demise of the wholesale industry has been predicted many times. Why do we need a multi-tier distribution model when manufacturers can now sell directly via the Web, and new online platforms bring vendors and customers together?

If one takes a look on the German wholesale industry, one can clearly tell that it has responded to the changes in various sectors, adapting its offerings to meet the emerging needs of the respective markets and customers. While it is true that competition is getting tougher here, too, the sector also remains remarkably stable. In 2015, there were approximately 157,000 wholesale companies in Germany, employing around 1.92 million people and generating sales of some EUR 1.13 trillion. In the same year, more wholesale companies were founded than went out of business.¹ Despite stagnant sales, there was a rise in employment and a new record was forecast for 2016.²

On the downside, there has been a negative trend in wholesale pricing for a number of years, with market players increasing their productivity to compensate for stagnant sales. Throughout that time, both the general investment climate and EBIT margins have remained relatively stable.

However, this stability is becoming increasingly fragile as digital transformation continues to erode traditional business models. These changes, including the emergence of new online platforms, are not only challenging wholesale companies, they are also threatening their traditional trade and retail customers in many sectors. Increasingly, consumers are buying products and services online rather than from local retailers or providers—usually for reasons of both price and convenience. With their lower pricing, logistical expertise, and easy access to increasingly tech-savvy customers, online platforms are now becoming serious competitors to traditional wholesale companies.

It remains to be seen how the mostly mid-sized wholesale sector will respond to these changes in market conditions and consumer behavior. The key elements in that response will include digitalization of the product range as well as clearer market positioning—whether as a price leader, service-oriented provider, multi-specialist, or niche player. Having a strong profile in a clearly defined market space will be crucial to future success.

But might the doomsayers be right? Are there really genuine alternatives to the traditional wholesale industry? Can manufacturers and new digital platforms really provide the same services, as is often claimed? Are these online providers willing or even able to take on all the traditional roles of a wholesale company, such as providing credit to retailers and the trades? Can these new

players really provide personalized assistance and services or implement customized processes throughout the supply chain from industry to retail and the trades?

In a market crowded with many buyers and sellers, the wholesale industry specializes in reducing transaction costs for all involved parties across a wide range of task areas. It seeks out and matches supply and demand, creating real added value for all participants. Thanks to its extensive market knowledge, it is able to combine products with processes and services to help its customers become more competitive. It is in this role that wholesalers will continue to serve as an essential link and facilitator between manufacturers, retailers, and the trades.

1 Source: Creditsafe

2 Source: BGA

Expert Interview with Dr. Kai Hudetz

Q1: Dr. Hudetz, what are your views on digital transformation of the wholesale industry? Is it a risk or an opportunity? Essential or just nice to have?

The second part of your question is easy to answer: It is absolutely essential. As a link between different stages in the value chain, the wholesale industry must seize the opportunities offered by digitalization. Otherwise, it will struggle to survive. The Internet offers many ways for wholesalers to improve and accelerate their service to customers—and thus boost customer loyalty. This is particularly important given the increased competition brought about by digital transformation. New competitors are entering the marketplace and pricing is becoming both more transparent and subject to greater pressure.

Q2: Dr. Hudetz, can you give us an overview of progress toward digital transformation in the wholesale sector? What is the current state of this business-critical customer-facing process?

Having conducted many studies and projects in this segment over the past year, we have a very clear insight into what is happening. As in other industries, however, it's not really possible to generalize. There are some wholesalers who are embracing digitalization with a strong customer focus, creating web-based offerings and/or apps, for example. The majority of companies, though, are still in the very early stages in terms of coming up with customer-facing online offerings. Having said that, there is a growing awareness that customer-focused digital content is absolutely key to future competitiveness.

Q3: Dr. Hudetz, is digitalization being taken as seriously as it should be in the wholesale industry? Who is actually promoting transformation within the individual companies? Are there signs of resistance to the necessary changes and innovation?

Digitalization is already a priority in many wholesale companies, although the majority still have a lot of work to do. As was the case over ten years ago in the retail sector, there are many wholesalers who still believe that online selling will never be relevant for their industry. They regard their industry, products, services, etc. as unique and not compatible with online commerce. This is a mistake we've already seen made by the likes of shoe retailers, opticians, and car dealers. As for who is driving digitalization within wholesale companies, it isn't just the younger generation—we're having more and more contact with senior management, too. Middle management, on the other hand, is often determined to stick to the established way of doing things.

Q4: Dr. Hudetz, they say good service is the key to good business—how can wholesalers use e-commerce to develop their business? What positive impact can a platform have in addition to its principal role as a sales channel? Who stands to benefit and how?

That's a very good question. Unfortunately, many dealers still see the Internet purely as a threat, rather than as a valuable opportunity to offer customers a better quality of service. It is crucial here to consider the issue from the customer's perspective: What do customers expect? How is their behavior changing? And how can we offer

them genuine added value? Online, it is extremely easy to bundle services and work with external partners to offer genuine solutions, rather than just limiting yourself to products.

Q5: Dr. Hudetz, what specific advice do you have for companies? How can they make a complex e-business project manageable? Where do they start and how much planning is required? Who or what should be the focus of their strategy?

The wholesale industry is very diverse, so it's hard to give a simple answer, but there are four basic principles to consider:

1. View things from the customer's perspective as far as possible. Ask your customers what they want!
2. Be informed: there are lots of studies, guides, and events that can help you.
3. Think of digitalization not as a finite project, but rather as a continuous process.
4. Be innovative: try out new ideas that might surprise your customers.

Dr. Kai Hudetz

Since August 2009, Dr. Kai Hudetz is the Managing Director of the IFH Institut für Handelsforschung GmbH (IFH Köln) in Cologne, Germany.

From its founding in 1999 until 2011 he has been in charge of the E-Commerce-Center (ECC Köln) which is a business unit of the IFH Köln. With his many years of experience, Dr. Hudetz is one of the most renowned e-commerce experts in Germany. As an author of studies and numerous specialist articles, he deals with current questions of trade in the digital age. In addition to his work as a lecturer at various universities, Dr. Kai Hudetz is a sought-after speaker and presenter at high-profile industry events. Furthermore, he was a member of the Supervisory Board of Inter-shop Communications AG from June 2013 until June 2016 and is currently a member of several advisory boards.

About IFH Köln

Markets. Customers. Strategies. IFH Köln has inside access to provide information, research and consultancy on retail issues relevant to the digital era. Since 1929, IFH Köln has been the first port of call for dependable data, analyses and concepts to make companies successful and sustainable. Since 1999 IFH Köln has been operating under the ECC Köln brand examining the future of retail: e.g. cross-channel management, mobile retail and payments.



Digital Transformation – Are You Ready for Change?

Digital transformation is now well underway and placing real demands on all wholesale companies. After all, their customers, employees, suppliers, competitors, and service providers are also becoming increasingly digitized. So the question is no longer whether it is possible to avoid digitalization, and if so how, but rather the order in which the necessary changes must be implemented.

The problem here is that many wholesalers are finding it difficult to keep pace with digital transformation. Even though nine out of ten wholesalers believe that digitalization will be the dominant topic by the end of 2020,

the majority feel that they are not properly prepared to take the necessary steps. In many cases, they simply lack the means of penetrating the increasingly complex issues they need to understand in order to digitize their business.³

When discussing digitalization with mid-sized wholesalers, they often raise the following basic questions: What do these changes mean for my company? How well do we compare with others? Where do we have the greatest potential? But most of all: Where should we start—and what is the best approach?

A useful tool for answering these questions is the “Digital Readiness Model” devised by the Bundesverband Digitale Wirtschaft (BVDW) e.V. (German Association of the Digital Economy). This model looks at digitalization as a comprehensive process that affects every part of an organization. It takes a holistic view of areas, such as purchasing, sales, IT, and HR, as well as qualities, such as culture, creativity, innovation, and adaptability, and assesses the company’s digital readiness. At the end of this process, the company is placed in one of the following five categories:



1. IDLE PHASE

In the idle phase, a company doesn’t yet have a digitalization strategy and there are no links between the various touchpoints and sales channels.



2. STARTER PHASE

In the starter phase, the company has already begun work on preliminary digital projects. Individual departments, e.g., marketing or sales, are running pilot projects; however, these projects are isolated and do not form part of an overarching strategy. There is no enterprise-wide digital strategy in place.



3. PILOT PHASE

In the pilot phase, the executive board has launched the first major steps in the digital transformation process. These steps build on preliminary pilot projects and are consolidated into strategies at the divisional level. In some cases, the company already has a high-quality digital offering for customers and users at selected touchpoints. In addition, the company has already started work on projects that demonstrate effective inter-divisional collaboration in cross-functional teams. The implemented digitalization strategies are clearly documented.

Cross-functional, interdisciplinary teams enable effective collaboration across boundaries. They bring together multiple areas of expertise for the purpose of developing new products and addressing complex problems within the respective organization.

³ Source: STMWI

4. DIGITALIZATION PHASE

In the digitalization phase, the company has considered the financial impact of digital strategies and is now increasing integration of its operational and business processes. To do that, it is developing dedicated strategies for digital transformation, which are then implemented by cross-functional teams. The executive board has issued a clear statement of intent, which is documented and has been cascaded throughout the company.



There is no one-size-fits-all solution to the challenges of digitalization. Every company needs its own unique strategy that is tailored to its particular value chain and coordinates all the relevant tasks in a systematic manner. It is also important to bear in mind that digitalization is not a one-time project with a beginning and end, but rather a continuous process. Therefore, this process must be firmly embedded in the corporate culture, i.e., implemented consistently by every member of staff, from senior and middle management down to junior employees.



5. DIGITIZED PHASE

The company is finally classed as “digitized” when digitalization of core processes, products, and services has been completed, leading to the adoption of new policies in the operational and business model. The company now has uniformly integrated touchpoints, synchronized strategies for its online and offline presence, and an updated marketing strategy—all of which is applied and implemented throughout the organization. The company can efficiently collect and analyze data that allows it to identify its target audience as well as their preferred type, channel, and frequency of communication.

Digitalization as Opportunity – Examples from Two Industries

While large parts of the wholesale sector are still struggling to identify suitable digitalization strategies and business models, two industries have already seen the opportunities and understood how to use them. The book trade and IT industry were among the first to face the challenges presented by online commerce. With the emergence of online vendors, such as Amazon, they were confronted with new and disruptive competitors, new technologies, and rapid changes in customer behavior. These developments threatened to undermine the traditional, multi-tier distribution paradigm and, with it, the long-established business models used by wholesalers and retailers in the two industries.

All of a sudden, tech-savvy consumers were able to compare prices, products, and service offerings with just a few mouse clicks and then choose the most attractive option and have it delivered to their door. Within a few short years, these industries were in total disarray and—long before other sectors—desperately searching for ways to fight back.

The wholesale sector faced two main challenges. Firstly, it had to undergo its own digital transformation in order to confront these new competitors. Secondly, it had to include retailers in this transformation process, since many small and mid-sized outlets had neither the necessary digital infrastructure nor sufficient resources to manage the transition alone. Wholesalers realized that without assistance more and more retailers would simply disappear, along with a significant portion of their customer base. In response, the wholesale industry began a massive expansion of its digital services for retailers, while also supporting these outlets as they developed their own digital processes and structures. The industry thus not only ensured that retailers were able to respond to the changing market and open up digital channels to their customers, it also strengthened its ties with these retailers.

B2B e-commerce solutions replace the traditional methods used to order from wholesalers (phone and fax) by

connecting buyer and seller smoothly and efficiently via Web-based interfaces or EDI integration. They also enable retailers to provide their corporate customers with standardized e-procurement options. In addition, thousands of different retailers can base their own online stores on the wholesaler's full-service e-commerce platform. They can use these stores to communicate directly with customers, to provide them with personalized product offerings, and to accept orders 24/7.

Sharing IT resources was not the only way in which the wholesale industry played a crucial role in helping its customers to go digital. It also provided them with the necessary expertise, e.g., through in-house academies where retailers acquired new knowledge and were kept updated on the latest developments. The industry understood that digital tools can only be used effectively if their users have the requisite knowledge. Through this systematic digitalization of all relevant stakeholders, the wholesale industry not only opened up new opportunities for retailers, it also succeeded in cementing its position in its customers' value chains and securing their long-term loyalty.

This type of digitalization strategy, where a wholesaler engages with its customers, considers their transformation needs, and provides corresponding support, can easily be replicated in other wholesale sectors.



Digital Excellence – Enterprise-Wide Digital Transformation at Würth

Based in southern Germany, the Würth Group is a global specialist for assembly and fastening materials. Principally a B2B wholesaler, the company supplies products to 540,000 customers in industry, construction, and the trades.

Würth has been deploying digital processes for a considerable period of time and is systematically expediting its own continuous transformation. In 2007, for example, the existing warehouse management system at company headquarters in Künzelsau-Gaisbach was linked to a pick-by-voice solution for handling the associated logistics. This solution provides a range of additional functions, including real-time inventory monitoring and the ability to view and plan the availability and productivity of individual warehouse staff members at any time.

On the customer-facing side, Würth operates an online store with extensive functionality. Purchasers benefit from a full range of product search, checkout, and order history options, plus many other useful services. In addition, Würth has its own mobile app that offers all of the above plus some additional features, e.g., a noise measurement tool that automatically recommends appropriate products from the hearing protection range. There is also a barcode scanner that customers can use to quickly re-order items by simply scanning a barcode on the product packaging.

To market its products, Würth uses a mix of direct sales, brick-and-mortar locations, and e-commerce. The company employs around 3,200 full-time sales reps, who use proven customer service methods that have been established over several decades. Nonetheless, Würth wanted to include the sales force in its pursuit of ever-greater digital integration. The company identified significant potential here due to the complexity of its product range and the resulting sales rep catalogs.

These catalogs, bound in loose-leaf plastic binders and used in customer meetings, contained more than 100,000 products, had an average of 2,000 pages, and weighed approximately 3 kilograms. Every month, all sales reps would have to update their catalogs by hand—an extremely time-consuming and unproductive process.

Looking for an alternative, the company came up with the 1PLUS mobile app. This quickly proved to be a major step forward and a significant improvement over existing processes. The app was designed not only to provide automatic catalog updates but also as an innovative PoS solution that company reps could use during customer visits. Offering quick and easy access to product information, it is also an efficient tool for inputting customer orders. If the device is connected to the Internet, the orders can be placed immediately. In addition, the app

allows customers to interact with sales staff and shape the consultation and purchase process.

Together, these features enable faster, more meaningful, and more professional communications with customers. For sales staff, the app has a monitoring function that improves the transparency of sales processes and makes it possible to verify the impact of marketing activity. Users can also add a wide range of other services, including automated product recommendations, complete customer histories, product configurators, route planning tools, and much more.

During the pilot phase of the 1PLUS app, Würth discovered that sales reps were able to increase the average number of items per order by 0.96 and broaden the range of products used by the customer. Today, the app is additionally being used by telephone sales staff and in the company's 400-plus branch offices.

In 2016, Würth received the Digital Leader Award in the category "Spark Collaboration" in recognition of its intelligent integration of direct sales with digital information resources and services.

How Digitalization Benefits the Wholesale Industry

Omni-Channel

According to a study by Forrester Research⁴, two-thirds of all B2B customers expect their interaction with a company to be totally seamless across all channels. Regardless of whether they communicate directly through a salesperson or by cell phone, Internet, or mobile app, they expect to find exactly the same products, information, and services. While providing a consistent offering across all channels is not always easy, it does create some important advantages. Forrester noted that about one-third of all omni-channel customers are ready to spend more, while around half of the companies surveyed stated that omni-channel customers are more profitable overall.

Failure to implement an omni-channel strategy has some obvious negative consequences. If a customer is unable to obtain an item from a vendor via a particular channel, they are more likely to switch vendors than to switch channels. If the channel in question is the Internet, those competitors are just a click away. If a product is not listed on the wholesaler's website, the customer is highly unlikely to inquire by phone—searching for a competitor's website is much more convenient.

Historically, wholesalers have pursued a clear multi-channel strategy, using catalogs, brick-and-mortar locations, sales representatives, call centers, and more recently the

Internet to interact with customers. The digitalization of multiple channels and touchpoints, along with the resulting harmonization of business processes, data, and technologies across all business areas, are key aspects of an omni-channel strategy. A successful omni-channel strategy supports consistent pricing and branding and provides customer-specific rather than channel-specific income statements. It also delivers a coherent customer experience across all areas and channels.

The transition to a truly enterprise-wide omni-channel strategy often requires a fundamental reappraisal and a new, cross-channel perspective. Wholesalers may be faced with complex change processes as old ways of thinking and areas of ownership are inevitably challenged and transformed. For example, all employees who interact with a customer during his or her journey across multiple touchpoints can be rewarded for their contribution to the long-term loyalty of that individual. This requires new internal structures, e.g., new commission models in sales and customer service.

When customers connect with a company through the various channels, they provide a range of useful information. By merging and then using this information in intelligent ways, it is possible to achieve a better and deeper understanding of the customer's needs. Based on this understanding, the company can create tailored

offerings across all channels, improve its cross- and up-selling options, and generate greater customer satisfaction and loyalty.

If available resources can be shared by multiple channels, this leads to savings, synergies, and increased profitability. By moving simple and frequently recurring services online, customer service staff gains time to concentrate on more personalized and customer-intensive tasks. Distribution costs can be reduced by providing a cross-channel overview of available stock. Going online can also cut process costs and lead times per order and eradicate continuity gaps.



4 Forrester: Building the B2B Omni-Channel Commerce Platform of the Future



Quick and Easy Order Processing

As more and more wholesalers recognize the potential of e-commerce to boost revenue, they are moving their sales online. Faster transactions, a larger selection of products at lower prices, plus comprehensive after-sales service are some of the main reasons that buyers now prefer the online channel over personal ordering methods.

However, B2B e-commerce in the wholesale industry is also becoming increasingly complex and multi-layered. In particular, it is important that wholesalers tailor their quotation management and order entry systems to the preferences of business customers and procurement experts—across all available channels.

This, essentially, is the whole purpose of B2B e-commerce: To give buyers convenient access to an online catalog, to provide comprehensive information on the required products and services, to create a personalized quotation for the required quantity, and to enable the buyer to place their order independently. The entire process is controlled by the buyer—at the time and location of their choosing. For the seller, the solution greatly reduces the burden on sales staff, who can use the reclaimed time for more productive tasks, e.g., one-on-one advice or handling complex, high-value inquiries.

The solution also results in time savings for companies and their buyers through customized control of approval workflows. While most companies have multiple buyers with the authorization to place orders, certain products or order values require an extra layer of approval from a manager. Using a digital sales platform, it is possible to assign a unique order-value limit or personal budget to each individual buyer. If an order value is higher than the assigned limit, an approval request is automatically sent to the manager responsible or the head of the respective cost center. This ensures full transparency for both buyer and seller and reduces the number of additional manual processes. The benefits are not only a faster and smoother purchase process, but also fewer processing errors—which in turn adds to customer satisfaction.

An integrated B2B e-commerce solution provides a range of important features and information that streamline business processes and make order entry more efficient and more productive. These features include special customer price lists, custom product offerings, master agreements, block pricing, tailored services, integrated quotation processes, full customer histories, special logistics options, and an overview of available items at all locations.

Using these features, it is possible not only to model and replicate sales and order management processes as part of a purely digital platform but also to coordinate and synchronize all customer interaction across all available channels. The latter aspect is particularly beneficial to sales staff, who have immediate access to a comprehensive range of customer details when advising a customer, including special terms and conditions and the full order history.

B2B commerce solutions provide wholesalers with an additional sales channel and thus a valuable opportunity to reach many new customers. They also include a range of additional services for sales staff and regular customers. Deeply integrated with other systems, and equipped with an extensive database and customizable functionality, B2B solutions not only support personalized quotations, they also accelerate transactions. Ultimately, this streamlining of everyday business processes is an important driver of digital transformation.

Service Portals – the Digital Customer Service Center

What sets a digital company apart from a traditional one? In a digitally transformed business, information technology is no longer limited to a supporting role—it is central to the evolution of the business model and associated business processes. New digital models and processes open up new sources of revenue and new competitive strengths. Digital services can be added to the existing portfolio and information and data become strategic assets.

One of the first effects of digitalization is to remove some of the traditional distinctions between small, medium, and large enterprises. The digital world is not only a great leveler, it is also surprisingly easy to enter—the cost of admission being offset by the resulting utility and benefits. Thanks to recent advances in cloud-based and B2B commerce technologies, it is now possible for mid-sized companies to use the same set of tools as larger corporations.

This new potential also enables companies to build a customer service system that is ready for future challenges, i.e., one which uses digital offerings to deliver more value to customers and meet their demand for greater autonomy. Today, buyers can choose between one-on-one service and maximum efficiency. With information now available

instantly from any computer or mobile device, digital content is rapidly replacing personal communication as the most important component in modern customer service.

Digital customer service is therefore a genuine requirement and now an integral part of an effective service strategy. Today's customers expect unlimited access to information, an immediate response to every service request, and the ability to perform all transactions unassisted. This is particularly important in the wholesale industry, where buyers expect sellers not only to supply goods but also to provide additional value-added services.

The telephone—formerly the principal channel for customer service—has been replaced by online service portals with their 24/7 availability. All services are bundled at a single location along with a wide range of information resources. Powerful and deeply integrated, the service portal is now the central hub for all core processes around the digital customer service platform.

Depending on the specific requirements and orientation of the business, a service portal offers enormous potential for efficient and scalable implementation of various processes:

- ▶ Customer-specific catalogs
- ▶ Detailed and relevant product information
- ▶ Cross- and up-selling opportunities
- ▶ Quotation management and project management
- ▶ Management of cost centers, projects, and approval processes
- ▶ Service and product configuration
- ▶ Cross-channel order management
- ▶ Order and transaction history
- ▶ Open items, billing history, and payment history
- ▶ Downloading of electronic documents, e.g., invoices
- ▶ Customized services available to order
- ▶ Management of auto-replenishment rules
- ▶ Returns management
- ▶ E-learning portals and online academies, user manuals, technical documentation
- ▶ Marketing and sales documents available to order/download
- ▶ Value-added services, e.g., product updates, maintenance, and repair
- ▶ E-services for electronic catalogs and EDI/OCI integrations
- ▶ Digital customer services, e.g., FAQs, chat, and ticket systems
- ▶ Analysis and evaluation, e.g., by product, product group, project, or cost center

A B2B e-commerce solution is the ideal platform for an online service portal and for delivering digital customer service. It offers a harmonized view of individual customers across all locations and systems, merging customer, transaction, and product data with service offerings to provide a consistent package of information and services. By automating the relevant processes, it is possible to improve the speed and efficiency with which services are delivered to customers and achieve a long-term increase in operating margin.

New Providers in Payment Management

The wholesale industry has been providing credit assistance to retailers for many years through generous payment terms on the goods supplied for resale to consumers. As a result, many wholesale companies have developed highly professional and efficient systems for managing payments and receivables. Naturally, this role of credit provider carries significant risk. All costs arising from payment delays and irrecoverable debts are borne by the wholesaler and detract from the bottom line.

Digitalization and the increasingly important role of e-commerce present new challenges for finance departments in the wholesale industry. Implementing a B2B e-commerce solution necessitates major changes in the way payments and receivables are managed. For example, companies will have to consider and decide how best to assess the credit terms offered to new cus-

tomers, how they choose which customers should be offered payment on invoice, and how they deal with new payment methods, such as credit cards or PayPal.

Digitalization gives wholesalers a wider range of possibilities when it comes to offering the ideal mix of payment methods. Options such as credit cards, bank transfers, and PayPal are now gaining acceptance alongside the traditional B2B methods of advance payment, direct debit and, above all, payment on invoice. However, new online payment methods also require new processes and partners. While traditional payment methods were usually handled internally by the finance department, the processing of online payments requires new external payment service providers. Companies such as Payone, Computop, and Wirecard manage the online payment process in collaboration with the selected payment providers. B2B e-commerce solutions help to bridge the gap by supporting and coordinating the old and new payment processes, thereby enabling easier integration with existing payment management systems.

When implementing a B2B e-commerce solution, it is important to consider how to combine traditional and online payment methods with appropriate risk and credit

checks in order to create the best possible payment and receivables management system. Open items, budgets, and individual payment histories are important reference points when determining the payment options and credit limits that should be made available to existing customers using the B2B e-commerce solution.

In the case of new customers, the risk assessment process is obviously reliant on external references. Credit agencies are a proven and easily integrated source of information on individual creditworthiness and risk. Providers such as Creditreform, and Infoscore offer ready-to-use interfaces for fast, real-time credit checks. Using these services, the wholesaler can verify a new customer and determine the appropriate credit limit during registration. If the credit check is negative, the customer can be limited to safe payment methods only, e.g., advance payment or PayPal.

In each case, the choice of methods offered can be as unique as the relationship with the customer. Using a B2B e-commerce solution, wholesale companies can combine a wide range of information and systems to create an efficient, personalized platform for managing payment and risk.

B2B Integration – Connected Digitalization

Far from being standalone solutions, B2B e-commerce platforms are deeply integrated with a wide range of internal and external systems. The ability to integrate these systems as seamlessly as possible is one of the most important factors in the successful implementation of digitalization projects. Small wonder, then, that in a recent study of digitalization in the wholesale industry Roland Berger noted that the greatest challenge is to combine the various internal and external systems to form an integrated solution and establish end-to-end processes across multiple system boundaries.⁵

Digitalization is a global economic trend, which means it also impacts the diverse range of networks typically used by a wholesaler's partners. These external networks are rarely static and new markets, new sales channels, and new product lines mean new suppliers, new customers, and new partners. To compete and succeed, wholesalers must be able to integrate every new partner quickly and easily into their existing B2B e-commerce solution.

While many of these partners have the EDI interfaces required for exchanging data, the sheer variety of data formats and divergent processes often makes it ex-

tremely difficult to communicate with external parties. Wholesalers should therefore consider precisely which interface technologies and data formats they would like to make available, and which standards are relevant for their segment and customers. They should also clarify whether it is necessary to support customer-specific interfaces and formats. This issue in particular can result in a considerable increase in workload if the wholesaler has to handle a wide variety of interfaces used by external partners during day-to-day operations. It may thus be preferable to outsource these services.

The main advantage of digital B2B integration is that by automating what were previously manual processes, companies can improve efficiency and data consistency while also bringing down costs. However, it is only possible to achieve significant cost benefits if all processes and data flows are implemented coherently across system and company boundaries.

Through automation of the order process, for example, all incoming orders can be received and processed with greater speed and accuracy. Faster processing boosts customer satisfaction and also internal efficiency. In addition, digital integration of suppliers allows wholesal-

ers to achieve even greater transparency in their delivery processes, greater automation in their warehousing and distribution centers, and tighter control of their inventories—which ultimately increases working capital and reduces costs.

B2B e-commerce solutions can make a significant contribution to B2B integration, enabling easier harmonization of processes and integration with existing infrastructures, internal processes, and data formats. Using omni-channel order management or EDI B2B integration platforms, these solutions provide the technical foundation for integrated end-to-end processes. These processes include sell-side e-procurement via OCI or EDI, the orchestration and consolidation of orders and inventories across distributed locations and suppliers, and the integration of processes and data across system boundaries. As a result, B2B e-commerce solutions are becoming a decisive factor in opening up new digital spaces for the wholesale industry.

New Digital Spaces

Omni-Channel Services for Retailers and the Trades

Omni-channel commerce and special delivery services often present major challenges for retailers. In order to provide ship-to-store, pick up in-store, and return in-store options, retailers first have to establish the necessary logistical processes and then set aside inventory for online customers. Wholesalers can assist by assuming responsibility for the key logistical and service tasks, i.e., combining the available product range with intelligent logistics solutions (same-day delivery or delivery within a specific time window). Many wholesalers already provide retailers with the option of just-in-time delivery or delivery within 24 hours or less. This enables retailers to offer in-store pick-up within a defined time window.

Another option available from some wholesalers is drop-shipping, i.e., direct delivery to the end consumer's door. All drop-shipments carry the retailer's own branding and the wholesaler charges the retailer for goods only when a customer places an order. Thus, the retailer can focus on its core product range while also offering items from the wholesaler's catalog at no additional risk.

Connect Directly with End Customers via Proprietary B2C E-Commerce

Wholesalers can also leverage their strengths by addressing consumers directly, either through specially created B2C solutions or by affiliating with external retail marketplaces. In many cases, these B2C activities are run under a new company name. A number of wholesale companies are already demonstrating how this strategy can be implemented. By creating pure-play spin-offs with systematic digitalization of all transaction processes, they are reaching out directly to consumers with competitive offers and pricing.



Direct Sales to Small and Mid-Sized Retailers and Trade Companies

Wholesalers who cater exclusively to larger enterprises and industrial concerns can expand their base by selling directly to small and mid-sized retailers and skilled trades, either under their existing brand or using a new company name. Usually, these wholesalers have complex and costly distribution processes that are tailored to the specific needs of their customers, e.g., master agreements and key accounts. For this reason, they are usually unable to find cost-effective ways of selling to smaller companies—who typically place smaller orders consisting of lower-value items. Exceptions to this rule can be found in technical wholesaling, where smaller customers are served via new subsidiaries, which make effective use of e-commerce strategies to create online offerings tailored to this specific target group.

Full-Service Provider for Smaller Specialist Retailers and Dealers

Multi-regional wholesalers and buying associations can help their customers and members compete more effectively by providing access to shared e-commerce platforms. Mid-sized specialty retailers and smaller commercial customers generally do not have the resources to create their own e-commerce solutions. However, using these shared platforms, they can improve customer retention within their region and reach out to new clientele. IT distributors and the book wholesale industry are already demonstrating the value of this concept with their e-commerce services for specialty retailers and resellers.

Full-Service Provider for Manufacturers

Given its traditional role with regard to manufacturers, the wholesale industry is ideally placed to offer full-service e-commerce solutions that enable partnered manufacturers to sell directly to consumers. Under this model, the wholesaler assumes complete responsibility for delivery of all services on behalf of the manufacturer, thus providing significant added value. While manufacturers would have to create totally new structures in order to sell directly to consumers, wholesalers already have these assets in place and can easily make them available as a service. Manufacturers, retailers, and commercial customers can all benefit from the provision of integrated omni-channel services by wholesale companies.



Establishing a Clear Market Position

In order to equip themselves for future challenges, wholesalers need to clearly define their respective market positions and communicate their strategic focus externally. The nature of that strategy is heavily dependent on the individual company and sector, but it is possible to distinguish between four basic approaches that differ in terms of pricing, service, offer complexity, and customer/product diversity.



PRICE LEADERSHIP

Digital platforms and new disruptive providers in areas such as technical wholesaling are already focusing their strategies on achieving price leadership. These companies leverage modern online technologies and define their position clearly and openly using the following three elements: pricing, breadth and depth of product range, and leanness/efficiency of processes and structures. The product range is based around standardized C-items, which are marketed to the consumer goods and industrial B2B sectors. The entire organization is geared toward optimum efficiency in purchasing, sales, and distribution. Price leaders generally do not offer customized services, consulting, or niche products. In most cases, they are pure-play e-commerce companies. However, there are also opportunities for established wholesalers to compete in this market if they can make efficiency a core feature and clearly communicate their price leadership credentials. Naturally, this strategy requires the widest possible reach to achieve the economies of scale that enable lower procurement prices.



SERVICE-ORIENTED WHOLESALE

The service-oriented sector relies entirely on traditional wholesale strengths. It offers added value to customers through a variety of services that can be individually tailored, combined with a broad, deep, and compelling range of products. Such is the quality of the service provided that the customer is willing to pay a premium. Naturally, that willingness has certain limits, which is why service-oriented wholesalers also require efficient processes and modern online technologies in order to compete with price leaders. Other methods of differentiation include additional offerings, such as service locations, showrooms, branch locations, high-end product presentation, product advice, information platforms, and training. These services should form part of a dedicated omni-channel strategy in order to meet customer needs and expectations at every touchpoint.



MULTI-SPECIALISTS

With their breadth and depth of offerings plus exceptional expertise, multi-specialists are ideally positioned to create new, complementary, market-tailored products and services. As industry specialists, they are committed to achieving the highest standards of excellence in genuine wholesale services. Multi-specialists perform a wide range of tasks in the value chain and offer specially tailored, end-to-end solutions with everything from project planning through cross-brand configurations or installations to service. As is the case with other wholesalers, multi-specialists are dependent on efficient processes, modern omni-channel technologies, and modern distribution strategies. Using integrated supply-chain processes, they offer just-in-time delivery of products and services to the customer's value chain.



NICHE SPECIALISTS

Niche specialists concentrate exclusively on narrowly defined segments, distinguishing themselves through the depth of their product range and the quality of their consulting and solution expertise in their respective market. This approach allows them to stand out from the competition. As in the other categories, niche specialists also require an efficient value chain as well as modern online and omni-channel technologies and distribution channels in order to bring their specific product and solution expertise to market. Key requirements are the ability to tailor solutions to individual customers and establish a clear position in the marketplace.

In each of the above categories, companies can differentiate themselves by remaining focused on their customers and continuing to customize their services. Equipped with a clear understanding of their own strengths and the needs of customers, they can specialize further in one of the following roles:⁶

- ▶ **System supplier**, of which there are two types: The first, an **MRO provider** (maintenance, repair, operation), caters to industrial and trade customers, assuming overall responsibility for the procurement and supply of items used in maintenance, repair, and operation and/or the procurement and supply of C-items (small parts of low monetary value). The second type, a **service merchandiser**, provides support to retailers through delivery of goods and management of sales, e.g., through appropriate marketing.
- ▶ **Module supplier**: Responsible for individual processing steps in the value chain, providing either customer-specific or segment-specific services. This role involves a certain amount of creative leeway and thus greater scope for influence.
- ▶ **Distributor**: This role is also essentially traditional, i.e., that of a broker between producers and consumers. For manufacturers, a distributor provides valuable expertise around opening up new markets. For industrial and trade customers, the distributor's appeal lies in the extensive product range. Distributors who fail to secure their markets run the risk of being displaced by logistics providers and/or manufacturers.

Choosing the right strategy is never easy, but most wholesalers have already identified a specialty area for their business. Nevertheless, it is important to revisit this decision at regular intervals so that any necessary adjustments with regard to expertise or positioning can be carried out in a timely manner.

⁶ For details, see Zentes, Swoboda et al., Handelsmanagement. Munich. p.165.

The Seven Rules of Digitalization

Many wholesalers find it difficult to digitize their business models. Often, CEOs are unsure of what is required to keep pace with existing or emerging competitors. According to industry experts, the first step is to assess the digital maturity of the company in order to understand the context in which digitalization will take place. The next step is then to consider the specific course of action. The following seven rules of digitalization are designed to keep you on track throughout the process.

1. Develop Digital Solutions in a Protected Space

During digital transformation of a company, it is important to provide a protected space where interdisciplinary teams can develop and test new projects without being exposed to everyday operations, internal culture, and established hierarchies. The main requirements are sufficient freedom, a focus on utility, and a suitable test and implementation methodology, which together make it possible to benefit from new ways of testing and successfully rolling out innovative new concepts.

2. Agile Development and No Fear of Failure

Agile management methods are an essential part of digital transformation (see info box). These lean-process methods are more effective than traditional work styles as they allow new ideas to be developed and tested with input from end users, thereby achieving faster results. Failure is an inevitable and important part of development, so it is always better to “fail fast and fail cheap.” Agile development quickly reveals whether a project has the potential to succeed, to deliver the required functionality, and to gain general acceptance among users.

Agile management methods

These are methods that allow all stakeholders to take more control and interact in a transparent manner. The aim is to encourage a proactive approach to change and arrive at new solutions through iterative cycles. Used successfully, agile methods deliver viable iterations quickly, thereby shortening feedback cycles. The long-term goal is continuous process improvement through self-reflection. The result is a responsive organization with fast lead times and lean inventories. One of the most popular agile management methods is “Scrum”.



Design thinking

Design thinking is a systematic approach to solving complex problems within all areas of life and business. Unlike traditional methodologies, which generally approach problems in terms of technical solvability, design thinking revolves around user needs and requirements. The design thinking process brings together a variety of individuals with diverse experiences, opinions, and perspectives in relation to a given problem. The basic assumption of design thinking is that new ideas emerge at the intersection between three equal factors: technology, business, and human values. It therefore combines three essential components—technical feasibility, economic viability, and human desirability. All three factors must be considered in order for the resulting idea or process to succeed. One of the methods used in design thinking is customer journey mapping. This technique analyzes all interaction with customers, documenting each one's preferences, experiences, and emotions at the various touchpoints. Information is collected through interviews and other means across a range of different channels, e.g., store, telephone, e-mail, website, or mobile app. This knowledge then becomes a key element in the design of new offerings and products.

Minimum viable product (MVP)

A minimum viable product (MVP) is a product that is created and deployed quickly with just enough features to gather validated feedback from customers and users. This information is then used to expand and develop the original MVP.

An MVP contains only those core features that are required to perform the given task. The MVP method saves considerable time and money, reducing the risk of creating a finished product that does not address the needs of customers. Companies can thus avoid the frustration and expense of investing months of development in a fully featured product that nobody wants to use.

3. User Focus Is the Top Priority

Digitalization should always be focused on the user. All products and features should be developed primarily on the basis of customer/user profiles and preferences. Design thinking methods (see info box) help to identify the right solutions for a given user problem or meet a customer need. The aim here is not to find the perfect solution to a problem, but rather to define the essential features or “minimum viable product” (MVP; see info box), which can then be continuously adapted and evolved. Ideally, it is possible to turn a basic idea into a finished product in a matter of weeks. Speed, of course, is one of the key criteria in the digital transformation process.

4. Work Toward Business Goals

From the outset, every digitalization project should have clearly defined business goals. Key performance indicators (KPIs) are also required, in order to be able to measure progress. Every digitalization project should unlock new revenue potential, generate new income, and/or bring down costs as quickly as possible. It is therefore essential to monitor the project on the basis of actual data and to incorporate findings into the agile development process. The collected data and KPIs are important pointers toward future steps in the digital journey.

5. Active Change Management

In order to optimize or redesign products and procedures, it is necessary to challenge the existing business model and processes. This in turn requires an active change management process within the company that involves the relevant employees and departments and ultimately leads to new ways of doing things. Using lighthouse projects that are developed in a protected space and subsequently rolled out to all parts of the organization, companies can give staff an early insight into future working practices. This ensures that staff remains actively engaged and feel their input is taken seriously, which then increases their willingness to embrace new mindsets and evolve along with the company. Nothing is as disarming for skeptical employees as seeing a successful product they helped to create.



6. Digitalization Expertise Is More Important Than Industry Knowledge

It is essential that companies embrace a new digital culture and create more key positions with digital responsibility. Successful digitalization requires new roles and competencies as well as a startup mindset among the staff. Successful “digitizers” are children of the digital age, who are familiar with disruptive technologies. Serving as innovation leaders, they can drive the company forward and help others to see the many opportunities in digital change. An open digital culture promises greater success in the development and implementation of digitalization initiatives.

7. Digitalization Is a Management Issue

No company can digitally transform unless the CEO is on board. Digitalization is not just a societal megatrend, it is an absolute inevitability: everything that can be digitized will be digitized. The only person in the company who can make decisions on that scale and ensure they are implemented is the CEO. The opportunities presented by digitalization must be recognized and understood at the highest level in order to be pursued effectively. This effort also requires a change in corporate culture with a view to becoming faster, more innovative, more assertive, and ultimately more successful in responding to market changes.

Digitalization is a complex process, and it may be difficult to implement some of the necessary changes using only existing in-house resources. Wholesalers should therefore consider bringing a “digital pilot” on board to help navigate the initially hazardous waters of digitalization. With this additional expertise, companies can find the breadth of vision they need to reevaluate their operations in the context of digitalization.

Ten Essential Features of a Successful B2B E-Commerce Solution

In order to exploit the full potential of a B2B e-commerce solution, wholesalers should consider a number of important factors during the selection and implementation process. After all, a B2B e-commerce solution is much more than a simple online shop.

E-procurement: E-procurement processes often include multiple permission stages before an order is approved. Different departments and buyers often have different authorizations with regard to product range and/or budget. A B2B e-commerce solution should support all the procurement and approval processes used within the respective company and enable the purchasing department itself to manage factors such as budgets, cost centers, and approval processes. Another important feature is standardized integration of e-procurement systems via OCI interfaces. This enables easy integration of the B2B e-commerce solution with the procurement processes used by customers.

Inquiries and quotations: Processing inquiries and issuing quotations are two very common B2B tasks. To simplify these processes, companies should provide an online portal where customers can easily submit inquiries and negotiate pricing and conditions. A B2B e-commerce solution should include a full range of functions to standardize such processes and make communication with customers more efficient.

Customer personalization: This includes everything from customer-specific price lists, T&Cs, master agreements, and discounts through to product recommendations and general personalization of the shopping experience. For example, by knowing which sector a particular B2B customer belongs to, it is possible to automatically select and display information on relevant products and services or generate personalized recommendations and special offers. The B2B e-commerce solution should enable wholesalers to manage and display pricing, content, and products by customer group and thus tailor every part of the online experience to the specific needs of each buyer.

Product information and catalogs: Product information is obviously an essential part of all sales activity—no buyer would be able to make a decision without it. There are many requirements to consider here, but complete and accurate product information is particularly critical in B2B commerce. Customers expect a lot from vendors, ranging from a basic overview of features through in-depth information to product configurator tools. A B2B e-commerce solution should therefore provide the functionality required to create and manage product information and digital catalogs that are individually tailored to the various sales channels and customer groups. In addition, the solution should integrate seamlessly with existing ERP and PIM systems.

Self-service: After-sales service is gradually moving online, enabling cost-efficient processing of frequent tasks and requests and reducing the workload of sales and customer service staff. Online service offerings enable customers to do whatever they need to do without having to contact a human advisor during regular business hours. Every B2B e-commerce solution should therefore include the following functionality: end-to-end order tracking, self-service returns, full payment history, and the ability to manage quotations, e-procurement processes, users, and documents.

Customer and organization structure: Companies typically have complex organizational structures consisting of multiple departments and, in some cases, multiple subsidiaries. Staff performs a variety of roles across a range of hierarchical levels, e.g., buyer, cost center manager, sales representative, etc. A successful B2B e-commerce solution should be able to replicate not only the complex organizational structures of a wholesale company but also those of its customers. Only then is it possible to cater consistently and satisfactorily to all user groups.

Flexible framework: The long-term viability of a B2B e-commerce solution is dependent on its reliability, flexibility, and broad-based functionality. Ideally, a solution should have powerful and efficient tools for adapting to new business processes and integrating with the existing system landscape.

Multi-store & multi-site: A B2B e-commerce platform is the most efficient way for companies to expand internationally and tap into new markets or customer groups. Using a multi-store concept within the solution, it is easy to create separate product portfolios, cater to multiple target groups, and implement a variety of internationalization and localization strategies. All target markets and customer groups are served via a single, centrally maintained installation with consistent page design and shared data resources. This requires a B2B e-commerce solution to support multiple languages, currencies, and tax systems.

Performance: A high-performance B2B e-commerce solution should support hundreds of thousands of products, a large number of orders with hundreds of order lines, and often thousands of different price lists. As a central commerce hub, it should also process data quickly and communicate seamlessly with other systems, e.g., ERP and PIM software.

Analysis and reporting: In the words of American management guru Peter Drucker, “You can only manage what you can measure.” Naturally, this statement also applies to a B2B e-commerce platform. It should therefore include web and business analytics tools that allow a deep understanding of its use and profitability across the various channels. Sales staff, for example, should be able to analyze the purchase behavior of customers and groups at all times in order to measure and increase profitability.

The above list of features is by no means exhaustive, of course. Other essential elements include marketing, SEO, SEA, mobile first, ease of use, and B2C best practices.

The demands placed on modern B2B e-commerce solutions are as unique and varied as the companies that use them. For this reason, it is essential to go into each project with as much clarity as possible in terms of internal processes, products, customers, and—in particular—the company’s digital objectives.

Summary

There is no doubt that the wholesale industry will see more change over the coming years. New providers will gain market share, the boundaries between sales channels and distribution stages will continue to blur, and the market will consolidate further. Wholesalers who embrace the challenges of digitalization and adapt their business model, their services, and their corporate culture to the ongoing social and market changes will ultimately emerge stronger from this period of fundamental change. Sandwiched between manufacturers, trade companies, and retailers, the wholesale industry will continue to be exposed to further innovation and market change going forward. As digitalization progresses, innovation cycles will accelerate, while issues such as Industry 4.0, predictive maintenance, the Internet of Things, connected homes, 3D printing, and big data will have an increasing impact on the entire industry. It is thus all the more important for the industry to act now and begin the transition to “Wholesale 4.0.” Companies must seize the opportunities of digitalization and make a sustained effort to develop and expand new digital channels and offerings. As they do so, digitally networked products and services will open up innovative new spaces where companies will operate in the future.





Checklist: Should You Invest in a B2B E-Commerce Platform?

Before deciding to invest in a B2B e-commerce platform, it is essential to consider the following strategic and tactical questions:

- ▶ Do you have customers or customer groups who are already pressing for digital procurement?
- ▶ Do your customers want self-service online and/or via mobile devices?
- ▶ Do you plan to reach out to new customer segments?
- ▶ Do you have difficulty catering to small and mid-sized customer groups profitably?
- ▶ Are you interested in low-risk expansion into new international markets?
- ▶ Are you finding it increasingly difficult to differentiate yourself from competitors on price?
- ▶ Are you considering new business models?

If you replied “yes” to one or more of these questions, you should take the next step and learn how integrated B2B e-commerce can secure the growth and profitability of your company.

About Intershop

Intershop is the leading independent provider of enterprise B2B e-commerce solutions. From global corporations to startups, more than 300 enterprise and SME customers all around the world now use Intershop solutions. Companies such as HP, BMW, Schneider Electric, Sonepar, Zamro, and Würth benefit from our 25 years of expertise in the management and implementation of successful B2B commerce projects.

Intershop Commerce Suite is a powerful software package with comprehensive functionality, including commerce management, product information management, order management, commerce analysis, and all related services. It is the ideal platform

for creating truly integrated B2B e-commerce solutions that enable global marketing of products and services as well as successful implementation of current and future growth strategies.

As an experienced project partner, Intershop works with international specialists to create turnkey solutions that are tailored to the requirements of modern B2B and B2C companies.

Intershop is headquartered in Jena, Germany, and has offices in several other European countries, the United States, Australia, and China.



References



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