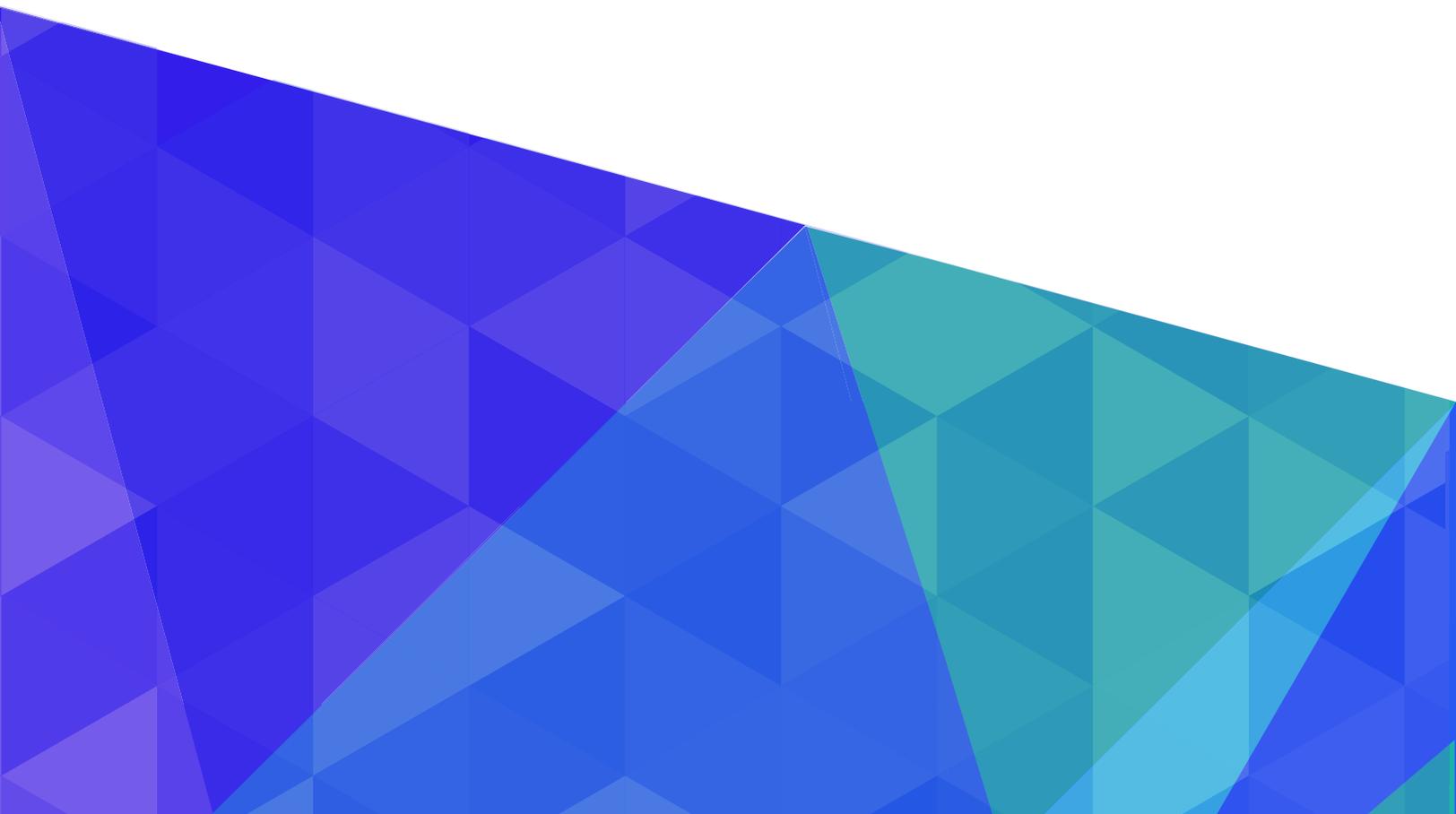




2016 Manufacturing & Distribution Sales and Technology Survey Report

A look at the wholesale distribution industry's latest trends, benchmarks, and technology investments.



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About This Study

Welcome to the 2016 Manufacturing & Distribution Sales and Technology Survey Report. Each year, this survey is sent to manufacturers and distributors around the world in order to gain a deeper understanding of how the industry is changing in the wake of new challenges, disruptive technologies, and shifting customer expectations. This year, survey respondents were asked about their operational challenges, sales and fulfillment processes, and technology investments, with a particular focus on the areas of B2B eCommerce and mobile technology.

We received over 450 responses from companies self-designated as manufacturers and/or distributors across more than a dozen industries. Organizations ranged in size from SMB (64.7%) to Mid-Market (29.6%) and Enterprise (5.7%).

Among individual respondents, 41% identified themselves as high-level leaders within their respective organizations (with C-level executives at 19%, VP-level leaders at 8%, and Director-level leaders at 14%). The remaining respondents included managers (35%) and individual contributors (24%) across departments including Sales, Marketing, Customer Service, General Management, Operations, IT, and Finance. Industries represented included: Food & Beverage, Apparel & Accessories, Hardware & Industrial, Electronics, Gift, Automotive, Home & Garden, Medical, Beauty & Cosmetics, Toys, Baby & Kids, Outdoor & Sporting Goods, Footwear, Chemicals, Pets, Music, and Agricultural Products.

This report includes a detailed look at this year's most significant trends in sales and technology among manufacturers and distributors and a list of recommendations for organizations to take action on over the next 12 months and beyond.

Executive Summary

Significant growth in eCommerce and mobile across all industries has drastically changed the B2B sales environment. While in past years, only the most sophisticated, tech-savvy B2B buyers pushed suppliers for change -- it is now the case that buyer expectations fueled by convenient consumer experiences are more widespread.

Suppliers have responded to these shifting expectations by implementing omnichannel selling strategies—strategies that give their buyers the option to buy in-person or online, from a computer or a mobile device. And despite growth in eCommerce, the historically dominant in-person sales channel is growing in strategic importance.

Completed in September 2016, this report explores how manufacturers and distributors sell to their customers, the related technology investments they've made to date, and the results they've seen from their efforts. Respondents from over a dozen industries, including Food & Beverage, Industrial Manufacturing, Gift & Homewares, Accessories, Apparel, Sporting Goods shared information about their current processes and future plans.

50% of respondents who have not yet adopted B2B eCommerce are looking to implement online ordering within the next 12 months.

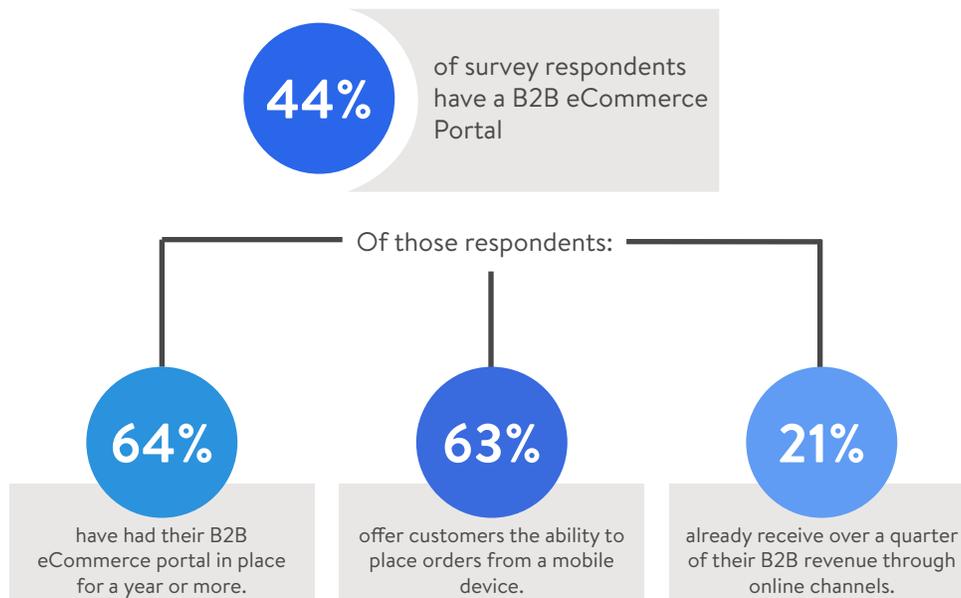
Omnichannel: A Reality in Manufacturing & Distribution

It is almost impossible to talk about B2B commerce today without talking about omnichannel selling, an approach that aims to provide a seamless customer experience across multiple touchpoints, whether they are in-person (store visits, sales meetings, and trade shows) or online (web-based B2B eCommerce sites and mobile commerce applications). Today, “omnichannel” is no longer just a buzzword. It is a reality that manufacturers and distributors across every industry must face in order to remain successful.

Among survey respondents, 44% currently have a B2B eCommerce solution in place that allows customers to order online, and 64% of those respondents have had their B2B eCommerce portal in place for a year or more. 63% of those respondents also offer their customers the ability to place orders from a mobile device, and 21% of respondents already have more than a quarter of their B2B revenue coming in via online channels.

As more manufacturers and distributors adopt online ordering, it’s going to become difficult to compete without it. Indeed, among survey respondents without B2B eCommerce, 50% reported that they had plans to implement B2B eCommerce within the next 12 months, and 20% reported that they were looking to implement B2B eCommerce in as soon as 6 months.

Figure A. The omnichannel reality



Offline channels remain critical as well. 74% of survey participants currently have reps selling in the field, 63% work with independent sales representatives (or manufacturer’s representatives), and 73% sell and/or promote products at industry trade shows.

As commerce technology in the B2B realm advances to match its consumer counterparts, manufacturers and distributors are investing in technologies that can improve processes within all of these channels. Companies are rolling out eCommerce sites that deliver intuitive user experiences on the web, mobile commerce applications that empower customers to place orders on the go, and mobile order writing software that make it faster and easier for sales reps to write and submit orders at in-person meetings.

Indeed, when asked what commerce technologies were a priority for their businesses, 63% cited web B2B eCommerce software for online customer ordering. 58% cited mobile order writing software for sales reps in the field as a key technology, and 30% said that they were prioritizing mobile commerce software that would allow customers to place orders from a mobile device.

Figure B. Which of the following commerce technologies are a priority for your business?



There is a clear desire among manufacturers and distributors to provide seamless buying experiences both in person and online--ensuring that customers can start an order on their mobile device, for instance, and then complete that same order on their laptop while maintaining a consistent brand and user experience.

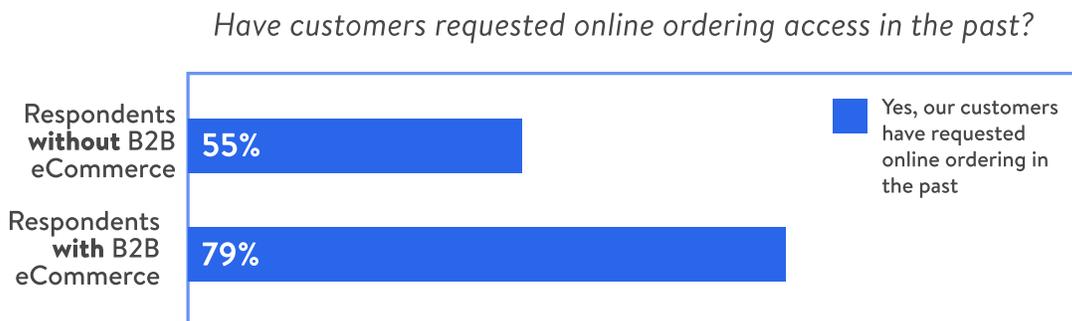
As more companies make the key technology investments required to create those experiences in the coming years, many are likely to invest in solutions that cover all sales and ordering functions--mobile order writing applications for sales reps, web-based B2B eCommerce portals, and mobile commerce applications--in one platform, ensuring feature parity and a seamless experience across touchpoints.

Customer Expectations Driving Widespread B2B eCommerce Adoption

As the B2C world raises the bar on consumer expectations with the convenience and speed of online ordering, those expectations are quickly seeping into the world of B2B commerce. Driven by their personal experiences as consumers purchasing from sites like Amazon, a new mindset is taking hold for B2B buyers, and they are demanding the ability to place orders online. They want to be able to access product information online from their laptops and mobile devices, place orders anytime, anywhere, and check their order history and order statuses on the go from whatever device they happen to be using.

It is these rising customer expectations that has led many manufacturers and distributors to adopt B2B eCommerce technology. Among survey respondents who have already invested in B2B eCommerce, 79% reported that their customers had asked for the ability to order online--24 percentage points higher than their counterparts who haven't yet made the leap.

Figure C. Customer expectations driving B2B eCommerce adoption



Clearly, keeping customers happy is a big reason for manufacturers and distributors to jump onto the B2B eCommerce bandwagon, and those who haven't yet adopted the technology may simply not be aware of how quickly this trend is moving--or lack adequate communication with their customers. Indeed, when asked whether they knew if their key competitors had a B2B eCommerce portal, 34% of survey respondents answered, "I don't know."

As the B2B eCommerce trend continues to mature, customer expectations are only going to get higher. Today, it's safe to say that organizations no longer have the luxury of waiting for their customers to ask for online ordering.

SMBs Seizing the B2B eCommerce Opportunity

Among small and medium-sized businesses (SMBs), there may be a perception that eCommerce is out of reach, whether it's due to a lack of capital or internal technical resources. When asked why they had not yet implemented B2B eCommerce, 40% of SMBs reported that it was too expensive. 38% cited a lack of internal staff to implement or maintain the software.

However, the reality today is that off-the-shelf Software-as-a-Service (SaaS) solutions are making B2B eCommerce more accessible than ever before. While traditional enterprise software is purchased and installed on-premise on the user's own servers, requiring large up-front investments as well as internal IT resources, SaaS solutions are offered on a subscription basis. They are hosted and maintained by a vendor, run in the cloud, and can be implemented quickly to enable rapid time-to-value on a much smaller initial investment.

Because the vendor is responsible for any maintenance, updates, infrastructure, backups, etc., the total cost of ownership is considerably reduced, making SaaS attractive for SMBs and mid-market companies, as well as a growing number of enterprise-level organizations looking for greater agility in an increasingly dynamic market.

In short, SaaS technologies are leveling the playing field for businesses of all sizes, and B2B eCommerce adoption is no longer reserved for larger enterprise companies with seemingly unlimited resources. Indeed, mid-market organizations and SMBs are making B2B eCommerce investments in large numbers. Even among companies with just 1-5 employees, 41% have adopted B2B eCommerce, and companies of all sizes are seeing significant growth via this channel.

Figure D. B2B eCommerce adoption by company size

Company Size	% Respondents with B2B eCommerce
1-5 Employees	41%
6-20 Employees	45%
21-50 Employees	43%
51-250 Employees	40%
251-1000 Employees	55%
1000+ Employees	54%

Figure E. B2b ecommerce growth by company size

Company Size	% Respondents who've seen significant (>20%) growth in their B2B eCommerce channel
1-5 Employees	41%
6-20 Employees	41%
21-50 Employees	62%
51-250 Employees	53%
251-1000 Employees	53%
1000+ Employees	45%

The Role of the Sales Rep Is Changing (Not Disappearing)

As B2B eCommerce becomes table stakes for success, many industry analysts have predicted that the end is near for the on-the-ground, road warrior field sales roles that have been integral to the success of manufacturers and distributors across industries for decades.

Reports like [Forrester's "Death of a \(B2B\) Salesman"](#) have estimated that over 1 million B2B salespeople in the United States will lose their jobs to self-service eCommerce by 2020, citing changes in buyer preferences for online self-service product research and purchasing.

Survey findings, however, tell a slightly different story. Field sales remains the most common sales channel among manufacturers and distributors. In-person customer visits and sales meetings rank ahead of trade shows, B2B eCommerce, B2C eCommerce, and EDI transactions.

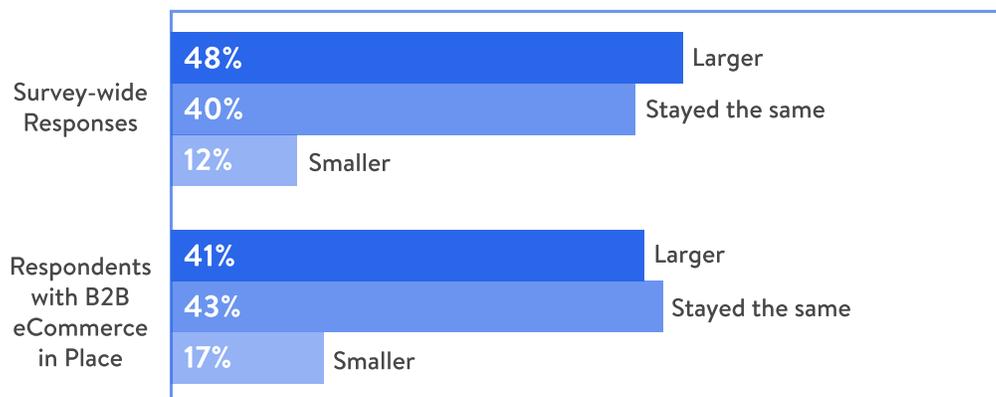
Among all survey respondents, 87% reported that they currently employ a field sales team. Among those respondents, 88% reported that the size of their sales team had stayed the same (40%) or grown larger (48%) over the past year. Only 12% reported their field sales team had gotten smaller.

But what do the numbers look like when looking only at those companies who have adopted B2B eCommerce portals? Does the presence of online ordering really spell the end for sales reps?

It would appear that the answer is no. 84% of respondents with a B2B eCommerce portal reported that the size of their field sales team either remained the same (43%) or increased (41%).

84% of respondents with a B2B eCommerce portal reported that the size of their field sales team grew larger or stayed the same over the past 12 months.

Figure F. Did your field sales team get larger, smaller, or stay the same over the last year?



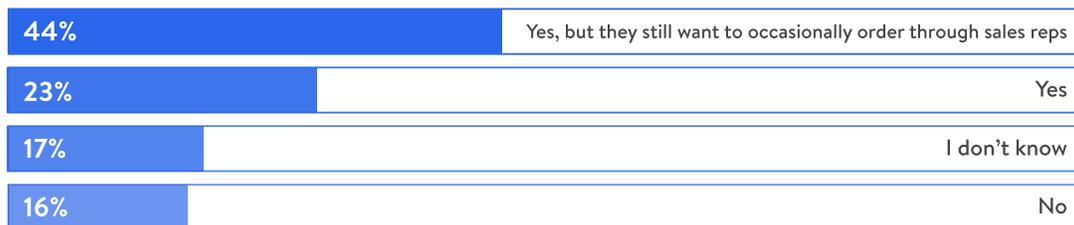
Likewise, when asked directly about the value of sales reps to their businesses, 75% of respondents cited the in-person sales channel as very important or extremely important.

Figure G. Perceived value of the in-person sales channel



Furthermore, when asked whether their customers preferred to place orders online, 44% of survey respondents answered, “Yes, but they still want to occasionally order through sales reps.”

Figure H. Do your customers prefer placing orders online?

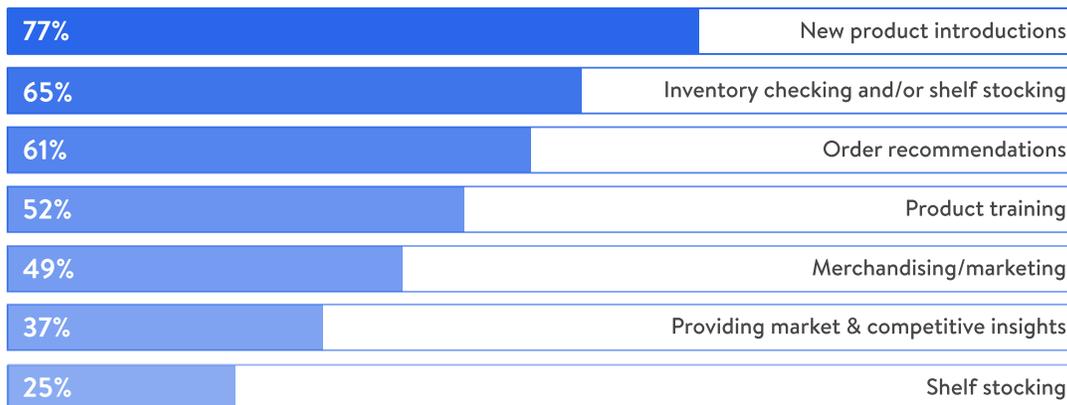


This supports not only the omnichannel trend outlined earlier in this report, but also the fact that sales reps offer buyers value that they simply cannot get from an online ordering portal alone. Ultimately, B2B relationships are built on trust, and face-to-face meetings are key to fostering strong relationships between suppliers and buyers.

While field sales isn’t disappearing, it is changing. The “transactional sales rep,” who dropped in on customers only to fill out an order form, is fast becoming part of the past. The easier it becomes to capture an order—whether it is a simple reorder placed online by the buyer herself, or an order written digitally by a sales rep on a tablet or smartphone—the less time a sales representative needs to spend on the manual data entry and order submission tasks that were once such a large part of their job.

Instead, reps are able to focus on becoming strategic partners to their customers—trusted advisors providing insights on assortment planning, market intelligence, and lean supply chain strategies. Rather than handwriting each line item of an order one-by-one, a rep can talk with a buyer about how to increase margin, phase purchases, and differentiate themselves from competitors. They also have more time for new product introductions, product education and training, merchandising, and marketing.

Figure I. In addition to order writing, what services do your sales reps offer customers?



Not only are sales reps becoming strategic partners to their customers, they are also increasing in importance as growth engines for their organizations. When asked to rank sales rep functions in order of their level of importance to their business, sales survey respondents overwhelmingly chose new customer acquisition as the most important--a reminder of how important the in-person role is to not just the expansion of existing business, but also the forging of new customer relationships.

Other key roles included merchandising and marketing support, and product education and training--functional areas that are about being physically present and building in-person relationships with customers.

Figure J. What sales rep functions are most important to your business?



Order Writing & Submission Processes Still Highly Manual

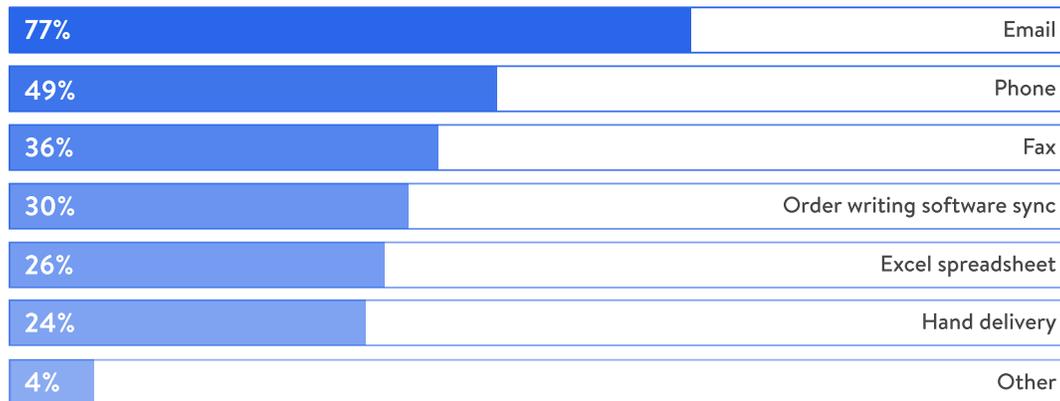
Despite the rapid advancement of B2B commerce technology, from digital catalogs to mobile order writing and automated order syncing capabilities, many manufacturers and distributors are still clinging to remnants of the analog world, requiring both sales reps and customers to place orders via highly manual methods.

When asked about the primary methods sales reps use to write B2B orders in the field, for instance, 34% reported that sales reps depend on paper order forms to write orders. 18% are primarily using PDF order forms, and 15% are primarily entering orders into Excel spreadsheets.

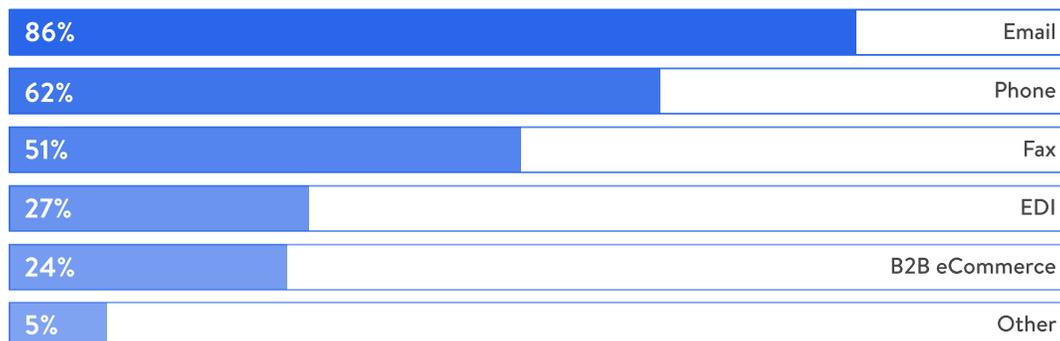
When it comes to order submission, there's a similar story. Sales reps submit orders via email, phone, fax, Excel spreadsheets, and even hand delivery.

Figure K. How does your back office receive orders from field sales reps and customers?

Sales Reps



Customers



When asked about how orders are received from customers, a similar trend emerged. In both categories, email, phone, and fax are still the most common methods of order submission. These manual order writing and submission methods often require orders to be manually entered into back office systems, which can cause a host of problems, including delays, errors, and resource drain.

While some manufacturers and distributors have created more seamless order writing experiences and automated order submission processes using digital catalogs (49%) and order writing software (30%), many are lagging behind, leaving a huge opportunity to increase accuracy and efficiency and speed up order processing and fulfillment.

Direct Triumphs Over Marketplace

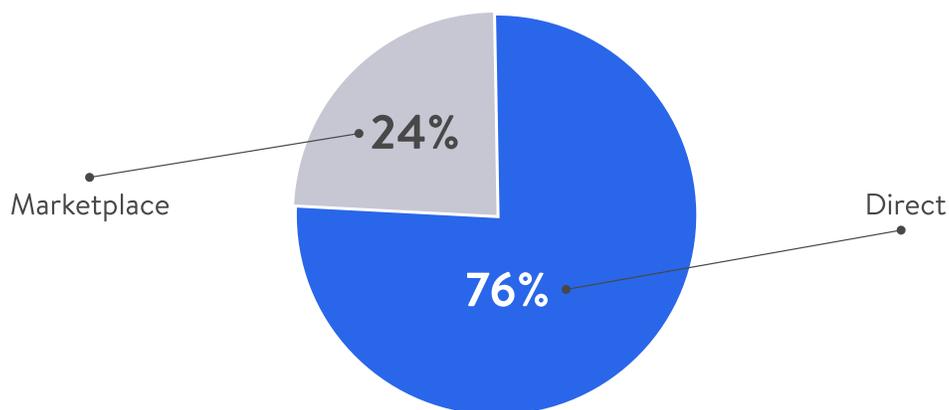
When it comes to B2B eCommerce, there are generally two approaches: the Direct Model and the Marketplace Model. A B2B eCommerce Marketplace Model is exactly what it sounds like: brands sell their products wholesale in an online marketplace right alongside their competitors. The Direct Model, on the other hand, involves a brand creating a B2B eCommerce portal dedicated only to their products.

Each of these models has its pros and cons. One advantage of the Marketplace Model is the possibility of increased exposure to a wider audience of buyers. However, in a marketplace, all brands, regardless of their size, are stacked against each other. In these types of selling environments, larger brands have a significant competitive advantage against smaller competitors simply due to brand recognition.

According to survey results, manufacturers and distributors prefer the Direct model, which generally allows organizations to have full control over the brand and customer experience, including things like customer-specific pricing, discounts, and promotions, as well as a distraction-free buying environment that highlights only their offering.

Of all participants surveyed who have already adopted B2B eCommerce, 76% have a Direct model in place, and only 24% are currently selling exclusively through an online marketplace. 56% do not plan on selling their products in a B2B marketplace over the next 12 months.

Figure L. B2B eCommerce models: Direct vs. Marketplace



Another advantage of the Direct model is the ability to create a channel of communication between brand and buyer, allowing organizations to build the strong, long-term relationships that remain the bedrock of B2B businesses online as well as offline.

With Direct B2B eCommerce portals, manufacturers and distributors have an online destination for promotional emails, as well as a permanent brand showcase where customers can get quick answers to product questions and access brand collateral. With companion mobile commerce applications, manufacturers and distributors also have the possibility of sending push notifications with shipping updates, new product announcements, or reorder reminders, customizing these online experiences to each buyer's individual needs.

Ultimately, the marketplace model offers greater visibility, but also increased competition and less flexibility. The Direct Model requires more effort in terms of service, but also offers complete control over the customer experience.

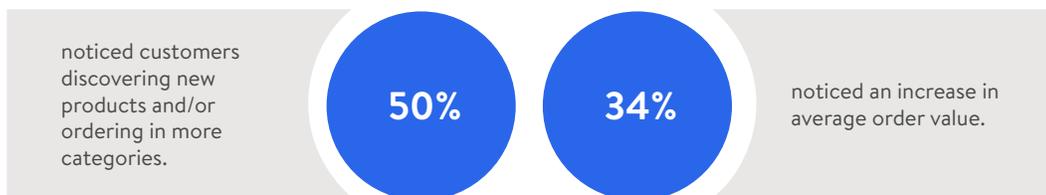
The dominance of the Direct model indicates that manufacturers and distributors are looking to maintain that control over their customer experiences in a selling environment where personalization and standout customer service are keys to success.

B2B eCommerce & Product Discoverability

Not only is B2B eCommerce meeting a clear demand, as outlined in the [Customer Expectations](#) section of this report, it is also driving growth for manufacturers and distributors in a range of new ways. One such example is the ability of a B2B eCommerce portal to encourage customers to discover new products and order across more categories.

Indeed, half of survey respondents reported noticing that their customers are discovering new products and/or ordering in more categories through their B2B eCommerce channels. Another 34% reported noticing that the average value of an order placed via B2B eCommerce was actually higher than the average value of an order placed through other means.

Figure M. Among respondents with B2B eCommerce:



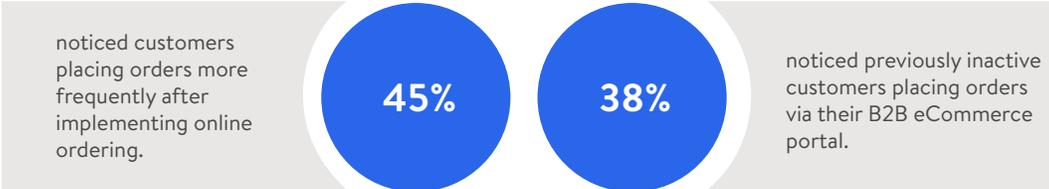
By offering a self-service experience online, manufacturers and distributors are giving customers the autonomy to browse products 24/7, rather than limiting their interactions to in-person customer meetings. By opening up new opportunities for product discovery, as well as a more interactive catalog browsing experience, manufacturers and distributors are allowing their customers to gain a more comprehensive view of their offerings—driving more sales.

B2B eCommerce & Order Frequency

In addition to increased order value, B2B eCommerce is also driving greater order frequency.

Among survey respondents with B2B eCommerce, 45% reported that their customers have been placing orders more frequently since they implemented online ordering. 38% even saw previously inactive customers (defined as customers who hadn't placed an order in 6 months or more) begin placing orders via their B2B eCommerce portal.

Figure N. Among respondents with B2B eCommerce:



The fact is, a B2B eCommerce portal allows brands to be front-of-mind with customers even when trade show season is over, or when sales reps are not able to schedule in-person meetings. These sites also make it much easier for retailers and other B2B buyers to do business with suppliers, which can be the difference between a buyer's choice between one supplier or one of their competitors.

Mobile Commerce Is the Next Frontier

As manufacturers and distributors invest in B2B eCommerce in greater numbers, mobile commerce is becoming the next big point of differentiation. According to survey results, 63% of respondents with B2B eCommerce already in place reported that their customers are able to place online orders using a mobile device.

63% of respondents with B2B eCommerce say their customers can place orders from a mobile device.

However, the vast majority (75%) of these are mobile web browsing experiences, rather than native mobile applications (17%). The last 8% do not offer mobile experiences on consumer mobile devices (i.e. smartphones and tablets), but are still using other mobile hardware, like legacy barcode scanning devices.

Figure O. Breakdown of mobile commerce experiences



It's important to make clear distinctions between each of these mobile experiences. A mobile web browsing experience is generally a resized version of an existing eCommerce portal that was originally designed for a desktop computer. The site is accessed from a mobile web browser, which may be subject to interruptions in Internet connectivity.

A native mobile application, on the other hand, is designed with the mobile experience in mind, removing visual clutter and displaying content in the most intuitive way possible for mobile users. Some native mobile applications can even function offline.

The preference for native mobile applications is widespread. According to [eConsultancy](#), as high as 85% of consumers favor apps over mobile websites, as apps are perceived to be more convenient to use, faster, and easier to browse. While 63% of survey respondents with B2B eCommerce may allow their customers to place orders on mobile, very few have invested in native mobile.

Manufacturers and distributors who are early to the game when it comes to investing in these applications will have an opportunity to gain a huge competitive advantage by making anytime, anywhere ordering as easy as possible for customers.

Multiple Touchpoints Key to Adoption

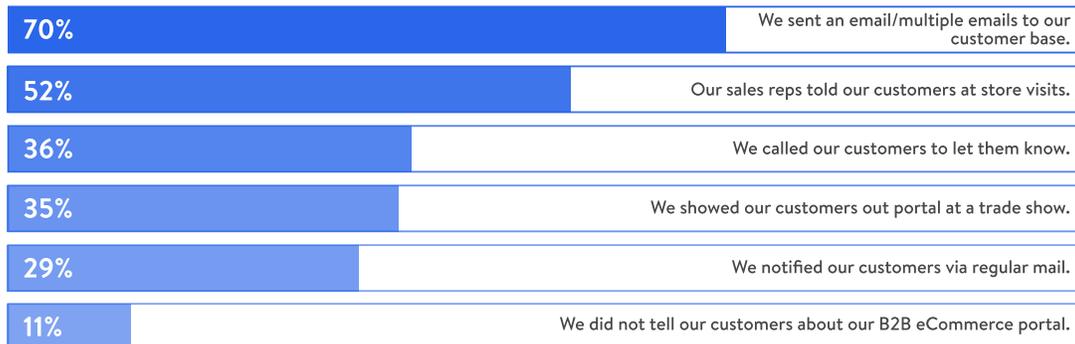
Customer adoption of B2B eCommerce portals remains a significant challenge. When asked what percentage of their customers were regularly placing orders via their B2B eCommerce portals, 36% of respondents reported that less than a quarter of their customers were regularly placing orders. Likewise, when asked to rank their biggest B2B eCommerce challenges, the top challenge among survey respondents was a lack of customer adoption.

In last year's report, adoption was cited as one of the biggest challenges facing manufacturers and distributors as they invested in these new technologies. Despite the fact that many B2B buyers are indeed demanding omnichannel experiences and convenient online ordering, a resistance to change remains, as evidenced in the "[Order Writing & Submission Processes Still Highly Manual](#)" section, in which we saw that the top methods through which suppliers receive orders from their customers were still email, phone, and fax--in that order.

The key to adoption appears to be having multiple touchpoints to increase awareness of newly implemented B2B eCommerce portals, including email campaigns, conversations with sales reps, phone outreach, direct mail, and others.

When asked how they notified customers of their B2B eCommerce portals, 70% of respondents reported sending emails. 52% had their sales reps introduce the portal to customers during an in-person meeting. 36% had their customer service and/or sales teams call customers directly to let them know, and 35% showed customers their new portal at an industry trade show. 29% even sent out notifications or announcements via regular mail.

Figure P. How did you notify your customers of your B2B eCommerce portal?



Customer adoption is the number one B2B eCommerce challenge among manufacturers and distributors who have implemented online ordering.

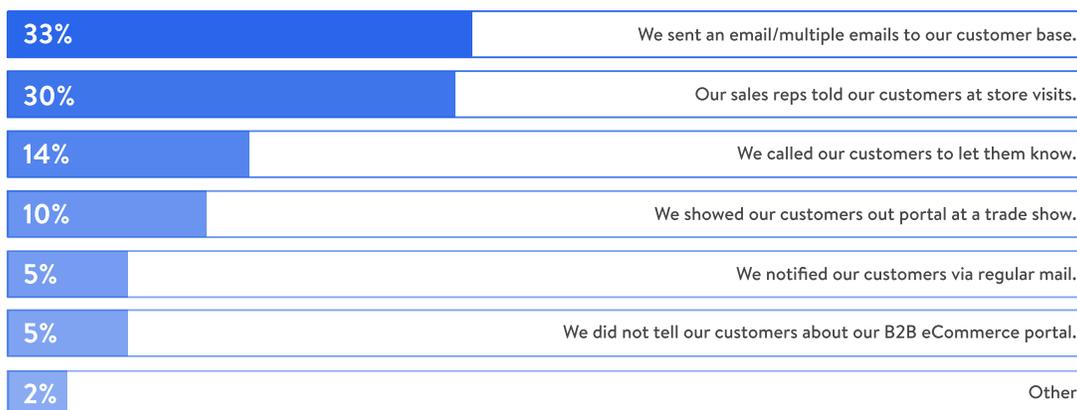
Perhaps unsurprisingly, organizations who notified their customers of their B2B eCommerce portal through more touchpoints saw greater adoption. Among survey respondents who introduced their B2B eCommerce portal via only one touchpoint, only 29% could report that a majority of their customer base had placed at least one order online. Among respondents that used 5 different touchpoints to introduce their portal to customers, that number jumps to 54%.

Figure Q. Multiple touchpoints encourage B2B eCommerce adoption

# touchpoints introducing customers to B2B eCommerce portal	Respondents w/ over half of customer base who've placed an online order
1 touchpoint	29%
2 touchpoints	24%
3 touchpoints	36%
4 touchpoints	46%
5 touchpoints	54%

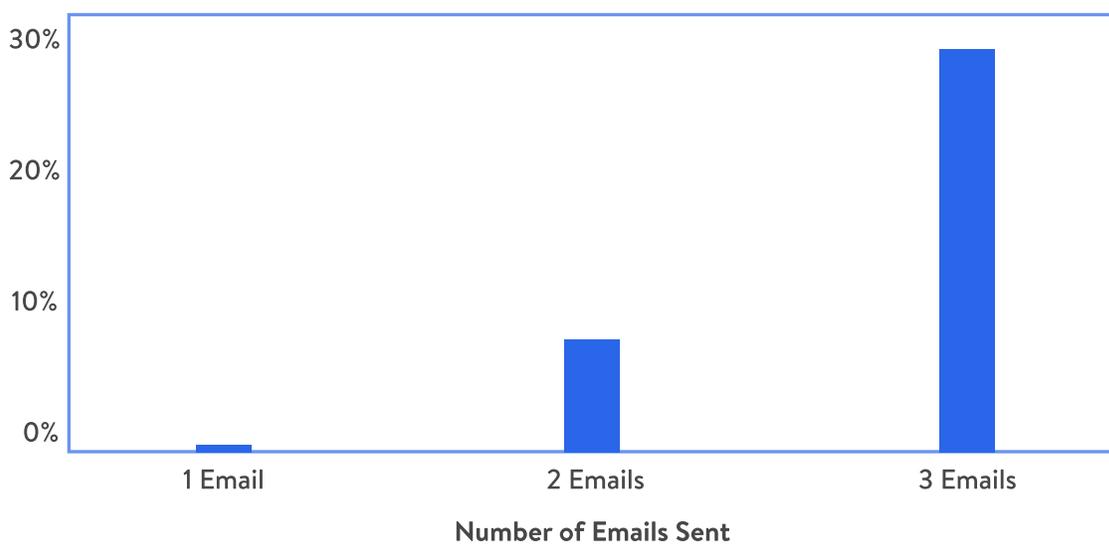
When asked about the method that was most responsible for customer adoption of their online ordering portals, email came out on top, with 33% of respondents citing it as the most effective method.

Figure R. From the following list, choose the method that was most responsible for getting your customers to use your B2B eCommerce portal.



When it comes to email notifications, a similar rule applies--more emails lead to greater adoption. Among companies who sent just one email to their customer base notifying them of their online ordering portal, none were able to report that more than 75% of their customer base had placed at least one order via B2B eCommerce. Among those companies who sent two emails, that number makes a modest jump to 6%. Among those who sent three emails, however, 30% were able to report that over three quarters of their customer base had placed an order online.

Figure S. Companies reporting that more than 75% of their customer base has placed an online order:



When it comes to encouraging B2B eCommerce adoption, persistence is key. Ensuring that customers receive multiple email notifications, as well as reminders from sales and customer service teams can go a long way toward seeing a faster return on B2B eCommerce investments.

Conclusion & Key Recommendations

The survey results indicate that manufacturing and distribution is well into the transition of moving sales and ordering processes online. This has resulted in some clear strategic shifts.

The pressure that B2B sellers feel to provide more convenient buying experiences for their customers has led them to implement omnichannel selling strategies. Technology has minimized the transactional elements of the selling process, enabling reps to provide more significant business value to their customers. With B2B eCommerce, manufacturers and distributors are also giving their customers the opportunity to explore their offerings and place orders around the clock, resulting in significant increases in both order value and order frequency. Finally, mobile commerce is still in a state of relative nascency, and is an area of huge opportunity.

Here are the three key recommendations that manufacturers and distributors should follow in order to remain competitive in this environment.

1 Elevate your sales reps.

Despite worries that sales reps are being replaced by B2B eCommerce technology, the importance of the sales rep has been proven several times over across this survey. The role of reps is not disappearing, but changing. Whether reps should focus on key accounts, new customer acquisition, or playing a more strategic advisory role with customers, manufacturers and distributors need to think about how to optimize their in-person channels.

For instance, technologies like digital catalogs and mobile order writing software, are making it easier than ever for sales reps to write orders. Nevertheless, many manufacturers and distributors are still using manual methods, with email, phone, and fax being the most common methods of order submission from their reps. While some respondents have automated their sales reps' ordering workflow using digital catalogs (49%) and order writing software (30%), there is still an opportunity for many to free up reps' time for more strategic roles.

2 Determine your omnichannel strategy.

With omnichannel selling no longer a trend, but a reality among manufacturers and distributors, many businesses are looking to make significant investments in mobile order writing software for sales reps as well as web and mobile B2B eCommerce technology for customers to place orders around the clock.

With suppliers looking to create a truly seamless experience across all channels, manufacturers and distributors who take a holistic, platform-based approach to investing in these technologies (rather than a piecemeal approach) will ultimately end up with a more consistent brand and user experience across touchpoints, as well as a single integration point to back office systems.

3 Seize the mobile commerce opportunity.

If B2B mobile commerce seems like a far-off prospect, or a trend that only the biggest players in manufacturing and distribution need to be thinking about, think again. The world of B2B Commerce is changing rapidly, and while B2B eCommerce has been the buzzword of the last few years, the next frontier is B2B mobile commerce.

Among survey respondents with B2B eCommerce, 63% reported that their customers are able to place orders with a mobile device. Of that 63%, however, only 17% have a native mobile commerce app. Manufacturers and distributors who are able to offer intuitive, convenient experiences on mobile will stand out from competitors.

About Handshake

Founded in 2010, Handshake provides the B2B Commerce platform that helps manufacturers and distributors grow their business by making it easy for their customers to order the right products from them, in-person and online. Handshake Rep is a mobile sales order entry app that allows sales reps to write orders faster and gives them the product and customer information they need to have more strategic customer conversations. Handshake Direct is an omnichannel B2B eCommerce solution that complements field sales reps by giving buyers the convenience of 24x7 ordering and product education through a custom B2B eCommerce portal and B2B mobile commerce app.

If you are interested in learning more about Handshake, please [request a demo](#) from our sales team or contact us using our info below.

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