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WHITEPAPER ___

Personalization in B2B
Turning the website into a digital sales representative

"Even in B2B, customers increasingly expect a simplified shopping experience and personalized content. The first groundwork has already been laid. After all, most B2B shops have customers logging in on a regular basis. Tailoring the content to the customer's purchasing history, browsing behavior in the shop and his or her needs would be easy. That's why it is so important for B2B retailers to connect and use existing customer data effectively and turn the website into a digital sales representative."

Felix Schirl, CEO and Managing Director, trbo GmbH

ABOUT TRBO ____

trbo is the leading technology provider for dynamic onsite personalization, optimization and testing. trbo's AI-driven onsite personalization platform allows users to customize website content, A/B and multivariant test, and serve recommendations down to the individual level using machine learning. trbo's self-learning algorithm analyzes user behavior based on 50+ visitor characteristics, creating highly personalized, unforgettable website experiences for their customers. Incredibly agile and easy to use, trbo's toolset allows users to make changes in real time and serve their customers' needs right away.

Major global brands across all industries such as L'Oreál, WeightWatchers, Eddie Bauer, Ecco, Zwilling, Porsche Design and many more rely on trbo's comprehensive services.

trbo was founded in 2013 by CEO Felix Schirl with global headquarters in Munich, Germany and US headquarters in Miami, Florida.

INTRODUCTION ────

Digital transformation remains a major challenge for many classic B2B models. But large scale disruptions like the Covid-19 pandemic have made one thing clear: It is extremely important to have an online shop if businesses want to succeed in the long term. In B2B there is still room for improvement. Oftentimes a shop already does exist, but it is not really tailored to the needs of the target group. However, the competition does not sleep – only those who focus on digitization and improving the customer experience in B2B can stand out.

B2B: THE WEBSITE AS A DIGITAL SALES REPRESENTATIVE

The majority of large B2B-transactions are still conducted via sales representatives or written orders. However, around 75 percent of buyers in B2B prefer to purchase their products online.[1] And just as with private shopping they expect a positive shopping experience that is tailored to their individual needs. In reality, however, this is often not the case: While a large number of B2B-retailers already have a (closed off) online shop that users have to log in to, they often fail to effectively optimize it – as it is not the main focus of their sales strategy. So the entire product range is offered – but usability and personalization aren't the top priority. However, this would support customer satisfaction, as studies show: According to McKinsey, the rating of the customer experience in B2C is between 65 and 85 percent. In B2B it is far below 50 percent.[2]

The first groundwork for a better shopping experience has already been laid in B2B.

After all, almost every shop has a large number of clientele that logs in on a regular basis. Thus, it would be easy to address their purchasing history, their behavior in the shop and their needs – a lot of potential remains unused in terms of usability and user-friendliness. Online shops and websites often fail to meet the needs of their customers. B2B retailers must link and use existing customer data effectively online, turning the website into a digital sales representative.

As a leading provider of onsite personalization, trbo contributes to the improvement of the customer experience and thus the sales growth of numerous online retailers – including B2B retailers such as certeo, Toolineo and Komet Dental. This whitepaper shows you how to successfully implement personalization in your B2B online shop.

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1 https://www.sana-commerce.com/b2b-buying-process-2019-report-how-to-meet-b2b-buyers-demand/
2 https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/improving-the-business-to-business-customer-experience

TIP 01   THE FIRST IMPRESSION COUNTS

A lot of B2B shops are only accessible via login. The advantage: the shop knows exactly who is currently browsing his website and the account is linked to the customer data and order history. The shop can therefore approach the user individually. As with the real-world sales representative, the user could, for example, be greeted by his or her contact person in the direct sales department. Using a picture that includes the contact's corresponding contact data creates trust. And especially in B2B, trust is an extremely important factor that should be nurtured online as well.

Additionally, the entire homepage of the logged-in user can be personalized. This way, the user's favorite shopping categories are brought to the fore, the navigation is customized, or the latest products that match his or her interests are recommended. If products need to be reordered, the shop can immediately remind the user that their paper supply is about to run out and that a reorder is due. But maybe the inclined B2B buyer just wants to browse a little? Then, of course, he should also receive relevant recommendations – based on his (previous) surfing and shopping behavior. This in particular is where B2B shops can benefit greatly from the advantages of their existing customer data.

But how gain the trust of a new customer? A personal approach is of course not possible at first, as the necessary information on the user is not yet available. However, in order to make the customer feel comfortable and take away the initial skepticism, you can use so-called "trust elements''. Has the shop been awarded any seals of approval? Display them prominently! But not only a seal of approval strengthens trust. Clearly visible information on delivery and payment terms on the homepage also creates a reliable impression. If you still want to address your users more personally, you can use geotargeting. The location of the user is often known – so if the shop has branches or events in the vicinity of the individual user, these can be pointed out. That enables the first form of a personalized experience, even for unknown users. The more often users return to the shop, the more familiar you (or the algorithm) become with them. Then, personalization can even occur without a login – for example, using the most recently viewed products on the homepage or customizing the shop according to your customers' interests.
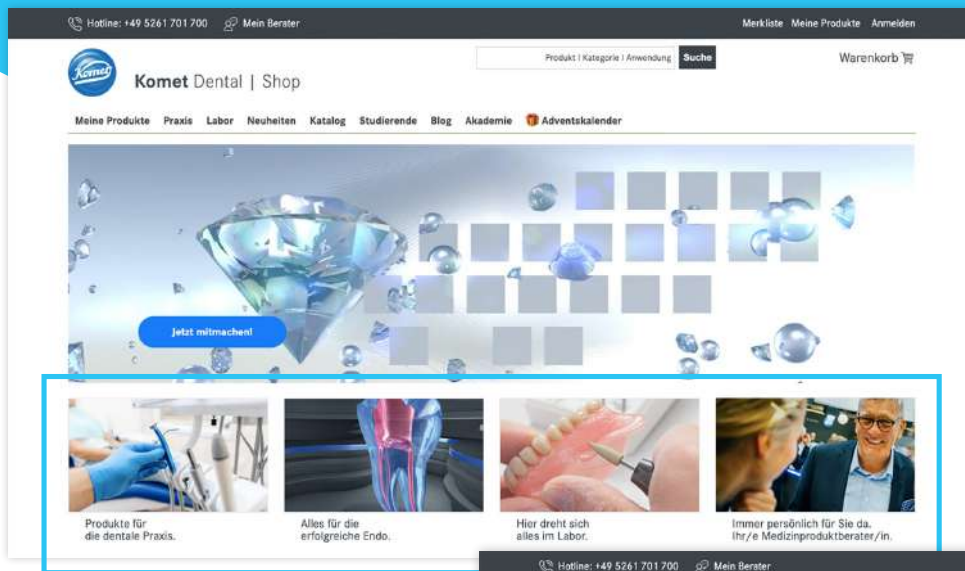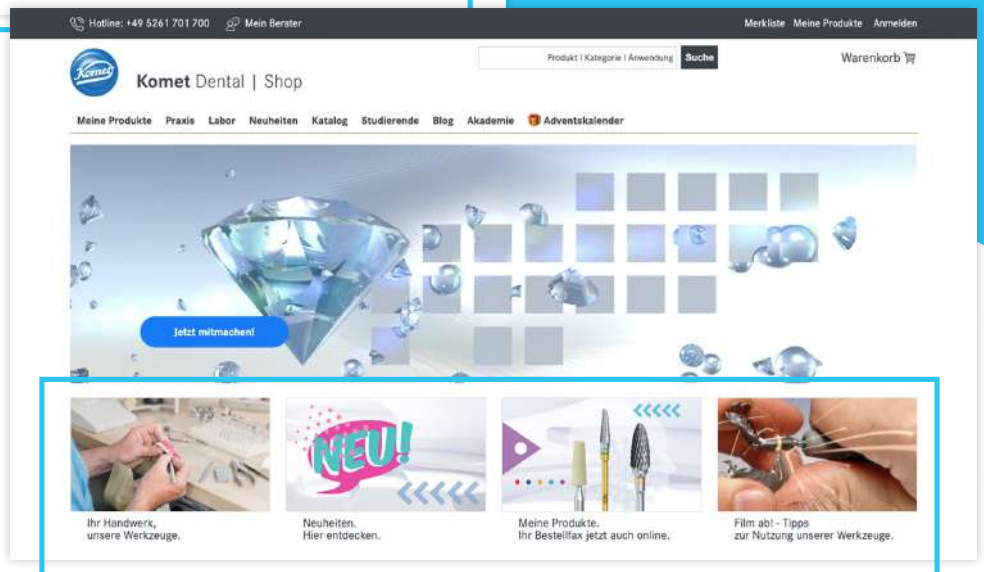
Fig.: Customization of the homepage according to the user's interests. Above: Default; Below: Users with interest in labratory products ([Komet Dental](#))

HOW CAN YOU GAIN YOUR CUSTOMERS' TRUST?

▶ FAMILIAR FACES

Customers that have been with the company for a long time usually have a personal contact person who provides support and advice. The familiar face on the homepage of the online shop conveys the personal relationship.

▶ REGIONAL RELATIONSHIPS

Events and trade fairs, but also local shops, are important contact points in B2B. With targeted regional advertising, the information in the online shop helps to establish a personal relationship.

▶ TRUST ELEMENTS

Anyone who does not know the shop also does not know about quality and trustworthiness. Trust increases with seals of approval and transparent information on payment methods and delivery conditions.

Gaining your customers' trust means you can benefit from satisfied users and long-term relationships.

WHAT ARE THE BENEFITS?

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LOOKING FOR A NEEDLE IN A HAYSTACK – NOT WHEN USING PRODUCT RECOMMENDATIONS

With the right product recommendations, you can not only simplify your customer's shopping experience, but also make it more personal. This does not just apply to regular customers. A smart algorithm uses previous purchases, surfing behavior, and the most recently viewed items to determine recommendations that are tailored to the user. Statistical twins also play a role in this process. If another customer has bought the same product and also bought something else in connection with it that the current user is interested in, this product can then be recommended to him or her. To further simplify the search for the customer, the menu items of the shop can be arranged according to their interests. The product category that appeals the most can be placed first, while the product category that they are least interested in can be placed last or even hidden from the menu.

Fig.: Display of additional recommendations on the product detail page (Toolineo)
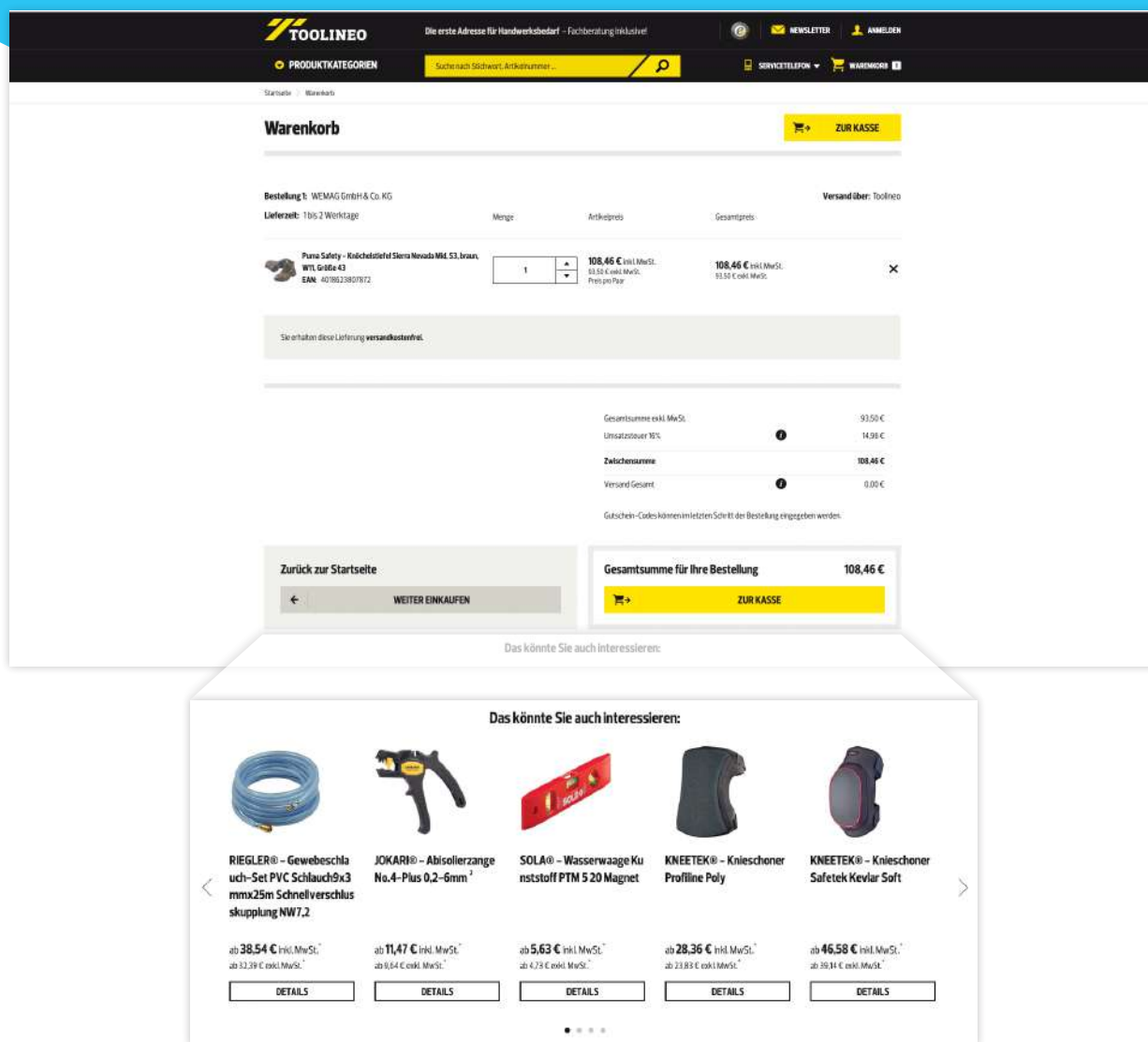
Fig.: Display of additional recommendations in the shopping cart (Toolineo)

Products that have to be repurchased on a regular basis, such as printer cartridges, can be shown accordingly. Automatic reordering takes this even a step further. This saves customers the trouble of having to look for the product in the online shop and order it themselves each time. A further relief is to display successor products of previously ordered devices as recommendations. For example, if there is a new version of the printer that was ordered some time ago, it might be relevant for the customer.

This may even encourage the customer to buy the more modern and usually higher-priced product.

Another profitable option is to cross-sell possible accessories. Not only can you suggest matching items to the products already in the shopping cart, but you can also take former purchases into account. This might lead customers to add a few more products to the shopping cart than originally intended.

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However, unknown users can also be assisted in their search for suitable products. Since personalized product recommendations are more difficult in these cases, users can first be shown teasers containing current offers or the latest products. The focus here lies on the products that other customers are also interested in. A user that is looking at office furniture for his premises, will certainly be interested in what other customers have bought or what they were satisfied with – especially if customers are not yet familiar with the quality of the shop. Social proof elements allow you to point out how many customers have already bought the product or are currently looking at it. As in private life, the opinion of others is also used by businesses to help customers make a decision. When the user has already been browsing the website for a while, you can determine initial interests based on AI and gradually personalize all teasers, offers, and recommendations.
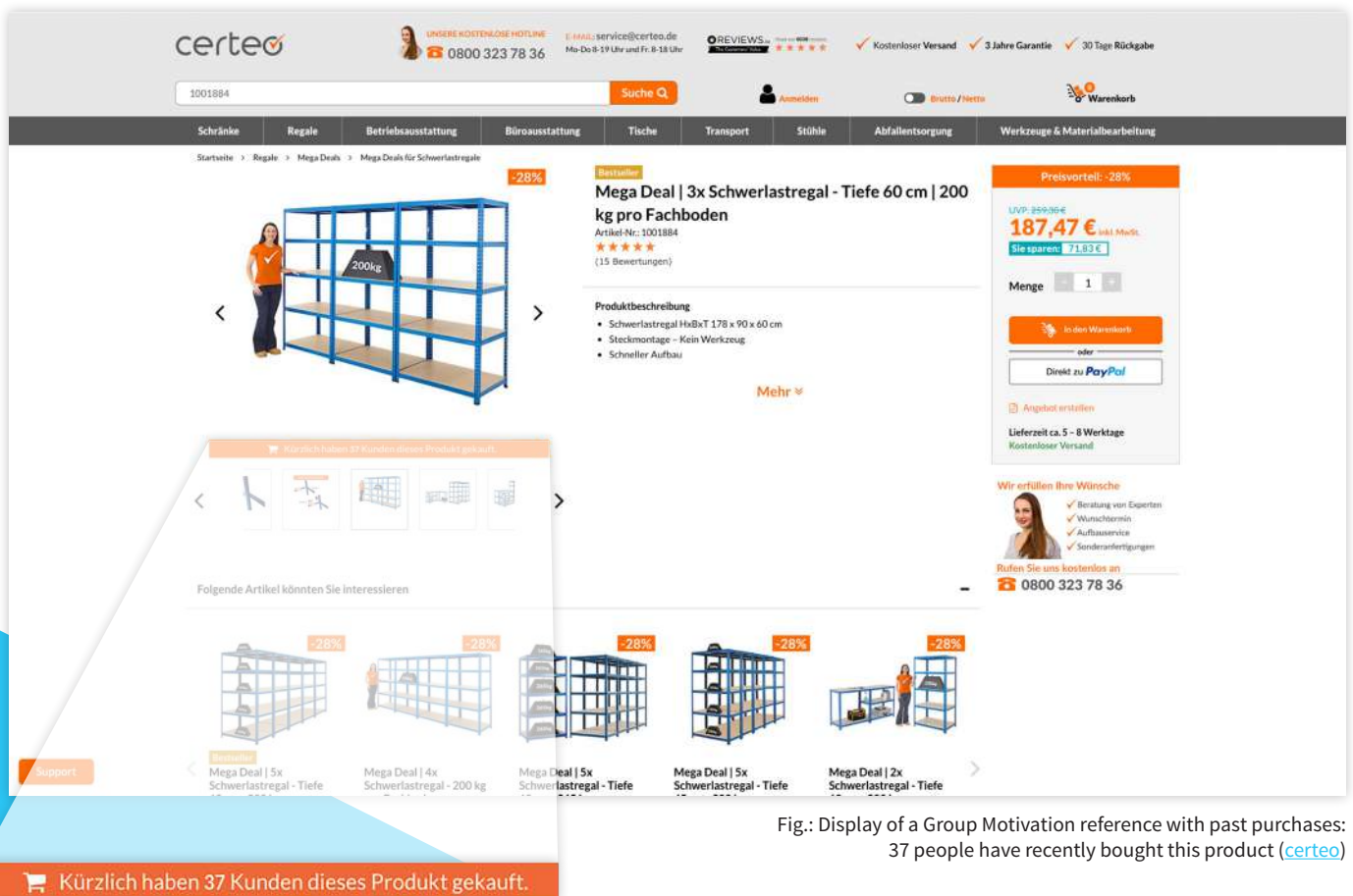

Fig.: Display of a Group Motivation reference with past purchases: 37 people have recently bought this product ([certeo](#))

To ensure that your customers do not lose track of what they are looking for and to make a structured decision, it can be useful to offer a watch list in your online shop. New customers as well as regular customers can save their favorite products and thus keep a better overview.

If the customer is still not sure whether the product is truly the right one for his company, an individual consultation could certainly provide clarity.

Similar to the field representative, a digital advisor can be integrated on the website. This can be achieved by displaying the contact data of the corresponding contact person or by means of an advisory service function. It guides the user through a predefined catalog of questions. By querying his interests and wishes, the appropriate products are then determined. A personalized and structured shopping experience not only ensures satisfied customers, but also strengthens customer loyalty.
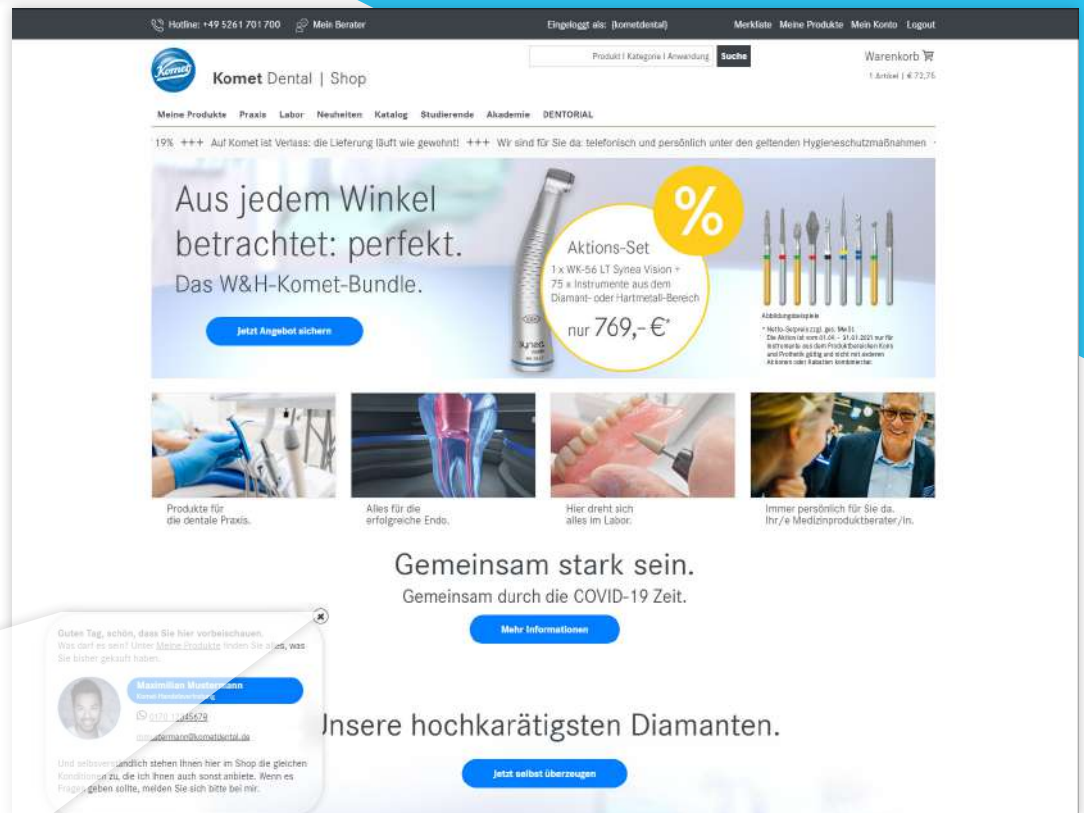

Fig.: Integration of the contact data of the personal contact on the website (Komet Dental)

IDENTIFYING YOUR CUSTOMERS' NEEDS

PERSONALIZED PRODUCT CATALOG

To target existing customers, you can present merchandise or offers based on their interests and needs, just as you would when visiting the customer in person.

CONVENIENCE

Especially in everyday working life, there is often not enough time to browse through the shop's assortment. For a relaxed shopping experience, automated reordering and sensibly used recommendations can help.

Time is money. Those who provide their customers with a quick and easy shopping experience will benefit from their satisfaction.

WHAT ARE THE BENEFITS?

BAD SURPRISES? NOT WITH OPTIMIZATION & PERSONALIZATION

In order to make the customer's search for products and their buying experience as easy as possible, important information must be made visible at first glance at all points in the customer journey. Beginning with the homepage, but also including product detail pages. After all, this is where B2B buyers find out more about the various products that are to be purchased in the next step.

Accordingly, shop operators should list all available information about the product on the product detail pages. This includes a detailed description, size specifications and other special features. Listing the compatibility with other devices is also recommended. If the customer is known, this can also occur dynamically. So for example if the printer cartridges do not fit the printers the customer has purchased so far, a warning notice can be displayed to create more trust in the shop. The customer has all the information at a glance and is not in for any unpleasant surprises after the purchase because he may have overlooked something. Even the coordination with the customer service advisor can be improved online. If the article data, such as the EAN or article number, is positioned in the visible area, there is no need to spend a lot of time searching through the catalog and when contacting the customer by phone, the advisor has the right product available straight away.

Besides displaying the features of the item and the

suitable accessories, it is also important to draw attention to the payment and delivery terms. Are there any delays in delivery or is everything running smoothly? Are there perhaps any supply shortages and the product might arrive later than expected? A real indication generates trust and avoids discontent. Are there short-term, deviating prices (such as during the VAT reduction in 2020)? If so, point this out transparently at the end of the period to avoid unpleasant surprises. In B2B, discounts are often offered for payments in advance or for quick payments of the invoice. The customer will certainly be happy if he is informed about the possible discount at an early stage.

Special prices and discount scales often apply to regular customers and key accounts. The sales representative in the field always has the appropriate price list on hand and the respective discounts are already applied. Thus, you can see the final price at a glance without having to use your math skills. Even on the website, these price scales and special discounts can be integrated and customized. As soon as the respective customer logs in and the shop knows which price scale applies to him, the displayed prices can be adjusted accordingly. This not only saves the customer a lengthy search through the various discount charts or even an additional round of coordinating with the shop, but also allows him or her to directly see the individual final price making him feel individually addressed and well taken care of.
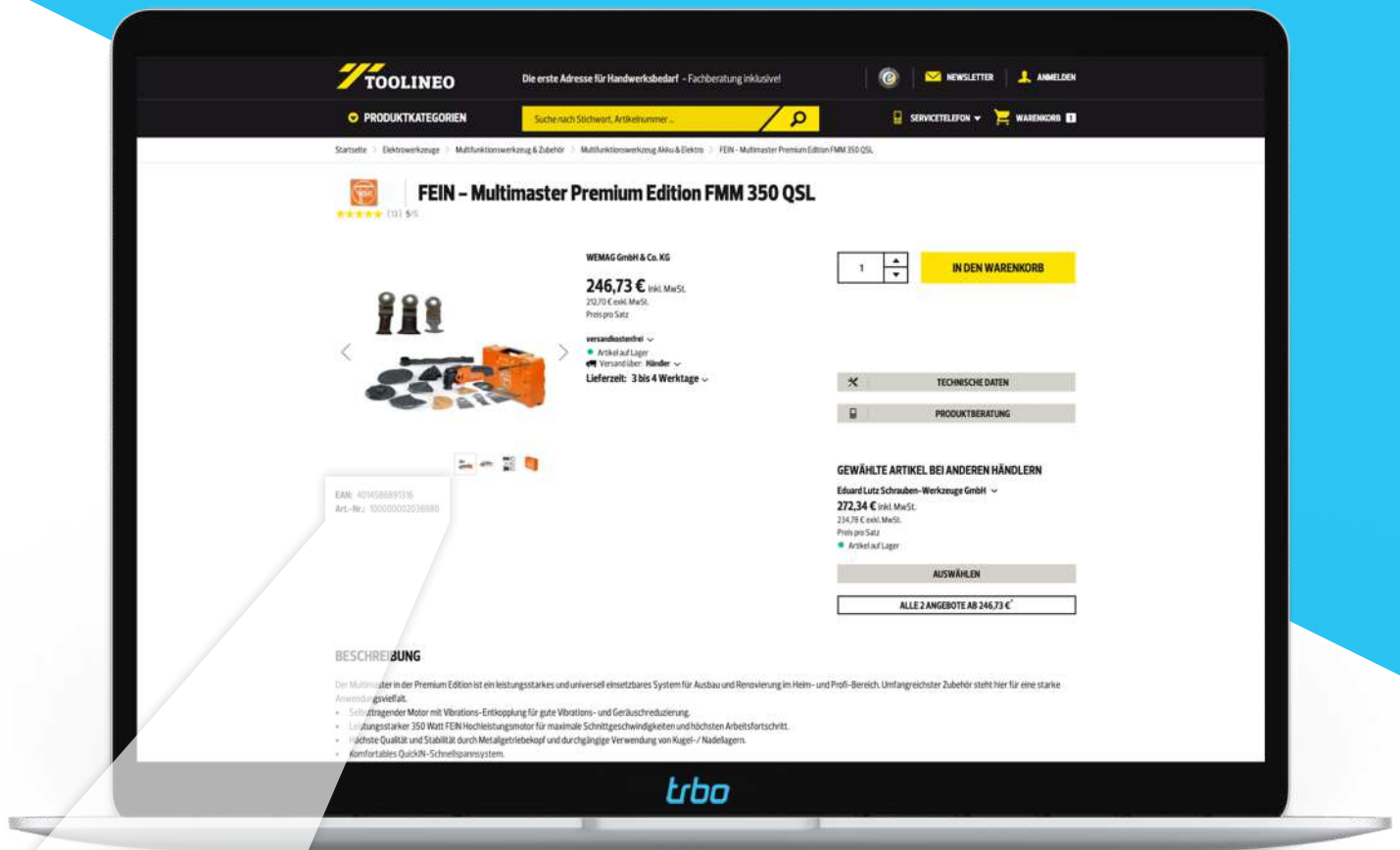
EAN: 4014586891316
Art.-Nr.: 100000002036980

Fig.: Repositioning the EAN (European Article Number) and the article number into the visible area for a better overview (Toolineo)

CLEVER WAYS TO ATTRACT CUSTOMERS

► CROSS-SELL AND UPSELL

These methods are well known in eCommerce and aim at suggesting matching products, more expensive products or even additional lower-priced products to the customer. Thus, the customer not only adds more products to his shopping cart, but also feels well advised and a positive impression remains.

► POINTING OUT POSSIBLE DISCOUNTS

Offering your customers the right discount can strengthen customer loyalty.

If you provide your customers with recommendations and show them detailed information, you make them feel as if they have come to the right place.

WHAT ARE THE BENEFITS?

PUSHING THROUGH THE FINAL STEPS

Time and again, customers leave the online shop shortly before completing their purchase for no apparent reason. In the process, they may even leave products in the shopping cart. To try and convince the customer to stay on the page and complete the purchase, an exit intent element can be used. As soon as the cursor approaches the URL bar or the exit button, an element containing the products that are still in the shopping cart can be displayed to the user. Additionally, a friendly note such as "There are still some products waiting for you in the shopping cart" can be added. This encourages the user to reconsider cancelling their purchase after all.

Fig.: Display of an exit intent element when abandoning the shopping cart. Text: "No time to pay right now? No problem! We have stored your shopping cart. To which email should we send your shopping cart?" (Certeo)

Regular customers can also be informed by email after they have left the shop that there still are products in their shopping cart. To attract the user's attention once again and convince him to continue shopping after leaving the webshop, you can also point out current offers or the latest products. Little-known users can not only be made aware of the products left behind, you can also score points with customer acquisition. A newsletter registration for example can be used for this purpose. Connecting the newsletter registration with a discount on the next purchase may not only lead to the customer deciding to complete his order after all, but also allow new customers to be approached with current offers in the future. The newsletter registration can also be personalized and adapted to the user's interests, for example by including the previously visited category. Signing up for the newsletter may even encourage him to make another purchase. If he does decide to complete the purchase, it is important to make a really good impression in the last steps of the customer journey. Similar to a sales representative in the real world, a nice farewell can work miracles digitally as well. With the words "Visit us again soon!" the customer feels cordially invited to visit the shop again and thus leaves the website with a good feeling.

AFTER THE PURCHASE IS BEFORE THE PURCHASE

▶ CUSTOMER LOYALTY DESPITE CANCELLATIONS

A cancellation of the purchase process can occur for a variety of reasons. To counteract this and still retain the customer on the website, you can offer your customers a newsletter subscription.

▶ CONVINCING YOUR CUSTOMERS

If your customer wants to leave the website but still has an item in his shopping cart, you might want to point this out in order to encourage him to reconsider leaving the website.

▶ IT'S NOT JUST THE FIRST IMPRESSION THAT COUNTS

If the overall impression is positive, it is important to go all out again in the final steps. This can be achieved with the right farewell. The customer feels personally addressed and will be more willing to come back.

If you leave a good impression from the first to the last moment, you ensure that customers feel well taken care of and more eager to return. In addition, you can improve customer loyalty.

WHAT ARE THE BENEFITS?

#CONCLUSION IMPROVED CUSTOMER EXPERIENCE WITH THE DIGITAL SALES REPRESENTATIVE

B2B commerce is predestined to personally address its customers. Many customers are used to the personalized experiences of consumer brands in B2C and project these expectations onto the B2B retail as well. B2B has a lot of information that the B2C sector lacks, and the vast amount of customer data combined with the know-how of the sales force is an immense strength of the B2B sector.

In order to integrate the digital sales representative at every touchpoint, the optimization of the webshop has to be approached in a holistic way:

➜ Friendly welcome by the personal contact person
➜ Presentation of the appropriate products

➜ Emphasis on the most important information about the product
➜ Personal farewell and customer retention after the purchase

If online shops exploit this potential and optimize the shopping experience even for unknown users, they can ensure higher profits and increased customer loyalty. The individual approach that is best suited for the shop and its users should always be tested. With accompanying A/B and multivariate testing, you can determine the most successful approach and perhaps even the one that doesn't generate an uplift at all. After all, different campaigns also work differently in different shops – even within the same industry. That's why online shops should always keep testing.

USING TRBO GIVES YOU THE FOLLOWING ADVANTAGES

• trbo creates a positive shopping experience: your website acts as an extended, digital arm of the sales force.

• With the trbo onsite personalization platform you can use all actions for onsite personalization, optimization and testing and always have 100% control over their success.

• Efficient user targeting increases shopping carts as well as sales.

• The simple integration of trbo technology reduces your time investment – should further questions arise, your personal account manager is available to help you implement your campaigns in the best possible way.

• Partners & interfaces: Our open, shop-agnostic platform architecture enables easy implementation and the connection of tracking systems, email providers and many more.

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Would you also like to use trbo to turn your B2B shop into a digital sales representative or learn more about onsite personalization to increase conversion rates and sales? Feel free to contact us!

We are happy to present how your webshop can benefit from better user engagement.

Arrange your free and noncommittal demo appointment now.

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