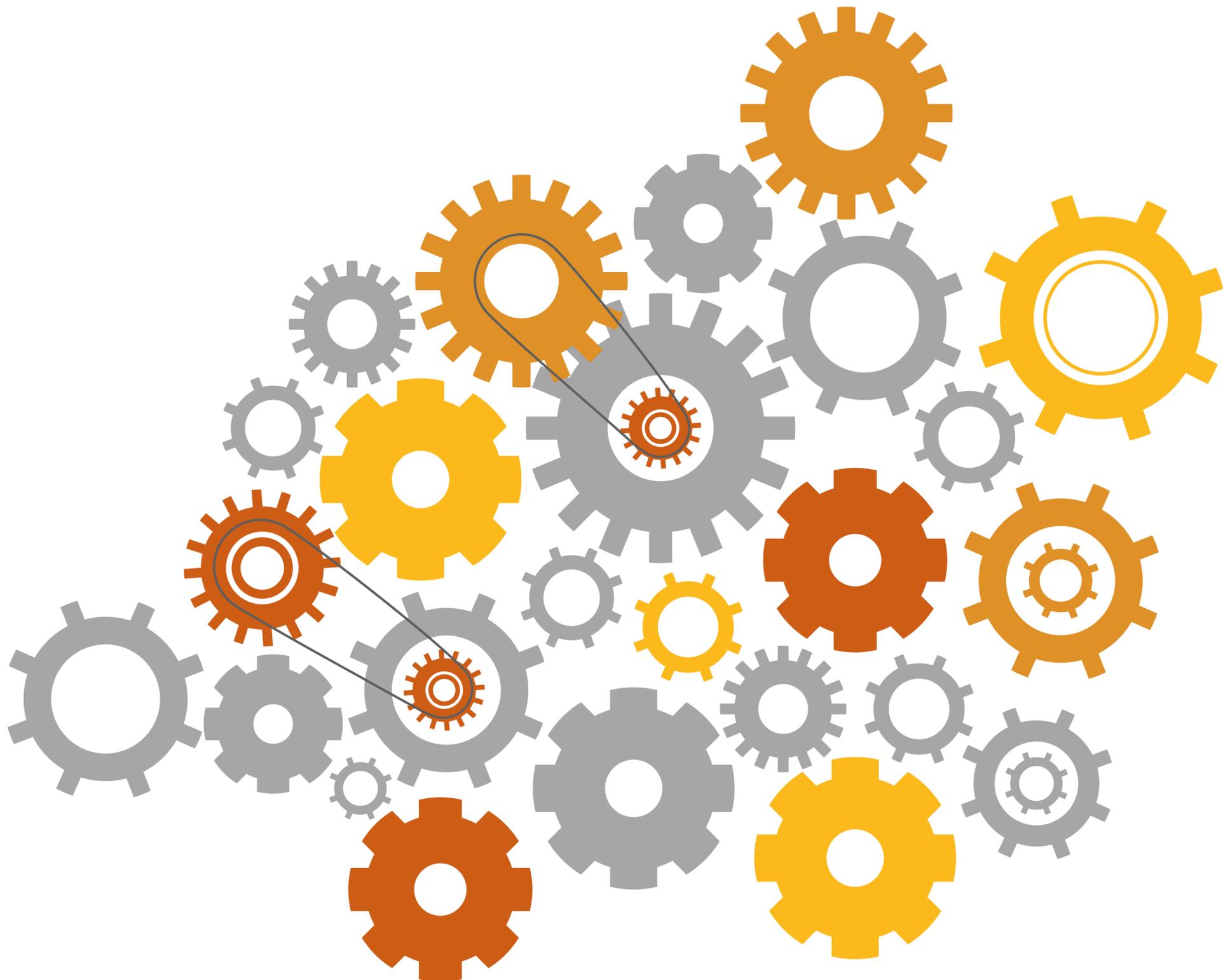




Whitepaper:

# Workflow Automation Engine and Its Impact on B2B eCommerce Digital Transformation



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# Workflow Automation Engine and Its Impact on B2B eCommerce Digital Transformation

Every business must grow. That's because if your business isn't growing, it's dying. The goals of doing more and doing it faster and better while decreasing costs are almost universal. Around the world, managers are tasked with finding improvements every day. While the drive for "more, better, faster, cheaper" may seem relentless, technology provides the tools that make it possible. For B2B businesses selling online, flexible B2B eCommerce workflows are a powerful way to help increase productivity and profit.

By automating routine business tasks, you can increase customer satisfaction and retention, improve the effectiveness of your sales and customer-facing teams, and provide better focus to non-routine and unique situations as they arise. In this whitepaper, you'll learn about automated workflows, how they benefit the business and why flexible workflows are essential for any B2B business doing eCommerce. We will also dive into some real-life examples of automated B2B eCommerce workflows. By the end, you should be able to identify the ways automated eCommerce workflows can help your business.

## Understanding Workflows and Business Processes

Before we dive very deep into this topic, it's best to define some of the terms we are going to use. The terms "business processes" and "workflows" are sprinkled throughout the latest business journals, but when it comes to eCommerce, they have very specific meanings. Here's how we will be using these terms:

**Business Processes.** Business processes are how work gets done in an organization. They can be confined to one department or flow throughout an organization. For example, the process of onboarding a new customer can involve:

- Sales who takes the order
- Accounting/risk management who approves the customer's credit
- Customer Service/Sales Support who sets up the customer's shipping and ordering preferences

The departments and order of operation are different in every company, but every company has some business process to onboard a new customer.

**Business Process Management.** This is the art or science (depending upon your viewpoint) of improving the effectiveness and efficiency of these business processes to reach the company's goals. Whether they realize it or not, most managers are responsible for business process management. This includes cutting out superfluous steps and reports and automating where possible.

**Workflows.** These are the series of steps that have been automated to complete a business process. A simplified automated workflow might look like this:

Sales enters a sales order from a new customer into a digital system. The system notifies Accounting that credit for a new account needs approval. Upon approval, the system notifies the warehouse to fulfill the order. At shipping, the system notifies Sales, Accounting, and the customer that the order is complete. If this workflow were not digitized, Sales might just walk over to Accounting and hand them a sheet of paper that has the customer's information scribbled upon it. Once the account is approved, Accounting might call Sales on the phone to let them know. As you can see, this is highly inefficient.

**Workflow Automation.** When you replace human processing with digital processing, you automate the workflow. Sticking with the new order example, the process of reviewing credit can be digitized to remove the human element. This results in faster, more accurate credit approvals and the approval criteria can be adjusted as the companies' sensitivity to risk and the customers' financial situation fluctuates. The most powerful workflow automation tools provide the most flexibility in workflow automation. These allow companies to maximize productivity and profit in their own unique business environment.

Every business is unique. The secret to successful business process management and workflow automation is to use flexible technology.

– Yoav Kutner, CEO, Oro Inc.

As you think about your own business, you should recognize that you already have business processes in place. These workflows may be a combination of digitized and manual processes or they may be merely digitized. You may even have some manual steps that should be digitized. At Oro, we don't aim to create technology that requires you to change the way you do business. Our goal is to provide you with the technology tools that fit the way you do business now and have the flexibility to change with you as your business evolves, scales, and expands into new arenas.

## The Benefits of Workflows

There are many obvious benefits of digitizing workflows and a few that aren't so obvious. First, when you digitize your workflows, you reduce paperwork and cut down on the number of steps and interactions necessary to complete a task. That means an increase in productivity. Automation further increases this productivity by having technology perform certain tasks instead of a human asset. Now you have increased accuracy (reduction in human error) and increased productivity. Those are obvious benefits. Now let's consider the not-so-obvious benefits.

Your most cost-intensive assets are your human assets. When their tasks can be digitized and automated, they are freed to perform the tasks that humans do best. No matter how sophisticated the artificial intelligence, sometimes only a human will do. It only makes sense to have humans doing what they do best (e.g., interacting with other humans) while technology handles the workflows that don't need a human.

While B2B eCommerce was once considered to be the death of the human sales force, savvy B2B companies are discovering how it actually enhances the productivity of the sales force. For example, when the salesforce is freed from onboarding new accounts, they have more time to help existing customers solve problems and focus on building the relationships that are the bedrock of B2B commerce. Instead of chasing down credit apps and dogging an order out of the warehouse, they use their social selling skills to convert warm leads into hot prospects. In the end, you have happier clients because you'll be more focused on customer satisfaction issues and higher employee morale because they'll be able to clearly see how their contributions impact the business as a whole.

Other benefits that aren't as obvious are increased agility to respond to changing and evolving environments. As your environment changes, you can readily adapt. For example, if your credit process is fully automated, it is easy to change approval criteria as market conditions or target customers change. It can be as simple as a few keystrokes. It's also much easier to review open accounts on a regular basis to determine if a change in terms is warranted.

In a nutshell, digital workflows increase productivity and profitability in B2B commerce by:

- Increasing efficiency to control costs
- Boosting productivity to elevate performance
- Enhancing the competitive advantage by streamlining operational processes

#### A Word About Integration

No one system performs all business processes. Your ERP isn't designed to operate as your website platform and your CRM isn't going to handle your social media marketing efforts. To further complicate matters, because no two businesses are alike, business applications are often highly customized. So, in order to enable companies to reap the maximum benefits from digitization and automation, Oro has made flexibility a hallmark of our open source platform. The result is a rich ecosystem of products and providers for easy integration with existing software. The flexible REST API enables developers to easily integrate Oro functionality into current and future third-party software.

## Flexibility is the Key to Sustainability

As technology evolves, the way people do business is evolving too. The B2B buyers from 5 years ago are very different from today's buyers. B2B buyers in 5 to 10 years will be different in ways we can only imagine. Think that is an exaggeration? The iPhone is only 12 years old. Can you imagine navigating life in today's world without your smart phone?

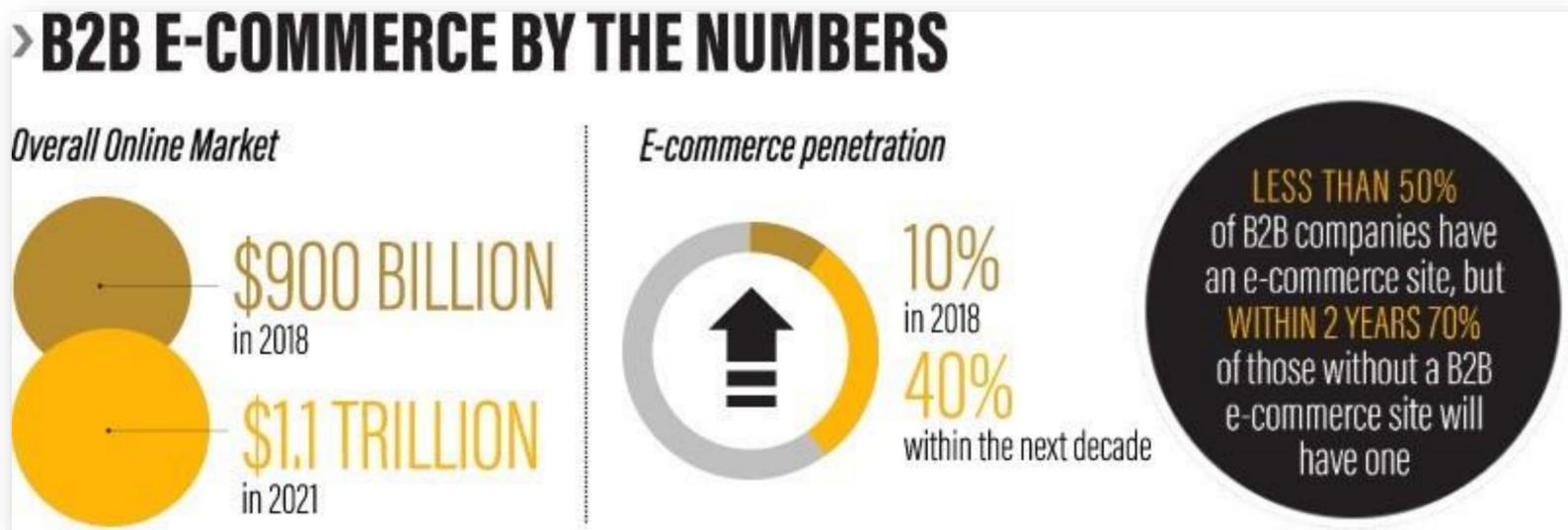
**91%** growth in B2B researchers using smartphones throughout the path to purchase



Source: <https://www.digitaldoughnut.com/articles/2017/june/how-b2b-marketing-has-changed-in-recent-years>

Something as seemingly unrelated to purchasing as the release of the smartphone has completely changed B2B product researching and buying. In business, the only thing you've ever been able to count on is change. With technology, the changes are coming even faster.

The B2B eCommerce market that was \$900 billion in 2018 is projected to be \$1.1 trillion by 2021. Right now, less than 50% of B2B sellers have an eCommerce site, but within two years 70% will have one.



Source: <https://www.digitalcommerce360.com/2018/07/30/infographic-b2b-e-commerce-by-the-numbers/>

Flexibility is crucial for sustainability. That's why you must invest in software that's highly flexible. The workflows that you use today may not be relevant next year or the year after that. Flexibility in your workflows is key. So, as customer expectations and business requirements change, you can adapt to these changes by building new workflows or adjusting existing workflows. If your company's strategy is to grow through acquisition, then flexible workflows are essential. Now we know what workflows are, let's look at a few practical applications.

## Workflows for Online Buyers

When your customer looks at your online store, they see product pictures, descriptions, prices and support information. If they establish an account, they can log in and check on their order status, order history, request support and more. What your customers don't see are the workflows behind the scene that make doing business with your company so delightful. While your customers aren't aware of these workflows, they will appreciate the customer experience they provide. When the right workflow is in place, you make the buyer's life easier. They will reward you with more sales and higher conversion rates. It's a win for you and your customer. The right workflows make their life easier while making your business more productive.

### Account Registration – Creating a New Customer

The account registration process must meet the needs of your customers and your business. And every business has different needs. In the most basic account registration, the customer enters a bit of information and creates a password. However, in many B2B transactions, a purchase may involve several people, require multiple buyer approvals, and include a check of credit by the seller. A flexible and powerful workflow engine allows for all these possibilities and more. Remember, the software should conform to the company's operations, the company should not be required to conform to the limitations of the software.

#### Standard Registration Form

With this workflow, the customer enters basic information such as name, company name, email address and then creates a password. They may also indicate their industry or sector, geographic location or product in which they are interested. A customer account would automatically be created. You might define the workflow to stop here or you could take it a step further and assign the customer a sales rep by sector, geographic location, product category or however you divide your customer base. You could include notifying the sales rep automatically and even adding the contact to the CRM. Some account registration workflows allow customers to add products to shopping lists and make the account registration the last step in the purchasing process. Other account registration workflows may require you to register for an account before you can access certain information on the website.

#### Customer User Registration

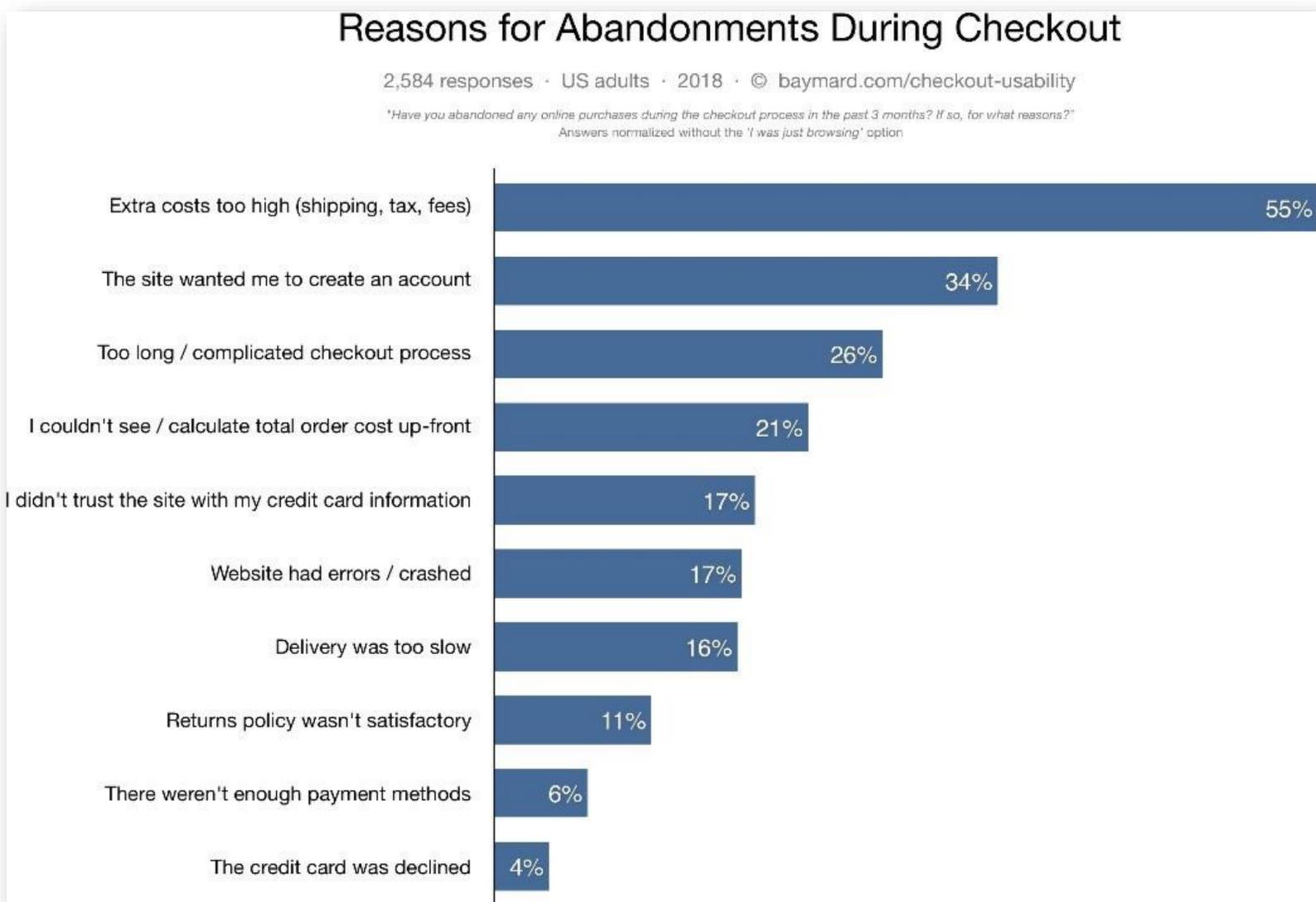
If the buyer requires approval from multiple stakeholders in order to make a purchase, your workflows should give customers the ability to define user-level permissions and access to the actions and data needed for users to perform their work. You can allow the customer to self-manage their corporate account and identify a user administrator that can then define other users roles. With this workflow, you enable your customers to easily perform their internal approval process, your sales team can monitor the transaction, and both buyer and seller are working more effectively.

## Account Registration with Credit Check

Most B2B commerce happens with extended terms. With this workflow, you perform a credit check at the time the account is created. You determine if a new account should be reviewed before or at the same time it is assigned to a sales rep. You can even automate your approval process by integrating this workflow with a third-party application (such as [Apruve](#) or [FundBox](#)) to automatically perform the credit check and establish a credit limit.

## Order Checkout Process

Your checkout process affects how well your visitors convert to buyers. Almost [70% of ecommerce carts are abandoned](#) before checkout is complete.



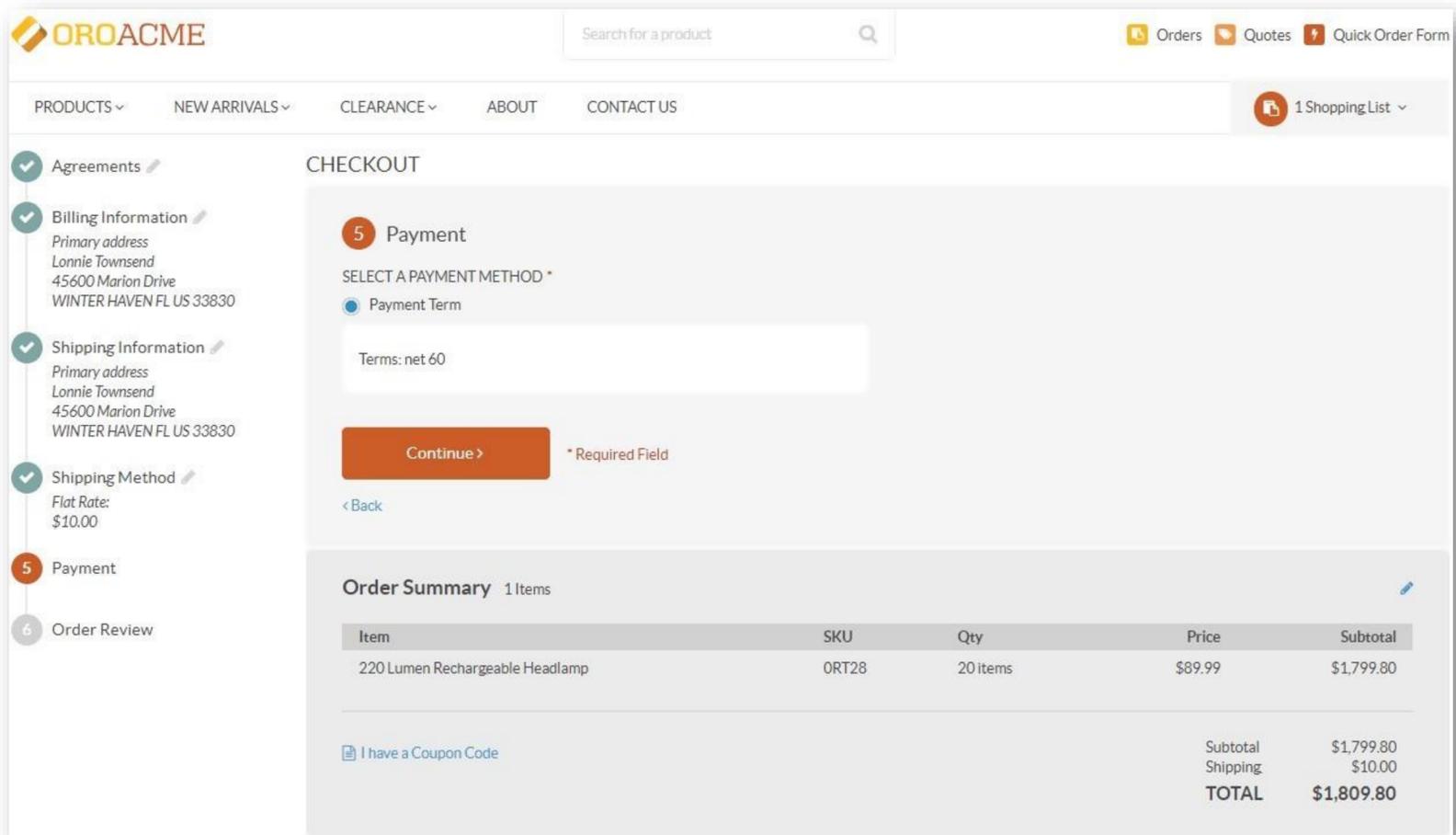
Source: <https://baymard.com/lists/cart-abandonment-rate>

When it comes to reasons for abandonment, 26% found the checkout process too long and too complicated. With a flexible workflow engine, you can A/B test different checkout workflows to determine which one converts best. And, when times change, you can change the workflow again to provide your customers the experience they want. Here are just a few examples of workflows for checkout.





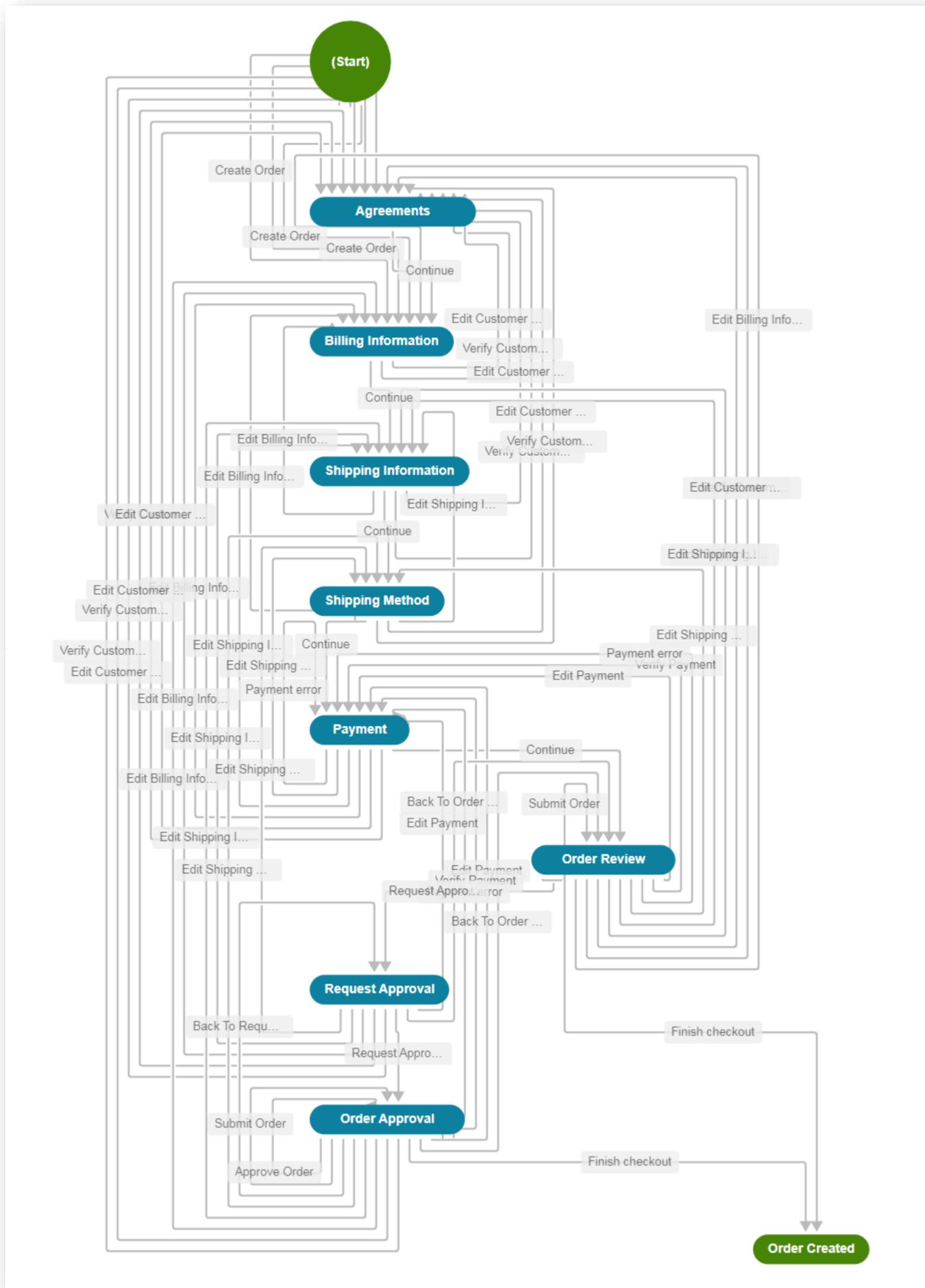
Once the checkout starts, the associated Terms and Conditions of the sale are presented on the screen along with a button for acceptance. The next screen collects billing information. After that, shipping data is entered. If the billing and shipping address are different, this is indicated during this part of the checkout process. Next, the customer selects a shipping option and agrees to shipping charges. If you ship via multiple carriers, this portion of the workflow allows you to give customers options as well as indicate any other necessary information such as a ship by date. Finally, the customer arranges payment and reviews the order before submission. During the order review process, the customer may decide to add additional information such as Purchase Order number and edit the order to correct any mistakes or make changes. The customer may look at a screen like this:



Notice how the information the customer provided for billing and shipping is summarized in the left-hand column? This allows the customer to easily review ALL information, not just information related to the product purchased. In addition, you can integrate with third-party shipping solution to verify delivery addresses, estimate time of arrival (ETA), and update shipping status at the time the order is placed.

## Approval Checkout Process

If your clients require multiple levels of approval for a purchase, you can set up a workflow to make the approval process easy for them. When the account is first registered, customer users and corresponding levels of authority are established. The workflow incorporates the customer's internal approval process.



If an order exceeds the user's authority, they receive a notice during the order review process.

Search for a product

Orders Quotes Quick Order Form

CLEARANCE CONTACT US ABOUT

1 Shopping List

### OPEN ORDER

#### 7 Request Approval

You exceeded the allowable amount of \$5000.  
To proceed please request manager approval.

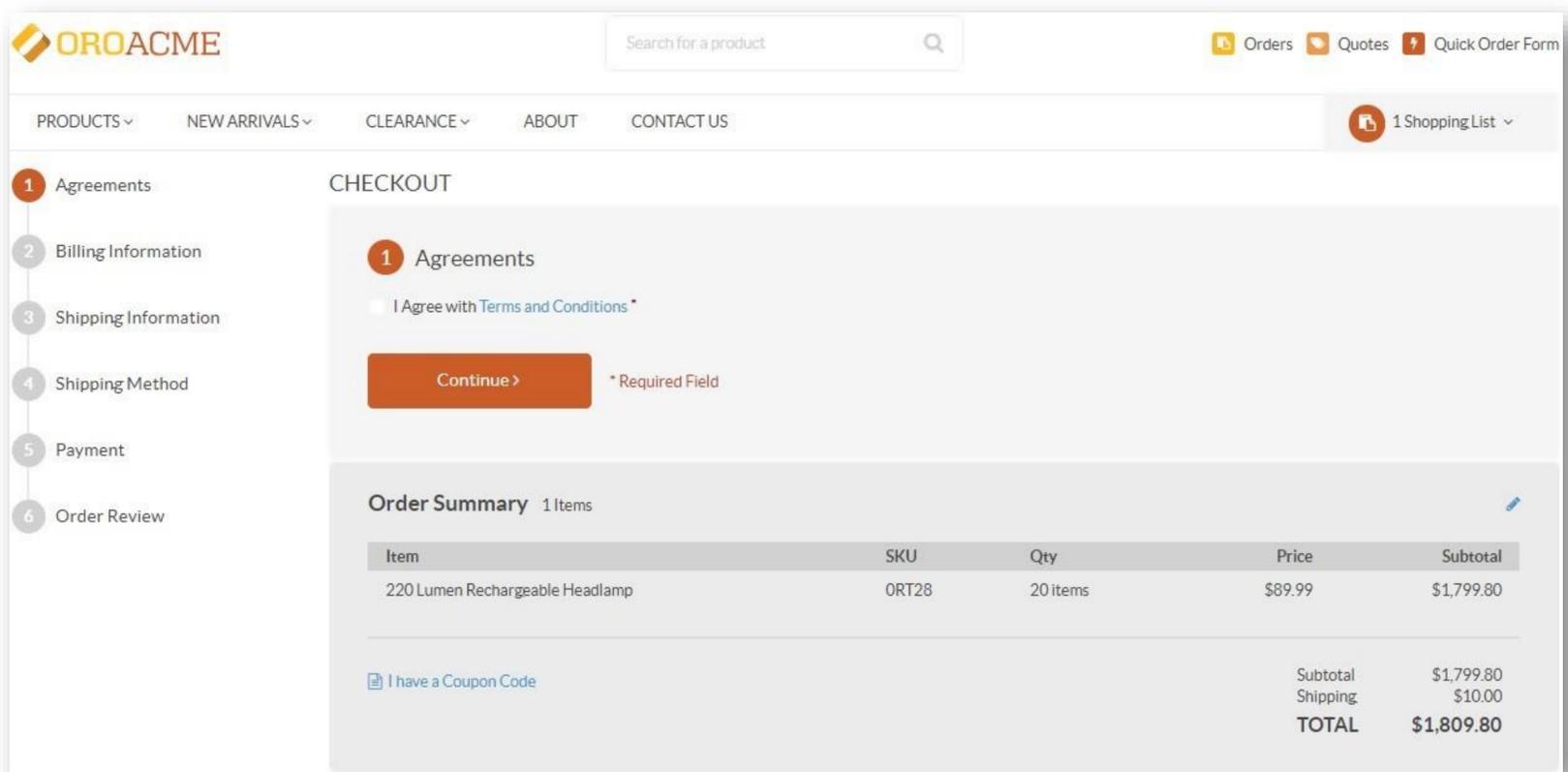
Request Approval > \* Required Field

< Back

When the customer clicks "Request Approval" the approving authority is notified of the request. They can review and approve the order and either submit the order or approve and notify the requestor to submit the order. Once approved and submitted, the order enters the normal workflow for processing and the sales rep is updated.

### Policy Agreement Workflows

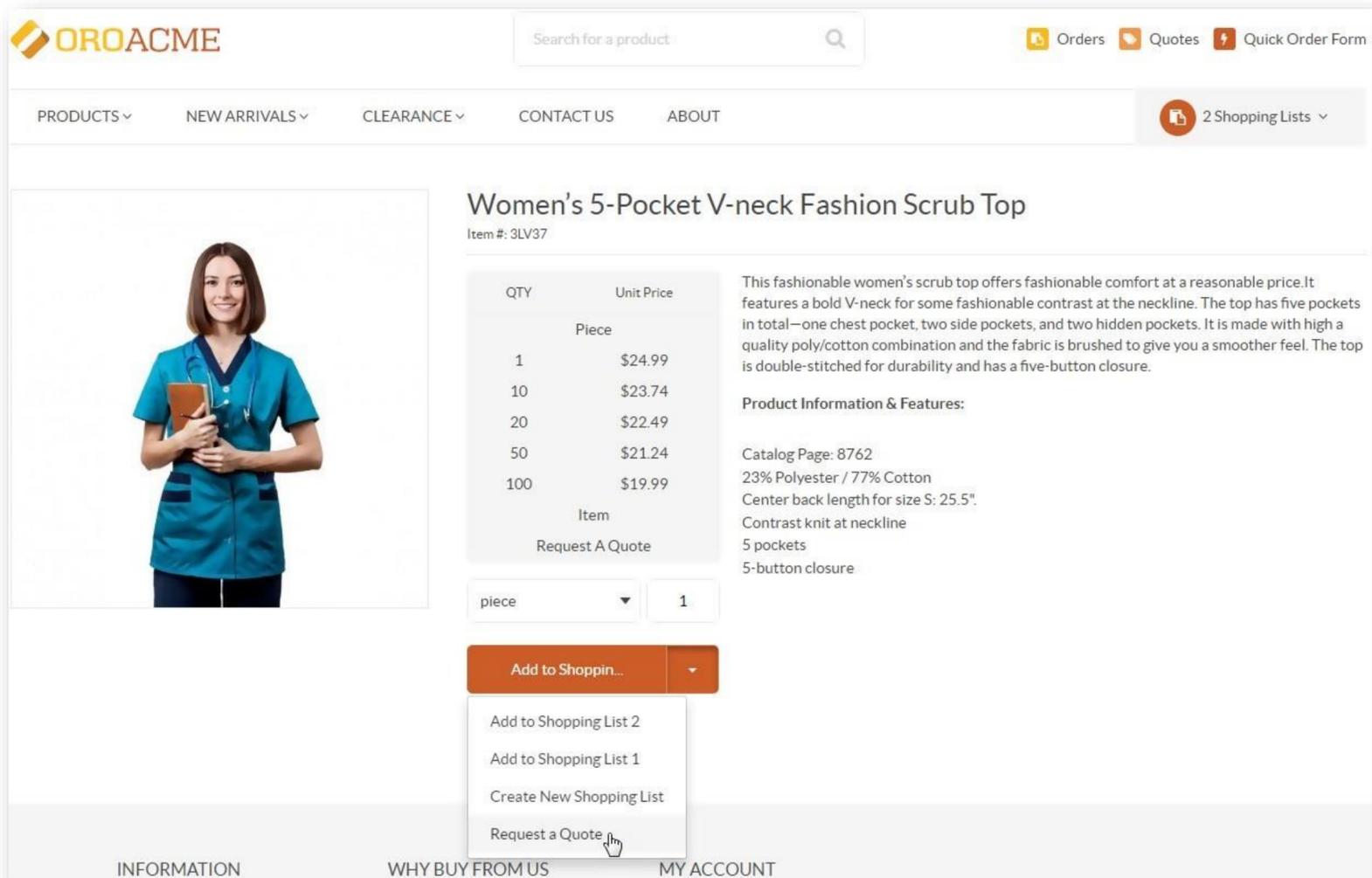
As the regulatory environment changes, compliance can be a challenge. For example, even if you don't have a physical presence in the EU, the [GDPR](#) may affect how you handle European clients. If you do business in California, [starting in 2020 you'll have new compliance requirements too](#). However, a flexible workflow engine allows you to conform to policy changes with ease. These can cover such agreements such as data privacy, product usage, and other terms and conditions of sale. By adding an initial step to your checkout workflow, you capture consent to any necessary policies.



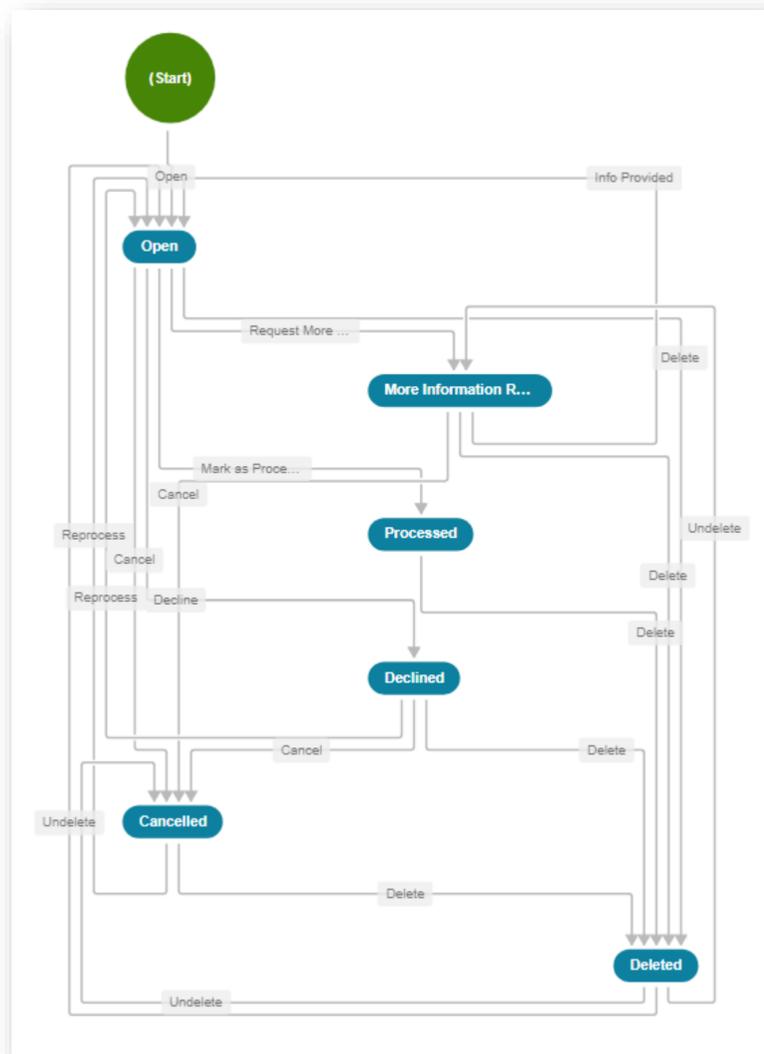
Now the user can view Terms and Conditions and provide consent before beginning the checkout process.

## RFQ/Request for Quote Submission

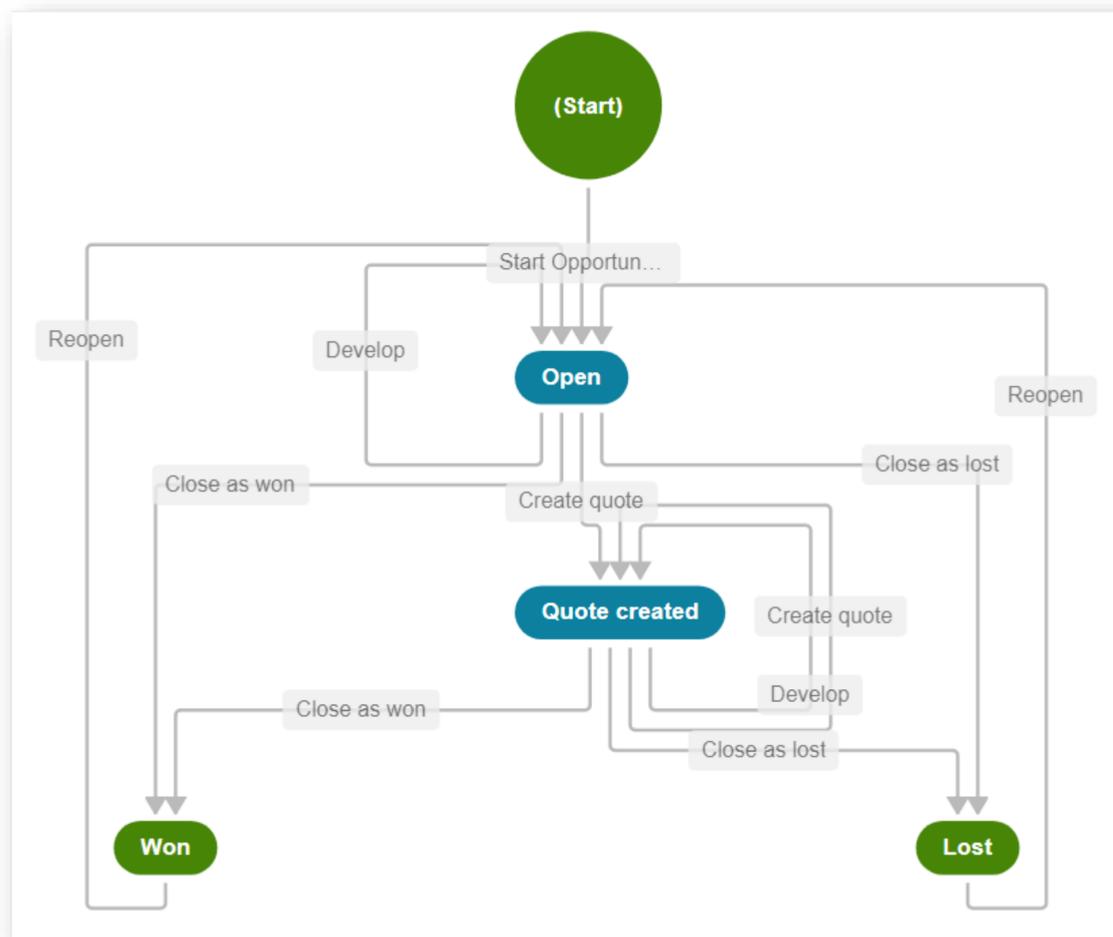
Since the prices and terms of sale for most B2B transactions are negotiated on an individual basis, your customers need a way to open these negotiations. By including a request for proposal/quote workflow within your website, you can digitize this process. For example, you can still list prices and quantities on the site, but still let buyers know these are negotiable by including a Request a Quote button as shown on this web page:



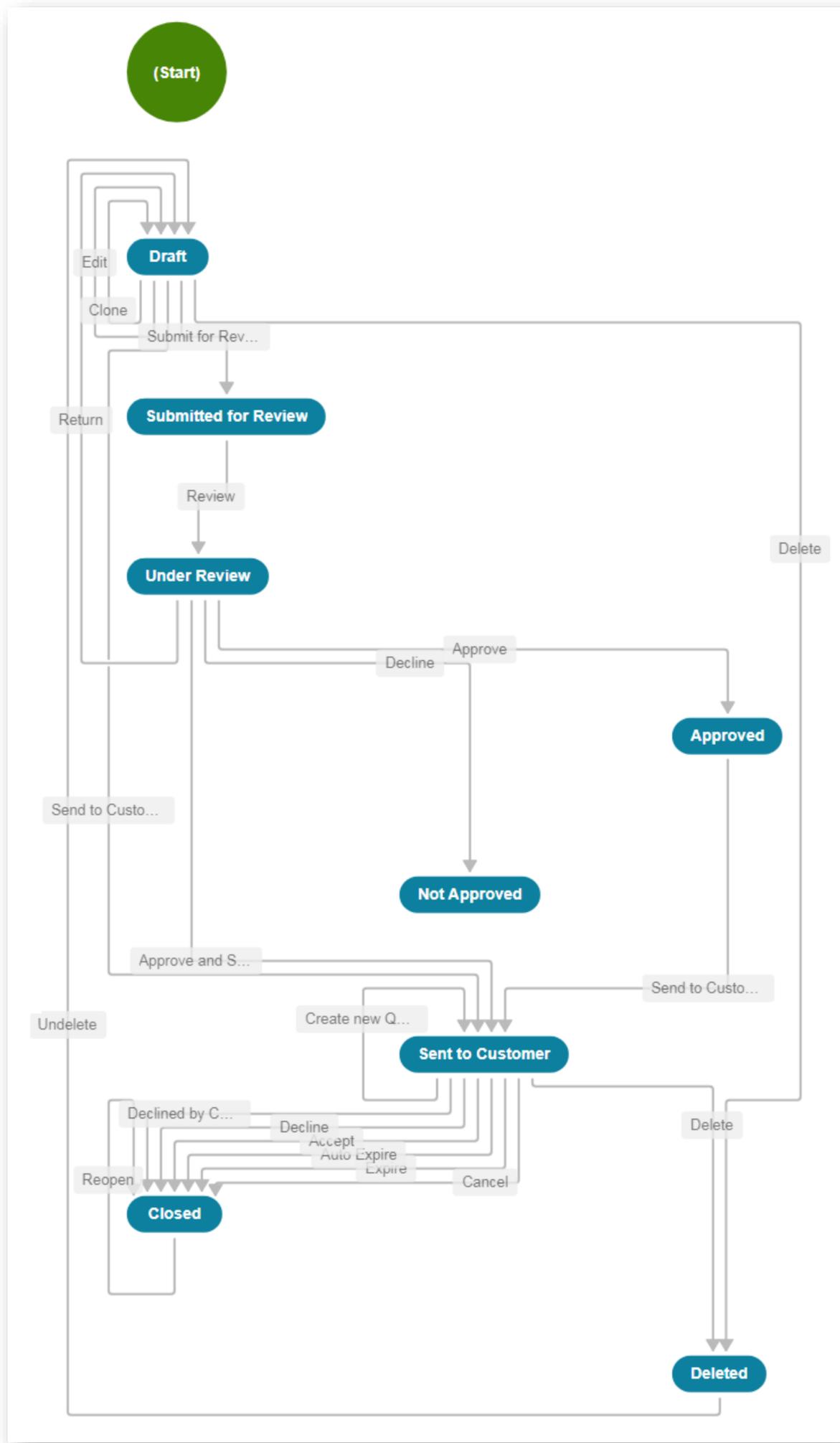
This workflow lets a customer initiate a negotiation with your sales rep. When the customer requests a quote, you can initiate a workflow that either requests more information so you can provide a quote.



Or you can initiate a workflow that treats the RFQ an opportunity.



Or even incorporates the possibility that internal approval is required to reduce the price offered.



The point is, your B2B eCommerce system should make doing business much easier for you and your customers.

## Order Processing Workflows

Once an order is placed, you have internal workflows that take care of fulfilling the order. But what about workflows that keep you in communication with your customer? Your customers will expect at a minimum an order confirmation and notification that their order has shipped. But, to keep your finger on the pulse of the market, you should continue to communicate after the order is placed. Don't forget to include follow-up emails to the order processing workflows. Emails and surveys requesting feedback can be automated and incorporated into the order processing workflows.

## Custom Product Configuration Workflows

Once you have negotiated terms, products, and prices, you should have a workflow to create custom catalogs for your customers. You may sell tens of thousands of SKUs, but most customers probably only purchase a fraction of the items you offer. Instead of forcing your customers to perform a site search across all of your offerings, you can create a customized catalog where only the products they purchase are displayed. Or, if you offer product customization (for example exclusive colors, finishes, etc.) this workflow can be incorporated as well.

## B2B Marketplace Setups with Vendors/Suppliers

If you operate a B2B marketplace, you need workflows for the vendors and suppliers that sell on your site. Workflows can help you capture product images and descriptions, pricing, quantity available and other information you need to add this seller to your network. B2B marketplaces are as unique as the markets they serve, and they require flexible workflows and processes for onboarding participants on both the buy-side and sell-side.

## Budget Management Workflow

If your customers order your products on a regular (i.e., monthly or weekly) basis they may want to set up a purchasing budget. Flexible workflows allow you to give customers the ability to set budgets and ensure they do not exceed their budgets. You might want to include thresholds so when a defined amount of budget is remaining (10%, 20%, etc.) they see an alert notifying them their budget is almost exhausted.

## Practical Workflows for Your Customer-Facing Team

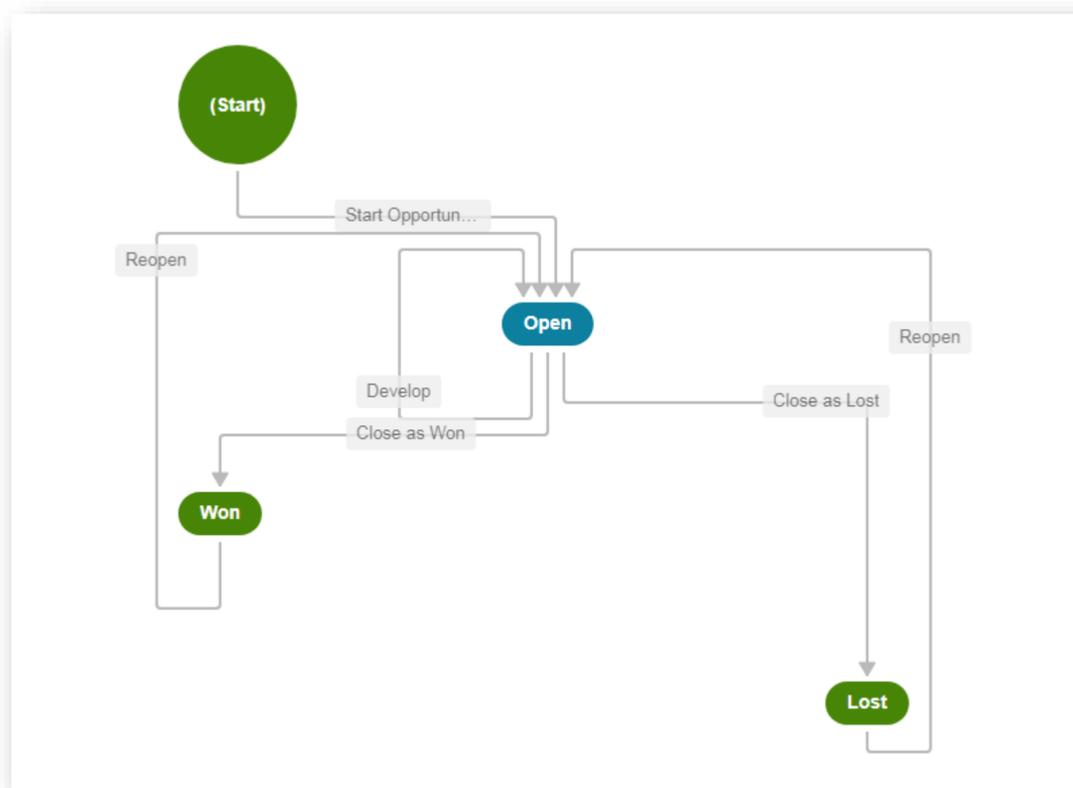
Workflows are crucial for maximizing the productivity of your customer-facing team. You need workflows that keep leads and opportunities from falling through the cracks, respond to requests for quotes, negotiate prices, qualify leads and free your human assets to focus on serving your customers.

### Sales Follow-Up

One of the best ways to keep customers happy is to stay in contact. Your sales team should utilize workflows that touch customers immediately after the sale. Follow up emails and requests for feedback and reviews let you know what your customers are thinking, where you can improve, and where you can shine. While phone calls take time, follow ups can be performed via email and scheduled to be sent 1, 30, 60, and/or 90 days after the sale or whatever time frame you define. By automating the follow-up process, your sales team can focus on non-routine tasks while routine tasks are automated.

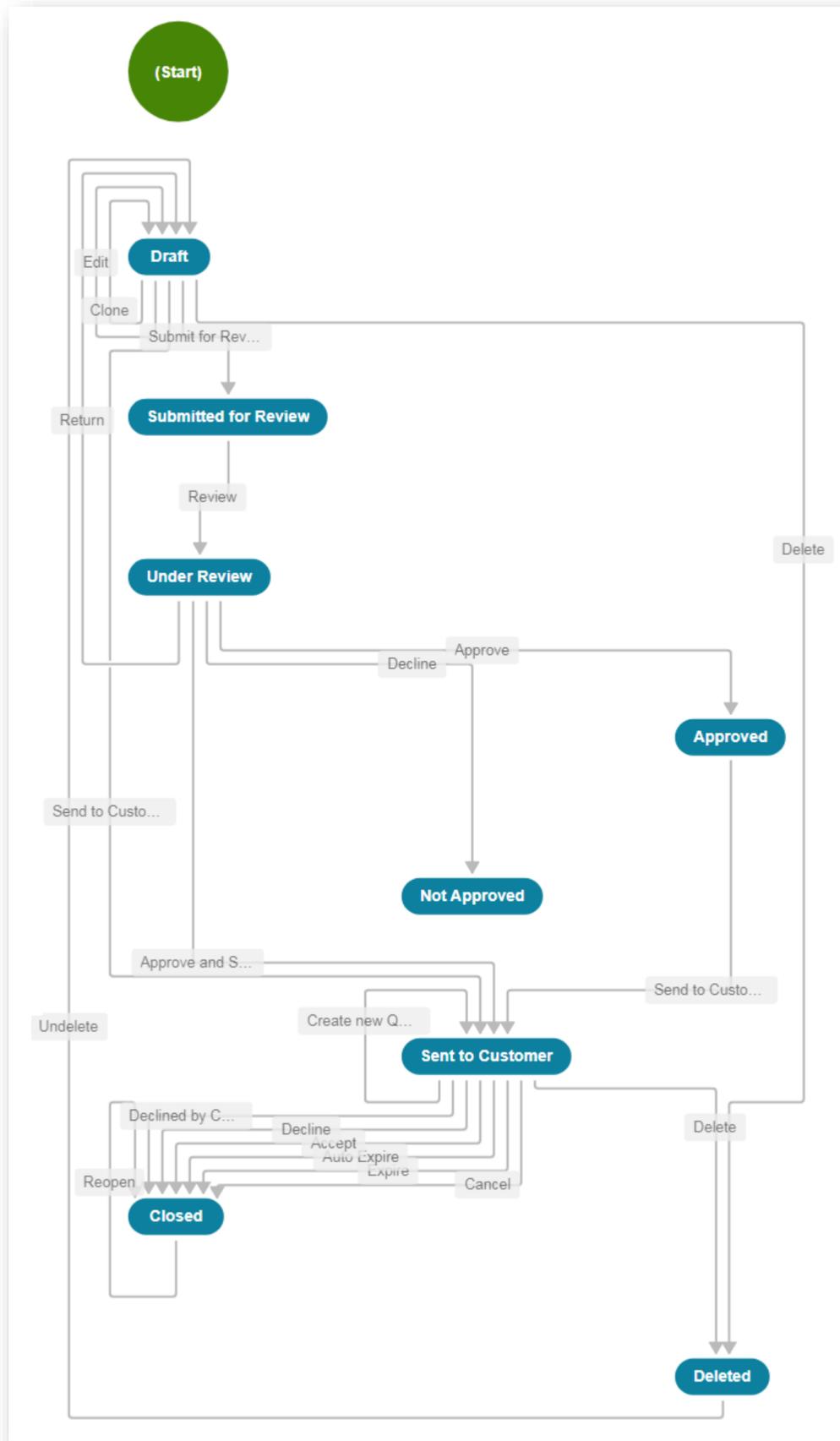
### Sales Opportunity Management Workflow

When marketing keeps the sales funnel full, it's important that you don't miss out on the chance to develop these opportunities. Whether it's through content marketing, landing pages or other means, when potential customers arrive at your site your sales staff need workflows to close the sale. These workflows can be customized to reflect the way your company does business.



## Traditional Quote Workflows

Since most B2B commerce purchases are negotiated, it only makes sense to have workflows that address the quotation process to support your sales staff. A web visitor makes contact through the site using your 'Ask for Quote' button and their information would be automatically forwarded to your sales staff for response. If sales management approval is required for discounted pricing, this needs to be factored into the workflow as well. Once pricing is approved, the quote can be sent to the customer. In this instance, the workflow might look like this:



Once the quote reaches the customer, they can accept, decline, or simply allow the quote to expire. If they approve, you can easily automate the workflow to move from quote to order.

## Requests for Quotation (RFQ workflow)

Sometimes you may need a more complex process for handling quotations. In addition, you might want customers to have access to their existing quotations by logging into your website or you may need further information before the quote can be prepared. Ideally, when more information is needed, not only is the lead contacted but the status of their request is updated as well. Either way, automated workflows help in managing and submitting quotations for you and your customers.

## Call Center Workflows

Your sales team needs workflows to help them be as efficient as possible. Your CRM should capture the information they need to get a 360° degree of each customer. As each customer or lead is contacted their information and status should be updated. Call center representatives typically have a checklist of items they need to perform. Whether that's verifying customer identity, logging notes of the interaction, or taking other actions, giving your call center representatives a digitized workflow to follow improves productivity and reduces errors.

## Lead Qualification Process

With lead qualification, you focus more productively on down-funnel activities and less with time spent at the top. Whether the lead is contact-based or generated in-house, workflows help with the qualification process. You can set goals that move the lead from one stage to the next in your sales lifecycle and even keep leads engaged with automated content. For example, you may identify a set of criteria to qualify a lead and assign each criteria a value (i.e., what industry is the lead in, what is their annual revenue, etc.). Based on the value, a lead is either qualified and gets a call or email from a sales rep or is not qualified and is sent further marketing information.

## Task/Alerts Management Workflows

Workflows can keep employees on task and ensure activities are performed on time. Alerts can be set for anything from generating monthly sales reports to following-up with leads to responding to a Request for Quote. If a task can be broken down into phases, workflows with alerts and reminders will get it done.

## Product Enrichment Workflow

How do you add new products to your offerings? From the initial design to gathering insights and testing and creating marketing materials, does the process flow smoothly or is it a chaotic journey? Workflows can help here as well. Before your new product is added to the website, do photos conform to standard sizes and resolution? Is there a consistent product description and are support materials available? Have the sales staff been onboarded? These are just a few ways workflows can make sure that when you launch, your company is as ready as your product.

## Content Management Workflow

Neil Patel, KISSMetrics founder, recommends that you spend half of your content time on strategy and marketing. Otherwise you end up with lots of content with no traffic. Workflows can help keep your content efforts on track. Create workflows to ensure you make content creation and distribution deadlines and hit all your social channels as well.

## Customer Service Case/Complaint Management Workflow

No matter how hard you strive for perfection, there will be times when you get a complaint. If a product fails or a customer is unhappy this is an opportunity to build an even closer relationship. According to [researcher John Goodman](#), only 4% of customers complain, the other 96% just quit buying. So, customer service and complaint workflows should be viewed as not only problem solvers, but marketing opportunities as well. Use workflows to make sure that customer complaints or requests for service don't get lost in the shuffle of emails. You can even automate the process of receiving the customer complaint, assigning it, and tracking through to resolution. In addition, digitizing this workflow will help you gather valuable data.

## Back Office Workflows

You don't have to be in the C-suite to realize that there's more to business than customers buying and reps selling. You still must get the product out the door, manage your inventories and production schedules, and deal with returns (if you accept them). Workflows and integrated software can help manage your internal operations.

### Returns

Not every company accepts returns, but if you do it's important to do it well. Because many departments are usually involved, workflows manage the process. If you have different return procedures for different products, that's not a problem either. Workflows make the complex simple. For example, workflows can let the sales or customer service reps know if a request for return was initiated online and the reason for return. If approval is required, automated workflows make sure returns are properly authorized and the warehouse is informed of the return. You can even further customize this workflow to automatically issue credit when the product is received.

### Fulfillment Workflow

Once an order is placed, workflows get it out the door and let the customer know its on the way. Automated shipping notification frees customer service and sales reps from time on the phone or answering emails asking the universal question "has my order shipped yet?" If your eCommerce platform integrates with your ERP, workflows update external systems like accounting and inventory to keep your business in sync as well. For example, an order comes into the eCommerce platform and moves over to the ERP for fulfillment and billing and back to the eCommerce platform to notify the sales rep and customer. Integrating fulfillment workflows with CRM gives every customer-facing employee a complete view of each client.

### Warehouse Management

Whether you pick and pack individually or in batches or maintain one or multiple warehouses, workflows maintain order. ERP workflow integration with your eCommerce platform automatically updates available quantities as customers shop to avoid backorder situations. Workflows can monitor inventory levels and with the addition of alerts, trigger notices to purchasing. Workflows can analyze buying patterns and shift inventory between warehouses to reduce shipping costs as well.

### Manual vs. Automatic Acceptance of Account Registration

If you are manually approving new accounts, workflows can help you work faster and more accurately. Applying criteria to acceptance (much like lead qualification) takes the human element out of the process. Not only does this increase efficiency, it improves effectiveness as well. Automated workflows for account acceptance also allow you to change criteria and credit limits as your risk tolerance fluctuates. Integrating with third-party software frees your staff to focus on activities where their time is more profitably spent.

## Workflows for Every Facet of Your Business

In day-to-day practical application, workflows make every facet of your business more productive and profitable.

**Sales and support teams** spend more time converting leads instead of qualifying them. This makes them more productive and as a result increases your profitability. Task alerts keep everyone on track while freeing sales reps to focus on building relationships and solving problems for their customers. [The modern seller is a problem-solver](#). Workflows help keep marketing and sales aligned for more productivity and better results in both areas.

By automating as many processes as possible, **owners and managers** reduce errors and free human assets to be used where they are the most effective. Modern buyers increasingly prefer a self-serve model for support, so automate the support function where possible. A recent survey by Nuance Enterprise found that [67% of respondents preferred self-service](#) over speaking to a company rep and 40% make a call only after trying to find a solution online. You can easily test workflows by running concurrent A/B tests for example to determine if returns are better handled by sales or customer service. By reducing returns, you increase profitability.

Workflows can reduce inventory carrying costs and keep stock information consistent across all channels.

And speaking of A/B testing, **marketers** can use workflows to test different eCommerce shopping experiences to find the most effective customer journey. Flexible workflows allow different touchpoints to be probed to find the sweet spot for conversion. You may use one workflow for leads generated by pay per click ads and another for those that download your free content.

**Product managers** use workflows to standardize product launch and retirement while capturing data to monitor customer satisfaction and promotion costs.

There is no facet or area of your business that can't become more efficient using workflows.

## Workflows with OroCommerce

OroCommerce comes out of the box with everything you need to get your B2B eCommerce store up and running. But Oro doesn't expect your business to conform to our software. Our software is ready to adapt to how you do business.

Through our robust workflow engine, you can easily customize task automation. Whether your workflows impact back-end processes or front end-processes, our easy-to-use workflow engine maintains excellent communication and control between your employees, your suppliers, and most importantly your customers. As your business changes and your workflows change, Oro changes right along with you. Digitize processes that you perform manually today and further automate your existing digital processes.

Companies like [TruPar](#) are using OroCommerce to customize their workflows to present online customers real-time inventory and pricing information across multiple warehouses. By implementing real time geolocation as part of the order workflow, customers get the shipping ETAs they need to run their own businesses better.

[Samuel Hubbard](#) freed their salesforce from entering orders into the ERP by digitizing the order workflow with OroCommerce. Sales reps now have time to focus on helping their customers maintain the right product mix to boost their profitability and increase sales. They are creating a rising tide to lift both boats.

When you combine OroCommerce's best in class, flexible workflow engine with a powerful CRM and easy to use and customize eCommerce platform you've got a complete solution that's ready to scale with you.

Ask for a [demo](#) today and see what OroCommerce can do for you.

# About OroCommerce

## The #1 B2B eCommerce Platform



### **Build Your Online Presence**

It doesn't matter if you're a manufacturer, distributor, wholesaler, retailer, or brand. Expand your business into new markets with an online and mobile presence.



### **Get eCommerce & CRM. All-in-One**

Get a 360-degree view of all customer touchpoints across sales, marketing, customer support, and eCommerce with a built-in CRM.



### **One Platform for All Your Commerce**

Addresses all B2B, B2C, and B2X (B2B2B, B2B2C, etc.) scenarios in a single platform. Easily customize it to fit your needs.

[TRY FREE DEMO](#)

