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MDM Special Report:

# 2016 State of E-Commerce in Distribution

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### About This Research

This research was conducted by Real Results Marketing with Modern Distribution Management. The research included an online survey taken by 468 participants across a variety of distribution sectors.

There was heavier participation from industrial, safety, electrical, building materials, janitorial, oil and gas products, jan-san, HVACR/plumbing and hardware, power transmission/bearings. Other participating sectors include pulp and paper, chemicals and plastics, grocery/foodservice and pharmaceutical.

One third are small distributors with less than $50 million revenue, nearly 40 percent are mid-market with $50 million to $500 million, and 18 percent are large with more than $500 million revenue. The remaining 10 percent did not disclose the revenue range.

About 33 percent are primarily focused on MRO, 13 percent are focused on OEM customers, 19 percent serve trades/contractors, 21 percent are an even blend of MRO and OEM, and 14 percent are in other categories.

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# E-Commerce Races to Maturity

*Expectations high for distribution e-commerce in 2016*

*The fifth annual MDM distribution e-commerce survey conducted with Real Results Marketing revealed several key trends:*

- *The number of companies with at least 10 percent of their total revenue from e-commerce grew 8 percentage points from 2014.*

- *Most distributors require a customer to log in to see pricing and purchase products.*

- *The primary objectives among distributors for e-commerce remain acquiring new customers, enhancing their company brands and improving the user experience.*

- *A quarter of distributors receive 50 percent or more of their orders by email.*

*This article examines the results of the 2016 State of E-Commerce in Distribution Survey and how the industry's e-commerce offerings are maturing.*

## By Jonathan Bein, Ph.D., & Dean Mueller

More distributors are crossing the threshold to e-commerce maturity. In the 2016 State of E-Commerce in Distribution survey, the percentage of respondents with a mature e-commerce offering (at least 10 percent of total revenue through the e-commerce channel) increased 8 percentage points from 2014. At the same time, the percent-age of respondents with 5 to 10 percent of total revenue from e-commerce declined from 20 percent in 2014 to 16 percent in 2015. Companies with nascent e-commerce (revenue less than 5 percent) fell 4 percent, further supporting the move toward more mature e-commerce offerings.

As in prior surveys, expected revenue percentage for the current year shows aggressive growth compared to actual revenue percentage in the prior year. The number of distributors expecting their percentage of revenue to be in the nascent stage fell 18 percentage points. This "irrational exuberance" is similar to what was experienced in the dot-com era. There tends to be a "build it, and they will come," mentality. But only in cases with a very small company or exceptional planning will companies be able to move beyond the nascent stage the first year of e-commerce.

As with the introduction of any new sales channel, there are new challenges to be overcome when implementing an e-commerce channel. In most instances, a distributor must modify online product acquisition and fulfillment processes.

Additionally, generating demand for the e-commerce channel takes a focused strategy and plan, just like a branch strategy. For example, for a distributor with many branches but no

**Figure 1: Percent of Revenue from E-Commerce**
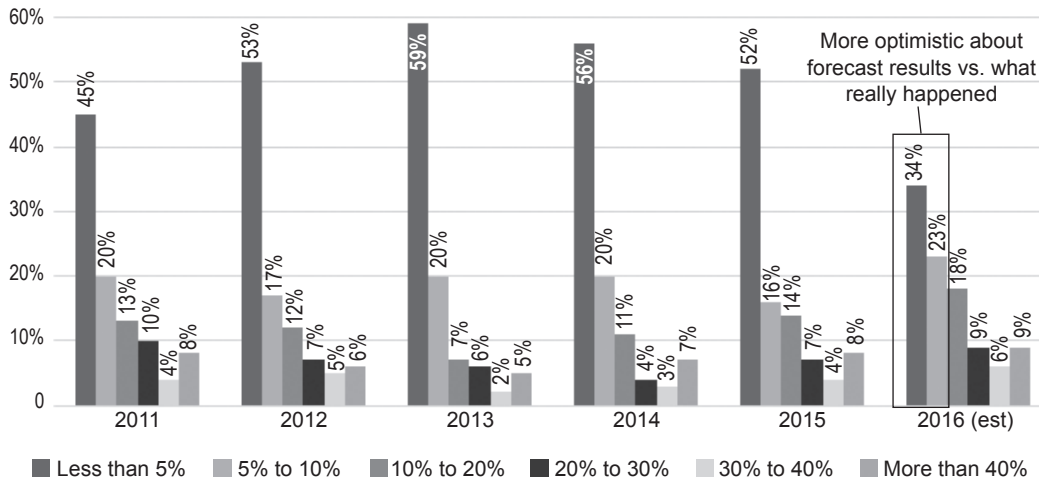
regional or centralized distribution center, the fulfillment of the e-commerce channel may take a backseat to fulfillment of orders in the local market. If a distributor can generate demand for the e-commerce channel but cannot fulfill the order based on customer expectation, it creates a negative customer experience.

For customers accustomed to the Amazon-like order and fulfillment process, the expectation and requirements are different. Distributors that address the unique challenges – and opportunities – of the e-commerce channel are more often rewarded with a compressed time period in the nascent stage as they move into the growth and maturity phases.

The typical breakdown of distributors' experience in the nascent stage include:

- Development of the capability – six months to one year.
- Working out operational kinks after launch – one year.
- Getting to 5 percent of total revenue – two to three years.

Previous research conducted by Real Results Marketing confirms that in many cases, not only will a distributor lose orders by not having an e-commerce solution that meets their customer requirements, but those customers may move all their purchases to a competitor.

### E-commerce priorities
The top priorities for e-commerce, as shown in

**Figure 2**, are:

- Increase new customers and orders
- To promote company brand
- Improve the customer experience

As the distributor e-commerce channel continues to mature, priorities get more focused on gaining new customers and orders. But distributors are putting more emphasis on improving the user experience, a natural and continual evolution as the e-commerce channel grows.

The priorities "increase efficiency and operational cost savings" and "improve productivity" both increased slightly from last year. Distributors moving from the nascent to maturity phase start to shift priorities to take advantage of the savings afforded by moving a higher percentage of business to the e-commerce channel.

### E-commerce platform
E-commerce platforms employed by distributors fall into five categories:

- Enterprise – generally supports complex, high-end integrations with organizations with >$500 million in revenue.
- Mid-market – greater functionality and flexibility than ERP-provided platforms that are not bound to one ERP and are generally found in organizations with revenue up to $750 million.
- Homegrown – developed from scratch and often incorporate third-party com-

### Figure 2: E-Commerce Priorities



As maturity grows, more focus is placed on new customers and customer experience improvements.
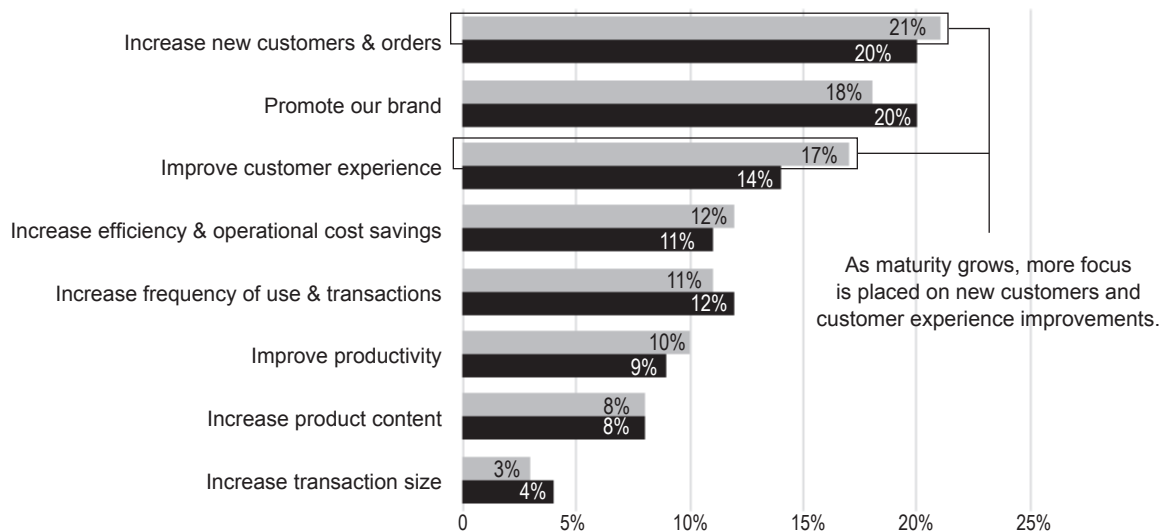
ponents, such as a shopping cart and/or content management system.

- ERP-provided – integrated directly with the ERP system and generally characterized with limited functionality and customization flexibility.
- Hybrid – generally a mix between homegrown and open source options.

Distributors with enterprise level e-commerce platforms are more satisfied than others; 22 percent of distributors with mid-market platforms said they were very satisfied, more than three times more than distributors with ERP-provided platforms.

ERP-provided platforms tend to be a popular starting point, especially for smaller distributors. However, as customers begin using the ERP-provided platforms, often demand for additional functionality and flexibility encourages distributors to graduate to a mid-market or even an enterprise-level platform.

Understanding the features and functionality required by customers is crucial to developing an effective strategic digital road map and compressing the time spent in the nascent stage. The road map also points to what platform is required to meet customer requirements. Some distributors have customers purchasing through traditional methods. For those, an ERP-provided platform may be completely adequate. For other distributors and sectors, the customer base may demand more robust functionality, requiring a more sophisticated and flexible platform.
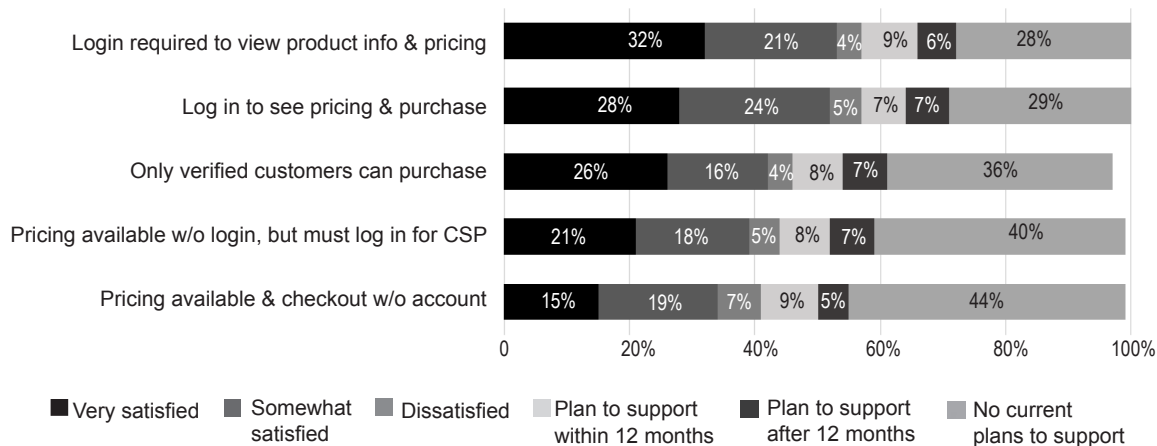
**E-commerce pricing practices**

How pricing is handled on distributor websites is a hot and often spirited topic. As shown in **Figure 3**, the majority of distributors currently require a login to view pricing. These distributors will only sell to verified customers. Shoppers who are not verified can't browse and buy products using a credit card. Some of that is driven by contracts or regulations that require a customer to be certified in some manner to purchase a product; in those instances, the distributor takes every precaution to sell only to authorized purchasers.

In other instances, however, distributors show pricing (generally list price or the highest price) and allow checkout without an account and payment by credit card. Customers with accounts having customer specific pricing do need to log in to see their contract prices.

There are many reasons to not show price. Some of the more common reasons include:

- Pricing varies by branch and, therefore, it is unclear what price to show on the website.
- Technical infrastructure is not sufficient to support different prices for different customers.
- Concern with holding prices constant with print catalog/flyer.
- Trade conflicts and/or can sell only to authorized or certified purchasers.
- Difficulty in training customer service/sales personnel to stop overriding existing pricing in the ERP.

**Figure 3: Website Price Visibility & Buying Permissions**



| | Very satisfied | Somewhat satisfied | Dissatisfied | Plan to support within 12 months | Plan to support after 12 months | No current plans to support |
|---|---|---|---|---|---|---|
| Login required to view product info & pricing | 32% | 21% | 4% | 9% | 6% | 28% |
| Log in to see pricing & purchase | 28% | 24% | 5% | 7% | 7% | 29% |
| Only verified customers can purchase | 26% | 16% | 4% | 8% | 7% | 36% |
| Pricing available w/o login, but must log in for CSP | 21% | 18% | 5% | 8% | 7% | 40% |
| Pricing available & checkout w/o account | 15% | 19% | 7% | 9% | 5% | 44% |

Best practices generally include showing a price without a login, assuming there are no contractual or regulatory restrictions. Pricing shown is generally the highest price structure to avoid channel conflict. Customers understand they must log in to see their specific pricing and to purchase on account versus with a credit card.

In most cases, the barriers to showing pricing on a distributor website can be overcome with a combination of technology, training and process modifications.

### Email ordering trend

The most common method for a distributor to receive an electronic order is via email (see **Figure 4**). Nearly a quarter of respondents indicated they receive more than 50 percent of electronic orders via email.

The trend shifts the order-entry burden in the purchasing relationship. If a customer places an order on a distributor website, the customer is doing order entry. When a customer can just send the email order from his or her system, the order-entry burden falls on the distributor.

### Moving forward

The "go-live" of an e-commerce site is a key milestone, but it is just the beginning of a long-term journey. Product data is the foundation of most B2B distribution sites, and it should be thought of as needing daily exercise through continual updates. If multiple websites show the exact same product data, search engines will attempt to select which site is the "authoritative" version of that data. This makes search engine optimization (SEO) a critical element of an e-commerce strategy.

Modifying product data to include key benefits for distributor customers is where the real SEO benefit comes in. A distributor that has hundreds of thousands of SKUs will find that impossible to do for every SKU. Focus first on the most important SKUs that drive revenue and profit for your company.

Significant differences exist between what distributors' customers want and need. Some distributors need a robust website for customers to shop, but most of the buying remains offline. Other distributors need robust shopping and buying sites. We have seen instances where distributors are planning to spend nearly 10 times more than is needed. Conversely, other distributors are not spending enough to get the right platform to meet customer needs.

*Part 2 of this research will dive into best practices of driving demand and keeping visitors engaged.*

**Figure 4: Source of Electronic Orders**
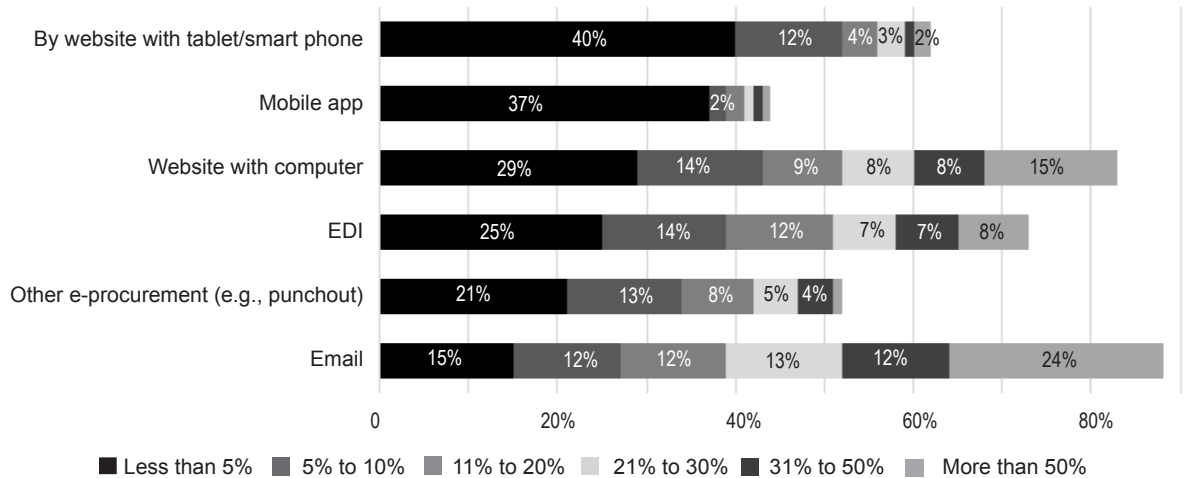
# E-Commerce Journey Continues

*Understand customer needs to grow e-commerce success*

*More distributors are crossing the threshold to e-commerce maturity, according to the fifth annual MDM distribution e-commerce survey conducted in partnership with Real Results Marketing. But if they expect continued growth, they must remember it is a journey, not a one-time event.*

*Part 1 of this series examined the continued trend of distributors moving from the nascent stage – less than 5 percent of revenue being through the e-commerce channel – to the growth and maturity stages.*

### By Jonathan Bein, Ph.D., and Dean Mueller

A large number of distributors that remain in the nascent stage of e-commerce have a "build it and they will come" approach. But research shows that that philosophy couldn't be further from reality.

Distributors that are successful in their e-commerce sales channel know it is a continuous journey, not a one-time launch. Just as opening a branch requires continuous effort, so does developing a successful e-commerce channel.

The distributors who are gaining traction in e-commerce place continual efforts on improving the user experience, whether that is through product data maintenance, training, marketing or anything else that makes it easier for customers to do business with you.

### Marketing vehicle effectiveness

How to drive e-commerce demand remains a critical factor in e-commerce success. Four of the top seven most effective vehicles identified in this year's survey are offline – sales rep, customer service rep, print catalog and direct mail.

As shown in **Figure 1**, sales and customer service reps are still the top two vehicles for driving e-commerce revenue. That may seem counterintuitive at first; however, it demonstrates the high importance that must be placed on gaining buy-in for all sales channels.

Given the importance of sales and customer service reps for driving e-commerce revenue, it is also essential to train them properly on the benefits of electronic shopping and buying for both the customers and the distributor.

Email marketing was a very close third place behind the customer service rep, while

### Figure 1: Marketing Vehicle Effectiveness
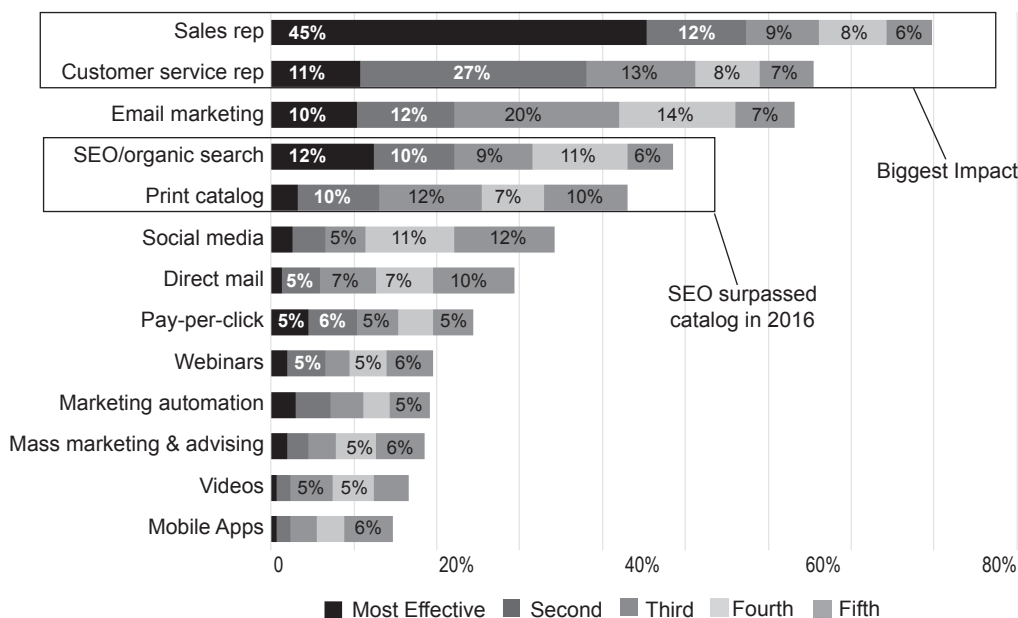


*Responses that garnered less than 5% are not labeled on this chart.*

marketing automation, though still in an early adopter phase, grew significantly from last year to this year.

SEO (search engine optimization) and organic search overtook print catalog for the first time this year; however, print catalog remains an important vehicle, as some segments, such as MRO, remain highly dependent upon it. In many cases, a catalog is used in the shopping process while an online vehicle is used to complete the transaction.

The distinction between "shopping" – searching for information and products – and "buying" – the actual financial transaction – needs to be made in evaluating what you need on your site. Significant variation exists among distributors and segments regarding shopping and buying preferences. Knowing specifically what your customer base requires is critical to providing a user experience that yields the highest wallet share across channels. We routinely work with distributors whose customers want a robust online shopping experience but will make the transaction with a non-electronic sales channel.

While SEO and organic search comprise the fourth most effective method to drive e-commerce demand, paid search (or pay-per-click) is far less often employed. As distributors move from the nascent stage to the growth and mature stages of e-commerce, search (both SEO and pay-per-click) becomes more important.
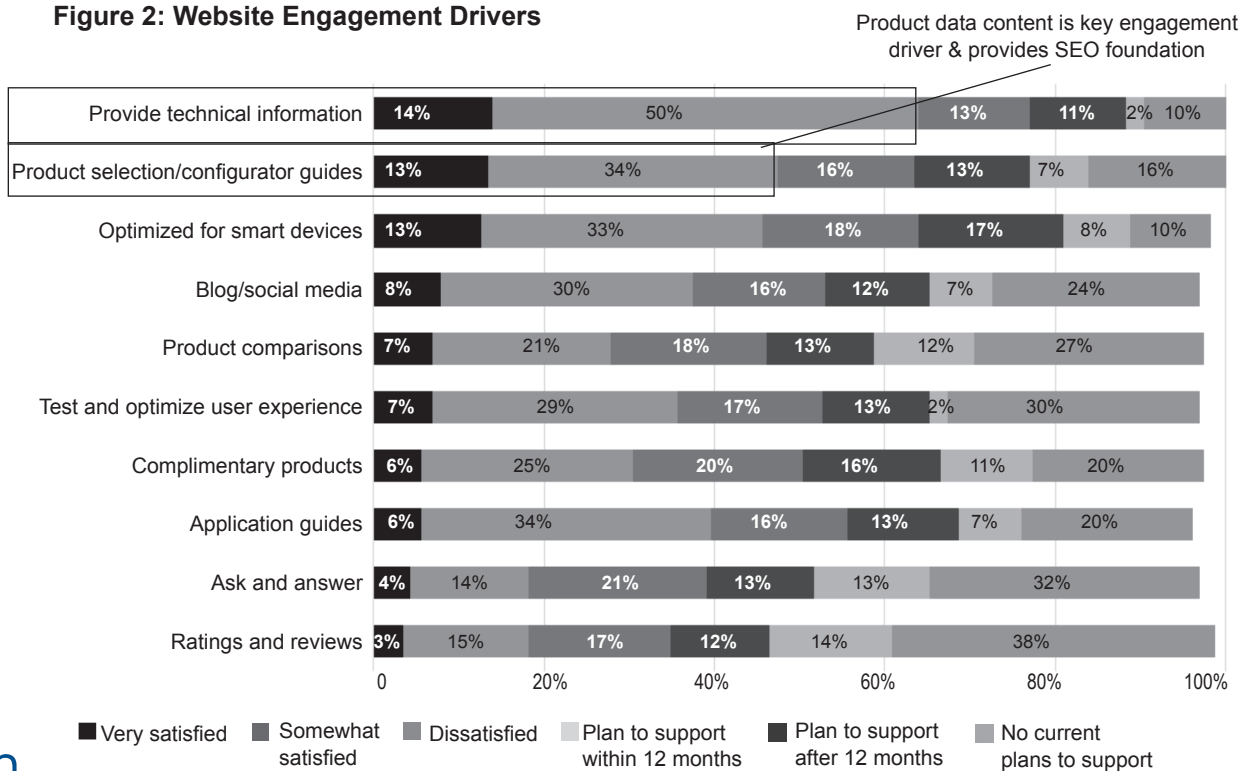
Search is more than getting people to your site, however. It also includes making it easy for a user to find what they are looking for once they get to a distributor's site. On-site best practices include:

1. Product taxonomy that provides the majority of search items to be found in three clicks or less
2. A robust on-site search that allows visitors to find what they need.

Both of these elements are necessary if you want your customers to view you as a reliable, efficient resource. For example, if a construction supplies customer is searching for a "hammer drill," that is a specific tool. An on-site search that returns results that include hammers and drills but not "hammer drills" will frustrate the user quickly, and they will often move on to another site.

Perhaps the biggest missed opportunity for distributors is use of a quality marketing automation tool. Coupled with customer profile and lifecycle information, along with product poten-

## Figure 2: Website Engagement Drivers

Product data content is key engagement driver & provides SEO foundation

| | Very satisfied | Somewhat satisfied | Dissatisfied | Plan to support within 12 months | Plan to support after 12 months | No current plans to support |
|---|---|---|---|---|---|---|
| Provide technical information | 14% | 50% | 13% | 11% | 2% | 10% |
| Product selection/configurator guides | 13% | 34% | 16% | 13% | 7% | 16% |
| Optimized for smart devices | 13% | 33% | 18% | 17% | 8% | 10% |
| Blog/social media | 8% | 30% | 16% | 12% | 7% | 24% |
| Product comparisons | 7% | 21% | 18% | 13% | 12% | 27% |
| Test and optimize user experience | 7% | 29% | 17% | 13% | 2% | 30% |
| Complimentary products | 6% | 25% | 20% | 16% | 11% | 20% |
| Application guides | 6% | 34% | 16% | 13% | 7% | 20% |
| Ask and answer | 4% | 14% | 21% | 13% | 13% | 32% |
| Ratings and reviews | 3% | 15% | 17% | 12% | 14% | 38% |

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tial by customer, a marketing automation tool that is implemented correctly can help distributors efficiently and effectively provide relevant messages and offers to specific customers.

Email marketing through an email service provider provides the ability to only send mass blasts and tracks open rates. Marketing automation provides much more powerful features, such as multistep campaigns, deep analytics, lead scoring and more. Marketing automation is a tool that can allow a distributor to be more strategic and targeted in its messaging.

**Keeping website visitors engaged**
Part 1 of this series showed that distributors continue to move from the nascent stage into and through maturity. As a result, a new topic for the 2016 survey was how distributors keep website visitors engaged. Due to the importance of knowing how a distributor's customer wishes to shop and transact, the answers varied widely from one distributor to another.

**Figure 2** shows how distributors keep website visitors engaged. Capabilities focused on product data – including technical information, product selection guides and/or configurator guides – were the most important. Additional capabilities tied directly to product data include

product comparisons, application guides and complementary products.

Use of smartphones and tablets continues to grow, and most distributors are adopting either a responsive design or mobile-formatted website so customers can easily find and purchase what they need, either through a mobile site, app or non-electronic methods.

Relevant product data is normally the foundational element of a distribution website, yet getting accurate and enriched product data is often one of the biggest website challenges a distributor faces. With many distributors having tens to hundreds of thousands of SKUs, getting the data and keeping it updated is a daunting task. Distributors in the growth and mature e-commerce stages normally have many resources responsible for the continual product data acquisition and enrichment.

Distributors normally acquire product data three ways: 1) a dynamic data feed provided by a manufacturer or some other entity, such as a buying group; 2) a static file used as a one-time method to populate the site; or 3) capturing information from a third party that scrapes data from sites.

Product managers/merchandisers may also manually populate the data, but this is not the

**Figure 3: Satisfaction with Website Self-Service Capabilities**
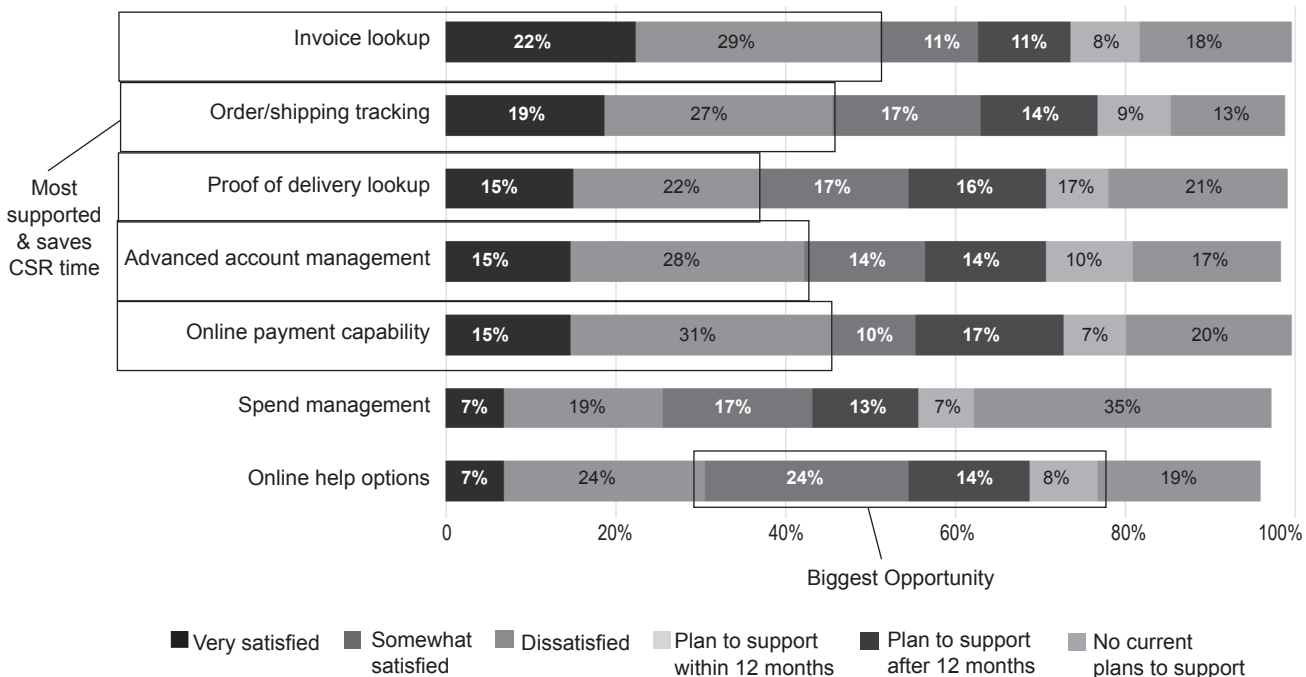
preferred method, due to the extensive time and associated inefficiencies.

Include more than just the basic data for products, particularly for the most important SKUs, which often are manually reviewed by a product expert to ensure the description and attributes match the most likely way a customer would attempt to find the product. "Data enrichment" refers to gaining product data beyond the basic description. Enrichment also can refer to filling in additional product attributes, more robust descriptions, title tags, meta description, etc.

The goal is to have searchable product information that most closely resembles how a customer would search. Distributors that have mastered this process are more easily found in search engines. Additionally, users are able to more easily find what they are looking for on their sites. Start with the top 100 online SKUs, then the top 1,000, etc.

For many SKUs that distributors carry, the same basic product data is available from a manufacturer or buying group. As multiple distributors have e-commerce sites with the same product descriptions, search engines use algorithms to select the one distributor that is deemed to be more authoritative. E-commerce sites containing content that most closely addresses the user's needs stand the best chance of achieving a better search engine results page (SERP) position.

**Self-service capabilities**

A natural way to keep visitors engaged on a website is to provide self-service capabilities. The top five self-service capabilities (see **Figure 3**) include:

- Invoice lookup
- Order/shipping tracking
- Proof of delivery (POD)
- Advanced account management (manage ship-to locations, etc.)
- Online payment capability

These top five capabilities also save the most administrative time for customer service reps. Many distributors have several CSRs that focus entirely on these items, so moving to the web allows for greater customer and distributor efficiency.

The ability to provide online help options, including online chat, robust FAQs or forums where customers can interact and ask questions, is one of the biggest opportunities for distributors.

Gaining clear insight into what customers most need is the best way to determine the road map for the customer experience journey. Understanding what customers need to keep engaged on a site, along with knowing the most important self-service capabilities, will go a long way toward increasing customer satisfaction while reducing the overall cost to serve customers.

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# Agenda

- Introduction
- 2016 State of E-Commerce Survey Results
- Panel discussion
- Q&A

# Speakers

**Jonathan Bein, Ph.D.**
Senior Partner
Real Results Marketing

**Don Polletta**
Vice President, Marketing
Torrco

**Joe Bennett**
Senior Vice President, Sales
Unilog

**Tom Gale**
Publisher
Modern Distribution Management

# 2016 State of E-Commerce Survey Results

# E-Commerce Percent of Total Revenue

Legend:
- Less than 5%
- 5% to 10%
- 10% to 20%
- 20% to 30%
- 30% to 40%
- More than 40%

More optimistic about forecast results vs what really happened

**2011:** 45%, 20%, 13%, 10%, 4%, 8%
**2012:** 53%, 17%, 12%, 7%, 5%, 6%
**2013:** 59%, 20%, 7%, 6%, 2%, 5%
**2014:** 56%, 20%, 11%, 4%, 3%, 7%
**2015:** 52%, 16%, 14%, 7%, 4%, 8%
**2016:** 34%, 23%, 18%, 9%, 6%, 9%

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Real Results MARKETING

**mdmwebcasts**

# What is Most Effective to Drive Demand to Your E-Commerce Channel?

| Channel | Most effective | Second | Third | Fourth | Fifth |
|---|---|---|---|---|---|
| Sales rep | 45% | 12% | 9% | 8% | 6% |
| Customer service rep | 11% | 27% | 13% | 8% | 7% |
| Email marketing | 10% | 12% | 20% | 14% | 7% |
| SEO/organic search | 12% | 10% | 9% | 11% | 6% |
| Print catalog | 3% | 10% | 12% | 7% | 10% |
| Social media | 3% | 4% | 5% | 11% | 12% |
| Direct mail | | 5% | 7% | 7% | 10% |
| Pay-per-click | 5% | 6% | 5% | 4% | 5% |
| Webinars | | 5% | 3% | 5% | 6% |
| Marketing automation | | 4% | 4% | 3% | 5% |
| Mass marketing & advertising | | 3% | 3% | 5% | 6% |
| Videos | | | 5% | 5% | 4% |
| Mobile apps | | | 3% | 3% | 6% |

**Biggest impact**

**SEO surpassed catalog in 2016**

Real Results MARKETING

# How Do You Keep Website Visitors Engaged?



| | Very Satisfied | Somewhat Satisfied | Dissatisfied | Plan to support within 12 months | Plan to support after 12 months | No current plans to support |
|---|---|---|---|---|---|---|
| Provide technical information | 14% | 50% | 13% | 11% | 2% | 10% |
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# How Do You Keep Website Visitors Engaged?

| Category | Very Satisfied | Somewhat Satisfied | Dissatisfied | Plan to support within 12 months | Plan to support after 12 months | No current plans to support |
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**Product data content is key engagement driver & provides SEO foundation**

Legend:
- Very Satisfied
- Somewhat Satisfied
- Dissatisfied
- Plan to support within 12 months
- Plan to support after 12 months
- No current plans to support

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Real Results MARKETING

# Shopping



Shopping Methods to FIND and SELECT Products



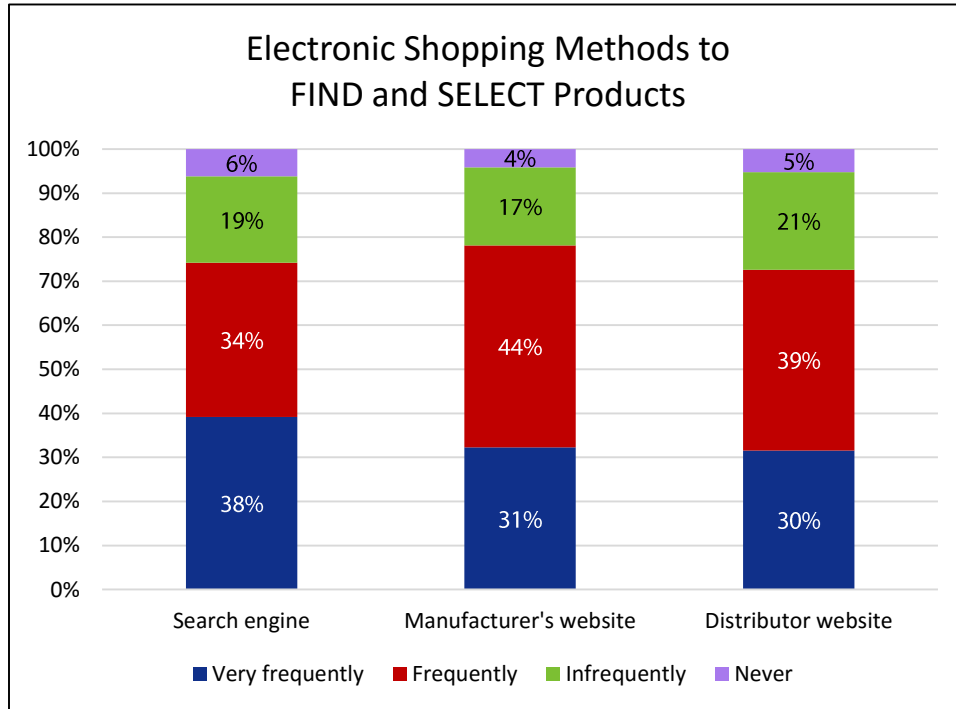Expected Change in Shopping Methods to FIND and SELECT Products over the Next Two Years

- More than 70% frequently or very frequently use electronic methods for shopping.
- Only 37% frequently or very frequently use print methods for shopping.
- Current preferences and expected change depend on sector and customer base.
- Significant shift to electronic shopping away from people and print within two years.

# Electronic Shopping

### Electronic Shopping Methods to FIND and SELECT Products

| | Search engine | Manufacturer's website | Distributor website |
|---|---|---|---|
| Never | 6% | 4% | 5% |
| Infrequently | 19% | 17% | 21% |
| Frequently | 34% | 44% | 39% |
| Very frequently | 38% | 31% | 30% |

Legend: ■ Very frequently ■ Frequently ■ Infrequently ■ Never

38% indicated they shop very frequently by search engine vs. about 30% for manufacturer or distributor website.

Shift toward search and distributor website over next two years.

Key demographic/firmographic trends:
- Customers with less than $1M revenue prefer electronic more than larger customers with more than $100M revenue.
- Under-25 demographic 47% use search very frequently vs. 35% for over-55.
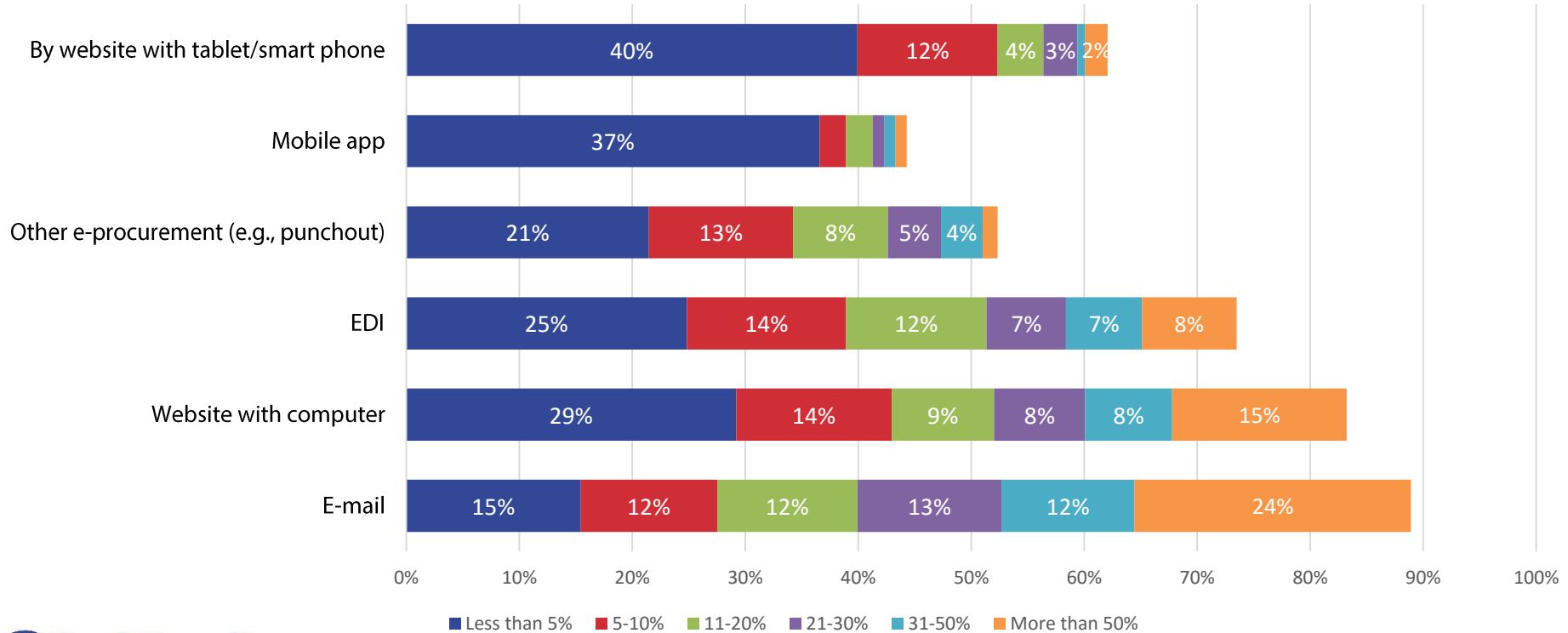
# Buying

## Frequency of BUYING Methods
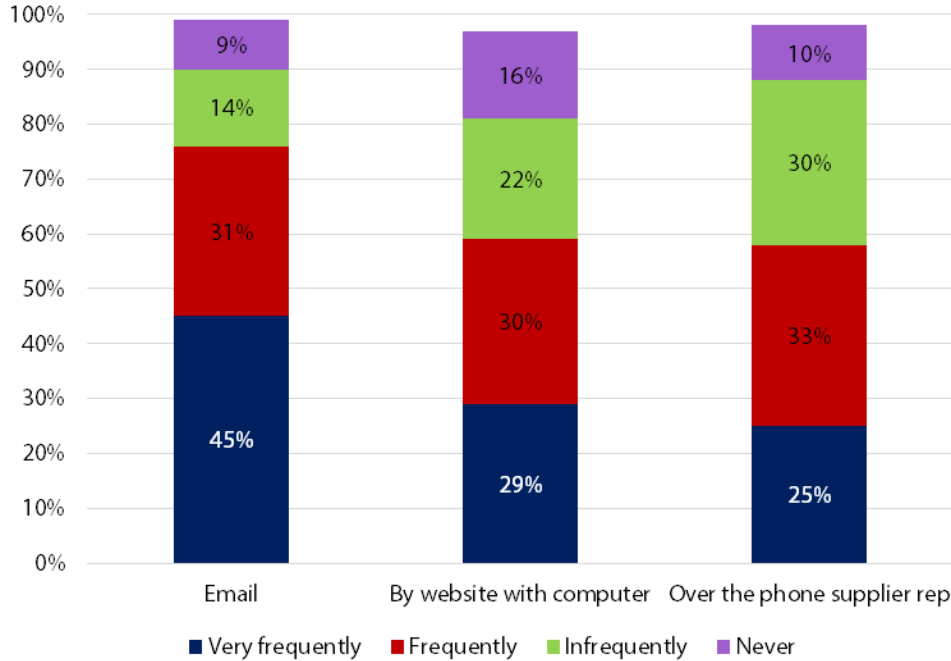


- Email, Web and phone are top preferences among 10 choices. Nothing else is even close.

- Movement over next two years toward Web and email.

- Tablet/mobile is not changing very rapidly .

- Fax usage is fading.

- E-procurement underutilized.

# Panel

**Jonathan Bein, Ph.D.**
Senior Partner
Real Results Marketing

**Don Polletta**
Vice President, Marketing
Torrco

**Joe Bennett**
Senior Vice President, Sales
Unilog

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# THE "TRI-POD" OF OMNI-CHANNEL COMMERCE

**3 Aspects to Agile, Scalable, Enterprise Commerce**

**1**   **The Fuel: Content Management, Taxonomy Build / Management**

**2**   **The Art: The Style Guide, Brand Manual, Website Wireframes**

Overall Branding / Presentation / "What are you solving for?" / Digital Marketing Strategy

**The Platform: E-commerce Platform**

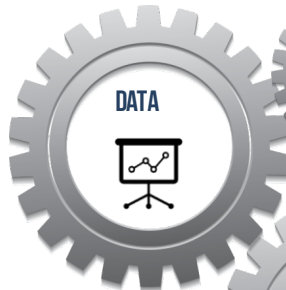**3**   PIM, CMS, Search, Cart (ERP Integrated Web store front), Mobile
*Mobile is both a responsive web page AND a native mobile commerce application.*

# CIMM2 OMNI-COMMERCE PLATFORM CAPABILITIES
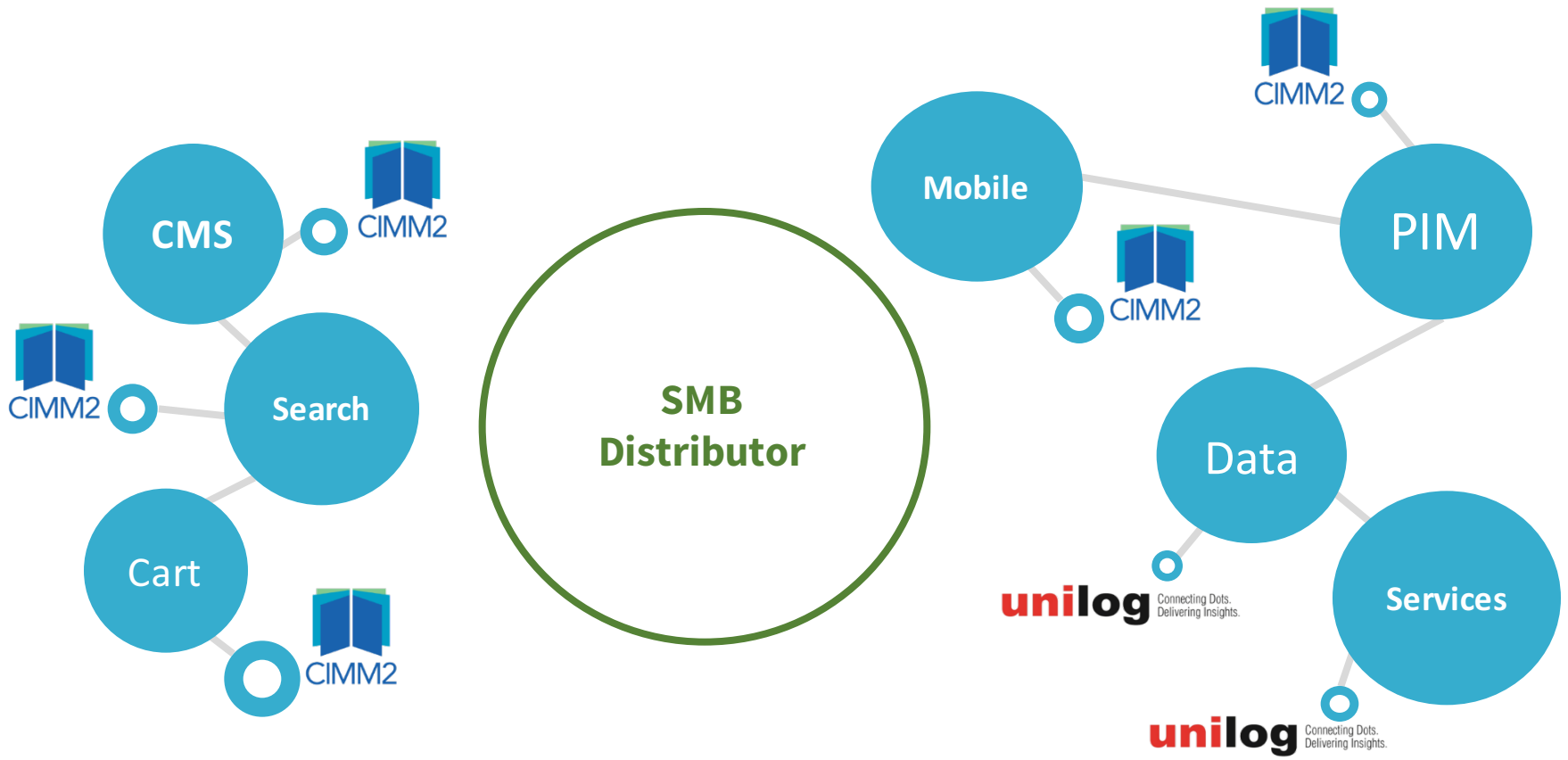
CIMM2 brings you
enterprise
ecommerce

Intuitive search and navigation

Optimized for mobile

Product Information Management (PIM)

Inbuilt security with role level access

Insightful analytics

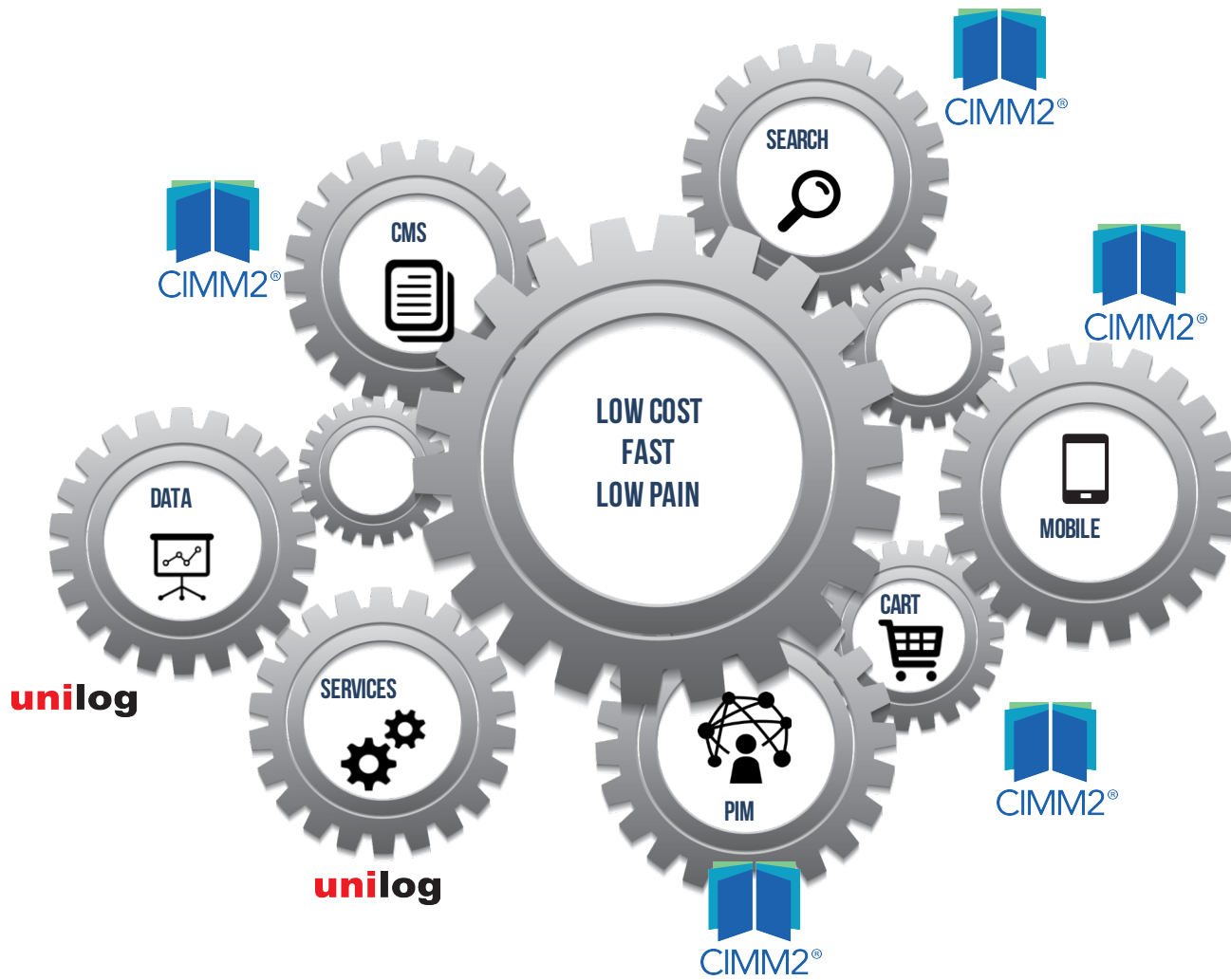Multilingual support

Robust Content Management System (CMS)

Seamless ERP integration for real-time information

Dynamic shopping cart

CIMM2®

# WHY UNILOG?

# COMPANY MOMENTUM

### 65% YEAR OVER YEAR GROWTH
2013-2014 vs 2014-2015

### 50 FASTEST GROWING TECH COMPANIES
The Silicon Review, July 2015

### SECURED FUNDING FROM KALAARI CAPITAL ADVISORS
A $650M venture capital fund investing in innovative
entrepreneurial technology companies.

### PARTNERED WITH AFFILIATED DISTRIBUTORS
A $31B buying group with access to over 570
independent wholesale distributors spanning seven industries.

### INTERNET RETAILER TOP 300 B2B E-COMMERCE COMPANIES 2015
Three early adopters of CIMM2 made the list, SupplyFORCE,
Van Meter and Werner Electric.

### NEW GARTNER RESEARCH POSITIONS UNILOG ON MQ
Unilog positioned on the Magic Quadrant for Digital Commerce in 2016 alongside major players in the space

Questions?

# 2016 State of E-Commerce in Distribution

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