HANDSHAKE

GUIDE

How to Audit Your Sales & Ordering Process

The 100+ questions you should ask to improve the most important processes of your business.

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This "**Establishing Baselines**" icon you'll see throughout the guide marks questions that are key to identifying baselines. As you make process changes, these baseline numbers should improve accordingly.

INTRODUCTION

If you're like most manufacturers and distributors, it's probably been some time since you've looked critically at your sales and ordering practices. These processes--centered around field sales, customer ordering, and your back office--are the building blocks of your business, and even small improvements can lead to major operational efficiencies and a better customer experience, translating to lower costs and increased revenue.

This audit will give you the tools you need to take a closer look at the most important functions within your business. **It provides a comprehensive list of questions broken up into three sections:**

1. Field Sales
2. Customer Ordering (including a special section on B2B eCommerce)
3. Back Office

These questions are meant to facilitate a series of strategic discussions between the key stakeholders in your company. Depending on the size and departmental makeup of your organization, this will include (but is not limited to) leaders from sales, operations and IT.

While this guide will have maximum impact when used in its entirety, you can also jump to the sections that reflect your greatest needs. Taking the time to delve deeper into what your business is doing well and potential areas for improvement will ensure that your business doesn't fall behind in today's competitive marketplace.

HOW TO USE THIS GUIDE
(The 4 Steps of the Audit)

1 Determine the task force.

Your sales and ordering processes span multiple departments, so it's important to create a task force comprised of leaders in Sales, Operations, and IT. If at all possible, include 1-2 representative customers as well. The different viewpoints and expertise offered by each of these stakeholders are key to running an effective audit.

2 Discuss & analyze key questions.

Next, you'll run a series of discussions about your sales and ordering processes with your appointed task force. These discussions will be based on a targeted question list, whether it's the full list of 100+ questions in this guide (recommended), the section of highest priority to your business, or other questions you develop on your own. This is the meat of your audit, where you'll uncover what you're doing well and what you can improve.

3 Prioritize next steps.

After the discussion phase, you'll collect your answers, summarize your insights, and prioritize what should happen next. Your next steps will be a mix of easily implemented low-hanging fruit and more strategic (but critical) long-term projects. Your list should reflect a balance of both, so it won't be too long before you realize some progress.

4 Assign takeaways.

Finally, you should assign your task force (or other members of your company if necessary) to each one of the changes on your list. It's particularly important that the larger, more strategic projects have an owner to ensure they are carried out.

The current sales and ordering landscape has three main components.

1. Field Sales

Typically comprised of customer visits and trade shows, your field sales operation is about how your sales reps write orders in the field and submit them to your back office. Depending on your business, these processes may range from highly manual to completely digital.

2. Customer Ordering

This audit category includes the processes around how your customers place orders from you. Orders are usually received by your back office via offline and/or online channels, which is highly dependent on whether or not your business has already implemented B2B eCommerce.

3. Back Office

Your back office refers to the team back at headquarters responsible for the receipt and processing of orders from your field reps and customers. They are also responsible for the fulfillment and operational practices related to your ERP.

Customer Visits   Trade Shows

Field Sales

Customer Ordering

Back Office
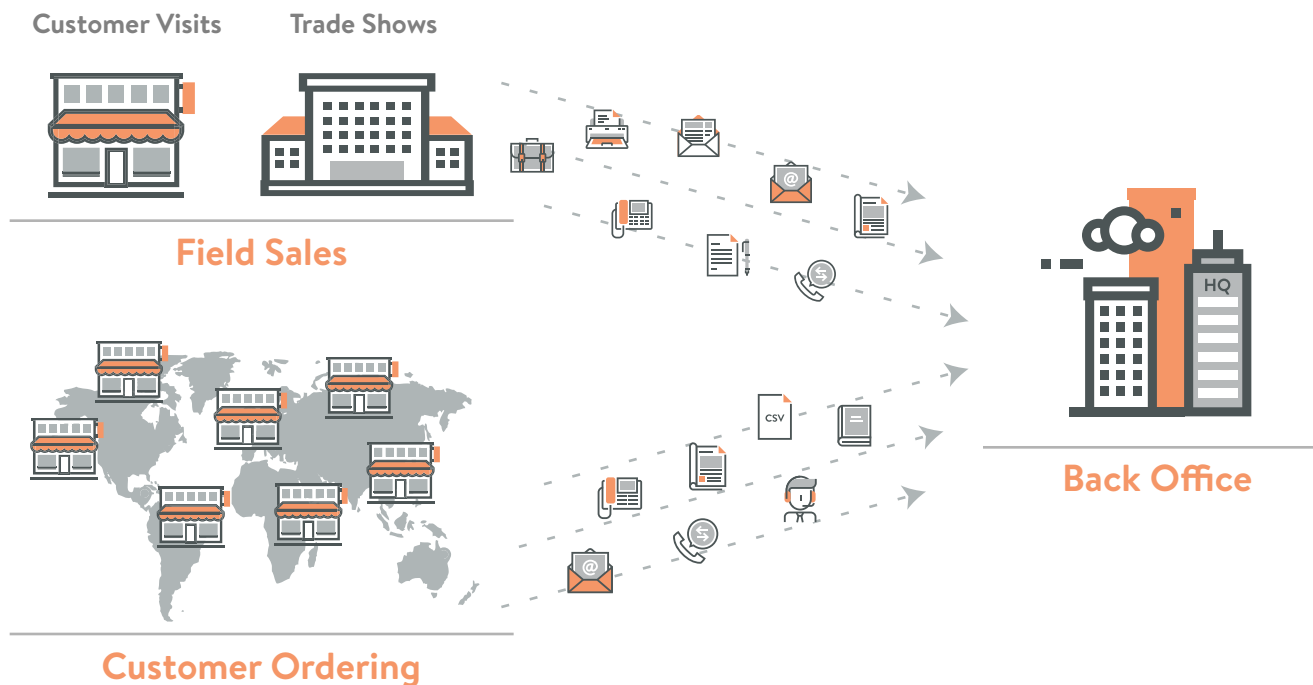
B2B COMMERCE

This guide will frequently refer to B2B Commerce platforms as a way to solve many common sales and operational challenges. There are three main components to a B2B Commerce platform:

1. Mobile Order Writing App

An app used by your field sales reps to write orders and access important customer and product information.

2. B2B eCommerce Portal

A portal, ideally offered on both web and mobile, that allows your customers to place orders directly from you online.

3. Order Management Hub

An admin portal used by your back office to receive orders and manage customer and product data. This data is integrated directly to your ERP.

Mobile Order Writing App

**B2B eCommerce Portal
(Web & Mobile)**

Order Management Hub

ERP
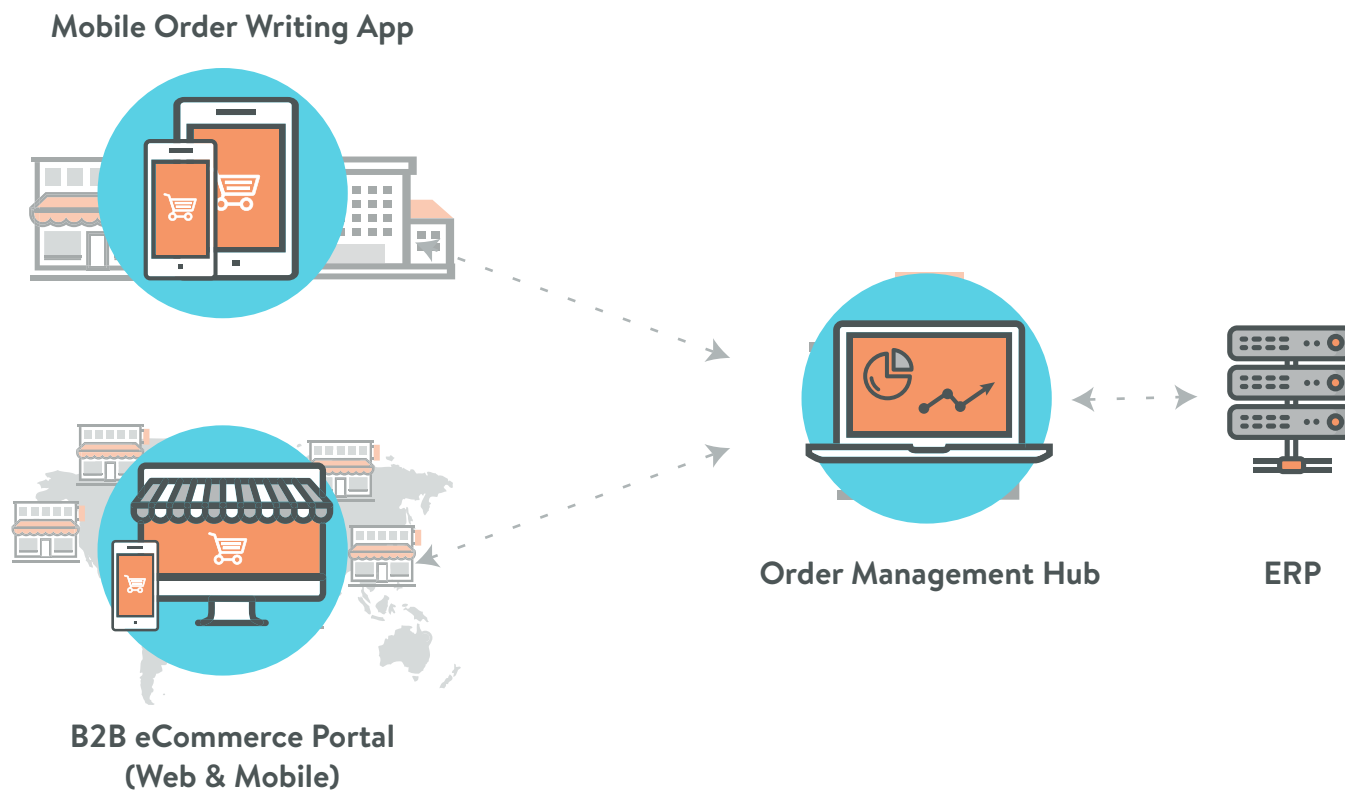
AUDIT CATEGORY 1:

FIELD SALES

FIELD SALES

Your salaried reps, independent reps and/or distributors' process of selling in the field.

Despite the growing importance of online ordering, the offline, in-person sales relationship remains an essential channel in manufacturing and distribution. In many instances, the customer relationship has been built over several years (or even decades), and the sales rep serves an important role when it comes to upsells, product education and overall strategic support. For this reason, it's important to look deeply at your field sales strategy and determine where there's room for improvement.

General

- Field sales operations in manufacturing and distribution are typically comprised of in-person customer visits and trade shows. If we were to categorize our own field sales operation, what percentage of our reps' time is spent at in-person visits vs. trade shows?

- **What percentage of our total annual revenue comes from in-person visits vs. trade shows?**

- Are in-person visits or trade shows more important to our overall sales strategy?

- How many sales reps do we currently have in the field?

- Are our sales reps salaried, independent, or both?

- Our sales rep compensation structure reflects the business goals we are trying to achieve.

  ☐ True

  ☐ False

- Our sales reps compensation structure is less than/more than/equivalent to industry standards.

- [If working with independent reps] Are we happy with the exposure our product line is getting in sales appointments?

- **On average, how many customer appointments do our reps have per day? Per week? Per year?**

- On average, how long do our reps spend traveling between customer appointments?

- How are our rep territories organized?

■ While with a customer, the primary methods our sales reps use to write a sales order is/are:

☐ Paper order form

☐ Fillable PDF

☐ Excel spreadsheet

☐ Direct input into ERP

☐ SaaS (Software-as-a-Service) order-writing application on smartphone or tablet

☐ Custom-built order writing application or device

☐ Other: _____

To remain competitive, manufacturers and distributors are looking to optimize the in-person sales conversation at trade shows and store visits. In your field sales operation, your reps are the key stakeholders, and you need to make it as easy as possible for them to sell for you, whether that involves giving them access to more information, powering them with technology, or looking critically at their commission structure. If you are among the 65% of manufacturers and distributors who work with independent reps, this becomes even more important, as it may make or break how much airtime your brand will receive during sales appointments.

On the tactical side, manual order-writing methods are being abandoned as more brands find value in digital order writing tools. Sales reps are finding particular success with SaaS mobile order writing apps that enable them to quickly browse and add orders via a digital catalog and immediately send an order confirmation email to both their customers and the back office.

Sales Rep Preparation

■ Do our sales reps prepare before meeting with our customers?

■ How do our reps prepare for customer meetings? Have we standardized a preparation process or does it vary on a rep-by-rep basis?

■ Before walking into a customer meeting, our reps either have memorized or can reference (mid-appointment, without having to contact our back office) the following information:

☐ Customer's order history

☐ Customer's most frequently ordered items

☐ The products that the customer is or is not eligible to purchase

☐ The specific pricing for all products that the customer has access to

☐ Discounts or promotions that the customer has access to

☐ General market/industry trend data

☐ Product availability data

FIELD SALES

■ Our sales reps are well-prepared before customer meetings.

☐ True

☐ False

In a fiercely competitive economy where you are vying for your customers' limited time, your reps cannot walk into customer meetings unprepared. Among many companies, however, critical information like customer-specific pricing, shipping terms and product availability data are not easily accessible from a centralized location. This forces reps to either try and memorize these details (difficult if not impossible for reps managing hundreds of accounts) or call your back office during a sales appointment, wasting their and your customers' time.

Many brands have found that consolidating all customer and product availability data in a mobile order writing app is the most efficient way to give their reps the information they need to prepare for sales meetings. This preparation allows reps to:

- Upsell accounts based on their order history
- Create pro-forma orders in advance
- Identify popular items to recommend

■ We attend trade shows to:

☐ Write sales orders

☐ Connect with our existing customers

☐ Acquire new customers

☐ Showcase new product lines

■ How many trade shows do we attend per year?

⬇ **On average, how many new customers do we acquire per trade show?**

⬇ **On average, how many customer orders do we write per trade show?**

■ Do we have sufficient sales reps/staff manning our trade show booth?

■ If a customer or prospective customer wants to place an order with a rep at a trade show, is it likely that someone will be available to help them immediately, or will they have to wait?

■ Have we received feedback, either positive or negative, from our customers about the way we serve them at trade shows?

FIELD SALES

If you're like most manufacturers and distributors, you attend several trade shows a year. With only a small window of time in an incredibly competitive environment––where you're vying for the attention of attendees alongside many other brands––it's critical to find ways to stand out and work more efficiently.

Many brands find mobile order writing software beneficial not only when it comes to preparing reps before the show (see the Sales Rep Preparation section above), but also in helping reps work faster in an environment where every moment counts. Some of the biggest benefits to using an effective sales app at a show include:

- The **ability to write orders offline**.
- Sending an **email order confirmation** to your customer while they're still in your booth.
- Sending a **draft order/sales quote** to customers that they can review after the show.
- Access to **real-time sales reporting** to determine rep performance and top selling items.

Additionally, many companies have implemented B2B eCommerce portals to give their customers a convenient method of placing reorders between shows. It's not only ideal for your customers, but also a great way to distribute your revenue more evenly throughout the year.

The Sales Appointment

- Our reps bring the following information with them into sales appointments:

  - ☐ Product samples

  - ☐ Paper catalog

  - ☐ Digital catalog

  - ☐ Lookbooks

  - ☐ Product availability data

  - ☐ Customer order history

  - ☐ Previous visit notes

  - ☐ Sales/product performance reporting

  - ☐ Customer-specific pricing and promotions

- On average, how long do our sales appointments last?

- How much time during each appointment is spent physically writing/compiling the sales order?

- Outside of writing a sales order, what do our sales reps spend the remaining appointment time on?

Long gone are the days that sales reps need to lug in heavy product samples and clunky paper catalogs. The modern sales rep sells from a digital catalog, is armed with product availability data, and builds a tailored order for your customers based on their rich order history.

It is important that you automate the transactional elements of order writing for your reps, as it frees them up to provide more strategic value to your customers.

Strategic Selling

- Our reps provide the following services to our customers:

  - ☐ Product education training

  - ☐ Assortment planning guidance

  - ☐ Merchandising guidance

  - ☐ Inventory checking

  - ☐ Shelf stocking

  - ☐ Trend forecasting

- Our sales reps help our customers grow their businesses.

  - ☐ True

  - ☐ False

- Our customers perceive our reps as partners helping them grow their businesses.

  - ☐ True

  - ☐ False

Forrester's report, "Death of a (B2B) Salesman" states that a million B2B sales reps will lose their jobs to eCommerce by 2020. The report details the four categories of salespeople:

1. **Order Takers**, who generally process orders that customers could easily place online.
2. **Explainers**, who provide buyers with product information.
3. **Navigators**, who help the buyer understand what to purchase.
4. **Consultants**, who advise the buyer on what to purchase, based on extensive knowledge of the buyer's company.

Perhaps unsurprisingly, the only category of buyers predicted to experience a job gain in the next several years are the Consultants. As technology transforms the in-person sales experience, it is imperative your reps adapt to this new environment. This means a more holistic and strategic approach with your customers, including extensive customer, product and industry knowledge.

Order Submission

- After our reps write a sales order, they submit it to our back office in the following way(s):

    ☐ Paper

    ☐ Phone

    ☐ Fax

    ☐ Email

    ☐ Text message

    ☐ Excel spreadsheet

    ☐ Direct input into ERP

    ☐ SaaS mobile order writing application sync

    ☐ Custom order writing application sync

    ☐ Other: _____

- **On average, how much time passes between the time an order is written and the time it is received by our back office?**

- Have we received feedback, positive or negative, from our reps and/or customer service team about the order submission process?

- How do we feel our order submission processes can be improved?

The most tedious part of your field sales operation is often once the order has been written -- it's what your sales rep has to do to get the order to the back office. Most methods of submission are wrought with issues. They require manual effort from your reps, waste valuable time that they should be spending with your customers, and because they often require re-entry by your back-office team once they're received, the risk of human error is high.

One of the biggest benefits brands see when adopting mobile order writing software for their reps is the immediate sync of a freshly written order from the field to the back office. This serves to drastically increase order accuracy and fulfillment times, especially for brands that have a real-time integration between their mobile ordering software and their ERP or accounting software. In fact, 49% of wholesalers using order writing software are able to get their orders to their back office in less than 1 hour, compared to just 17% using manual methods.
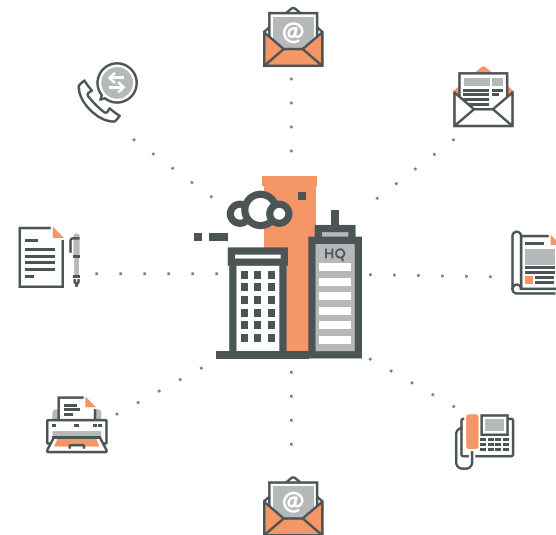
AUDIT CATEGORY 2:

CUSTOMER ORDERING

CUSTOMER ORDERING

The process by which your customers submit orders to your back office.

Note: This section refers specifically to customer-initiated orders, not orders placed through your sales reps. Orders submitted through your sales reps are covered in the Field Sales section of this guide.

The customer experience has become one of the most important points of differentiation in manufacturing and distribution today. It is critical that you closely examine and optimize the way you are serving your customers, starting with a thorough audit of your customer ordering process.

General

■ How do our customers submit orders to our back office? Check all that apply.

☐ Email

☐ Phone

☐ Fax

☐ Excel spreadsheet

☐ B2B eCommerce portal

☐ Other: _____

■ How long have we been utilizing our current methods of customer ordering?

■ Can our customers place orders from us online?
  (If yes, see B2B eCommerce section)

■ Can our customers place orders from us from a mobile device?
  (If yes, see B2B eCommerce section)

Many brands wrongly assume that a customer order process that supports manual (email, phone, fax, Excel) order submission methods is a flexible approach that accommodates their customer preferences.

In actuality, **this fragmented approach has many downsides for your company and your customer, including:**

- Time wasted by your back office team re-entering orders
- High risk for order inaccuracy due to human error & typos
- A lack of centralized customer order data
- A drawn out ordering process that can only progress during business hours
- Lack of transparency at the time of ordering, resulting in backorders and the need to field product questions

CUSTOMER ORDERING

Your customers––regular consumers in their personal lives––are used to the conveniences of an on-demand economy. They want to be able to place orders from you online and from a mobile device at a time that works for them, which is often outside of your business hours.

A process that some companies have not improved upon in decades, manufacturers and distributors can no longer be complacent about the ways in which they serve their customers. There has been a lot of momentum around an omnichannel sales strategy, an approach that aims to provide a seamless customer experience across multiple touch points, whether they be in person or online.

In a survey conducted by Accenture and Forrester Consulting, 72% of respondents agreed that omnichannel customers are substantially more valuable than single-channel customers. **In order to stay competitive in an environment that is rapidly evolving due to buyer expectations and advances in technology, you must provide your buyers with an online ordering portal.**

Information Access

- Where do our customers access product images, descriptions, and pricing? Do we feel confident that the information they are viewing is accurate?

- Can our customers access their order history? How?

- How do our customers determine what to order?

- How do our customers access our marketing collateral, like videos, merchandising guides, or lookbooks?

- Do our customers know whether items are in or out of stock at the time they place orders?

- How do our customers view and order SKUs that come in multiple sizes, colors, or materials?

- How do our customers redeem promotions or access special pricing during the ordering process?

- Are our customers aware of our ordering and/or shipping restrictions––such as order minimums, product minimums, or product multiples––when placing an order?

A modern B2B customer ordering experience includes easy access to product images and descriptions. Going further, it must also be personalized. Buyers should only be viewing the pricing and products they are eligible for.

Access to order history is also a key component of a superior buyer experience, allowing buyers not only to inform future sales orders, but also quickly duplicate and re-submit recurring orders, a common workflow in wholesale ordering.

B2B buyers also want access to inventory information. According to a report by Forrester, 70% of B2B buyers feel that transparency of product availability is an important factor in the buyer experience.

Finally, your customers should also be able to easily access your marketing assets such as product education videos and merchandising guides. This collateral enhances the buyer experience and answers remaining product questions.

Competitive Landscape

- Based on our understanding of our customer base, what is their ideal ordering workflow?
  Examples: Placing orders online rather than over the phone, acting immediately on promotional offers, placing re-orders while doing store inventory, etc.

- What feedback have we received from our customers on our ordering process?

- Are customers satisfied with our current ordering process?

- How does our customer ordering experience differ from that of our competitors?

- On the whole, is our customer ordering experience better or worse than experiences offered by our competitors?

- After a closer look at our customer ordering process, what are our biggest opportunities for improvement?

While many manufacturers and distributors know how their product line differs from that of their competitors, most don't know how they stack up in terms of customer service.

Outside of one-off conversations with your most vocal customers, do you know the general sentiment towards your buyer experience? Are your customers happy? Are orders being shipped complete and error-free?

If you're not confident about the answers to these questions, do some research. Put together a list of questions that will help you determine what you're doing well and what you can improve upon. Depending on your bandwidth and/or the number of total customers you serve, you can interview a segment of customers on the phone or have your sales reps talk to customers at store visits. The best way to get this information at scale, however, is to put together a short online survey that you can distribute via email. For help drafting your survey, contact us at info@handshake.com.

The Customer Experience

- Is it simple for our customers to place an order on our portal? Can our customers place an order without being trained?

- Can our customers place orders from both their computers and mobile devices?

- If our customers can place orders from a mobile device, are they doing so by accessing our website on a mobile web browser, or are they installing our native mobile ordering app from an app store?

- Can our customers place orders from a mobile device even if they are offline?

- Our customers can access the following information when placing an order through our B2B eCommerce portal:

  - ☐ Product images & descriptions

  - ☐ Product availability data

  - ☐ Order history

  - ☐ Most frequently ordered items

  - ☐ Product collateral such as merchandising guides, videos, and lookbooks

  - ☐ Other: _____

- When our customers place an order via our portal, they immediately receive an order confirmation message.

  - ☐ True

  - ☐ False

The experience your buyers have using your B2B eCommerce portal determines whether or not they adopt it and how frequently they use it.

Today's modern B2B buying experience is heavily impacted by the on-demand economy, an environment where the consumer can place online orders at any time, from any device. Your buyers want a familiar interface to be able to do the same in their professional lives.

What's most important in your buyer experience is that your portal is easy and straightforward to use, and that you give your buyers the option of ordering on a mobile device. Native mobile applications––that are installed from an app store and can function offline––are particularly important given the ordering workflows of many buyers (ordering shelf-side with spotty internet access).

As detailed in the "Information Access" portion of the Customer Ordering section of this guide, the buyer experience is also stronger when your customers have access to key information like product availability information and marketing collateral that answers any remaining questions. The benefit of providing this via a B2B eCommerce portal is that this information remains centralized and updated in a location your customers can reach whenever they need it, as opposed to having to call or email your staff.

The Catalog & Selling Terms

- Our B2B eCommerce solution includes:

  ☐ Single or multi-brand navigation

  ☐ Support for multiple currencies

  ☐ Support for our entire product line (any number of SKUs)

  ☐ The ability to quickly order a range of sizes, colors or materials for a given product

  ☐ Customer-specific pricing

  ☐ Customer-specific product assortments

  ☐ Customer-specific promotions

  ☐ Support for B2B selling terms like order minimums and payment terms

  ☐ The ability for our customers to set a ship date.

  ☐ The ability for our customers to set a cancel date.

- What additional features do we wish our B2B eCommerce portal could support?

- At this time, our B2B eCommerce solution meets all of our needs.

  ☐ True

  ☐ False

Your B2B eCommerce platform must include a digital catalog with the flexibility to accommodate your product line. It also must include familiar B2C eCommerce features like search, for a convenient browsing experience.

What sets superior B2B eCommerce platforms apart from their competitors is their ability to support the B2B-specific selling terms that your business likely employs. For example, if you have business rules that dictate your customers can only order in case packs of 10, you should have a B2B eCommerce portal that will not allow an order to be submitted under this minimum threshold. Unless you want to do the manual work of correcting orders after they have been submitted (not to mention explaining the changes to your customers) **you need to find a provider that supports the way you sell.**

Integration

- Our B2B eCommerce platform is integrated with our ERP or accounting software.

  ☐ True

  ☐ False

- How often is our customer order data updated in our ERP each day? Is it real-time?

- Can our back office team approve incoming customer orders before they are sent to our ERP?

- Is our current integration satisfactory? What could be improved?

- Does our vendor offer a turnkey integration option for our ERP?

The method in which your B2B eCommerce solution is integrated to your backend systems is likely related to your level of in-house technical sophistication. However, the accuracy of your product and order data in both your ERP and your B2B eCommerce platform is important to running a seamless operation. If your data is not updating in a way that is real-time enough for your business, speak with your provider about integration options.

Solution Details

- Are we making a B2C eCommerce platform work for our B2B needs, or are we using a platform that is optimized specifically for B2B?

- Is our B2B eCommerce portal a hub for our customers to buy from our company only?

- Do we sell our products on any B2B eCommerce marketplaces, alongside other brands? How satisfied are we with this marketplace presence, particularly compared to our direct B2B eCommerce portal?

- Do our sales reps feel threatened by our B2B eCommerce portal, or do they actively encourage our customers to use it?

- Is our B2B eCommerce solution part of a B2B Commerce platform, including mobile order writing for sales reps and an admin hub for our back office, or is it a standalone solution?

- Does our solution have an open or closed API?

B2B eCommerce platforms (and the strategic decisions businesses make around implementing them) are fairly diverse, and it's important to take a few moments to think about the complexities around these issues.

Of particular importance here is the issue of 'frankensteining." This refers to attempts to retrofit a particular solution to achieve something different from its intended purpose. Companies who have tried to force a B2C solution to work for their B2B needs have found that it requires a great deal of custom work by an internal technical team or contracted developers, who must patch up B2C holes.

This approach is not only costly, but also difficult to maintain over time, as a core platform with this level of customization becomes nearly impossible to upgrade. If you are currently in a situation that sounds familiar, it is in your best interest to implement a B2B-specific solution rather than doubling down on this difficult strategy.

The other thing you need to critically look at is the alignment between your sales reps and your B2B eCommerce portal. If your sales reps see online ordering as threatening to their job security (or negatively impacting their commission) they may prevent your customers from using your portal, making it next to impossible to realize any return on your investment.

The value of an omnichannel customer is higher than those who only interact with one channel, so great effort must be put around encouraging your customers to place orders with you in multiple ways. Your reps are important allies to you in this process, so **you must commission your reps on all their customer orders, even those placed via your B2B eCommerce portal**, in order to gain their support.

Stability & Support

- Are we satisfied with the performance of our B2B eCommerce website and mobile app? Can our customers rely on it?

- Are we confident that our B2B eCommerce solution will be able to support our business as it scales over time (if we add more order data, customers, and/or products)?

- Are we satisfied with the quality of the support we are receiving from our B2B eCommerce vendor? How long on average do we wait for a response to our support requests?

Your B2B eCommerce portal is a 24/7 ordering destination for your customers, and the performance and constant availability of that portal is key. If you haven't asked questions of your B2B eCommerce vendor about supporting your business as it scales over time, it's not too late. Determining whether your provider has supported customers with your particular data load is important. If they have, you will have the peace of mind that you made the right choice. If they haven't, you may need to push the conversation further to ensure you will be covered.

Adoption & Usage

- We feel confident that all of our customers know about our B2B eCommerce portal.

  - ☐ True

  - ☐ False

- What percentage of our customers have placed at least one order via our B2B eCommerce portal in the past year?

- What percentage of our customers regularly place orders via our B2B eCommerce portal?

- Since we implemented B2B eCommerce, our customers have been placing orders more frequently.

  - ☐ True

  - ☐ False

- The average value of a sales order placed via our B2B eCommerce portal is higher than the average value of an order placed through other means.

  - ☐ True

  - ☐ False

- What are the biggest challenges we are facing with our B2B eCommerce portal?

Whether or not your customers use your B2B eCommerce portal to place orders is directly related to the user experience you provide them. If the buyer experience is not straightforward or does not result in an accurate order, they will want to resort to their previous ways of working with you.

It's also important that you have done your part to notify your customers about your portal and incentivize them (especially initially) to use it. A promotional offering––like 10% off your first online order––will increase adoption.

Once you give your customers the buyer experience they're looking for, you will not only see your order frequency and value increase, **you will also become their preferred vendor.**

AUDIT CATEGORY 3:

BACK OFFICE

The operational components around your ordering experience are mainly around back office operations, resource utilization, and integration.

Receiving & Processing Orders

- ■ We receive orders to our back office from the following channels:

    - ☐ Offline, via **sales reps**

    - ☐ Online, via **mobile order writing software sync**

    - ☐ Offline, via **customers**

    - ☐ Online, via **B2B eCommerce portal**

- ■ Our back office receives orders from customers and field reps in the following ways:

    - ☐ Paper

    - ☐ Phone

    - ☐ Fax

    - ☐ Email

    - ☐ Text message

☐ Excel spreadsheet

☐ Direct input into ERP

☐ SaaS mobile order writing application sync

☐ Custom order writing application sync

☐ B2B eCommerce portal

☐ Other: _____

- ■ Select the statement that most accurately reflects your processes around inbound orders and ERP updates.

    - ☐ We must manually collect and aggregate orders from the field before they can be entered into our ERP.

    - ☐ We have an automated system that transfers inbound orders directly to our ERP.

- **What percentage of our inbound orders require follow-up from our back office team before they can be processed?**

■ What are the main reasons our back office staff must follow up on sales rep or customer orders before they can be processed?

☐ Order is illegible

☐ Order has a typo

☐ Order contains backordered products

☐ Accurate pricing or promotions were not applied to the order

☐ Accurate payment terms, shipping addresses, or other customer-specific details were not applied to the order

☐ Staff has general questions for customer

☐ Other: _____

⬛ **On average, how much time is spent by our staff processing each inbound order? How much of that time is spent specifically on re-entering an order into our internal system or ERP?**

■ The staff members responsible for processing orders are also responsible for:

☐ Customer service

☐ Account management

☐ Marketing

☐ New customer acquisition

☐ Order fulfillment/shipping

☐ Accounting/invoicing

☐ Other: _____

The biggest sales and ordering challenges in manufacturing and distribution are often related to how orders are received, organized, and processed by the back office.

Most companies with manual order submission practices process and fulfill orders more slowly than their counterparts using digital selling tools. This is mainly due to the amount of effort required by your back office team to decipher and confirm order details with your reps and customers before they can be processed. As a result, customers not only wait longer for their product shipments, they may also receive conflicting information from your reps, your catalog, and your back office.

It is possible to avoid the above risks by implementing digital sales and ordering tools such as mobile order writing software and online ordering, **where brands see the following back office impacts:**

- **Order accuracy** is improved because your sales reps and customers are tapping and clicking on items directly from a digital catalog, and no longer need to write or type out a cumbersome SKU. They can also confirm the order is accurate by reviewing a digital shopping cart before submission.

- **Backorders** are reduced because reps and customers will know whether items are in or out-of-stock when placing an order.

BACK OFFICE

The Catalog

For those with paper catalogs:

- How many times do we print our catalog per year?

- What is the cost associated with each catalog printing?

- Is our paper catalog an accurate source of truth for our reps and customers? Why or why not?

- What is our process for notifying our sales reps and customers of product and pricing updates? Is this process effective?

- Do we feel confident that our sales reps are using the most up-to-date version of our catalog? Why or why not?

For those with digital catalogs:

- How often do we update our digital catalog?

- Does our digital catalog provide a user-friendly browsing experience?

- Is our digital catalog an accurate source of truth for our reps and customers? Why or why not?

- Can a sales rep or customer place orders using our digital catalog?

If you're still using paper catalogs, you may already be aware of the downsides, including:

- The **costs** associated with printing and distribution.
- The fact that printed catalogs are often **obsolete** the moment they're printed due to constantly evolving product data.
- The **poor user experience** offered by a heavy paper book that is difficult to browse.

Not surprisingly, the move towards digitizing product catalogs is already far along. 60% of sales reps are already selling from digital catalogs, and that number continues to grow. Digital catalogs provide brands with a number of benefits, including:

- The ability to **quickly and easily update** pricing and product information that can be immediately distributed to reps and customers.
- A **better user experience**, allowing reps and customers to quickly locate products they want to order.
- The option to layer ordering functionality on top of the catalog and use it as a **revenue-generating tool**.

If you have not yet digitized your product catalog, you are lagging behind. For more information on the benefits of a digital B2B catalog and how to go about creating your own, click here.

Providing Information Access

- Our **sales reps** know where to find the following information:

    ☐ Customer's order history

    ☐ Customer's most frequently ordered items

    ☐ The products that the customer is or is not eligible to purchase

    ☐ The specific pricing for all products that the customer has access to

    ☐ Discounts or promotions that the customer has access to

    ☐ General market/industry trend data

    ☐ Product availability data

    ☐ Marketing collateral such as merchandising guides, lookbooks, lifestyle imagery, and product information videos.

- Our **sales reps** can proactively access the above listed information without interacting with our back office.

    ☐ True

    ☐ False

- Where do we store the above listed information for our **sales reps**?

- Our **customers** know where to find the following information:

    ☐ Their order history

    ☐ The items they order most frequently

    ☐ The products that they are eligible to purchase

    ☐ The specific pricing they have access to

    ☐ The discounts or promotions they have access to

    ☐ Whether our products are in or out-of-stock

    ☐ Marketing collateral such as merchandising guides, lookbooks, lifestyle imagery, and product information videos.

- Our **customers** can proactively access the above listed information without interacting with our back office.

    ☐ True

    ☐ False

- Where do we store the above listed information for our **customers**?

If your sales reps are writing orders with your customers (see Field Sales section) but don't have access to critical information like order history, pricing, and product availability, one of two scenarios will occur:

- **Reps will not be able to write informed or accurate orders.** The rep may miss critical items that are routinely ordered, place orders for items that are out-of-stock, or apply a promotional discount that customer doesn't qualify for. Upon receipt, your back office team will have to rectify these mistakes with your rep and/or your customer.

- **Reps will call your back office to confirm details during their sales** appointments. This is not respectful of the customer's time, interferes with the sales process, and distracts your customer service team from other work they could be focusing on.

On the customer side, many brands end up withholding the product information their customers need, but can only get during business hours. The result is a constant need to field customer questions over email and fax (perhaps even across time zones).

Your customer-specific information and product data must be centralized in order to streamline every part of your sales and ordering operation. It is far simpler to achieve this goal using a commerce platform that aggregates customer and product data for your sales team and customers in one central location. At the very least, your customers should have round-the-clock access to an updated digital catalog and marketing collateral, and you must provide your sales reps with data they can access mid-appointment in a format that works for your business.

Operations & Resource Utilization

- **What percentage of our back office staff's time is spent on order re-entry and processing?**

- Do we feel our order entry staff's time could be better utilized? If so, what do we wish they were doing more of?

- What are some of the problems or complaints we have heard from our back office staff regarding the receipt & processing of **field sales orders**?

- What have we done to address these problems or complaints? What can we do to address them further?

- What are some of the problems or complaints we have heard from our back office staff regarding the receipt & processing of **customer orders**?

- What have we done to address these problems or complaints? What can we do to address them further?

- **What percentage of inbound orders contain backordered items?**

- What is our process around handling an order containing backordered items?

- **How much time lapses between when an order is received by our back office and when it is shipped out to the customer?**

■ Are our customers satisfied with our shipping times?

■ We ship out orders faster than our competitors.

☐ True

☐ False

Advances in technology are changing the role of the B2B sales rep from order taker to business partner. In the same vein, more companies have found that their back office staff is wasting time herding in orders, performing data entry, and apologizing to customers when mistakes are made. Instead, they could be providing more value to the business--proactively serving customers, supporting marketing initiatives, and focusing on new customer acquisition.

Manufacturers and distributors that put a B2B Commerce platform in place have been able to automate this tedious order processing workflow. Orders from reps and customers sync immediately upon submission from the field and are received in a central hub.

Any complaints from customers regarding your fulfillment processes are likely related to sub-par operational practices, so take a moment to connect the dots. In a fiercely competitive environment where your customers have many options to stock their shelves, they are going to order from the brand that ships quickly, sends them accurate orders, and has an efficient process in place to manage backorders. **If that's not you, you are going to lose your customers to competitors.**

ERP and Integrations

● How does our customer order data get reflected in our ERP or accounting software? Is this process something that can be improved?

● If we are currently utilizing a manual approach to update our ERP, what can be done to automate this process?

● Do we have to update our customer order data and sales rep order data in our ERP separately, or is this data consolidated and then updated at the same time?

● How often is our order data updated in our ERP or accounting software each day? Is it real-time?

If you are like most manufacturers and distributors, you are reliant on an ERP or accounting software to streamline your back office functions like product planning, inventory management and accounting. In order for your business to run smoothly, it's important that your ERP reflects the current state of your business, and a big part of that is your customer order data.

For companies receiving orders manually from the field from both customers and reps, orders often have to be hand-entered into the ERP. This is a waste of your staff's time and introduces the risk of human error.

BACK OFFICE

For manufacturers and distributors using B2B Commerce platforms, customer order data is typically integrated to the ERP in one of three ways:

- **A flat file integration.** The simplest (and most manual) option, this allows you to upload a spreadsheet of your customer order data directly into your ERP.

- **Scheduled import/export**. This option allows you to schedule recurring data imports and exports in and out of your ERP.

- **API Integrations.** This is the most flexible option, giving you much more control to trigger exceptions and route your data the way you like. API integrations can be turn-key (out-of-the-box) or custom built.

However you choose to update your ERP, keep in mind that the more automated the process is, the less manual work your staff will have to handle.

CONCLUSION

Congratulations on taking the first step to improving your sales and ordering processes! Now that you've taken stock of your current landscape, you may find it difficult to know where to start.

When deciding how to prioritize your next steps, keep in mind that in order to remain competitive in this economy, you must:

1. **Provide your sales team with the information and tools** they need to write more informed, less manual orders. This will result in increased sales, greater order accuracy, and faster submission to your back office.

2. **Improve the customer experience** by making order submission easier and more convenient. The on-demand economy dictates that you must have a web B2B eCommerce portal for your customers to place online orders, and before long, you must accept orders from mobile devices as well.

3. **Remove the manual processes of data entry** from your back office team and establish a more seamless transfer of order data into your ERP.

If you have questions about how to determine your next step forward, contact us at info@handshake.com or by phone at 855-532-9044 or +1-646-434-2553 (intl).

ABOUT HANDSHAKE

Handshake provides the B2B Commerce platform for manufacturers and distributors that powers standout ordering experiences both in-person and online. Companies using Handshake transform their sales effectiveness and drive operational efficiency, delighting customers and growing lasting relationships.

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