Intershop E-Commerce Report 2016:
Taking the Fast Track into the Digital Future of B2B Commerce
Increase in efficiency, expansion into new markets, fast marketability of the right product – the challenges business face have been the same for long. The world of opportunity digitalization has to offer in that respect, however, is not yet fully grasped. Then again, digital transformation seems to be on its way everywhere. Here, B2B commerce can be considered a pivotal point as many automated processes of marketing, sales, service, and more and more those of production, converge in its context. Evidence shows that many organizations are already successful in finding answers in the digital transformation for challenges of their daily operations. Others have changed their markets or business models altogether. Given the dynamics of the market and the complexity of the challenges, assuring flexibility of business processes is mandatory. This requires appropriate technological infrastructure.

The Intershop E-Commerce Report 2016 captures the state of digital B2B commerce to date. It’s both an informative and inspiring read for all who want to learn where digitalization already returns results, which IT systems have proved particularly efficient, and where businesses plan to invest next.

Dr. Jochen Wiechen, CEO Intershop Communications AG

With online and mobile sales channels growing rapidly, organizations are now on a mission to embed end-to-end digitalization across the enterprise. This report evaluates their progress from vision to reality – and the potential impact of game changing technology trends like the Internet of Things and big data.
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Executive Summary

In August 2016 Intershop commissioned independent research consultancy Vanson Bourne to survey 400 B2B decision-makers with responsibility for e-commerce, marketing, products, or strategy in the UK, France, Germany, the Nordics, Benelux, and the US.
Designed to evaluate the current state-of-play of digital B2B commerce today, this year’s research was focused on exploring exactly how organizations are grasping the digital opportunity:

- As B2B organizations build out increasingly sophisticated digital commerce channels, how is this changing the way they operate?

- Understanding and evaluating the opportunities of digitalization is just the start – what are the inherent risks of failing to adapt fast enough in an increasingly competitive digital landscape?

- As organizations move beyond leveraging digital to boost the efficiency and effectiveness of their commerce processes, will mega trends like the Internet of Things (IoT) and big data enable disruptive new capabilities?
Using digital channels to interact with and provide services to partners and customers is driving fast-paced changes in customer engagement models – but it’s not just the sales function that’s being affected.

Digitalization can result in more cross-linked processes within organizations and beyond, as supply chains are reinvented in order to respond more dynamically to customers and market opportunities. For some, this pursuit of a truly ‘synaptic commerce’ landscape is seen as key to adapting, thriving and surviving in today’s fast evolving and highly competitive digital era.

These B2B visionaries are striving to connect disparate systems and gain end-to-end visibility across the extended supply chain – so that their organization can take advantage of real-time data about demand, inventory and capacity.

But that’s not all. These trail blazers are now turning their attention to leveraging the potential and opportunities made possible by the IoT - while exploring how best to make big data work for their enterprise.
Key Findings

- Three-quarters (76%) of respondent organizations currently have their own B2B commerce site and 41% report utilizing B2B market places; just 42% currently have bricks and mortar outlets.

- Over half the respondents surveyed (53%) confirm IT plays a key role in their organization’s sales strategy and digitalization is having further impacts on the way organizations sell their products; 50% report sales are more cost effective and 48% say their sales process is more efficient.

- Respondents confirm digitalization has conferred wider benefits for their organization – 44% say they are able to get new products to market faster; 46% confirm their sector is more global than ever before; 43% are selling to customers who would not buy from them before.

- Digitalization is changing the business landscape – more than one-third (37%) of organizations report an increase in ‘stealth’ practices, with new and competing products and services coming to market with little warning and not always from traditionally competitive suppliers.
The research confirms B2B e-commerce decision makers are looking to evolve their B2B commerce offering – enabling new mobile touch points and seamless omni-channel experiences.

Little wonder then that 94% of respondents acknowledged that their organization will need to integrate at least one system into their B2B landscape in the next three years – a particular challenge for the 42% of companies which admit they have yet to integrate their order management system (OMS).

As digitalization drives fast-paced change in their sectors, forward thinking brands are already assessing how to harness the IoT and big data to better serve customers, streamline operations and optimize their supply chains.

Four in ten (40%) respondents claim that digitalization has completely changed their organization’s business model. A further 48% have had to make at least some change.

Digitalization has enabled impressive commercial success; 44% of respondents are generating more total sales – and more sales per representive, with 40% successfully leveraging digital B2B channels to persuade customers to purchase more items across more product categories.
1 The Story Unfolds

Digitalization has had a big impact on sales channels. But in order to stay competitive, companies are being compelled to ‘hard wire’ digital into wider organizational processes, systems and structures. The first part of the study examines how the digitalization agenda is driving change across different departments – and causing business models to evolve.
B2B E-Commerce Comes of Age

Digital sales channels are no longer a sideshow. More than three-quarters (76%) of the respondents surveyed report that their organization has implemented a dedicated B2B e-commerce site, with an impressive 39% confirming that their e-commerce store/online self-service tool is the only online sales channel on offer.

Operating in the construction, machinery, wholesale, materials and tools sectors, it’s clear that today’s B2B businesses are fully embracing digital marketing and e-commerce platforms as a primary means to interact and transact with buyers.

What’s more, these organizations have proved highly successful at building out an e-commerce presence that resonates with customers. Respondents confirm that 42% of their organization’s B2B revenue is now generated online, on average – this average is consistent across all sectors surveyed, with a limited range from 37% (construction machinery) being the lowest and 45% (transporting and warehousing) being the highest average percentage of B2B revenue coming online.

When asked which channels they plan to use to sell products and services in the next 12 months, respondents’ organizations anticipate their own e-commerce site remaining the most widely used channel (71%). However, other digital channels including B2B market places such as Alibaba (up from 41% to 49%), social media (growing from 41% to 46%) and mobile shops (up from 22% to 32%) are expected to increase in use over this time frame.
Utilization of B2B Sales Channels in the Next 12 Months:

- **Own e-commerce site**: 71%
- **B2B marketplaces**: 49%
- **Social media**: 46%
- **Mobile shops**: 32%
The Impact of Digital on Business Models

The far-reaching influence of digital sales channels has had a profound business impact - four in ten (40%) respondents surveyed confirm the pursuit of digital transformation has resulted in a complete change of their organization’s business model.

Perfecting digital sales, marketing and customer relationship initiatives that entice existing and new customers have seen end-to-end digitalization practices creep across the enterprise. Companies report that 55% of their organization is now ‘digital’ and that automation practices incorporate both the supply chain (54%) and demand chain (52%).
Digitalization has certainly impacted sales operations for 99% of respondents' organizations surveyed. Half (50%) report digital has made sales more cost-effective while 48% say the sales process is more efficient. But these aren’t the only benefits being reported:

- 43% are successfully selling to customers that would not buy from them before
- Over one-third (36%) report they’ve been able to expand globally at lower risk
- 44% are generating more total sales - and more sales per representative
- 40% are leveraging digital B2B channels to persuade existing customers to purchase more items across more product categories.
Risk and Reward – an Increasingly Competitive Digital Landscape

There is a flip side to being part of an increasingly digital ecosystem. The vast majority of respondents (99%) observed marketplace disruption as a result of digital technologies changing the rules of engagement:

- Almost half (46%) say their sector is more global than before
- 47% say new products and services are being released with greater frequency – as a result, their products and services can become redundant overnight
- 37% report an increase of stealth practices within their sector, with fast moving competitors and unexpected market entrants launching new products and services with little warning.
While globally 43% of respondents are concerned about stealth competitors, respondents in the Nordic region are more likely to recognize the danger of stealth competition, with nearly three quarters (72%) in this region noting this as a concern. Clearly, as digitalization lowers market entry barriers and causes long-established boundaries between sectors to tumble, competitive leapfrogging represents a strategic challenge that organizations will need to confront.

While only 30% of the respondents surveyed felt confident about the primacy of their organization’s product offering or their ability to keep up with the effects of digitalization, others were more confident about their ability to stay ahead of the game.

More than three-quarters (77%) of the respondents surveyed believe that their organization is digitalizing at a faster rate than other market players. In this respect respondents from France appear particularly confident, with 95% stating they are evolving faster than other sector challengers. By comparison, just 42% of Nordic respondents were positive their organization was not at risk of getting left behind.
Who’s Driving the Digital Agenda?

Almost half the respondents (46%) confirmed tech savvy leaders like the CEO and CIO are spearheading their organization’s digital transformation. But it’s not just senior executives who are driving or communicating the digital vision – responsibility appears to be cascaded across organizations.

Indeed, 40% of organizations say the IT department as a whole is one of the primary drivers of digitalization with a third (33%) saying it’s the non-C-level senior IT team that is accelerating digital adoption.

For others, however, it is senior marketing and sales management (29%) and operations management (25%) – individuals working at the sharp end who need to enable their organization to become more agile fast - who play a leading role.

In terms of identifying which business areas are embracing digitalization the most, it’s perhaps no surprise that it is the sales department (58%) that is leading the way – with stock management (47%) not far behind.

But digital tools and processes are making an impact across the enterprise; respondents report that operations (44%), customer relations/client services (43%), stock procurement (38%) and supply chain/logistics/fleet management (38%) are all being embraced by digitalization within their organization.
Digitalization Drivers

IT department: 40%
CEO and CIO: 46%
Non-C-level senior IT management: 33%
Senior marketing and sales management: 29%
Operations management: 25%

The Story Unfolds
2 Digitalization Success Factors

Respondents know what they want from their platforms and IT systems – and say that solutions like order management systems (OMS) are already proving invaluable at facilitating a truly seamless experience for buyers.
But organizations acknowledge that when it comes to achieving a truly synaptic commerce landscape, they still have a long way to go. Indeed, a sizable number of respondents confirm they are yet to fully realize the benefits that will arise from integrating B2B commerce and digital experience platforms with their ERP, CRM and product information management (PIM) systems.

**Responding to Customer Expectations**

In terms of the B2B e-commerce system characteristics that hold the most appeal for customers, respondents confirmed the following features were in high demand:

- Flexible payment options such as PayPal/credit card/debit card (47%)
- Customized content/personalization (42%)
- After sales care (40%)
- Device optimization and integration (32%)
- Search functionality (29%) and comparison functionality (36%)
- Social features – including the ability to share on social media – 28%
Today’s buyers increasingly prefer to transact and interact via online channels rather than electronic data interface (EDI) and will use multiple devices – including mobile – to get the job done. Organizations confirmed they are experiencing a ‘mobile first’ shift from buyers and are cognizant of the need to adapt.

**The Cross-Platform Integration Challenge**

Delivering breakthrough customer experiences depends on providing a seamless and unified experience across multiple touch points. Little wonder then that 98% of respondents have integrated at least one IT system to set up their B2B commerce landscape, with OMS (58%) and CRM systems (54%) topping the list.

Clearly, organizations are prioritizing their system integration strategy around delivering against the customization and after sales expectations of customers. It also explains why 43% have integrated procurement systems to enable the delivery of flexible payment options.

However, more than half the respondents confirmed that they have yet to integrate ERP, web content, digital asset management, PIM, procurement, content delivery networks, CRM, or image servers into their B2B commerce landscape.
Orchestrating Complex B2B Order Cycles

Today’s B2B buyers expect to encounter a rich consumer-like experience but also have very specific needs and requirements – complex pricing lists, bulk order entry, recurring order set up, item configuration and a convenient returns process – and want to make, receive and return orders through the channel of their choice (sales rep, the web, on location, over the phone, via customer services).

No wonder then that order management systems were viewed by almost six in ten (58%) respondents as central to the successful execution of an omni-channel strategy. They make it possible to orchestrate orders through complex fulfillment workflows and support complex ordering scenarios while delivering a trusted source of inventory data across the enterprise.

Indeed, 94% of those who have integrated OMS with their B2B commerce landscape report this has had a positive impact on their e-commerce operations. While 42% of organizations have yet to integrate OMS, half of those (19%) plan to do so in the next three years. Of those that have already implemented an OMS system, 63% report they expect to see more accurate order capture as a result while 59% expect to benefit from customer account tracking – a capability that will enable them to deliver enhanced personalization.

Other currently seen or anticipated benefits that will accrue from the integration of OMS in the next three years include:

- Improved stock level management (58%)
- More efficient e-commerce operation (57%)
- Better integration between ordering, supply and delivery (56%)
- Better supply chain management (56%)
- Fewer lost orders (52%).
of those that have integrated OMS say it is having a positive effect on their e-commerce operations

58% expect improved stock level management

63% expect more accurate order capture

52% expect fewer lost orders

56% expect better supply chain management

57% expect more efficient e-commerce operation

56% expect improved stock level management

59% better customer account tracking
Investing in the Digital Future of B2B

Organizations confirm that both the sales (59%) and marketing (54%) functions have seen the biggest impact of B2B IT integration efforts to date, although 43% also highlighted after sales operations had also been impacted.

Organizations are also actively leveraging new tools and capabilities to recalibrate their B2B commerce approach. Almost all (99%) had invested in at least one tool or capability in the last 12 months; around half (53%) had invested in cloud-based services, closely followed by e-commerce systems (49%) and mobile applications (48%).

In terms of investment priorities for the next 12 months, mobile applications (50%), cloud-based services (47%) and e-commerce platforms (43%) topped the list. Almost half of respondents (48%) confirmed these investments are being driven by the desire to create efficiencies across the organization and the commitment of senior management to innovation (47%).

For others, responding to customer demand (44%) and fear of falling behind the competition (39%) were among the primary motivations.
Almost 45% of respondents identified their sector as being heavily reliant on up-to-date technology, with automotive (68%) and hi-tech manufacturing (57%) most likely to select this. By contrast, the tools sector (27%) was least reliant on cutting-edge technologies.
3 What’s the Next Digitalization Megatrend?

As digitalization initiatives gain momentum, organizations are leveraging existing IT investments to achieve long-term competitive advantage and innovate - without disrupting themselves.
Operating in the midst of a “fourth industrial revolution” characterized by the increasing interconnection of products, value chains and business models, organizations are now contemplating the transformative impact of digital megatrends like big data and the Internet of Things (IoT).

**Building IoT Capabilities**

Almost all (96%) of respondents believe the IoT will have an impact on their B2B operation. Four in ten or more cited it will enable:

- Better marketing and targeting due to the collection of big data
- Cost savings
- More efficient supply chain management
- Greater efficiencies across the business.

Yet less than three in ten have invested in the IoT over the last 12 months – and only 37% have plans in place to invest in the next 12 months. This is despite the fact that, from an organizational perspective, over half (54%) say their business’s sector will benefit significantly from smart production and the IoT in the future with a further 41% saying they anticipate some benefit.
Exploiting Big Data for Business Advantage

When it comes to big data, the story is different; over half (54%) of respondents say it will be their organization’s next major investment. That said many respondents are already utilizing the big data they are generating – although less than half (42%) believe their entire organization is completely effective at using big data.

Despite this fact, the majority of those surveyed acknowledged big data is already having a positive impact on their sales (82%) and marketing (81%) departments. However, not every area of the enterprise appears to be benefiting; a quarter of respondents (25%) say neither the production nor the research and design departments are experiencing any impact yet.

Perhaps data integration issues are holding back the ability of some functions to reap the promised rewards of big data? Or maybe a lack of skills and capability is the issue. Only four in ten (40%) respondents said they have been “completely successful” at understanding or utilizing the big data that is being generated for business advantage.
What’s on the Horizon?

When asked to evaluate their organization’s next big digital investment, getting to grips with mobile proved by far the most pressing concern for 55% of respondents. Indeed, it is seen as a future big investment for 87% of respondents in the Nordic region, yet French respondents are less enthusiastic; just 33% are planning to invest.

The Nordics (63%) also expects to lead the way in respect of investment in big data analytics, while respondents in Benelux are most likely (50%) to be investing in 3D printing in the future. Meanwhile, respondents at German companies see themselves buying into virtual reality (45%) and intelligent automation/next generation robotics (42%).

In fact, respondents in Germany and Benelux consistently topped the leader board when it came to investing in a range of digital technologies and initiatives in the future. Clearly, organizations in these territories are fully committed to hunting down any and every digital advancement opportunity.

The research also highlights some interesting sector quirks. When it comes to future investment in 3D printing, for example, construction (machinery) is leading the way (45%). Meanwhile, wholesale trade is the most likely sector to be investing in intelligent automation (34%).

Despite the fact that future investment in mobile tops the list for transportation and warehousing (71%), machinery equipment (other) is the least likely of all the sectors to be prioritizing this area.
The Pursuit of Digitalization Ambitions Ramps Up

The findings of the survey confirm that organizations understand the importance and value of digital change and are taking specific steps to meet that challenge.

In an increasingly digitalized and connected world, the dynamic nature of commerce means organizations are increasingly adopting digital technologies to maintain their market position or position themselves to win.

Respondents are all too aware that they need to build the right digital capabilities to ensure their company remains relevant and is positioned to fend off competitive threats. Clearly, deploying digitalization in the right places, at the right time, is more important than ever before.

In terms of value creation, respondents were clear as to the potential opportunities that are presented from their digital investments and initiatives:

- Greater efficiencies in the business is being enabled by IT systems (47%)
- Faster and improved customer services through information back channels (40%)
- Faster and improved product development cycles (40%)
- Constant data analysis is enabling better-informed decisions (40%)
- Predictive inventory analytics and supply chain visibility (37%).
4 Examining the Findings

Respondents affirm that digitalization is transforming their business landscape and enabling innovative new ways of working.
The strategic intent behind their on-going investment in digital initiatives is clear – building competitive advantage, responding to customer demand, and extending market reach to tap into new profit pools. Indeed, for many organizations the pressure is now on to have all digital processes, information and interactions with customers.

But respondents also confirm they view digitalization as a two-edged sword. While enjoying the benefits engendered by digital customer engagement, enhanced innovation capabilities and more efficient operating models, respondents also voiced concerns that the pace of digital change means their organization needs to be constantly on alert to protect against being left behind.

While digital opens the door to exciting new market opportunities, it also enables disruptive new entrants to emerge from unexpected quarters.

In other words, digital is rewriting the rules of competition. No wonder then that organizations are determined to focus their digital efforts on staying relevant by evolving their value proposition using a data-based view of each customer.

Against the backdrop of a rapidly evolving competitive landscape, selling cost-effectively is no longer enough. Providing a compelling user experience and optimizing B2B e-commerce collaboration across the supply chain depends on achieving a synaptic commerce landscape in which processes and IT systems within and between companies simply work.

Yet integration continues to represent a major stumbling block to achieving this synaptic vision. Excellence in one channel is no longer enough. Today’s B2B customers expect a frictionless experience, no matter what channel they use. As a consequence, organizations are striving to improve connectivity between multiple ecosystems within and beyond the enterprise.

Integrating their B2B commerce platforms with back-end systems represents a big but essential step for companies – and B2B order management systems are proving a highly effective approach to bridging the gap between complex heterogeneous application landscapes.
Connecting every part of the order process, the OMS:

- Automates and streamlines the life cycles of orders, payments, and invoices across all channels
- Provides real-time visibility into customer purchasing behaviors, stock levels and payments across all touch points
- Enables organizations to respond to customers with individualized offerings and services
- Orchestrates applications like ERP, point of sale (POS) and warehouse management systems to facilitate a truly seamless customer experience
- Manages order routing and fulfillment
- Supports after order services, including returns management.

Over half (58%) of the respondents participating in this year’s survey have jump-started their organization’s journey to B2B synaptic commerce by integrating OMS with their e-commerce platform.

The message from survey respondents is clear. Pursuit of the digitalization agenda is enabling organizations to transform their business models, expand outside their traditional markets and enable operational innovation.

But succeeding in this new digital world requires agility, a deep understanding of customer needs, and the capability to respond fast to incremental and unexpected shifts in the market place.
5 Key Recommendations

Rising customer expectations is driving organizations to invest in digital tools and platforms that improve the customer experience across all channels – especially mobile.
Most organizations don’t appear to be pursuing a strictly linear digitalization strategy. Instead, they are cherry picking the digital initiatives they follow in order to:

- Build out new capabilities for competitive advantage
- Enable lower cost, more transparent transactions
- Enhance customer and supplier interactions
- Boost operational performance
- Respond fast to disruptive market shifts.

Clearly, B2B organizations are now paying attention to digitalization. What’s more, the findings of the report confirm that they know what they want from their landscape and their platforms – 98% have plans to make a major digital investment in the next three years.

As digital becomes more fully integrated into their demand and supply chains, organizations are next looking to leverage game-changing digital technologies like IoT, big data and analytics. They plan to use the insights they gain to augment the customer experience of their products and services and fine tune market place offerings.
A World of Opportunity
Organizations are sizing up the future opportunities made possible by investing in smart production and digital commerce technologies. A third or more of respondents are targeting the following gains:

- Greater efficiency in production or retail (47%)
- Enabling value-add offerings for customers (40%)
- Faster and improved customer service (40%)
- Faster and improved product development cycles (40%)
- Predictive inventory and supply chain visibility (37%)
- Integration of customers and partners with value-add processes (33%)
- Initiate new business models and revenue streams (32%)

As digitalization changes the dynamics of the markets they operate within, organizations will need to ensure they are well positioned to capture opportunities – and respond fast to disruptive competitor challenges.

While digitalization extends and organizations move closer towards the real-time networked interconnection of everyday objects, thriving and surviving will be dependent on becoming a truly digital-led business that is capable of navigating complexity and evolving systems with ease.
Act Now – or Risk Being Side-Lined
The competitive landscape is changing rapidly and the digitalization agenda is moving beyond simply responding to B2B customer expectations to conduct procurement online – it’s now about making it easier to transact and do business with. Alongside maximizing process efficiency, B2B organizations are looking to build deeper and more binding relationships by enabling the personalized delivery of products and services – at scale. The next 12-24 months look set to see further fundamental changes in business models as organizations become increasingly customer-centric.

Be Wary of Stealth Competition
The era of business disruption is upon us. B2B organizations are on the alert for aspiring new entrants emerge from unexpected quarters, while incumbent competitors innovate under the radar. Digitalization combined with globalization lowers market entry barriers tremendously. As a result – or side-effect – more and more often B2B businesses find themselves confronted with stealth practices which can lead to market disruption altogether. The ability to out-execute is becoming a critical competitive advantage. The free flow of cross-functional information fluency will be essential, as it will enable B2B organizations to innovate, adjust and disrupt at a rapid rate.
Get to Grips with Big Data
In an increasingly real-time and connected world, the volume and detail of information captured by the enterprise means big data will underpin new waves of productivity, innovation and operational efficiency. No longer just the domain of marketing, big data is now an important factor for all business and production functions. But generating value from big data efficiently depends on having a fully integrated ecosystem – and the right analytical tools in place. Some visionary B2B organizations are already going beyond the buzz surrounding the IoT to identify some fundamental opportunities. It’s time to get off the side-lines – and into the game.

Bridge the Integration Gap with OMS
Order management systems are a highly effective way to bridge the gap between B2B e-commerce and ERP systems and simplify complex landscapes. Integrating multiple customer-facing channels with diverse fulfillment systems, OMS not only delivers real-time visibility of available inventory, and customer purchasing behaviors (including open orders and order status) – it can also optimize stock allocation between fulfillment systems by orchestrating applications like ERP, POS and warehouse management systems behind the scenes. Smart B2B organizations are leveraging solutions like Intershop’s order management system to manage the complexity of new and growing omni-channel models, improve efficiencies and master demand and supply chain digitalization.
Appendix – Study Methodology

The research was conducted on behalf of Intershop by Vanson Bourne, an independent specialist in market research for the technology sector.

In August 2016, 400 business decision makers were interviewed from B2B organizations that had over €5 million online revenue and included a B2B element to their business. Participants were selected from organizations located in six geographic regions around the world: the UK (60), the US (120), Germany (60), France (60), the Nordics (60) and Benelux (40).

Survey participants were drawn from a range of sectors: wholesale trade (84), construction materials (80), tools (68), construction machinery (52), machinery equipment (24), transportation and warehousing (24), high tech manufacturing (24), automotive (24), telco and utilities (20).
About Intershop

Intershop Communications AG (founded in Germany 1992; Prime Standard: ISH2) is the leading independent provider of omni-channel commerce solutions. Intershop offers high-performance packaged software for Internet sales, complemented by all necessary services. Intershop also acts as a business process outsourcing provider, covering all aspects of online retailing up to fulfillment. Around the globe more than 300 enterprise customers, including HP, BMW, and Deutsche Telekom run Intershop solutions. Intershop is headquartered in Jena, Germany, and has offices in the United States, Europe, Australia and China.

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