

# Mastering Platform Selection

**For manufacturers,  
wholesalers & distributors  
selling online**

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# **Introduction: Setting the Stage for Success**

Choosing the right B2B eCommerce platform is critical—but not for the reasons many might think. “Right” doesn’t mean the platform with the most features or the best sales pitch. It’s about finding a solution that aligns with your unique business needs, both now and in the future, while considering your constraints like time and budget.

For many, this process feels overwhelming. If you’ve done it before, you know how much has changed. If you haven’t, it can seem like an insurmountable task. The real challenge lies in navigating conflicting advice, glossy sales materials, and opinions shaped by bias toward specific platforms.

The common approach to platform selection — get some quotes, do an RFP, and run a few demos — sounds straightforward but often misses the mark. Much of the advice you’ll find online is designed to sell you something. It’s rarely neutral or pragmatic.

In the B2C world, platform selection is largely feature-driven because the buyer journey is predictable: visit the site, add to the basket, and check out. But B2B eCommerce is a different beast. Complex sales processes, unique products, and intricate supply chains mean a one-size-fits-all approach simply doesn’t work. Your platform needs to adapt to your business, not the other way around.

You’ll hear many vendors and agencies talk about “Discovery” as the first step in the process. But this guide challenges that notion. Step 1 isn’t Discovery — it’s understanding your needs. By focusing on this critical stage, you’ll set a strong foundation for every subsequent step, ensuring your platform aligns with your goals and transforms your business.

This guide is built on nearly 15 years of experience running Rixxo, a B2B eCommerce consultancy, and working with wholesalers, manufacturers, agencies, and platforms. But it doesn’t stop there. I’ve also gathered insights from other industry veterans — agencies, platforms, systems integrators, and merchants — who’ve shared their experiences and best practices.

**Together,  
we’ll help  
you navigate  
the process  
of choosing  
the right B2B  
eCommerce  
platform for  
your business.**

# **The Problem with RFP in B2B eCommerce Platform Selection**

If you've researched B2B eCommerce platform selection, you've likely come across the term "RFP" (Request for Proposal). It's often touted as the cornerstone of the selection process—a formal way to outline requirements, evaluate vendors, and make a decision. But in practice, traditional RFPs often fall short, especially in the complex world of B2B eCommerce.

## Here's Why Traditional RFPs Are a Problem

### 01. Too Feature-Focused

Traditional RFPs tend to be exhaustive checklists of platform features. While features are important, they often lead businesses to focus on what a platform can do rather than what it needs to do. This feature-led approach risks choosing a platform that looks good on paper but fails to address your unique business requirements.

### 02. Lack of Context

Many RFPs fail to provide vendors with a clear picture of the business processes, goals, and challenges driving the need for a platform. Without this context, vendors respond with generic solutions that may not align with your business needs.

### 03. Bias Toward "Shiny Objects"

Sales pitches often highlight cutting-edge features and trends, steering your attention away from what actually matters: scalability, integration capabilities, and alignment with your workflows. These "shiny objects" can distract from the core purpose of the platform.

### 04. Neglect of Internal Processes and People

Traditional RFPs focus almost entirely on the platform itself, neglecting critical factors like your internal workflows and the team that will use and manage the platform. Misalignment here can lead to frustration, inefficiency, and resistance to adoption.

### 05. Time-Consuming and Inefficient

The back-and-forth involved in traditional RFPs often creates a lengthy, convoluted process. Businesses invest significant time without ensuring that the chosen platform truly meets their needs.

# Why This Matters in B2B eCommerce

Unlike B2C, where customer journeys are relatively uniform, B2B businesses have highly complex sales processes, unique pricing models, and intricate integrations. A one-size-fits-all platform selection approach is inherently flawed in this context. Traditional RFPs do little to address these nuances, often resulting in platforms that require heavy customisation, expensive workarounds, or, worst of all, re-platforming shortly after implementation.

## A Better Way Forward

This guide introduces an alternative approach to RFPs—one that focuses on understanding and communicating your needs first. By shifting the emphasis from a feature checklist to a needs-driven process, you can ensure alignment between your business goals and the platform you select.

**This new method not only shortens timelines but also positions you as the leader in the decision-making process, with clear goals and realistic expectations.**

# 01

## **Preparing for RFP: Understanding Your Needs**

Choosing the right B2B eCommerce platform isn't just about technology – it's about aligning **people, platforms,** and **processes** to create a seamless and scalable solution. These elements don't exist in isolation; they must work together, supported by the glue that holds everything together: **integration**.

## People

The teams within your organisation and your external partners, who bring the expertise, knowledge, and skills to drive the project forward.

## Platform

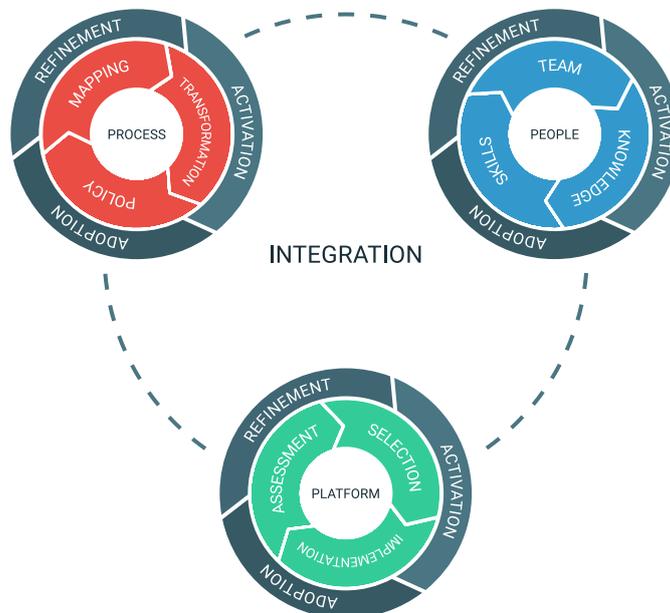
The eCommerce technology itself, is chosen not for its shiny features but for its ability to meet your specific needs and support your business goals.

## Process

The workflows, customer journeys, and operational steps that define how your business runs, which must be understood and adapted for a successful transformation.

## Integration

The critical element that ensures these three pillars – people, platform, and process – work together harmoniously.



This guide builds on these pillars to help you move beyond traditional, feature-driven platform selection methods. By focusing on your unique business needs and creating alignment across these areas, you can transform a daunting decision into a strategic advantage.

# Readiness:

## Why understanding needs is more important than what a platform does

In B2B commerce, understanding your business needs is more important than focusing on the features of a particular platform. The sources emphasise that the platform itself is only one part of a successful B2B commerce strategy and that many platforms offer similar capabilities. Focusing too much on features can lead to selecting a platform that doesn't meet the unique needs of your business. Instead, you should prioritise understanding your business processes, customer needs, and overall goals.

### Here's why understanding your needs is paramount

#### Platforms are becoming increasingly commoditised

Over the past decade, many B2B commerce platforms have converged in terms of functionality, offering similar core features. This means the platform itself is unlikely to be a source of competitive advantage.

#### Your business has unique complexities

Each B2B business has its specific processes, pricing structures, customer segments, and integration requirements. No platform will perfectly match these out of the box, so you need to understand what customisation will be required and whether the chosen platform can support it.

#### Successful implementation relies on aligning technology with your processes

Technology should support and enhance your existing workflows, not force you to change them entirely. If you don't clearly understand your needs upfront, you risk implementing a platform that creates more problems than it solves.

#### Customer experience is paramount

B2B buyers have increasing expectations for personalised, efficient, and user-friendly online experiences. Meeting these expectations requires a deep understanding of your customers' needs and pain points, which should drive your platform selection and implementation strategy.

By focusing on your business needs first, you can select a platform that serves as a foundation for achieving your specific goals rather than a limiting factor. **This means:**

### **Investing in a thorough readiness process**

Over the past decade, many B2B commerce platforms have converged in terms of functionality, offering similar core features.

This means the platform itself is unlikely to be a source of competitive advantage.

### **Defining clear success metrics**

This allows you to measure the effectiveness of your B2B commerce strategy and determine whether the chosen platform is delivering the desired return on investment.

### **Documenting your business processes and customer journeys**

This provides clarity for both internal teams and potential vendors, helping to identify areas for improvement and ensure that the chosen platform can support your desired workflows.

Remember, the goal of B2B commerce is not to implement the platform with the most features, but to use technology to drive business growth and enhance customer experience. By prioritising your needs, you can ensure that your platform selection and implementation strategy are aligned with this ultimate objective.

## **Identifying Your Business Needs**

### **The Unspoken and Forgotten Stage**

The first step in selecting a B2B eCommerce platform isn't about sending out RFPs or running demos — it's about preparing yourself. This stage is often overlooked because it doesn't feel like tangible progress. However, skipping this critical step can lead to missed opportunities, misaligned goals, and costly mistakes down the road.

Before diving into quotes or sales presentations, you need to step back and assess your business from all angles. This unspoken stage sets the foundation for everything that follows, ensuring your platform decision isn't just about technology but about enabling sustainable growth.

## Identifying Current Challenges in Your Business

What pain points is your business currently experiencing? What's slowing down your processes, frustrating your customers, or holding back growth? Identifying these challenges is the starting point for understanding your needs.

Take the time to map out where things aren't working. Maybe it's a lack of scalability in your existing system, inefficient workflows, or poor integration with other tools like your CRM or ERP. Knowing these pain points will help you narrow down what your platform must solve to be successful.

## Defining "Success" for Your eCommerce Platform Project

Success isn't just about getting the platform up and running—it's about achieving specific, measurable outcomes for your business. Define what "success" looks like for your eCommerce strategy.

This could include:

**Reducing manual workflows through automation**

**Increasing revenue by enabling new sales channels**

**Improving customer satisfaction by offering a better online experience**

**Streamlining inventory and order management**

**Having a clear vision of success ensures every decision you make is aligned with these goals.**

# Engaging Stakeholders: Why It Matters

One of the most common reasons platforming and re-platforming projects fail is the lack of stakeholder involvement. Your platform will touch many areas of your business, from operations to marketing, IT, and sales. Leaving key voices out of the conversation can lead to gaps in understanding, misaligned goals, and resistance to adoption.

**Don't forget your customer.** They are one of the most important stakeholders in this process. Their expectations for usability, speed, and reliability should be at the heart of your decisions. A platform that doesn't make their lives easier is unlikely to succeed, no matter how advanced or feature-rich it is.

Additionally, consider appointing "digital ambassadors" within your team. These are individuals who deeply understand your business processes and can serve as champions for the project. Their role is to bridge communication gaps, ensure alignment between departments, and advocate for the platform's success from planning through implementation.

## Learning from Real-World Examples

We'll explore the role of **People** in greater detail when discussing project teams later on, but for now, here are two examples that highlight the importance of stakeholder engagement:

### Example 1: A Missed Opportunity

A business invested in a headless front-end to achieve cutting-edge speed and flexibility. However, the marketing team and SEO agency weren't engaged during the planning phase. As a result, critical SEO implications went unnoticed, causing delays and costly changes.

The project suffered not because of bad technology, but because the right stakeholders weren't consulted early enough.

## Example 2: Customer-Centric Design

Another business made customer involvement a priority. They invited key clients to provide feedback on early prototypes and workflows, uncovering friction points and unspoken needs.

By incorporating this input, the business launched a platform that solved real problems, resulting in high adoption rates and glowing customer feedback.

## Why It Matters

Engaging stakeholders isn't just about avoiding conflict; it's about building a platform that aligns with your entire business. By involving the right people early—especially your customers and internal advocates—you can anticipate challenges, bridge knowledge gaps, and ensure everyone is aligned toward shared success.

# Avoiding Common Pitfalls

**TLDR Without proper preparation, it's easy to fall into traps that derail platform selection:**

### Focusing on Features Over Needs

Don't let shiny objects distract you from your core requirements.

### Rushing Through Preparation

Skipping the readiness phase often leads to lengthy implementation delays and costly changes later.

### Neglecting Stakeholders

Ensure everyone impacted by the platform has a say, from employees to customers.

Without proper preparation, it's easy to fall into traps that can derail your platform selection process. On the following page you'll find some of the most common pitfalls and how to avoid them.

## Focusing on Features Over Needs

It's tempting to be dazzled by platforms showcasing impressive features or the latest trends—whether it's advanced AI, flashy dashboards, or augmented reality tools. But do these features solve your business problems?

01

### The Trap

Selecting a platform with features you don't truly need while neglecting the functionality critical to your success.

### The Solution

Focus on your core requirements. Clearly define what "success" looks like for your platform and evaluate each feature against that benchmark. Remember, the best platform is the one that aligns with your business needs, not the one with the most bells and whistles.

## Neglecting Stakeholders

A platform will touch many areas of your business, yet key stakeholders are often left out of the decision-making process. Whether it's your marketing team, sales reps, IT department, or even your customers, their insights are critical to ensuring the platform meets everyone's needs.

02

### The Trap

Overlooking input from critical stakeholders leads to misalignment, frustration, and resistance to adoption.

### The Solution

Engage stakeholders early. Schedule workshops, interviews, or surveys to gather their insights. For example, your marketing team might flag SEO implications, while your customers might highlight features like streamlined ordering or detailed product data. Their input helps avoid blind spots and ensures buy-in across the board.

## Rushing Through Preparation

Under pressure to meet deadlines or budgets, businesses often rush through the readiness phase, assuming they can “figure things out later.” Unfortunately, this often results in unclear requirements, misaligned expectations, and costly rework during implementation.

# 03

### The Trap

Skipping the readiness phase leads to delays, ballooning budgets, and unmet expectations when the platform doesn't align with your workflows.

### The Solution

Invest time in preparation. Map out your workflows, define your requirements, and create clear success metrics. While it may seem like a longer upfront investment, it saves significant time and resources later.

## The Cost of Falling Into These Traps

The consequences of these mistakes can be severe — wasted budgets, delayed timelines, and, in the worst cases, the need to re-platform shortly after implementation. Avoiding these pitfalls isn't just about making better choices; it's about creating a foundation for success that ensures your platform becomes a powerful enabler for your business, not a source of frustration.

By keeping your focus on needs, engaging stakeholders, and committing to thorough preparation, you'll avoid these common pitfalls and set your business on the path to a successful platform selection and implementation journey.

# The Ongoing Benefits of Understanding and Communicating Needs in B2B Commerce Projects.

Investing in a clear understanding of your business needs upfront yields long-term benefits that can transform your B2B eCommerce strategy. **Here's how:**

## 01. Enhanced Customer Experience

- **Meet Expectations:** Tailor your platform to provide features like customer-specific pricing, bulk ordering, and seamless navigation
- **Reduce Friction:** Eliminate pain points in the customer journey, making ordering, payment, and support interactions smoother.
- **Drive Loyalty:** Simplify your customers' processes to keep them coming back.

## 02. Improved Operational Efficiency

- **Streamlined Workflows:** Integrate your platform into existing systems with minimal disruption, reducing manual effort.
- **Lower Customisation Costs:** Choosing the right platform from the start minimises costly and time-consuming adjustments.
- **Data-Driven Insights:** Collect and analyse relevant data to make better decisions on pricing, promotions, and inventory management.

### 03. Increased revenue & growth

- **Expand Sales Channels:** Reach more customers by tailoring your platform for omnichannel selling—direct commerce, marketplaces, or sales-assisted platforms.
- **Strengthen Relationships:** Build trust by offering a consistent and personalised experience across all touchpoints.
- **Adapt to Change:** Stay competitive by quickly responding to evolving customer demands and market trends.

### 04. Successful Technology Implementation

- **Informed Decisions:** Clearly defined needs help evaluate platforms and ensure the right choice for your business.
- **Stronger Collaboration:** Open communication fosters alignment between internal teams, vendors, and implementation partners, avoiding misunderstandings.
- **Smoother Rollouts:** A well-planned strategy reduces delays and ensures your platform is set up for success from day one.

## Now you are ready to start an RFP

Preparing for an RFP isn't just about filling out a checklist or identifying features. It's about deeply understanding your business, aligning your people, platform, and processes, and communicating your needs clearly. By doing so, you'll not only simplify the platform selection process but also set yourself up for long-term success.

# 02

## Communicating Your Requirements

# Crafting a Clear and Concise Requirements Document

Effective communication starts with a strong foundation: **a project charter**. This document acts as a north star, aligning everyone involved and ensuring a shared understanding of the project's goals, needs, and expectations.

## Project Charter

- Define overarching goals and objectives
- Outline the current state, including a gap analysis
- Conduct risk assessments and establish mitigation strategies
- Specify project management procedures, budget recommendations, and a process for resolving disagreements
- Treat the charter as a living document, updated as the project evolves

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## Write for Yourself

Your requirements document should reflect your team's understanding of the business needs, articulated in clear, actionable terms. It's not about impressing vendors; it's about ensuring internal clarity.

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## Avoid Assumptions

Assume nothing is obvious. Over-communicate and be explicit to eliminate potential misinterpretations by vendors or team members.

# Defining “Satisfied”: Setting Expectations for Vendors

A well-defined requirements document directly impacts the success of the RFP process. By clearly articulating what you need, you make it easier to evaluate vendor responses programmatically, rather than relying on subjective interpretation.

## Specificity Over Ambiguity

Replace vague language like *should*, *could*, or *might* with *must* and *will*.

### Example

Instead of saying “*should improve site speed*,” say: “*Page load time must not exceed 2 seconds under peak traffic conditions.*”

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## Acceptance Criteria

Define measurable outcomes for each requirement.

### Example

**Requirement:** “*The platform must support customer-specific pricing.*”

#### Acceptance Criteria:

1. Customers see their pricing tiers upon login
  2. Discounts apply correctly for bulk orders
  3. Pricing updates sync within 24 hours
- 

## Conflict Resolution Plan

Incorporate a clear process for handling disagreements. Use the acceptance criteria as a guide: “*If it’s not documented, it wasn’t agreed upon.*”

## Impact on the RFP Phase

With well-defined requirements, the RFP phase becomes a straightforward comparison. Vendor responses can be scored programmatically, matching responses directly to the requirements.

This approach eliminates guesswork, allowing you to assess completeness and alignment rather than interpreting whether a platform feature truly meets your needs.

# Ensuring Everyone Knows What's Happening

Transparency and consistent communication are critical to aligning stakeholders and vendors.

## Continuous Communication

- Share updates regularly with vendors and internal teams
- Address weaknesses openly and encourage ongoing dialogue to ensure alignment

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## Collaborative Approach

- Adopt an agile, social approach to vendor engagement
- Consider workshops, cross-functional meetings, or shared digital workspaces to encourage a shared understanding of project progress and challenges

## Key Considerations for Success

Getting the requirements right now ensures a smoother evaluation process and long-term success.

### 01. Digital Vision

Establish a clear vision that reflects your organization's digital maturity and long-term objectives.

### 02. Target Business Model

Ensure every decision aligns with your target business model, especially during re-platforming.

### 03. Gap Analysis

Evaluate current systems to identify strengths, weaknesses, and areas for improvement.

### 04. Scalability

Confirm the platform can grow with your business, accommodating future traffic, transactions, and customer needs.

### 05. Value Delivery

Design every aspect of the platform with your customers in mind, creating an experience that meets their needs while fulfilling your business goals.

# Translating Needs into Clear, Actionable Requirements

Once challenges and goals are identified, translate them into precise, measurable requirements.

## Frame Requirements Around Problems and Solutions

**Example:** Instead of: *“The platform should be scalable,”* say: *“The platform must support a 50% increase in traffic year-over-year and handle peak periods with no downtime.”*

## MoSCoW Prioritisation

Categorise requirements into:

- **Must:** Critical for success
- **Should:** Important but not essential at launch
- **Could:** Nice to have if time and budget allow
- **Won't:** Not in scope for this phase

## Business Value Scoring

Evaluate requirements based on their business impact.

**Example:**

“24/7 customer support integration” → High value for retention.

“AR-based product visualisation” → Lower value unless tied to a strategic goal.

# Adapting to Change: The Importance of Flexibility

Recognise that details will emerge over time. Building flexibility into your process helps you adapt without derailing progress.

## Focus on the Why

Business needs are the foundation. While solutions may evolve, staying focused on the why ensures alignment with objectives.

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## Milestone Mindset

Treat your eCommerce platform as an ongoing programme, not a one-off project. Focus on delivering essentials for the first milestone to avoid overloading the initial scope.

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## Document "What Done Looks Like"

Maintain shared documentation that outlines requirements, decisions, and acceptance criteria. This keeps everyone aligned as details shift.

## Integration: The Glue That Holds It All Together

Integration ensures your requirements translate into a cohesive system that connects people, platform, and processes.

### Continuous Alignment

Regularly evaluate how systems and workflows integrate to meet evolving business needs.

### Customer-Centricity

Ensure integration efforts enhance the customer experience, from order placement to fulfilment.

# Final Thoughts

Communicating your requirements effectively not only streamlines the RFP phase but also ensures the right platform is selected with confidence. By crafting clear, actionable requirements, defining what “satisfied” means, and fostering transparency, you position your team for a successful platform selection and implementation.

In the next section, we'll explore how to document and align your processes to ensure seamless integration with the chosen platform.

# 03

## Documenting and Aligning Your Processes

# Why Process Documentation Matters

Deeply understanding your business processes is crucial for ensuring the success of any eCommerce platform project. Clear documentation doesn't just serve internal clarity – it helps external partners provide targeted solutions, minimizes wasted time on repetitive explanations, and ensures alignment between your business needs and the platform's capabilities.

## The Foundations of Process Documentation

Clear documentation of your processes provides the backbone for every decision in your eCommerce transformation.

Here's what it involves:

### 01. Documenting Business Processes

- Outline your revenue-generating workflows, from product staging to returns.
- Highlight key internal processes such as inventory management, order fulfilment, and customer support.
- This documentation streamlines configuration and integration during implementation while serving as a reference to assess how well potential platforms align with your needs.

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### 02. Mapping the Customer Journey

- A successful eCommerce platform begins with understanding your customer journey.
- Map each touchpoint and identify internal processes that either support or detract from the customer experience.
- Engage customer-facing employees to uncover pain points and gain a realistic view of customer interactions.

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### 03. User Stories in Action

- Include user stories in your documentation and RFP.  
**For example:** *"As a customer, I want to view product-specific pricing after logging in, so I can order quickly without contacting sales."*
- User stories bridge the gap between abstract feature checklists and real-world scenarios, enabling vendors to demonstrate their ability to meet actual requirements.

# Understanding the "Why" and "How"

Effective process documentation goes beyond "what you need" and focuses on the why and how. These elements ensure your chosen platform aligns with your broader strategy and expected outcomes.

## Explain the "Why"

- What is driving this transformation?
- How does the eCommerce solution fit into your long-term strategy?

**For Example:** *"We need a scalable platform to handle a 50% annual increase in SKUs and support expanding into new markets."*

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## Define the "How"

- What outcomes do you expect, and how will they be achieved?
- Be explicit about the role each platform feature will play in achieving these goals.

**For Example:** *"To increase customer satisfaction, the platform must offer a self-service portal with real-time stock availability."*

# Key Business Processes That Impact eCommerce Success

The success of your eCommerce project hinges on certain core processes that must be documented and aligned:

## Order Fulfillment

How orders are processed, shipped, and tracked.

## Pricing and Discounts

How customer-specific pricing, promotions, and bulk discounts are managed.

## Inventory Management

Ensuring real-time accuracy across multiple sales channels.

## Customer Support

How your platform integrates with existing customer service workflows.

## Returns and Refunds

Ensuring a seamless post-sale experience.

# Leveraging Documentation for RFP Success

Detailed process documentation is invaluable during the RFP phase, enabling you to:

## 01. Streamline Comparisons

Vendors can overlay their workflows onto yours to highlight alignment and discrepancies

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## 02. Create Programmatic Evaluations

Use your documented processes to create scoring systems for RFP responses, ensuring vendors meet your specific needs

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## 03. Eliminate Ambiguity

User stories and specific process flows provide vendors with a clear understanding of what "success" looks like, reducing room for misinterpretation

# Benefits Beyond the Project

Process documentation offers value far beyond platform selection and implementation:

## 01. Preparation for Procedural Qualifications

Well-documented workflows prepare your business for ISO9001 certification and other procedural benchmarks.

## 02. Enhanced Training Materials

Visual diagrams and written processes double as training tools, accelerating onboarding for new employees.

## 03. R&D Tax Credit Documentation

Clear documentation of innovative processes can support applications for R&D tax credits.

# Practical Tips for Documenting Your Processes

Here's how to start documenting your workflows effectively:

**01 Engage Your Team**  
Involve stakeholders across departments to capture a comprehensive view of your processes.

**02 Use Visual Tools**  
Flowcharts, diagrams, and visual overlays are particularly effective for simplifying complex workflows and accommodating diverse learning styles (visual, auditory, and kinaesthetic).

**03 Focus on User Stories**  
Describe specific goals customers or employees need to achieve, framing requirements in practical, actionable terms.

**04 Create a Living Repository**  
Maintain a central location for process documentation and update it regularly as workflows evolve.

# Final Thoughts

Process documentation isn't just about recording workflows—it's about empowering your team and external partners to deliver solutions that truly fit your business. By understanding your "why" and "how," mapping critical processes, and leveraging user stories, you set the stage for a platform that not only meets your needs but drives growth.

In the next section, we'll dive into how to assemble the right team to lead your platform selection and implementation journey.

# 04

## Building the Right Team

Selecting and implementing a B2B eCommerce platform is not a one-person job. Success depends on building the right team early, one that combines diverse expertise with strong leadership, a healthy dose of pragmatism and clear communication. This section focuses on assembling a balanced team, including generalist experts, specialists, and digital ambassadors, to ensure a seamless platform selection and implementation process.

## Getting the Right People Involved Early

To set your project up for success, involve the right mix of people from the start. Your team should include a generalist expert who can see the big picture, supported by subject matter experts (SMEs) who bring deep knowledge of specific areas. This balance ensures your decisions consider both strategic and technical perspectives.

### 01. The Need for a Balanced Team

#### Balancing Business and Technical Perspectives

Developers may excel at execution but might not fully grasp strategic objectives. Conversely, business consultants might lack the technical expertise to evaluate platform capabilities. Combining these skills ensures a holistic approach.

#### Details Emerge Over Time

This process highlights the importance of a dedicated team that adapts and learns throughout the project. Continuous collaboration and feedback are key.

## 02. Generalist Expert: The Big Picture Visionary

### Strategic Oversight

Generalists focus on identifying and prioritising business issues rather than diving into feature specifics. They guide the platform selection process, ensuring alignment with long-term goals. Their role in the project is to **Focus on Business Requirements**.

### Leading Digital Transformation

Beyond selecting a platform, generalists drive organisational change, aligning internal processes and workflows with the platform's capabilities.

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## 03. Subject Matter Experts (SMEs)

### Technical Expertise

Developers or technical teams customise the platform, integrate it with existing systems, and ensure its stability.

### Operational Insights

SMEs in operations, customer service, and inventory management streamline workflows and maximise efficiency.

### Strategic Thinking

Business consultants contribute market insights, competitive strategies, and customer-focused plans that ensure the platform supports business growth.

# The Essential Role of Digital Ambassadors

Digital ambassadors are champions within your organisation who bridge the gap between People, Processes and Integrations, ensuring collaboration and alignment.

They play a vital role in:

## 01. Facilitating Communication

- Act as liaisons between departments, vendors, and project stakeholders
  - Ensure that the unique needs of each department are heard and integrated into the platform selection process
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## 02. Driving Adoption

- Help teams understand the value of the new platform and address resistance to change
  - Promote training and awareness to ensure smooth adoption across the organisation
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## 03. Highlighting Operational Challenges

- With their deep understanding of day-to-day processes, ambassadors can identify inefficiencies or gaps that the platform must address
  - Provide real-world insights that improve the alignment between platform capabilities and business needs
- 

## 04. Focus on the Customer's Needs

- Ambassadors keep the customer at the centre of every decision
- They bring insights from customer feedback, interactions, and pain points, ensuring that the platform delivers value where it matters most
- By advocating for customer-centric design, ambassadors help the team avoid costly missteps and missed opportunities

# The Value of Collaboration

Collaboration is the glue that holds your team together, enabling them to tackle challenges from multiple perspectives and ensure the platform aligns with business objectives.

## 01. Cross-Functional Alignment

- A balanced team encourages communication across departments, ensuring the platform meets the needs of all stakeholders
- Prevents siloed decision-making and fosters a shared vision

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## 02. Addressing Challenges from Multiple Angles

- Generalists and specialists bring complementary skills, addressing both the strategic and technical aspects of the project
- This diversity ensures the platform scales effectively and delivers an excellent customer experience

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## 03. Adaptability Through Feedback

- A collaborative team thrives on continuous learning, and adapting to evolving project needs
- Regular feedback loops ensure the platform remains aligned with changing business requirements

## Why the Right Team Matters

Building the right team isn't just about getting the job done – it's about ensuring the platform becomes a driver of long-term success.

### A well-rounded team:

- Enhances customer experience by aligning platform functionality with user needs
- Improves operational efficiency by streamlining workflows and reducing friction
- Increases revenue by implementing features and processes that directly impact growth
- Provides a sustainable competitive advantage by future-proofing the platform against evolving business needs

# Practical Steps to Build Your Team

Here's how to start documenting your workflows effectively:

01

## Start Early

- Identify and onboard key players during the needs assessment phase
- Include representatives from all major departments, including IT, marketing, sales, and operations

02

## Define Roles

- Clearly outline responsibilities for generalists, specialists, and digital ambassadors
- Assign a product owner to act as the central point of contact for decisions

03

## Collaborate Regularly

- Schedule recurring meetings to align on project goals, progress, and challenges
- Use collaborative tools like shared documentation and dashboards to keep everyone informed

04

## Seek External Expertise

- Engage consultants or agencies with proven B2B platform experience to fill knowledge gaps
- Leverage their insights to avoid common pitfalls and streamline implementation

# Final Thoughts

The team you build is the backbone of your platform selection and implementation process. A mix of visionary leadership, technical expertise, and operational insight ensures the platform you choose isn't just functional but transformational. By fostering collaboration and leveraging digital ambassadors, you create a cohesive, aligned team ready to tackle the complexities of B2B eCommerce.

In the next section, we'll dive into the platform selection process itself, guiding you through evaluating vendors and comparing solutions to find the perfect fit for your business.

# About Rixxo

Rixxo helps manufacturers, wholesalers and distributors choose the right platforms to grow with confidence.

The first step in a successful B2B eCommerce transformation project is choosing the right platform. That decision defines how your business runs, how your team works, and how your customers buy. We help you take this first step with clarity, navigating competing priorities and aligning technology to your real operational needs. We are advisors; we guide strategy, lead implementations and deliver results, without pushing a preferred tech stack or platform.

## Trusted by leaders in B2B

We specialise in mid-size and enterprise B2B firms across manufacturing, wholesale, and distribution. Our clients include brands in automotive, wholesale, manufacturing and SaaS.



## Work with us

Want to learn how Rixxo can help you select the platform which best supports your operational needs? Click below to speak with the team today.

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