

# How to Write an Effective RFP for B2B E-Commerce

# Introduction

Digital experiences in B2B commerce have been rapidly outpaced by B2C standards. While B2C companies are racing to provide more personalized and intuitive interactions, many B2B companies are still using paper and phone processes to place simple transactional orders. Most B2B commerce leaders know that this needs to change. The longer they wait, the more likely it is that their customers will start to leave for merchants that are easier to do business with.

Yet for companies that are taking their first steps into modern digital commerce (whether they have a green field opportunity or are replatforming a legacy system), the question of how to prioritize the available technology is a difficult one to tackle. This RFP guide, paired with a customizable RFP template, is designed to help your company identify the technology that will best serve your digital commerce strategy, both in the immediate future and as you evolve your site long-term. We recommend first reading this guide to gain an overview of the major considerations that will impact your RFP. Afterwards, review the features included in the RFP template and edit according to your own requirements.

If your download of this document didn't include the RFP template as an Excel file, please [download the full RFP kit here](#).

## Platform Approaches

There are several different breeds of B2B digital commerce platform, each influenced by its history and background. Each vendor's approach will impact the design of its platform and its roadmap. Approaches are often skewed towards serving Marketing, Sales and Service, or IT needs. Identifying the approach that best suits your business needs early will help you create a shortlist of vendors that match your requirements from the start.

## Experience-Driven Commerce

B2B commerce is arguably the defining element of B2B customer experience; some platform vendors have responded to this by bringing their expertise in Content Management Systems (CMS) or Digital Experience Platforms (DXP) into the digital commerce world. These vendors tend to offer all-in-one platforms that combine rich content, personalization, applied Artificial Intelligence and site building features with a robust commerce engine. Their strength is in allowing business users to handle the day-to-day work of managing a digital commerce site, from targeting content for audience segments to updating product catalogs to

optimizing page engagement across the site. By bringing content and commerce together into one platform, this approach equips business users to deliver a cohesive customer experience.

## Headless Commerce

A growing trend today is Headless Commerce, which removes the presentation layer from the digital commerce platform and frees front-end development teams to use any framework they prefer to build the end user experience. As emerging technology creates new market channels, taking a headless approach makes it easier to create experiences for screenless or non-standard size screens such as voice search or smart watches. Some headless commerce platforms also connect into traditional CMS frameworks to manage the front-end experience, leaving the commerce vendor to focus on transactional capabilities. The latter approach is particularly popular with vendors that started in the commerce space (rather than CMS or DXP) and saves them from trying to catch up with the robust experience management capabilities offered by leading DXP vendors.

Many platforms also offer a decoupled approach, in which they offer an integrated presentation layer as well as headless API support so that companies can choose which strategy to apply to which channel. This allows companies to use a full platform for the main digital storefront, but take a headless approach when piloting projects on emerging technologies. Because headless puts control of the end user experience in the hands of the IT team, this approach requires strong internal development support and collaboration with the marketing team to ensure a cohesive experience.

## Omnichannel

Within the context of B2B digital commerce, omnichannel refers to the role of the traditional sales and customer service teams in the buying process. A commerce platform that takes an omnichannel approach will usually start with an app or site designed for your sales and service teams to take and troubleshoot orders for B2B customers. If your buyers still primarily purchase through personal interactions, rather than through a self-service site, then vendors in this category may be a good fit. However, B2B buyers increasingly prefer to make the majority of their purchases through a self-service commerce site, so it would be wise to evaluate the broader capabilities of these vendors and ensure they align with your company's future direction.

## Build Your Own Suite

Finally, B2B commerce leaders may opt to build their own B2B commerce platform out of the multitude of point solutions that exist in the space. This approach is best suited for companies with strong IT leadership that can maintain custom integrations and code as systems are upgraded and new solutions are brought into the stack. For companies that have very complex commerce requirements or niche business models, this can be a strong approach that allows for more flexibility to bring in best-of-breed products as needed.

## B2B vs. B2C Platforms

Aside from approach, vendors can also be split into primarily B2B or B2C platforms. Many will claim that they support both, but their product development history will usually show that they started in one category, which has defined their customer base and the direction of their product development.

Vendors that began as B2B commerce servers tend to fall short in the content and experience management features that most companies need today. On the other hand, vendors that began as B2C commerce servers have often done minimal work to cover B2B functionality out of the box, requiring a significant amount of customization to make them truly serve B2B needs. Most B2B commerce leaders will find the most value in a B2B commerce platform that takes an experience-driven approach or is paired with a strong CMS solution to avoid developing and maintaining custom code for core commerce functionality.

## Core Commerce Platform vs. Point Solutions

There are many point solutions available in digital commerce that focus exclusively on one piece of the commerce experience. For example, Configure-Price-Quote engines provide the interface and logic to allow customers to configure their own product bundles and generate pricing on the spot, but they don't provide features for the rest of the commerce experience such as the full customer portal, customer communications and marketing capabilities. Those broader features should be covered by your core platform and supplemented with point solutions as needed.

Point solutions can be strategically brought into the areas of your business that require robust, specialized capabilities. If 80% of your business is earned through customized products, then a commerce platform that integrates easily with the

CPQ engine of your choice will be a must-have. If you're still growing your revenue through configurable products, then it's possible to start with a platform that covers basic CPQ functionality and bring in a more advanced solution later.

## Major User Personas

Once you've chosen the type of platform and approach that best matches your project, one of the most effective ways to customize an RFP for your needs is to lay out the commerce experience you envision by persona, then map each persona's requirements back to specific features. After that, you can break these requirements into phases that align with your resources and highest priorities. This ensures that you have a concrete vision for every feature you purchase and safeguards against overbuying from vendors that will try to upsell features you aren't ready to use.

These are the major user personas for most B2B commerce companies:

- **Customer Portal Users.** The bulk of your existing customers will purchase products online through a self-service site that includes account management, subscriptions, order history, shipment tracking and purchase approval workflows.
- **Public Website Users.** New prospects will discover your company and catalog through a public-facing site that is indexed by search engines and provides information on how to become a customer, or even allow guest checkout.
- **Marketing and Digital Store Users.** Marketers or commerce-specific roles such as catalog administrators will update and manage content, create landing pages, run marketing campaigns and optimize page designs for better engagement.
- **Sales Representatives.** Sales representatives may use the site to create and approve orders on behalf of the accounts they manage, suggest products to specific accounts or track their KPIs through a dashboard and reporting.
- **Customer Service Representatives.** Customer service representatives may use the site to communicate with customers via live chat, troubleshoot issues, make adjustments to pricing or initiate returns.
- **Analytics and Business Intelligence Users.** BI users may expect key metrics and reporting within the platform to help them track the health of the digital commerce channel and identify areas of improvement.

Identify which of these apply to your project and interview stakeholders within your company to understand must-have and nice-to-have requirements to include in your RFP.

## Other Areas to Consider

Successful technology projects require more than good software. Your RFP should also cover key information such as company history, customer references, available customer success programs, pricing model and the options for training and implementation services.

## Next Steps

### Start Your RFP

The attached Sample RFP Requirements focus on the core features that an experience-driven commerce platform should provide for most B2B scenarios, assuming that both content management and commerce features will be delivered in one platform and primarily used by non-technical users. However, requirements for Headless API support and Sales Rep support are included, as these are quickly proving to be strategically important to delivering a true B2B digital commerce experience.

Be sure to utilize the included [customizable RFP template](#) and adjust for your own business' needs.

### Learn More About Liferay

Liferay Commerce is an experience-driven B2B commerce platform that enables companies to create modern commerce experiences that are rooted in B2B customer needs. To learn more, visit [liferay.com/commerce](https://liferay.com/commerce).

# Sample RFP Requirements

| Design and Experience  | Vendor Response |
|--|-----------------|
| Support for mobile friendly or responsive design                         |                 |
| Customizable branding and user interface                                 |                 |
| Fast, accurate search of content and product data                        |                 |
| Catalogs, Products and Pricing   | Vendor Response |
| Catalog Design and Management  |                 |
| Category pages   |                 |
| Product detail pages   |                 |
| Master catalog   |                 |
| Multi-level category navigation  |                 |
| Faceted product search   |                 |
| Physical and digital products  |                 |
| Product Management   |                 |
| Capability to create product data feeds and syndicate to online channels |                 |
| Support for multiple units of measure                                    |                 |

|  |                        |
|--|------------------------|
| Support for multiple images per product  |                        |
| Automatic image optimization and resizing  |                        |
| Multiple variants/options per product  |                        |
| <b>Pricing</b>   |                        |
| Pricing at fixed, % margin and % discount levels   |                        |
| Support for bulk discounts   |                        |
| <b>Content Management and Marketing</b>  | <b>Vendor Response</b> |
| <b>Content Management</b>  |                        |
| Ability for business users to manage content and marketing tools independent of IT         |                        |
| Integrated Content Management System that supports blogs and content pages with rich media |                        |
| Integrated Digital Asset Management System   |                        |
| Ability to create new websites quickly   |                        |
| Unlimited page templates   |                        |
| Customizable landing pages   |                        |
| Form builder   |                        |
| Multilanguage and localization capabilities  |                        |



| Marketing  |                 |
|--|-----------------|
| GDPR compliant   |                 |
| Customer segmentation                                      |                 |
| Content targeting  |                 |
| Support for coupons with customizable codes                |                 |
| Configurable URLs  |                 |
| Automatic content recommendations (machine learning or AI) |                 |
| Automatic product recommendations (machine learning or AI) |                 |
| Personalized content and pages per customer segment        |                 |
| Role-based experiences                                     |                 |
| A/B testing  |                 |
| Account Management and Customer Roles                      | Vendor Response |
| Account registration                                       |                 |
| Password resets  |                 |
| Access order history, invoices and quotes                  |                 |
| Save multiple billing addresses and payment methods        |                 |

| Favorites lists or wish lists   |                 |
|---|-----------------|
| Subscription management   |                 |
| Custom roles and permissions for buying teams                             |                 |
| Ordering, Shipping and Taxes  | Vendor Response |
| Ordering  |                 |
| Display frequently ordered items  |                 |
| Order from history/reorder  |                 |
| Support for subscription ordering   |                 |
| Support for multiple currencies   |                 |
| Set order minimum and maximum levels                                      |                 |
| Email notifications regarding order status                                |                 |
| Rules for out-of-stock behavior, including pre-ordering and back-ordering |                 |
| Support for starting a purchase on mobile and completing on desktop       |                 |
| Single page checkout  |                 |
| Guest checkout  |                 |

| Shipping   |                 |
|--|-----------------|
| Allow customer to select shipping method                     |                 |
| Display shipment tracking information                        |                 |
| Support partial order deliveries                             |                 |
| Display real-time shipping costs at checkout                 |                 |
| Taxes  |                 |
| Support different tax rules per location                     |                 |
| Display tax calculation at checkout                          |                 |
| B2B Features   | Vendor Response |
| Customer or account specific pricing                         |                 |
| Customer or account specific catalogs and product visibility |                 |
| Multisite functionality                                      |                 |
| Multisite catalogs   |                 |
| Buyer workflows  |                 |
| Account hierarchies  |                 |
| Account groups and tiers                                     |                 |

|   |                        |
|---|------------------------|
| Quick Order and upload from list                                    |                        |
| Support for payment by invoice or PO                                |                        |
| Quote request and unpriced catalog items                            |                        |
| Support for tiered pricing  |                        |
| Support for multiple price lists                                    |                        |
| <b>Sales Representative Experience</b>                              | <b>Vendor Response</b> |
| Support for KPI dashboards  |                        |
| Allow representative to buy on behalf of customers with attribution |                        |
| Receive and respond to form-based requests                          |                        |
| Allow representative to access and update customer information      |                        |
| Add notes to orders   |                        |
| <b>Technical</b>  | <b>Vendor Response</b> |
| Describe the overall technical architecture of your platform        |                        |
| Support for cloud-based deployment                                  |                        |
| Environment support (Dev, UAT, Production)                          |                        |
| Headless support  |                        |

|  |                        |
|--|------------------------|
| Access to source code                                |                        |
| Audit trails   |                        |
| Federated identity and Single Sign On                |                        |
| Data encryption methods                              |                        |
| Support for batch and real-time data synchronization |                        |
| <b>Integrations</b>                                  | <b>Vendor Response</b> |
| Enterprise Resource Planning System                  |                        |
| Inventory Management System                          |                        |
| Warehouse Management System                          |                        |
| Configure-Price-Quote                                |                        |
| Tax Management System                                |                        |
| Payment Gateways                                     |                        |
| Search Solutions                                     |                        |
| Customer Relationship Management System              |                        |
| Marketing Automation                                 |                        |
| Live Chat  |                        |

|                           |  |
|---------------------------|--|
| Chatbot                   |  |
| Customer Service Platform |  |
| Loyalty Program Platform  |  |
| Social Media              |  |



Liferay makes software that helps companies create digital experiences on web, mobile and connected devices. Our platform is open source, which makes it more reliable, innovative and secure. We try to leave a positive mark on the world through business and technology. Hundreds of organizations in financial services, healthcare, government, insurance, retail, manufacturing and multiple other industries use Liferay. Visit us at [liferay.com](https://liferay.com).

© 2019 Liferay, Inc. All rights reserved.