



5 big challenges in B2B search

# The Bar Is Raised for **B2B Search**

As B2C shopping sets the tone, customers expect more personalization, more relevance, more... everything from B2B. Here's your punch list of what you need to solve these challenges.



Over the past couple of years, we've been bombarded with headlines about the dramatic rise in online B2C shopping during the coronavirus pandemic. But what has been less talked about is how the growing embrace of online shopping is now bringing transformation to the typically slower-to-change B2B world.

B2C shoppers have become used to the smooth, personalized experiences provided by digital giants such as Amazon and Wayfair. In turn, those consumers who make online B2B purchases at work are demanding better buying experiences as well.

In fact, according to current studies over **70% of B2B buyers** now expect a personalized, B2C-like experience from all websites.



# Personalization Starts With Search

Personalization in B2B online comes down to one thing: helping buyers get what they need faster. And that starts in the search box.

A website that delivers a personalized, relevant search experience ought to be akin to a knowledgeable and helpful sales rep. Like the salesperson, a website can:

- ▶ Get to know returning customers well and **anticipate their needs**
- ▶ Give customers information that **guides their purchasing decisions**
- ▶ Help customers sort out the options and **find exactly what they need**
- ▶ Tell customers about **other products** that fit their interests

All of that is a tall order in B2C. But creating ease and relevance in a B2B search experience is even more complex. In this guide, we'll explore the unique challenges of improving B2B search to keep up with customers' ever-higher expectations. We'll also take a look at the most effective approach to transforming B2B search.



Challenge

1

# Customer-Specific Pricing and Catalogs

When prices and product availability vary among customers, search gets complicated.

Jonathan and Megan work for two different trucking companies. They each are ordering parts needed for repairs in their fleets. They need the same parts, in the same quantities, and they're shopping from the same supplier. But Megan's company pays 20% less than Jonathan's does for a part. For another, Jonathan sees products in his search Megan doesn't due to underlying customer catalog entitlements.

Their experiences illustrate one of the biggest challenges in B2B search: customer specific pricing and customer specific catalogs. This is typically managed by product permissioning and entitlements in ERP and CRM systems — that house data outside the ecom platform.



Pairing custom pricing for different customers with the various options available on each product, creates a 'combinatorial explosion.'

**Vincent Bernard**, R&D Director at Coveo

B2B sellers often have different prices they've negotiated with different buyers. That's tough for search engines to handle — which is why buyers often only see pricing on a product detail page or worse, that confounded "Call for Pricing."

And then consider that the same products may not be available to every customer. "There might be export restrictions or regulations in different geographic areas or industries that impact availability to purchase," says Ryan Heusinkveld, EVP, Chief Delivery and Technology Officer at Smith Digital Consulting.

A great B2B sales rep knows that Megan and Jonathan each have different products and pricing available to them — and only mentions relevant options. Now websites need to "know" your customers too.



# Challenge 2 Availability

It's not good enough to show whether a product is in stock. Something that is tough for B2B merchants is factoring product availability into search.

Increasingly, customers expect to be able to narrow their searches to products available to ship within their desired window or to pick up at a brick-and-mortar location near them.

B2B sellers face those same challenges — and more:

- ▶ **B2B sales can involve larger quantities of items.** For example, a B2C customer might be buying a single office chair for their home, while a B2B customer is buying office chairs for an entire branch location.
- ▶ **Some B2B purchases are blanket or standing purchase orders.** The seller agrees to provide the customer with the same goods, at the same price, in recurring shipments over an agreed-upon period.
- ▶ **Buyers have gotten used to short lead times in their B2C transactions.** And they are bringing those expectations to their B2B purchases, along with combining their expectations to define a delivery date, not simply that it's in stock.

The screenshot shows a search results page for 'Hydraulics & PTO' parts. The page includes a 'Filter by Vehicle' section with dropdowns for Year, Make, Model, and Engine. A search bar shows '74709 items'. The results are filtered by 'Part Type: Hydraulics & PTO'. A product card for 'Buyers Hydraulic Accessory' is highlighted, showing a price of \$16.99/ea (original price \$23.66) and a 'Sign In/Register' button. The product card also displays 'Universal Fit' and 'Parcel Eligible' badges. Below the product card, there are three delivery options: 'Pickup Available in 1 to 5 business days', 'Local Delivery Not available for this item', and 'Ship to Me Delivery in 3-5 business days'. The product is also noted as 'Available in 1-5 Business days' and 'Check Availability at Other Locations'.



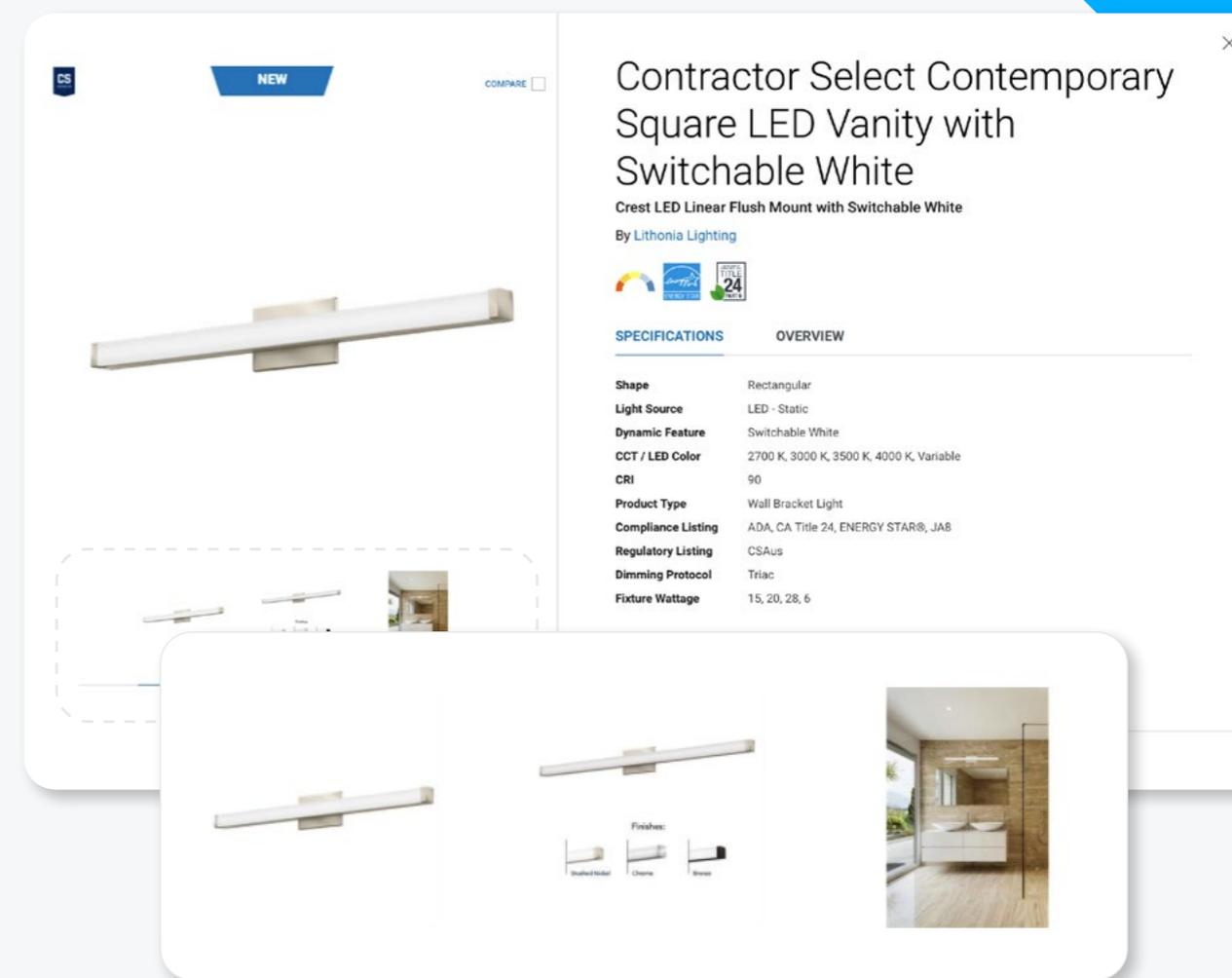
# Challenge 3 Complex or Configurable Products

With so many options, B2B search can feel overwhelming. Configurable products aren't unique to B2B, of course. For example, if you're buying furniture, you may have options to select fabrics, colors and maybe even the size of the couch.

A B2B item might have multitudes of additional options or features from which to choose. "You could have a group of 10 products that holds 10 variants each," says Coveo's Vincent Bernard. "So this single result set can mean you can buy 100 different variations of that object."

Now consider that many B2B purchases demand high precision. If a truck part isn't exactly what a B2B buyer needs, it could delay repairs on a vehicle — keeping it off the road longer, and costing the customer money. By enabling search to consume and index the variants of a product or the configurable options, a buyer can more easily search and filter to find the right product.

**With complex products, B2B search can be a balancing act. On one hand, you want to help the customer quickly hone in on the product and options they need. On the other, you don't want them to overwhelm them with choices early in their search.**

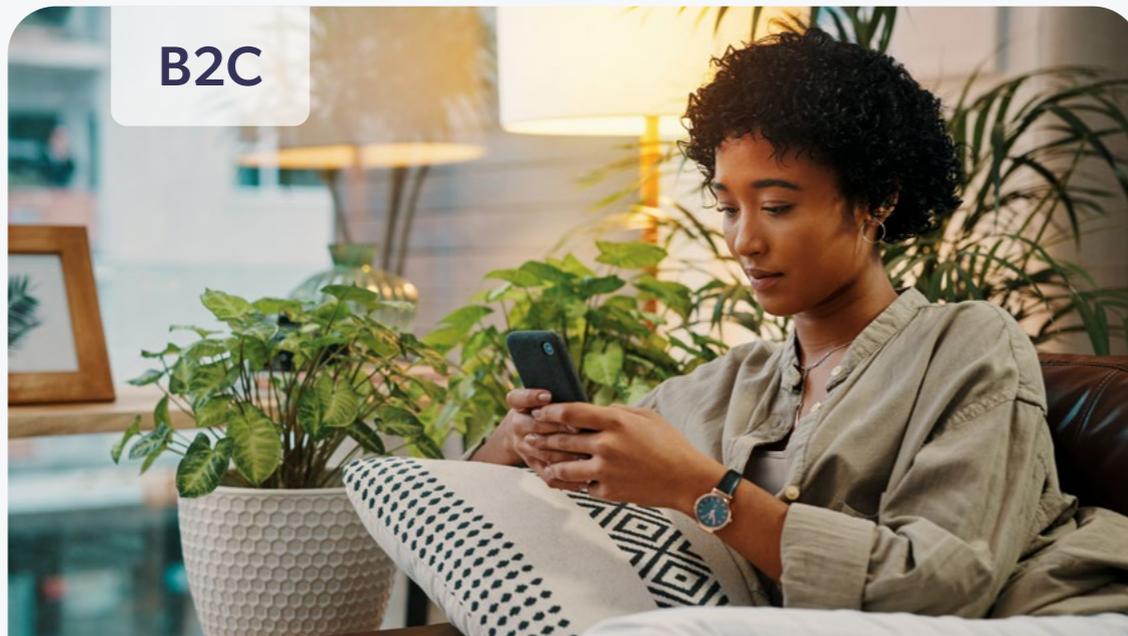


Challenge

# 4 Account-Level Buying

Another challenge for B2B that differs from the B2C search experience is relevance and personalization.

For a B2C merchant, the customer is typically one person. In the B2B world, the customer is an organization. And many people in that organization may be making purchases or involved in purchasing decisions. ([Gartner](#) has found that a complex B2B purchase typically involves six to 10 decision-makers.) So, as Smith's Heusinkveld explains, the search experience isn't personalized to an individual. It's personalized to that individual as a member of their organization.

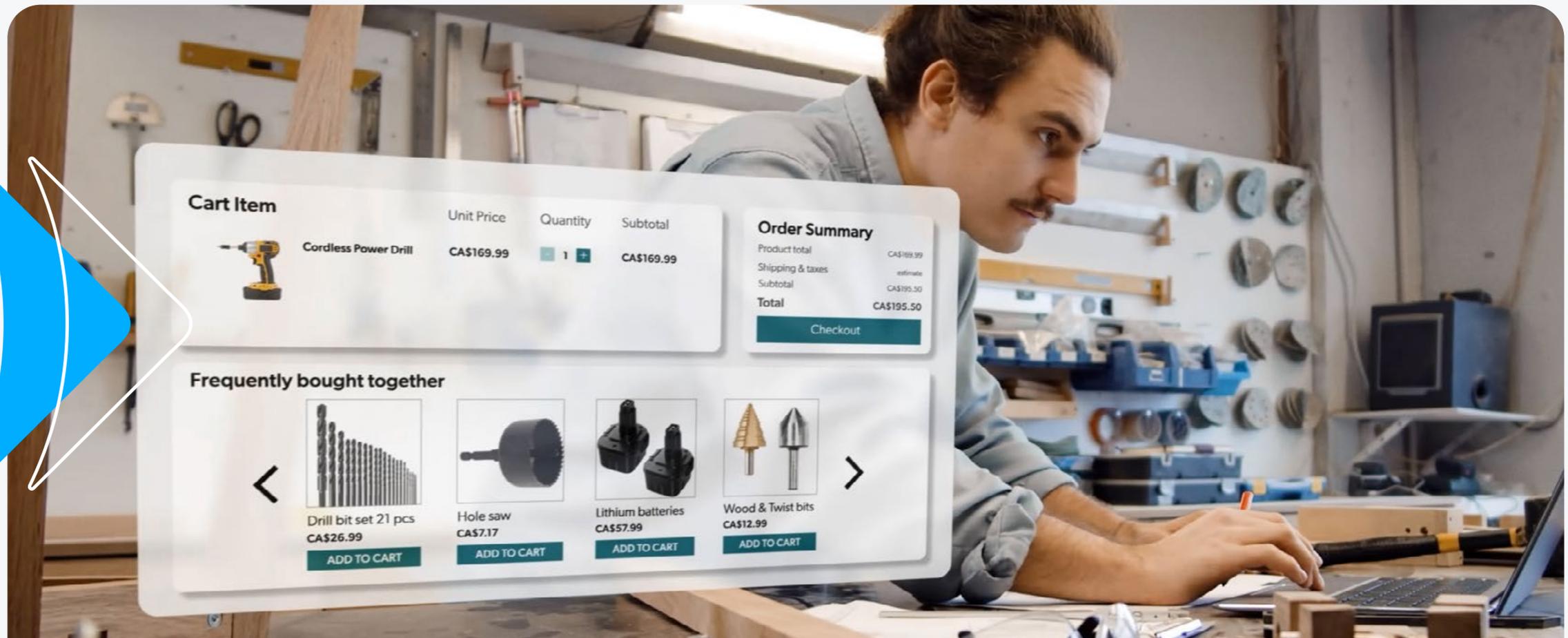


# Challenge 5 Help Them Find What They Need

Unlike your B2C brethren — your customers are more likely to sign in as an account. This gives you a leg up on what their intentions may be. What that means is rich behavioral history can be stored and impact each and every interaction.

A buyer for scientific or engineering equipment may not remember exactly what something is called — but may have a partial part number. Based on history that should influence

what comes up in the search results. If things aren't in stock, machine learning may be able to help your customers find similar items that other customers like them have chosen.

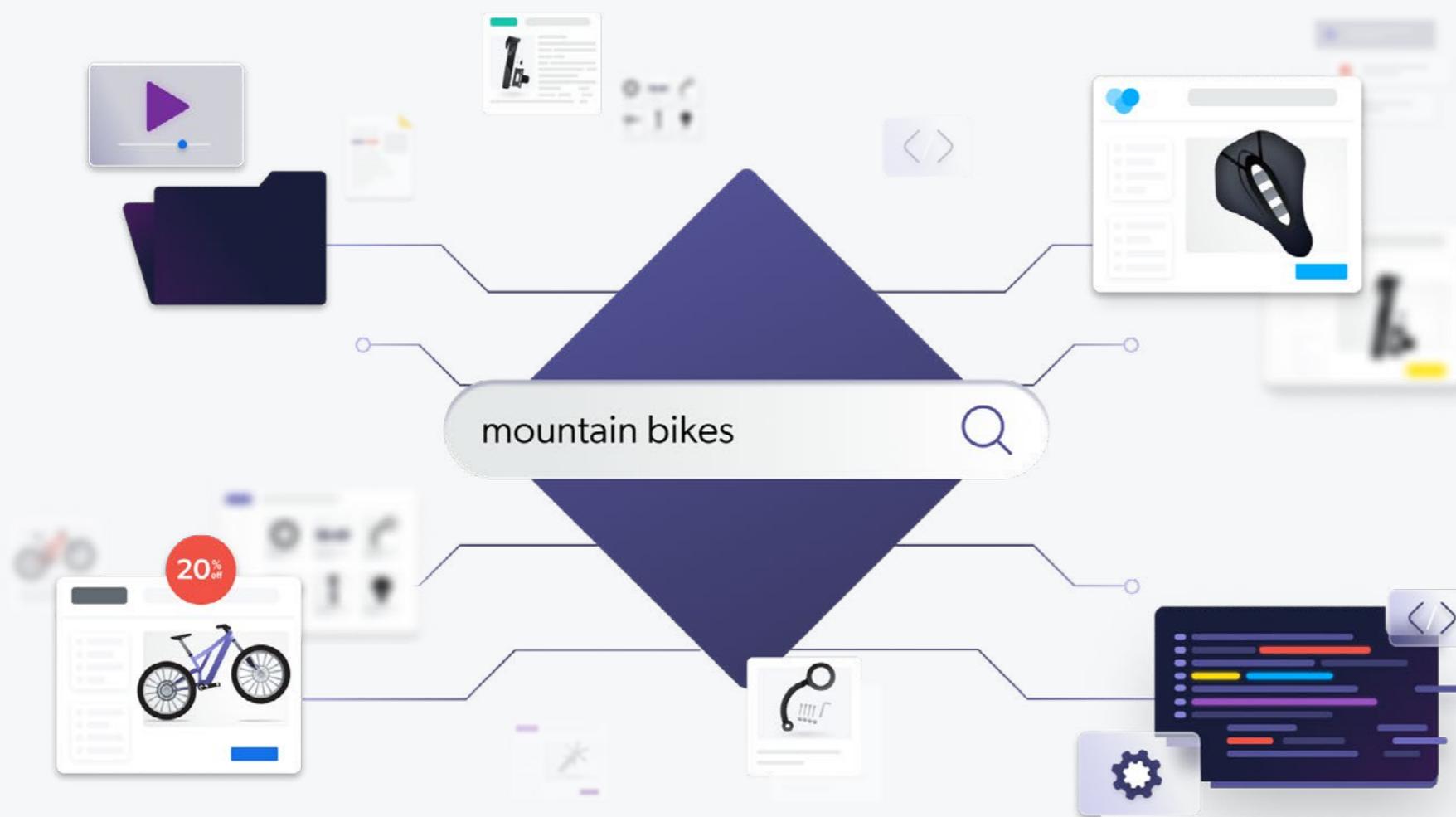


# The Way Forward With B2B Search

Now that we've explored the challenges in B2B search, let's answer the big question: Are there solutions?

The answer (thankfully!) is yes. But, as Smith's Ryan Heusinkveld and Liz Duggan, SVP, Commerce & Industry Solutions explain, improving B2B search requires a big-picture approach. Think macro, not micro. In other words, it's a lot more effective to implement an across-the-board solution than to tackle the issues we've discussed here individually.

Answering all these challenges requires calling in the technological big guns. There's just no way to throw enough people at the complexities of B2B search. What can wrangle them? Artificial Intelligence (AI).



With AI, B2B experiences can rise to customer expectations.



# How AI Impacts B2B Personalization

With AI and machine learning, the B2B search experience becomes a lot different — and a lot more like B2C shopping or B2B buying with the help of a sales rep. So what can AI-powered B2B search do?

Here are just a few examples:

- ▶ **Offer the customer personalized results** based on custom pricing and customer specific catalogs, ensuring that products, items and prices are correctly shown to different groups.
- ▶ **Recognize the customer's buying patterns**, anticipate their needs and speed their path to those products.
- ▶ **Lead the customer to informative content** that helps guide their complex purchase.
- ▶ **Show the customer whether the items they need are in stock** at the seller's warehouse or distribution location near them.
- ▶ **Allow buyers to narrow a set of results as they go**, with the facets dynamically reordering and changing based on the product category and filter selections.
- ▶ **Deliver recommendations to the customer** based on what others in their organization have bought.



As you go through that complex selling journey, we're simplifying that, guiding them through that sale, driving confidence because of the accuracy and the results of that engagement.

When customers can find exactly what they need, and find it faster, that drives both conversions and long-term loyalty.

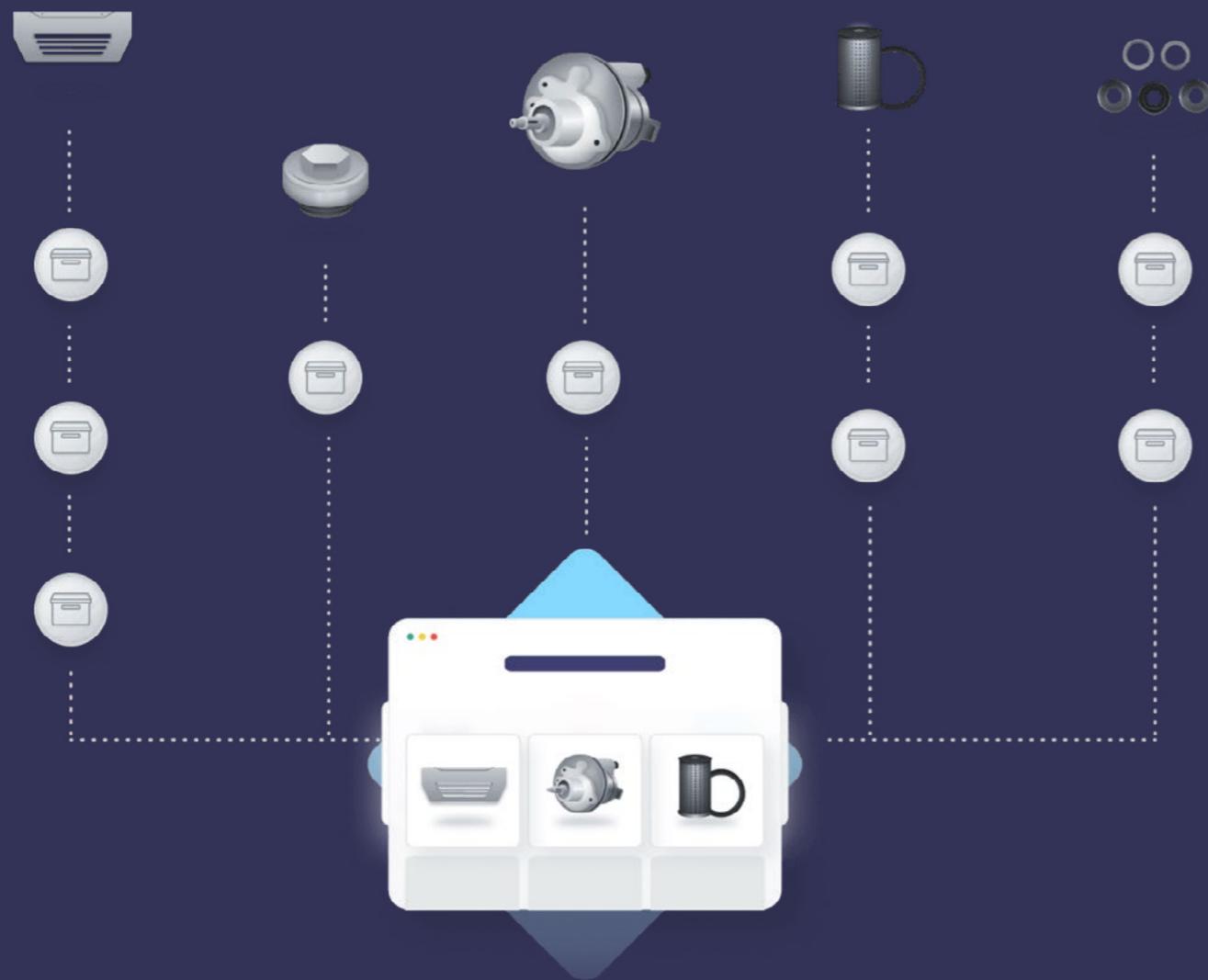
**Liz Duggan**, SVP, Commerce & Industry Solutions at Smith



# Your B2B Search Platform

The challenges listed above are rampant in the industry — and solutions have traditionally been a mix of managing by spreadsheet, human intervention, creating lots of rules, or just ignoring the problems.

To earn your buyers' loyalty and improve lifetime value, look for a platform that can leverage these capabilities.



## 1. Unified Index

With supply chain issues, buyers are looking for alternative products and need to find different types of information that can help them complete their purchases. Robust product search requires an aggregated and unified index of not only your product catalog, but relevant descriptions, technical specifications, video tutorials, product/marketing collateral, maintenance information.

## 2. B2B Search

To keep buyers from bouncing, you need very precise search. Unlike B2C consumers, in a B2B scenario search by SKU is an expected behavior, even if the SKU is not entered perfectly (e.g. spaces, underscore). You need to make it possible to apply precision to product types, categories, numeric attributes, or attributes to support part number search, fitment, brand searches, and more.



### 3. User Behavioral Signals

B2B buyers emit real-time signals as they research and evaluate. Machine learning should be capturing, learning, and re-ranking results as buyers interact with the search engine, navigation, product collateral. This should be done in aggregate (historic signals of what all users have done and led to successful outcomes) as well as by user sign-in (in real time).

### 4. Advanced Machine Learning

Best-in-class B2B relevance platforms handle large and complex catalogs (millions of products with thousands of attributes), advanced machine learning helps in both findability and discoverability. Look for critical capabilities such as dynamic navigation, automatic relevance tuning, and intelligent faceting — which lets one narrow down a set of results as they go, with the facets dynamically reordering and changing based on your query.



Add a Catalog ?

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Name  
acme\_engines

The catalog name must be unique. Editing an existing catalog's name will cause all search interfaces referencing it to cease working.  
Description (Optional)

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**Object Types**  
Select the object types your catalog should include

- Variants  
For when one product has different variations, such as size.
- Availability  
For when you need to manage product selections for stores or customer entitlements.

**Catalog Content**

Stores (PUSH) ▼

- Use a different source for availabilities

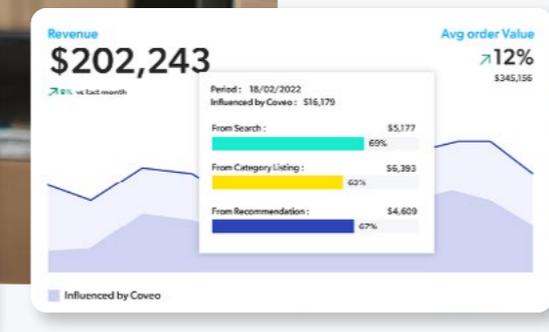
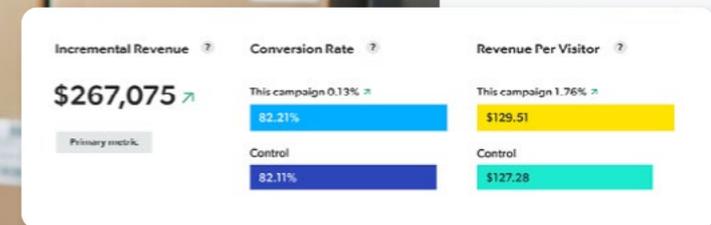


## 5. Site Search Analytics

In addition to tools that measure click through rate, conversion rate and average order value, don't forget site search analytics. This answers: What did buyers search for? What are you learning about them and their needs? Did they find the product they were looking for — or leave your site? Do their experiences suggest any improvements to your product portfolio? The answers can help you fill gaps in your content strategy to deliver a better experience and help you determine the best strategy for driving more conversions.

## 6. Seamless Repurchasing

B2B buyers are often return customers, so it is critical to have capabilities to facilitate repeat purchasing. B2B Ecommerce relevance platforms must provide buy-again recommendations based on purchase history to remove friction and let B2B buyers quickly add to cart what they need and get back to their day.



## Learn more about Smith

Smith is a performance commerce agency that designs and develops digital solutions, enabling over 500,000 transactions around the globe each day. With over 20 years of commerce expertise and an industry-leading blend of creative, analytical, and technical skills, we create innovative solutions that enhance customer experience, accelerate digital sales and optimize operations. A relentless focus on outcomes guides us as we partner with clients to create commerce experiences that help them thrive in the global economy, driving over \$38 billion in revenue each year.

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## Learn more about Coveo

Coveo is a world leading cloud-based relevance platform. The Coveo Relevance Cloud™ uses applied AI to deliver relevant experiences in all digital interactions, from search to recommendations to personalization.

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