



# B2B Sales: The eCommerce Playbook for Wholesale Distributors

Presented by

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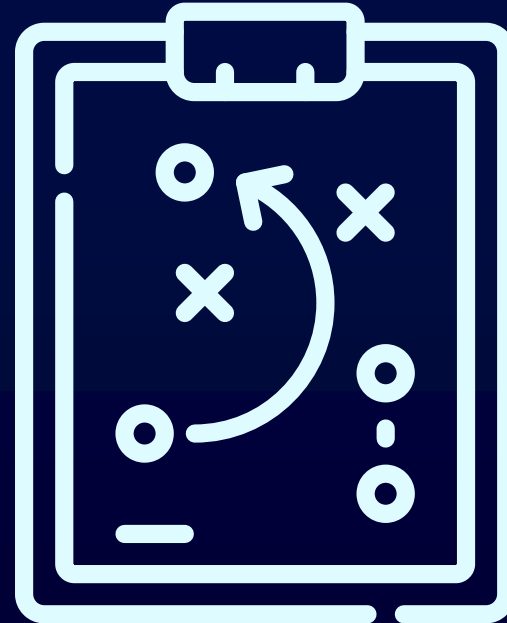
Brian Seidel  
CEO and Co-founder



# Agenda

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- Review Learning Objectives
- The Target Audience(s)
- The Playbook
  - The 4-Part Framework
  - The Program Goal (Why)
  - Program & Projects
  - Platform(s) vs. Solution
  - Critical Roles (“Hats”) To Fill
- Three Simple (Next) Steps
- Customer Testimonials
- Key Takeaways
- Q&A

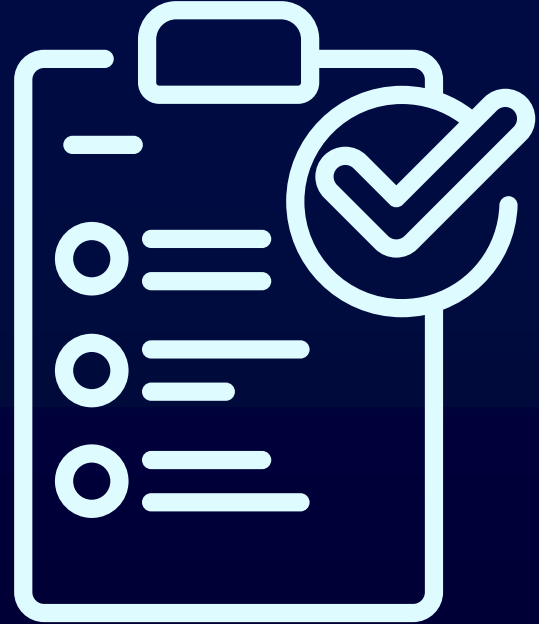


# Learning Objectives

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Understand the game of B2B eCommerce...

- Why play the game?
- How do championship programs operate?
- What positions do I need to fill?
- What equipment (tools) do I need?
- How do I avoid penalties & setbacks?
- How are other teams winning?



# The Target Audience(s)



Product-Centric on ERP



Consumers



Professional Practices



Clubs & Organizations



Mom & Pop Stores



Franchise



Big Box Stores



Distributors & Manufacturers



COMs



Not In The Game



Losing



Winning



Supporting Players

B2B-First

Your eCommerce Game

## Six Quick Indicators Of B2B-First Needs

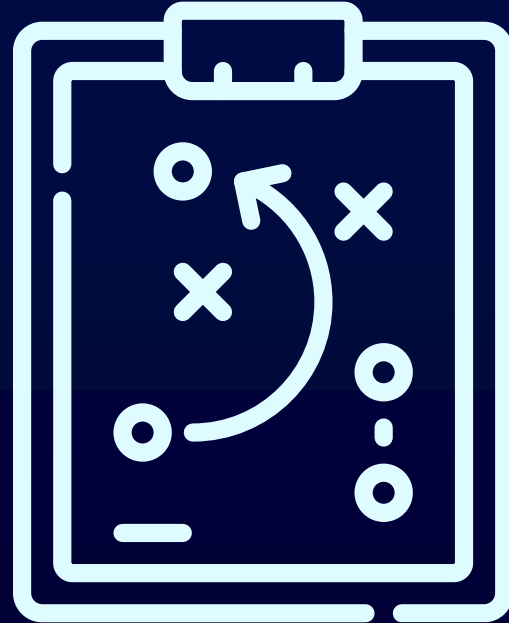
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- 1) Sell to Companies or Organizations
- 2) Price Varies by Customer
- 3) Customers Buy On Credit
- 4) Customer Employees Need Different Things
- 5) Tricky Product Situations
- 6) Tricky Ordering Situations

# The B2B eCommerce Playbook

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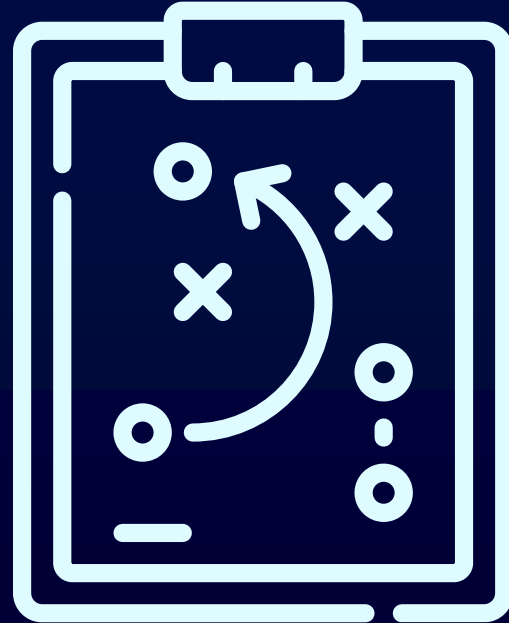
- The 4-Part Framework
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# The B2B eCommerce Playbook

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- **The 4-Part Framework**
- The Program Goal (Why)
- Program & Projects
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## The 4-Part Framework

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PROGRAM

PROJECT(S)

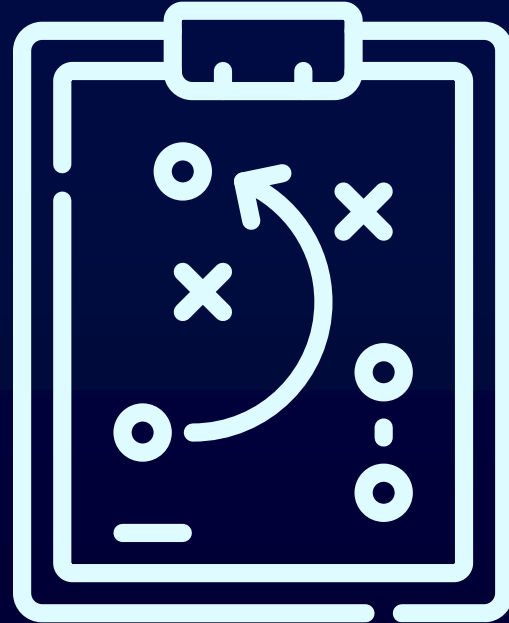
PLATFORM(S)

SOLUTION

# The B2B eCommerce Playbook

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- **The 4-Part Framework**
- **The Program Goal (Why)**
- Program & Projects
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# The Ultimate Goal

The Ultimate Goals  
Of Your Business

GROW SALES

DOMINATE  
YOUR  
MARKET  
(customer  
loyalty)

NOT HEADCOUNT

MAXIMIZE  
OPERATIONAL  
EFFICIENCY

## THE PLATFORM(S)

Tactic #1:  
Customer Self-Service

eCommerce

Tactic #2:  
Employee Visibility

ADMIN PORTAL

Tactic #3:  
Integrate With Your  
Backend ERP System

ERP SYNC

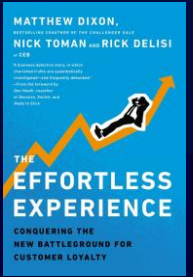
## THE PLAYBOOK

Program

Projects

Platform

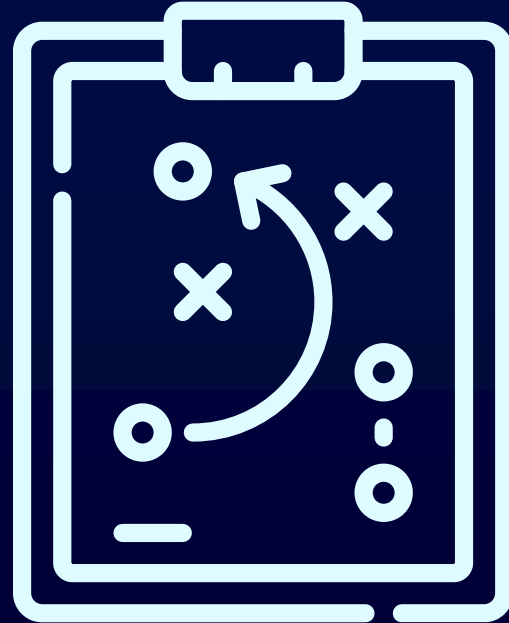
Solution



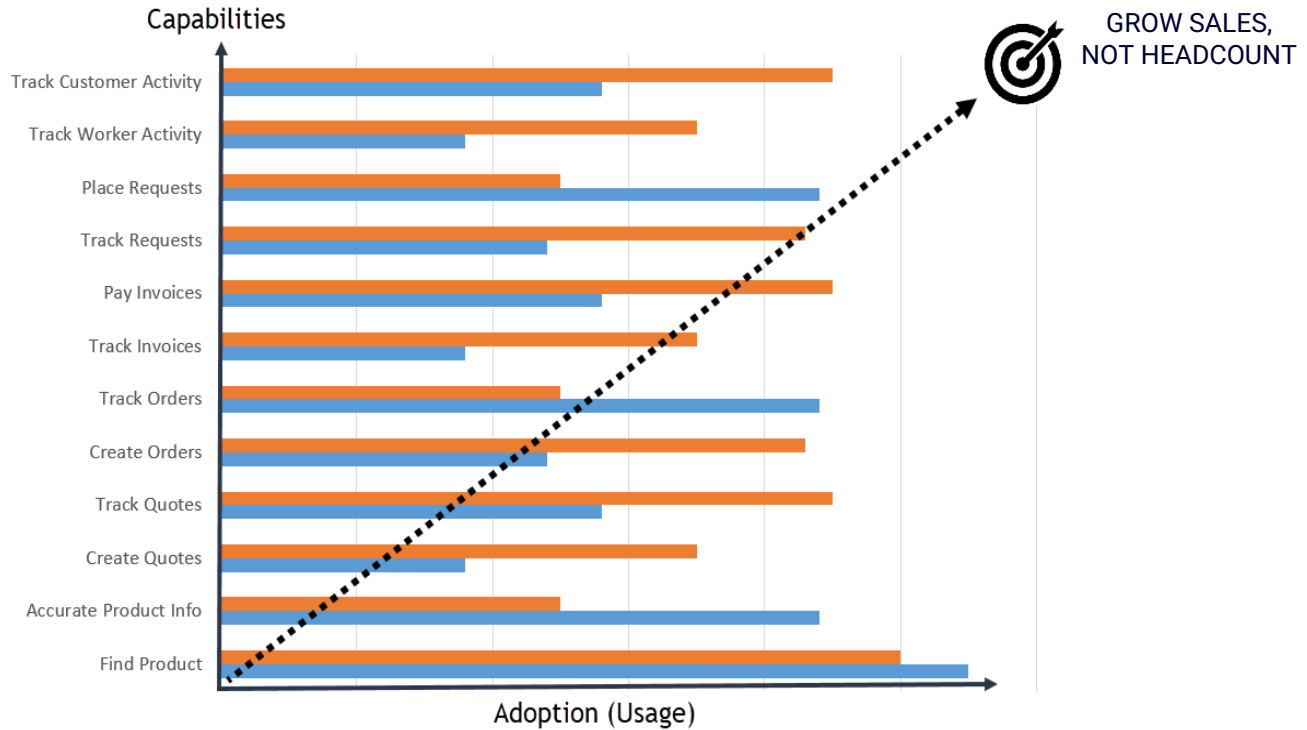
# The B2B eCommerce Playbook

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- The 4-Part Framework
- The Program Goal (Why)
- **Program & Projects**
- Platform(s) vs. Solution
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# Program & Projects



# Example eCommerce Program

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**Objective:** Customers can and do self-service for their needs and all rep & customer activity is logged and visible

**Program Manager:** Janet Johansson, VP of Sales & Marketing

**Key Results:** The following key results have been accomplished by 12/31/2026

- 50% of customers are self-servicing for product data (images, specs, prices, stock levels, lead-times)
- Customers are self-servicing for 50% of quotes & orders
- Customers are self-servicing for 95% of shipment tracking
- Customers are self-servicing for 50% of AR / aging-related questions
- Customers are self-servicing for 50% of invoice payments
- Reps can see all customer interactions (emails, meetings, calls, etc) made between employees and customers
- Sales reps are logging and updating 95% of customer and contact “rolodex” data so we have highly accurate data
- 100% of our inbound customer requests are logged in a central system
- 99% of our inbound requests are being responded to in 1 business day with 85% completed in 3 business days

# Example Projects of an eCommerce Program

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## Project #1 (capability)

- Outcome = Deploy a customer self-service tracking AR portal that works with our Acumatica ERP system and allows customers to see orders, shipments, open and past invoices, payments, and credits
- Project Manager = Director of Customer Service
- Project Budget = \$X,000
- Project Deadline = X/X/2025
- Project Scope = Defines what deliverables are needed to achieve the outcome
- Project Plan = Lines up platform(s), resources, work / actions items needed to hit the scope, budget, and deadline
- Project Team = These are the people (in-house and outsourced) that will fill the job functions & execute the plan

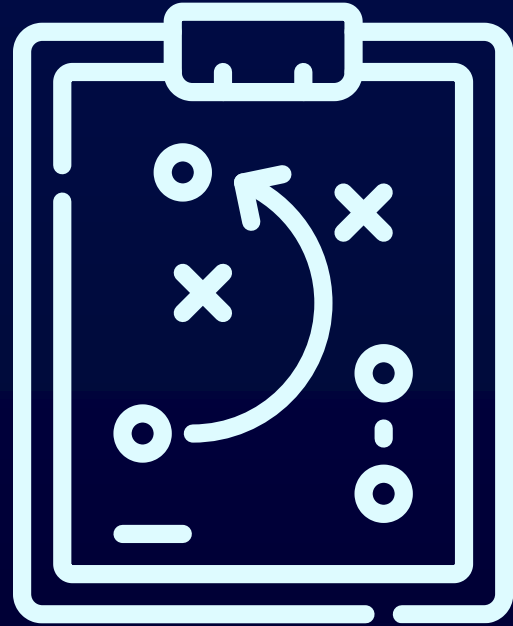
## Project #2 (adoption)

- Outcome = Get 15% of our dealers using the AR portal on a monthly basis
- Project Manager = Director of Marketing
- Project Budget = \$X,000
- Project Deadline = X/X/2025
- Project Scope = Defines what deliverables are needed to achieve the outcome
- Project Plan = Lines up platform(s), resources, work / actions items needed to hit the scope, budget, and deadline
- Project Team = These are the people (in-house and outsourced) that will fill the job functions & execute the plan

# The B2B eCommerce Playbook

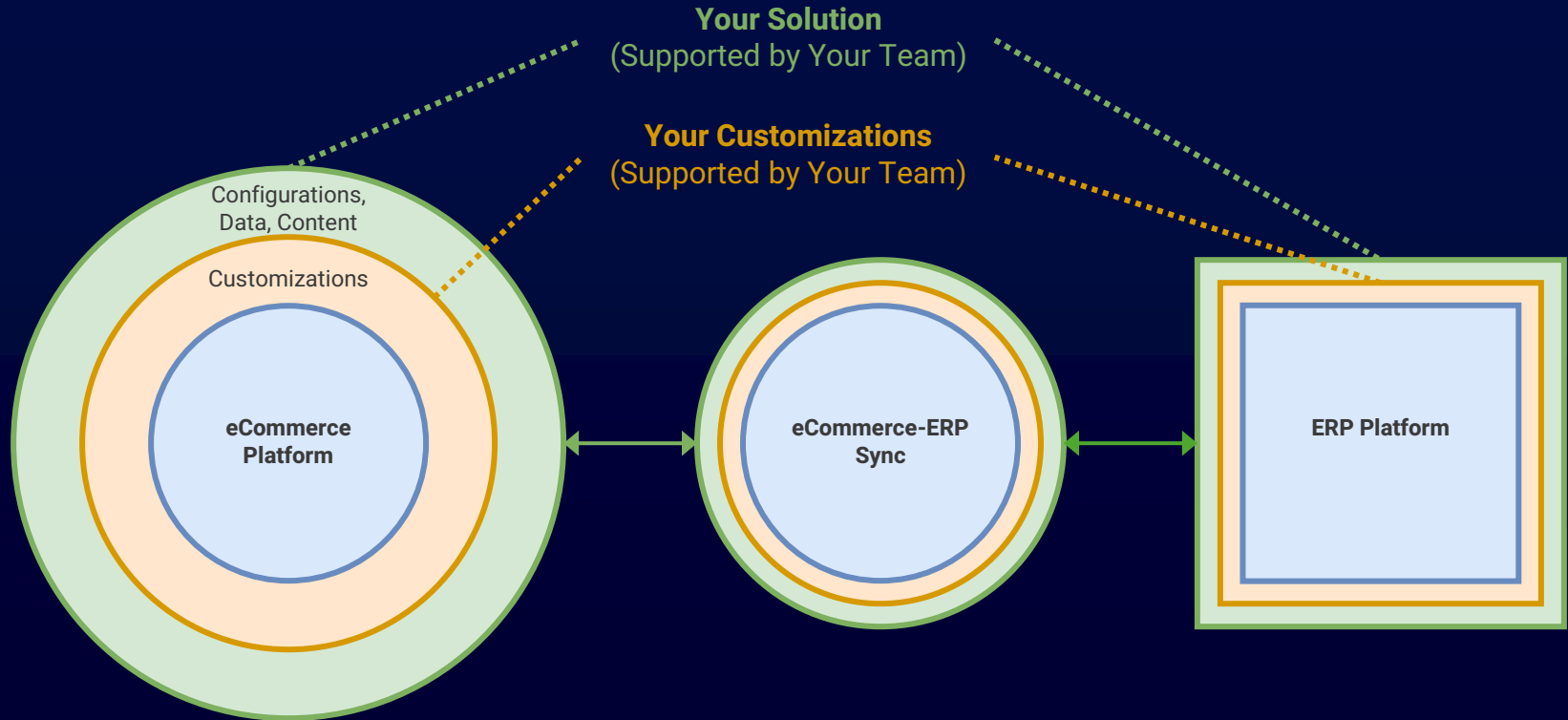
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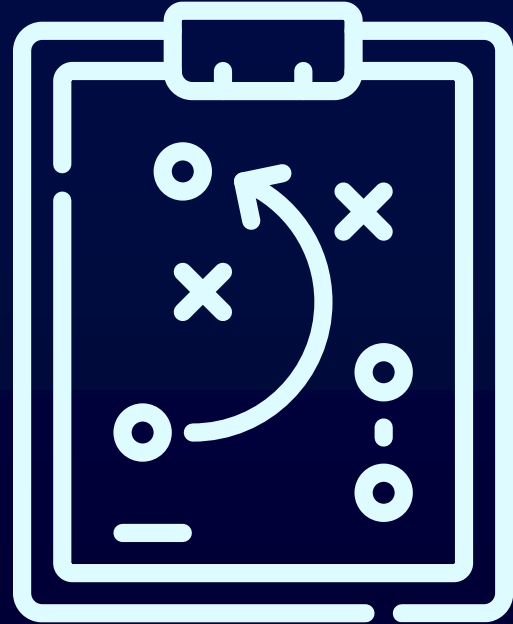
# Platform(s) vs. Solution



# The B2B eCommerce Playbook

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- The 4-Part Framework
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- **Critical Roles (“Hats”) To Fill**



## Critical Roles (“Hats”) To Fill

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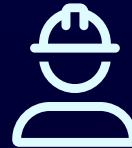
- Program Manager
- Lead Project Manager
- Project Planner
- Lead Solver: Solution Architect
- Lead Implementer & Lead Operator
- Onboarding & Adoption Specialist



# Critical Roles (“Hats”) To Fill

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- **Get It**
  - Understand The Role And Responsibilities
  - Have the Aptitude
  - Have the Skills / Abilities
- **Want It**
  - Want The Role
  - Enthusiastically Take It On
- **Capacity To Do It**
  - Have The Time
  - Have The Energy



# Program Manager

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**Program Manager** is accountable for delivering business results to the organization

## The “Musts”

---

- Be filled by 1 and only 1 person
- Be known (who it is) by all parties involved
- GWC the role
- Take on all key responsibilities

## The Key Responsibilities

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- Maintains a clear (written) vision and goals for the program
- Verifies you have the software platform(s) you need to carry out the vision
- Decides which projects to do and when to do them (including budget authority)
- Makes sure each approved project has clearly written goals, budget, and timeline
- Fills the critical roles (see below) on each project (especially the initial implementation), with people that GWC each role
- Fills the program and solution job functions with people that GWC each role (in-house or with contractors)

# Lead Project Manager

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**Lead Project Manager** is responsible for delivering the project goal on time and on budget

## The “Musts”

- Be filled by 1 and only 1 person
- Be known (who it is) by all parties involved
- GWC the role
- Take on all key responsibilities

## The Key Responsibilities

- Has a clearly written project goal
- Uses and manages/updates a written plan (i.e. tasks / work) to hit that goal
- Lines up the resources they need to work the plan
- Keeps the project running on time and on budget
- Addresses any issues that come up (by parking them or turning them into tasks)
- Manages changes (to the scope, timeline, and budget)
- Routinely communicates with the Program Manager and other key stakeholders on the project status and risks.

# Project Planner

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**Project Planner** creates a written list of tasks / work that must be done to complete the project

## The “Musts”

---

- Typically 1 person w/ lots of experience
- Be known (who it is) by all parties involved
- GWC the role
- Take on all key responsibilities

## The Key Responsibilities

---

- Clearly understands the project goal / deliverables
- Has deep domain knowledge of these types of projects (knows if / where their blinds spots are).
- Develops a written plan of tasks / work (WBS)
- Organizes the work in sequence, including identifying major milestones and key skills needed to complete the work
- Assists the Project Manager with modifying the plan if substantial adjustments are needed.

# Lead Solver: Solution Architect

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**Lead Solver** is responsible for designing solutions that will technically and commercially work

## The “Musts”

- GWC the role
- Take on all key responsibilities

## The Key Responsibilities

---

- Has strong technical and commercial awareness
- Understands the business goal / outcome
- Understands the customers / customer needs
- Understands the business / business needs
- Understands the platform(s) and solution
- Knows when to ask for deeper expert help
- Designs technical solutions that will work



# Lead Implementer (& Lead Operator)

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**Lead Implementer** creates sets up and manages the platform so it can deliver the goals

## The “Musts”

- Typically 1 person w/ tech skills
- Be known (who it is) by all parties involved
- GWC the role
- Take on all key responsibilities

## The Key Responsibilities

- Gains a deep understanding of the Platform
- Gains a deep understanding of the ERP sync / data moving
- Makes or coordinates strategy decisions on platform setup and configuration
- Executes the setup and configuration of the platform and/or oversees other Implementers handling areas of the setup / configuration

# Onboarding & Adoption Specialist

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**Onboarding & Adoption Specialists** is responsible for getting & growing platform usage

## The “Musts”

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- Can be 1 or more people
- Each has a target set of users that is known by them and all
- GWC the role
- Take on all key responsibilities

## The Key Responsibilities

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- Understand how to use the platform
- Understands the benefits of using the platform
- Design and executes promotions & tools to get Customers and/or Workers to use the platform
- Measures the growth of platform usage and is responsible for doing what is needed to hit goal usage numbers.
- Identifies & communicates gaps and needs (that, if solved, would result in more platform usages / adoption) to the Program Manager, Lead Operator, and Solver.

# Three Simple Steps

## 1. Assign Roles

**B2B Ecommerce Playbook - Org Chart (Key Roles / "Hats") Tool**

Instructions: Complete the "Name of Person" column with the person (or people) on your team!  
This outlines the 4 Part Framework: Program, Projects, Platforms, and Solution.  
This B2B eCommerce Success Playbook was developed and battle-tested through 1,000's of B2B  
For an overview (written and video) of the Playbook, go to: [Details]  
For a key responsibilities on each role, go to: [Details]  
It is important that the person Gets It, Wants it, and has C: [Details]  
The most critical roles to fill (i.e. the ones that, if not filled with a GWC fit, are most likely to cause

**Program**

These are roles involved in your long term / multi-year Ecommerce Program.  
Dream "North Star" goals of a Program: 1) Dominate Your Markets (Total Monopoly), 2) Maximize

Description	Name of Person / People	Need Help
Program Manager (1 and only 1 person) *		
Business Stakeholders		
Lead Solver: Solution Architect *		
Assistant Solver (ERP): Solution Architect		
Assistant Solver (Ecom): Solution Architect		

**Project**

These are roles or "hats" (many part-time) that need to be worn for each approved Project in your  
Projects have specific (written) goals, deliverables (the scope), a plan/WBS (tasks to deliver the  
Projects typically focus on 1 or both of these two general areas: 1) Get (implement) Capabilities  
Ecommerce platforms, by default, assume a self-service implementation where you (the client)  
i) already have or will gain a deep understanding of the platform and "roles" (by learning via s  
ii) will subcontract with expert help who has a deep understanding of the platform or the "role

Description	Name	Need Help
Lead Project Manager (1 and only 1 person per project) *		
Lead Project Planner		
ERP Access: IT / Network Admin Specialist		
Lead Solver: Solution Architect *		
Lead Implementor (Cloud Platform Administrator) *		

## 2. Confirm Goals

GROW SALES

DOMINATE  
YOUR  
MARKET  
(customer loyalty)

NOT HEADCOUNT

MAXIMIZE  
OPERATIONAL  
EFFICIENCY

## 3. Organize Project

**STAGE 1 - GETTING CONNECTED PROGRESS**

tasks completed. \_\_\_\_\_  
actions completed. \_\_\_\_\_  
not complete. \_\_\_\_\_

**COMPLETE YOUR DEPLOYMENT PREREQUISITES**

[Complete the ERP Sync Pre-install Checklist \(by IT / Network Admin Expert\)](#)  
[Complete the ERP Sync Configuration Questionnaire \(by ERP / Financial Data Expert\)](#)

**EMPOWER YOUR CORE TEAM**

[Empower the Program Manager](#)  
[Program Manager assigns the Other 4 Critical Roles](#)  
[Join the Working Group Document Form](#)

**PROGRAM MANAGER - GENERAL ORIENTATION CHECKLIST**

[Complete the Program Manager General Orientation Checklist](#)  
[Read a recap of What is Included in Your CIMcloud Quote](#)  
[Read an overview of The Implementation Process \(From Order to Go Live\)](#)  
[Read the "Abridged" version of the Program, Project\(s\), Platform, and Solution \(P\)](#)  
[Read \(and assign if any roles are still vacant\) The 5 Critical Roles \("Hats"\) for a Fa](#)  
[Review the Overview of the Platform \(and watch videos linked to each major area\)](#)  
[Read and understand How Teams Are Organized](#)  
[Review and understand the Ways You Can Get Help](#)

Intro ▾ Team (Org) ▾ Issues (IDS Topics) ▾ Ad-Hoc To Do's ▾

# Customer Testimonial: Dakota Red Corporation

It's Built with Midland

Masonry. Landscape.

[EXPLORE OUR GALLERY](#)



# Customer Testimonial: Dakota Red Corporation

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## The Brands

**KING'S**  
MATERIAL INC.

**M** MIDLAND  
CONCRETE PRODUCTS

## The B2B Challenge

- Multiple Brands
- Sell To Businesses
- Multiple Locations
- Inventory Availability
- Pricing By Customer + UOM
- Local Pickup / Delivery
- Acumatica Runs Ops

## The Winning Team

Program Manager

- Patrick Sauter

Lead Project Manager + Solver

- Marsha Swanson

Lead Implementer + Solver

- Brent Leis

Customer Adoption

- Amanda Wendling

Assistance Solvers

- Robby + Jack (Ecom Partner)

# Customer Testimonial: Van Dyk Recycling Solutions

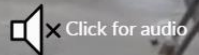
**We Consult and Sell Equipment to Help Recyclers  
and Waste Processors Maximize Profits**

[BOLLEGRAAF BALERS](#)

[RETROFITS](#)

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# Customer Testimonial: Van Dyk Recycling Solutions

## The Company



## The B2B Challenge

- Big & Small Businesses
- Inventory Availability
- Pricing By Customer
- Interactive Quote Workflow
- Punchout Catalog Workflow
- Acumatica Runs Ops

## The Winning Team

Program Manager

- Chris Bova

Lead Project Manager

- Jim Shapiro

Lead Project Planner

- Jack (Partner)

Lead Implementer/Operator

- Jim Shapiro

Lead Solver

- Charles (Partner)

# Customer Testimonial: Mold in Graphic Systems

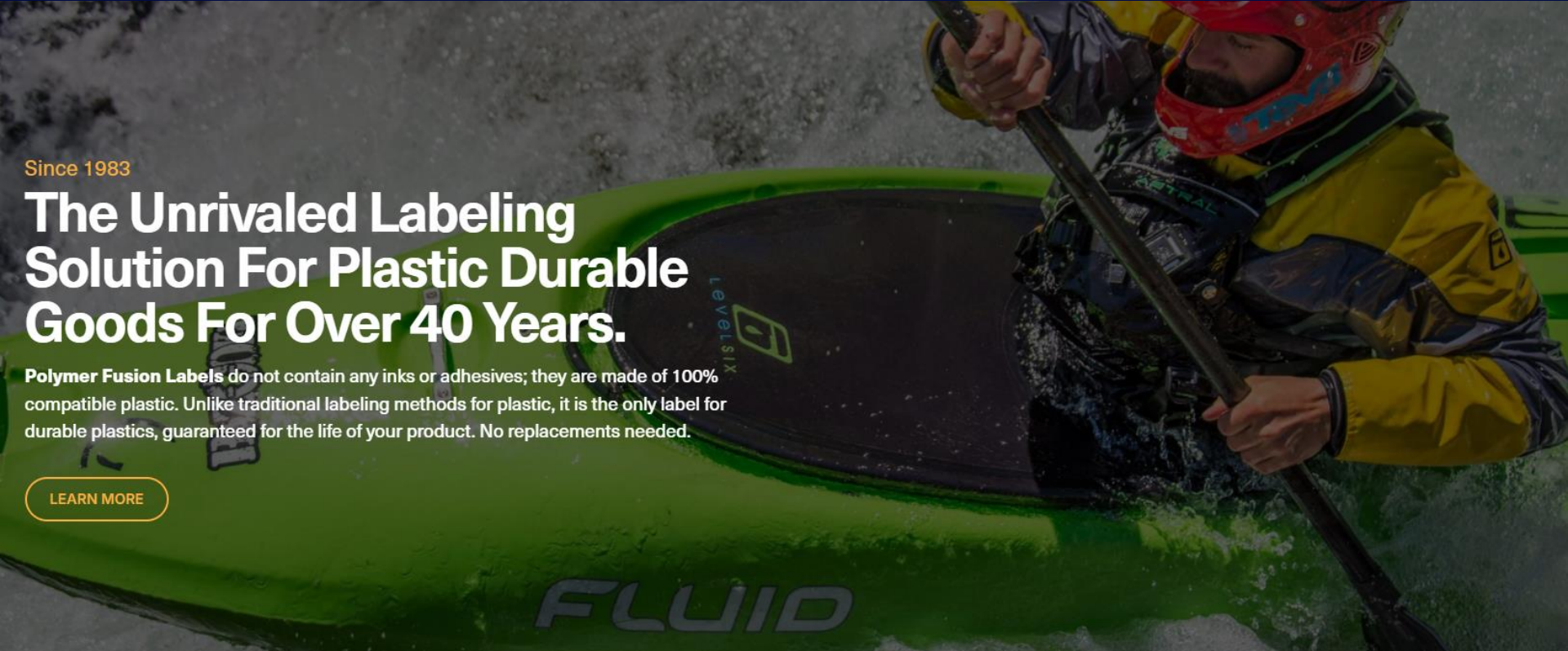
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# Customer Testimonial: Mold In Graphic Systems

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## The Brands



## The B2B Challenge

- Big & Small Businesses
- Customer-Specific Products
- Made to Order
- Custom Pricing (by Qty)
- Acumatica Runs Ops

## The Winning Team

Program Manager

- Marty Mares

Lead Project Manager

- Phillip Baird

Lead Implementer

- Jay Swartzfeger

Customer Adoption

- Emily Miller

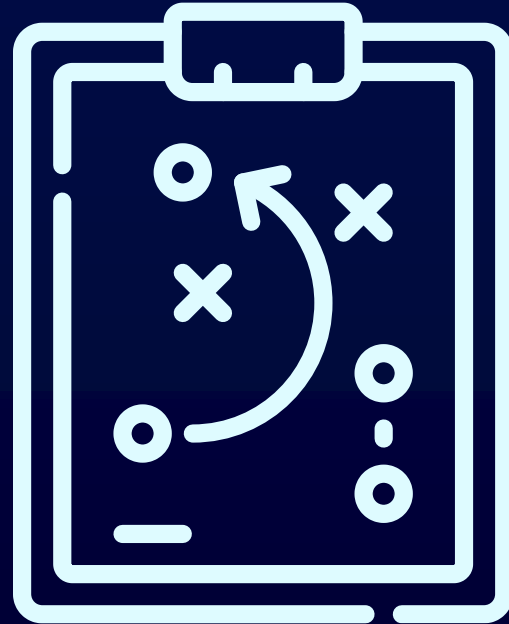
Solvers + Implementers

- Four13 Group (partner)

## Key Takeaways

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- Winning takes effort
- Write a multi-year goal (program)
- Write your project goal(s)
- Assign names to roles
- GWC fit on critical roles?
- Track project issues & tasks
- You can play to win!



# Q&A

**We want your feedback.**

Complete a survey in the Summit app for an entry to win one of these awesome customer prizes!

**Every survey completed = an entry to win!**

Item image  
here

Item Description 1

Item image  
here

Item Description 2

Item image  
here

Item Description 3

# Keep in touch!

**Brian Seidel**

LinkedIn:

[linkedin.com/in/brian-k-seidel/](https://www.linkedin.com/in/brian-k-seidel/)

X (formerly Twitter):

@briankseidel

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