

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

by Andy Hoar
August 31, 2017

Why Read This Report

In our 35-criteria evaluation of B2B commerce suite providers, we identified the 11 most significant vendors — BigCommerce, CloudCraze, Episerver, Handshake, Insite Software, Intershop, Magento Commerce, Oracle NetSuite, Sana Commerce, SAP Hybris, and Unilog — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital business professionals at midmarket B2B companies make the right choice.

Key Takeaways

Magento Commerce, Oracle NetSuite, SAP Hybris, And Insite Software Lead The Pack

Forrester's research uncovered a market in which Magento Commerce, Oracle NetSuite, SAP Hybris, and Insite Software lead the pack. Intershop, CloudCraze, Episerver, and Unilog offer competitive options. Sana Commerce, Handshake, and BigCommerce must continue to evolve their offerings.

Digital Commerce Pros Are Looking For Solutions That Go Beyond The Shopping Cart

The B2B commerce suites market is growing because more digital business professionals see B2B commerce as a way to engage in true full-spectrum customer engagement — which includes research, sales, and servicing.

Agility, Omnichannel, And Experience Management Are Key Differentiators

On-premises software and legacy commerce technology are becoming outdated and less effective. In the midmarket, time-to-market (TTM) and total cost of ownership (TCO) are top priorities — which means cloud offerings dominate. Vendors that excel at assisted sales, personalization, and content management stand out.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up



by [Andy Hoar](#)

with [Fiona Swerdlow](#), Bruce Eppinger, Sara Sjoblom, and Peter Harrison

August 31, 2017

Table Of Contents

- 2 B2B Companies Demand More Than A Shopping Cart
- 3 Maturing eCommerce Vendors Experience A Renewal
- 3 Firms Purchase B2B Commerce Suites In Three Distinct Ways
- 6 B2B Commerce Suites For Midsize Organizations Evaluation Overview
 - B2B Commerce Builds On A B2C Core But Requires Unique Functionality And Capability
 - How The Criteria Are Organized
 - Evaluated Vendors And Inclusion Criteria
- 9 Vendor Profiles
 - Magento Commerce, Oracle NetSuite, SAP Hybris, And Insite Software Are Leaders
 - Intershop, CloudCraze, Episerver, And Unilog Are Strong Performers
 - Sana Commerce, Handshake, And BigCommerce Are Contenders
- 16 Supplemental Material

Related Research Documents

- [The Forrester Wave™: B2B Commerce Suites, Q2 2015](#)
- [The Forrester Wave™: B2C Commerce Suites, Q1 2015](#)
- [The Forrester Wave™: B2C Commerce Suites, Q1 2017](#)



Share reports with colleagues.

Enhance your membership with Research Share.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

B2B Companies Demand More Than A Shopping Cart

For many companies with total revenue of \$50 million to \$500 million, eCommerce is now critical to growing existing customers, acquiring new customers, and protecting market share from Amazon. As such, midmarket and midsize divisions of large distributors and branded manufacturers are upgrading and replatforming their commerce infrastructure to capture and — very importantly — retain demanding, channel-agnostic customers. Midsize firms are gearing up: Overall, we expect companies to spend \$2.4 billion on B2B commerce platforms by 2021, of which just over \$1 billion will be spent on midmarket B2B commerce platforms alone.¹

Digital business professionals have always looked to commerce suite vendors to support basic (and now, fairly commoditized) capabilities like running online catalogs, shopping carts, and promotions. However, their customers now expect seamless purchase journeys, innovative fulfillment options, and assisted sales alternatives. In addition, branded manufacturers and high-tech firms are now using their websites to manage their channels and even sell directly to their customers. As a result, midsize B2B firms now need enterprise-quality commerce technology at a small-business price that supports:

- › **Full-spectrum selling.** B2B customers now migrate freely between self-serve and full-service buying and across online and offline touchpoints.² Midmarket B2B sellers must deliver solutions that meet the idiosyncratic needs of business customers who often prefer to buy without talking to sales reps but who also, at times, consult with sales reps for more complex and involved purchases.³ In addition, midmarket B2B brand manufacturers bear the special burden of selling direct from their own website and also facilitating indirect sales via traditional channel partners.⁴
- › **Personalized digital commerce experiences.** MSC Industrial Supply uses targeted promotions and fulfillment guarantees to drive sales and enhance the B2B shopping experience.⁵ Clearly, personalization is as critical for midmarket B2B companies as it is for enterprise B2B companies. Commerce suites provide midmarket B2B customers with a personalized buying experience by controlling the front-end experience or managing the customer data that fuels personalization.
- › **Data-driven merchant tools.** One customer reference told us that it wanted deeper data capabilities so it could “arm merchants with access to data so that [the merchant] can make better decisions.” To meet rising customer expectations, midmarket B2B firms are investing in merchant tools to easily make decisions about which experiences to deliver to customers. Commerce suites are innovating in these areas with machine learning (particularly around personalization and fulfillment) to support automation. We’ve also seen greater investment in reporting, analytics, and data-driven decisioning tools that further support merchant control over experiences.
- › **Agility and faster time-to-market.** Customers’ need for agility and faster TTM from their platforms has banished years-long implementations and heavy-IT-footprint solutions. Midmarket B2B companies now insist that their commerce solutions have cloud-based, service-oriented architectures in a more modern and modular environment. Firms typically look to either platform-

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

as-a-service (PaaS) deployments, where the vendor manages the solution in a single-tenant cloud instance, or software-as-a-service (SaaS) deployments, where the vendor manages the solution in a multitenant environment.

Maturing eCommerce Vendors Experience A Renewal

In response to surging demand for eCommerce service, vendors are going to market with more fully functional upgrades to their existing solutions as well as with net-new offerings. The opportunity to monetize legacy commerce infrastructure in new ways and drive new customer interactions has attracted the interest of investors and incumbent players alike, and it has driven:

- › **Key acquisitions in the space.** In 2016, Oracle spent \$9.3 billion to acquire NetSuite and its eCommerce solution, SuiteCommerce.⁶ The same year, Salesforce jumped into the eCommerce space by buying commerce vendor Demandware for \$2.8 billion.⁷ We expect to see more established companies make acquisitions in the space and in adjacent verticals like marketing technology, web content management systems (CMSes), and CRM.
- › **Private-equity-funded turnarounds and accelerations.** Permira acquired Magento Commerce as a part of a spinout from eBay in 2015.⁸ That same year, Vista Equity Partners started buying up properties (Baynote, Fiverun, MarketLive, Mozu, and Shopatron) to combine them into eCommerce platform Kibo. And in early 2017, CloudCraze took \$20 million in fresh funding from Insight Venture Partners and Salesforce Ventures.⁹ We anticipate that these venture-backed companies will either be acquired or pursue IPOs within the next few years.
- › **New market entrants.** Mobile commerce vendor Handshake added online commerce capability to its mobile offering and created a B2B commerce suite. Episerver, whose roots are in marketing and web CMS, doubled down on its commerce investment. Expect additional players in adjacent spaces to opportunistically enter the market as a way to use the transaction-centric model of eCommerce to further monetize complementary software.

Firms Purchase B2B Commerce Suites In Three Distinct Ways

Four major pillars of digital commerce anchor the commerce suite: commerce management, experience management, order management, and product information management (PIM) (see Figure 1). Even though these areas are converging, digital businesses purchase their B2B commerce suites via three primary modes. We encourage our clients to customize the Forrester Wave criteria weightings accordingly, depending on which of the following three models works best for them:

- › **All-in-one commerce suite approach.** Many customers that Forrester speaks with prefer to purchase commerce suites that include all major pillars of digital commerce in one: commerce management, experience management, order management, and PIM. This approach is typically best for midmarket and lower enterprise firms that can't afford to integrate multiple best-of-breed components — as well as firms just starting to develop their digital commerce business.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

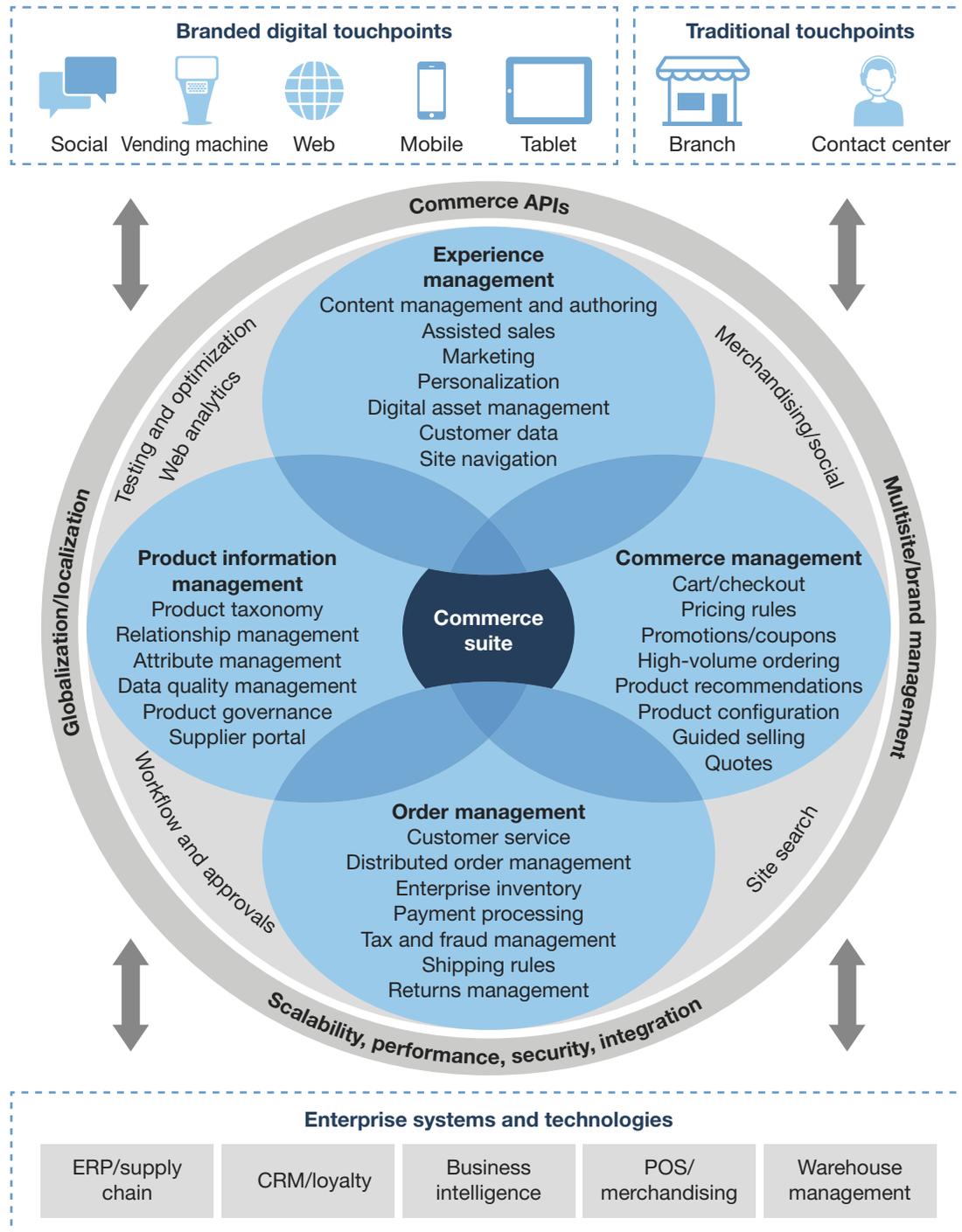
The 11 Providers That Matter Most And How They Stack Up

- › **Commerce suite with complementary best-of-breed solutions.** One customer reference told us that it uses its suite to support commerce management, PIM, and experience management, but it uses a best-of-breed order management system (OMS) to handle significant needs around areas like routing logic and omnichannel fulfillment. Why? The time and investment spent on integration and vendor management can be onerous. However, many customers choose to strategically bundle elements of the suite when possible — and then source best of breed as their needs dictate.
- › **Headless commerce suite.** Headless commerce is emerging as the latest way to purchase commerce capabilities. It primarily offers commerce management, potentially offers some basic OMS and PIM support, and uses other solutions (enterprise marketing, web CMS, and custom development) to manage the front-end experience and marketing. Digital businesses that purchase via headless are typically either heavily invested in existing web CMS and marketing tool sets, or they may want to innovate with commerce on new front-end interfaces.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

FIGURE 1 Today's Commerce Suites Support Four Core Pillars Of Functionality



The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

B2B Commerce Suites For Midsize Organizations Evaluation Overview

Forrester set out to assess how well B2B commerce suite vendors are meeting the evolving needs of the market and to determine how well leading vendors stack up against each other. We evaluated the strengths and weaknesses of 11 top midmarket B2B commerce suite vendors across a range of business and technology criteria.

B2B Commerce Builds On A B2C Core But Requires Unique Functionality And Capability

Midmarket B2B firms must now benchmark themselves against both leading enterprise B2B and B2C companies as well. Therefore, Forrester has purposefully kept the majority of the criteria in this evaluation the same as those in our Q1 2017 Wave evaluations of enterprise B2B and B2C commerce suites.¹⁰ However, this evaluation differs substantively from those Forrester Wave evaluations in that it gauges vendors' ability to deliver enterprise-quality features at a lower TCO and faster TTM.

How The Criteria Are Organized

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 35 criteria, which we grouped into three high-level buckets:

- › **Current offering.** We focused on commerce capabilities across major categories like mobile and emerging touchpoints, solution architecture, experience management, commerce platform capabilities (e.g., shopping cart, promotions, and pricing), and adjacent commerce suite capabilities (e.g., PIM and OMS). We targeted current offering evaluations on key areas of differentiation and innovation, like experience management, omnichannel, agility, and data-driven merchant tools.
- › **Strategy.** We reviewed each vendor's strategy, evaluating its strategic vision and planned enhancements. In particular, we gauged how well the vendors positioned themselves in the midmarket space with customers, partners, and developers. In addition, we assessed how well they plan to accommodate significant market disruptions like cloud, service-oriented architectures, AI and machine learning, and personalization. We also heavily weighted vendors' ability to execute on their vision — based principally on what we learned from numerous in-depth customer and partner reference calls.
- › **Market presence.** To determine a vendor's market presence, we created a composite assessment that took each vendor's installed base, customer growth, company size, vertical penetration, revenue, and revenue growth into consideration.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

Evaluated Vendors And Inclusion Criteria

Forrester included 11 vendors in the assessment: BigCommerce, CloudCraze, Episerver, Handshake, Insite Software, Intershop, Magento Commerce, Oracle NetSuite, Sana Commerce, SAP Hybris, and Unilog. Each of these vendors (see Figure 2):

- › **Illustrates a strong focus on B2B commerce.** Although vendors we included may serve clients in other market segments (B2C) or have extended portfolios (marketing, service, or sales), each has a product offering focused on the needs of midmarket B2B clients as well as an ongoing strategy and road map commitment to B2B commerce.
- › **Possesses critical components of a standalone B2B commerce suite.** Vendors we included support core commerce platform capabilities to set up and run an online shopping experience. In addition, these vendors are able to support their clients' needs for extended capabilities like omnichannel order management, product information management, and experience management. These vendors can deliver such capability via embedded functionality, companion products from within their solution portfolio, mature partnerships, or a combination of these approaches.
- › **Produces at least \$10 million in total B2B-specific commerce revenue.** To ensure that the vendors we evaluated will remain viable in this evolving market, Forrester limited its analysis to companies that have the resources and momentum to sustain themselves through variable market conditions. Each of these companies has a minimum of \$10 million in annual B2B commerce solution product sales, is profitable or indicates it is approaching profitability, has at least 50 existing clients, and demonstrates positive sales momentum.
- › **Has notable mindshare among Forrester clients.** The vendors we evaluated were able to demonstrate significant customer bases in at least two geographic regions in addition to strong mindshare with digital business professionals and a focus on midmarket B2B customers.

Forrester did not include companies that have a primary focus on other related market segments, such as:

- › **Enterprise-focused B2B and other B2C solutions.** Forrester identified a few vendors with commerce solutions that principally serve enterprise B2B and B2C customers, such as Apttus, Digital River, Elastic Path, IBM, Oracle Commerce Cloud, Salesforce Commerce Cloud, and Sitecore. All of them have some midsize company customers but currently lack dedicated strategies and sizable installed bases in the midmarket space.
- › **Digital- or media-focused solutions.** These providers focus their solutions heavily on media, software, and other virtual or digital goods, and they lack critical physical goods and omnichannel capabilities such as order management. We have written a separate report about vendors that specifically focus on selling digital goods.¹¹

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

- › **One-dimensional point-solution-centric options within the stack.** Our evaluation does not include vendors that focus primarily on layers within the stack, like CMS, PIM, and enterprise resource planning (ERP). These include CMS vendors such as Acquia and Adobe, PIM vendors such as EnterWorks and Stibo Systems, and ERP vendors such as Epicor and Infor. These vendors may partner with eCommerce vendors, but they do not provide significant native eCommerce capability.

FIGURE 2 Evaluated Vendors: Vendor Information And Selection Criteria

Vendor	Product evaluated	Version number	Release date
BigCommerce	BigCommerce	Continuous release cycle	N/A
CloudCraze	CloudCraze	V4.6	May 2017
Episerver	Digital Experience Cloud	Continuous release cycle	N/A
Handshake	Handshake	V5.4	May 2017
Insite Software	InsiteCommerce Cloud	V4.3.1	May 2017
Intershop	Intershop Commerce Suite	V7.8	December 2016
Magento Commerce	Magento Commerce Magento Order Management Magento Business Intelligence	V2.2 Software-as-a-service (SaaS) SaaS	June 2017 N/A N/A
Oracle NetSuite	SuiteCommerce Advanced	V17.2	March 2017
Sana Commerce	Sana	V9.2	April 26, 2017
SAP Hybris	SAP Hybris Commerce Cloud	Standard Edition	N/A
Unilog	CIMM2	V3	March 17, 2017

Vendor inclusion criteria

The vendor illustrates a strong focus on B2B commerce.

The vendor possesses critical components of a standalone B2B commerce suite.

The vendor produces at least \$10 million in total B2B-specific commerce revenue.

The vendor has notable mindshare among Forrester clients and is frequently mentioned in the context of inquiries, briefings, and consulting engagements.

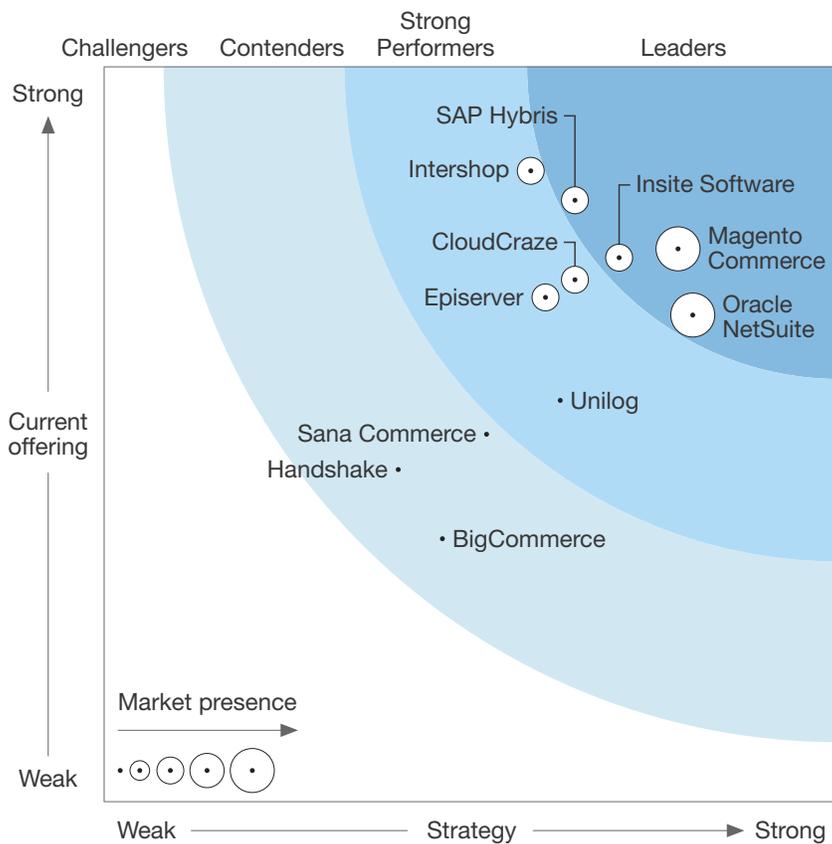
The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

Vendor Profiles

This evaluation of the market for B2B commerce suites for midsize organizations is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 3).

FIGURE 3 Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 '17



FORRESTER RESEARCH
 The Forrester Wave™
 Go to Forrester.com to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

FIGURE 3 Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 '17 (Cont.)

	Forrester's weighting	BigCommerce	CloudCraze	Episerver	Handshake	Insite Software	Intershop	Magento Commerce	Oracle NetSuite	Sana Commerce	SAP Hybris	Unilog
Current offering	50%	1.78	3.54	3.42	2.25	3.69	4.28	3.75	3.30	2.49	4.08	2.72
Customer-facing digital touchpoints	20%	1.70	4.30	3.00	5.00	5.00	5.00	4.30	3.00	3.70	2.40	3.00
Solution architecture	20%	2.10	4.50	3.40	1.80	3.70	4.80	4.30	4.20	2.50	4.80	3.00
Experience management	15%	1.90	2.10	5.00	1.90	3.00	3.20	3.00	2.80	1.90	4.10	1.20
Commerce suite capabilities	20%	1.44	2.70	3.44	1.00	3.00	3.46	3.50	3.46	1.46	5.00	2.70
Commerce management	25%	1.80	3.70	2.80	1.60	3.60	4.60	3.50	3.00	2.70	4.10	3.20
Strategy	50%	2.30	3.20	3.00	2.00	3.50	2.90	3.90	4.00	2.60	3.20	3.10
Product strategy and road map	25%	1.00	3.00	3.00	1.00	3.00	3.00	3.00	3.00	1.00	3.00	3.00
Company vision	30%	3.00	3.00	3.00	1.00	5.00	3.00	5.00	5.00	3.00	3.00	3.00
Commerce service providers	10%	1.00	3.00	3.00	1.00	3.00	3.00	5.00	3.00	1.00	5.00	1.00
Developer community	5%	3.00	3.00	3.00	1.00	1.00	1.00	5.00	3.00	1.00	3.00	1.00
Implementation time frame	10%	3.00	5.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Total cost of ownership	20%	3.00	3.00	3.00	5.00	3.00	3.00	3.00	5.00	5.00	3.00	5.00
Market presence	0%	1.00	3.00	3.00	1.00	3.00	3.00	5.00	5.00	1.00	3.00	1.00
Company size, revenue, and customer base	100%	1.00	3.00	3.00	1.00	3.00	3.00	5.00	5.00	1.00	3.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Magento Commerce, Oracle NetSuite, SAP Hybris, And Insite Software Are Leaders

- › **Magento Commerce targets the midmarket with a partner-driven cloud offering.** Campbell, California-based Magento Commerce has a long and rich history of selling its on-premises commerce solution to midsize organizations. As a result, the company has a large network of systems integrators (SIs) and digital agencies both selling the Magento Commerce 2 platform and creating hundreds of “extensions” to it via the Magento Commerce Marketplace. Several of

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

the most popular extensions are commercial partner- and Magento Commerce community-built integrations that enhance Magento Commerce 2's ability to offer advanced shopping carts, content management tools, and Apple Pay features. Magento Commerce's latest release, V2.2, is a cloud-based solution that includes an out-of-the-box B2B module that packages together the most important B2B features as a part of the core commerce platform.

Despite a full year of patches and releases for the Magento Commerce 2 platform, customers still cite some challenges with the bug-fixing process. Magento Commerce 2.2 was a big step forward in advancing the Magento Commerce 2.0 franchise, but customers noted that Magento Commerce 2.2 requires further enhancements in areas like personalization and site search.

Magento Commerce 2.2 is a best fit for midsize B2B companies that want an open, feature-rich solution that they can extend easily and inexpensively by way of a large network of Magento Commerce system integration partners and developers.

- › **Oracle NetSuite goes to market with a full-stack, multitenant SaaS solution.** Redwood Shores, California-based Oracle officially completed its acquisition of NetSuite in November 2016. The purchase gave NetSuite, now a global business unit within Oracle, access to Oracle's global footprint of data and development centers and sales offices. In turn, the acquisition gave Oracle a strong midmarket install base and a tested and proven cloud-native commerce solution. Oracle is focusing the NetSuite SuiteCommerce Advanced solution on midmarket customers, the NetSuite SuiteCommerce Standard solution on the small and medium-size business space, and Oracle Commerce Cloud on enterprise customers. The product we evaluated, NetSuite's multitenant SaaS SuiteCommerce Advanced solution, is a single, unified system that includes NetSuite's impressive ERP offering as well as powerful out-of-the-box billing and financial management features, order and inventory management, and customer account management capabilities.

Customers have described Oracle NetSuite's commerce capabilities as "powerful and flexible" but "missing some bells and whistles." For example, customers assert that the solution needs stronger personalization tools, third-party integration capability (e.g., syndicating catalogs to marketplaces), and site search functionality (which one customer described as "getting better but still weak"). In addition, the Oracle NetSuite solution lacks market-leading configurator and data-driven decision-making capability.

Oracle's NetSuite SuiteCommerce Advanced solution is a best fit for midmarket B2B customers looking for an easily configured, value-priced, multitenant SaaS commerce suite that works seamlessly with NetSuite's widely deployed ERP solution.

- › **SAP Hybris extends its leading enterprise offering to midsize organizations.** SAP Hybris' offering to midsize organizations is a scaled-down version of its feature-rich enterprise solution that has consistently earned accolades for being a stable, reliable platform. The company's ecosystem includes a large, global implementation partner network, which customer references lauded for its breadth and depth and high standards for inclusion.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

However, the B2B midmarket is a segment that prefers low TCO and fast TTM — both of which have been challenges for SAP Hybris. To address those issues, the company created a Professional Edition targeted at the upper midmarket and a Standard Edition aimed at the lower midmarket. We evaluated the Standard Edition cloud version, which offers impressive capability out of the box but lacks key functionality such as omnichannel order management (OMS), an assisted service module, and a product catalog that supports subscription products.

SAP Hybris Commerce Cloud, Standard Edition, is a best fit for companies looking for an industrial-strength commerce platform with which they can ramp functionality as their business scales.

› Insite Software unifies self-service and sales enablement with single-tenant SaaS.

Minneapolis-based Insite Software has a strong vision for a unified value proposition that includes eCommerce as well as salesperson-centric and persona-driven selling. Insite Software began several years ago as a company focused on the midmarket and is now returning to its roots — this time with a purpose-built, single-tenant SaaS product in InsiteCommerce Cloud 4.3.1. One customer described the solution as having “the key out-of-the-box functionality that enabled us to compete.” Insite Software is even crossing over into B2C by offering basic B2C-specific features to B2B companies that now want to sell directly to consumers. Customers consistently describe Insite Software as “very responsive to client needs” and willing to incorporate direct customer feedback into the product development process.

Insite Software has been late to the game on AI and offering a microservices-based framework. The company is also relatively weak on dynamic personalization technologies and PIM. Customers commented that Insite Software’s solution was “light on analytics,” and that its recent switch to partner implementations was disruptive and at times “painful.” Insite Software has made impressive strides in developing its partner network, but the company still lacks a footprint that rivals its closest competitors.

Insite Software is a best fit for midmarket companies with complex, multiple-SKU offerings that need a vendor with deep experience in the B2B space that understands persona-driven and B2B channel selling.

Intershop, CloudCraze, Episerver, And Unilog Are Strong Performers

- › Intershop offers a powerful platform to address complex midmarket seller needs.** Among the first to offer commerce software in the 1990s, Jena, Germany-based Intershop has a long history in the commerce space. The company historically sold to — and did in-house implementations of a licensed, on-premises solution to — enterprise companies. Now, Intershop has officially repositioned itself to focus on selling a single-tenant SaaS solution by monthly subscription via partners. Intershop is inherently strong in its core commerce capabilities like promotions, channel management, and customization. On top of solid and well-built commerce features, Intershop demonstrates a strong technical road map and a selectively deep ecosystem of partners and developers — particularly in Europe.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

Intershop has struggled over the years to deliver a consistent, overarching vision and global go-to-market strategy. The company's efforts still skew heavily to an engineering audience, sometimes leaving a less technical VP of eCommerce behind. Customers highlighted this deficiency by commenting that the product training process was "somewhat lacking" for business users. We believe the vendor has room to grow, particularly with its story (and capabilities) regarding data-driven decision making.

Intershop is a best fit for brand manufacturers that have complex channel support requirements and need particularly well-developed commerce functionality — especially around order management.

› CloudCraze enables ready-made, Salesforce-centric eCommerce for midmarket B2B.

Chicago-based CloudCraze is native to Salesforce and therefore hardwired to work in conjunction with Salesforce's other native cloud offerings. Because it's deployed on the Salesforce PaaS, CloudCraze enables customers, in particular, to spin up commercial selling sites in short order. Midmarket B2B customers cited CloudCraze's relatively fast implementation time frame, B2B workflow management features, and easy system configurability as pluses.

CloudCraze lags competitors in terms of digital asset management capabilities and web CMS functionality. In addition, customers cited weak integrations with some Force.com platform apps as a negative. CloudCraze is aggressively building out its implementation partner network and has made especially good progress of late, but some customers still report having difficulty finding qualified SIs and digital agencies.

CloudCraze is a best fit for B2B customers that are looking to build on their investment in Salesforce and want to get up and running with an eCommerce solution quickly and easily.

› Episerver integrates content and commerce for midsize B2B organizations. Irvine, California-based Episerver goes to market with a .NET, cloud-based combined content and commerce offering. Accordingly, it demonstrated its experience- and marketing-centric capabilities like web CMS (it was named a Leader in The Forrester Wave™: Web Content Management Systems, Q1 2017), promotions, A/B testing, and digital asset management.¹² Customers we spoke with found the product to be flexible, offering business-user-friendly interfaces and templates for B2B workflows. They also praised the vendor's customer service and transparent vision.

Episerver still has some gaps in its commerce capabilities. Notably, it lacks market-leading OMS and product configurator offerings. Furthermore, customers reported some difficulties with third-party integrations with some PIM and ERP vendors. Episerver's partner network is also somewhat limited in the B2B midmarket and consists mostly of smaller, boutique players — particularly in North America.

Episerver is a best fit for midmarket customers looking for a CMS-driven solution that offers tightly integrated commerce capabilities.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

- › **Unilog drives midmarket omnichannel commerce from your product data level on up.** Based in Philadelphia and Bengaluru, Unilog entered the commerce space by productizing functionality that it originally developed in its heritage catalog and taxonomy management business. From its inception, Unilog's cloud-native commerce solution has focused mostly on serving the B2B midmarket — and it has strong relationships with midmarket cooperatives and associations, such as affiliated distributors, to show for it. Customers told us that Unilog's unique data-mapping capabilities accelerated their deployments and reduced their setup costs.

Unilog's CIMM2 commerce product lacks the ability to personalize customer experiences at the same level as other Forrester Wave participants and offers fairly standard web CMS capability. Unilog's CIMM2 product is also limited in handling subscription services. In addition, customers told us that Unilog has some immature processes around product updates and offshore support.

Unilog's CIMM2 product is a best fit for midmarket distributors, especially those operating in the industrial space and eager to leverage Unilog's product content management capabilities.

Sana Commerce, Handshake, And BigCommerce Are Contenders

- › **Sana Commerce converts an ERP into an eCommerce engine.** Based in Rotterdam, the Netherlands, Sana Commerce transforms a company's ERP into a functional eCommerce engine. Sana works within both SAP ERPs and the Microsoft Dynamics ecosystem — which Sana estimates is an approximately 80,000-client global install base in B2B. Sana uses the ERP's own business logic and doesn't have to replicate/synchronize that business logic elsewhere within the stack, so customers report that Sana Commerce can make the ERP "eCommerce operational" within weeks. In addition, customers say that Sana's direct integration with the ERP offers access to information out of the box that typically requires heavy customization (e.g., order history going back a decade, access to real-time inventory and pricing, etc.).

However, Sana's strength is also its weakness. As of this report's publication, Sana only works with the SAP and Microsoft ERPs, which means that midmarket clients using ERPs from Infor, NetSuite, Sage, and others cannot use Sana for eCommerce. Similarly, direct calls into the ERP can also slow down response times and occasionally limit system performance, despite tooling that the company uses to reduce latency. In addition, customers reported that Sana needs better analytics and reporting capabilities.

Sana Commerce is a best fit for companies that want to directly extend their investment in their SAP or Microsoft ERP with a fast time-to-market and quite functional eCommerce solution.

- › **Handshake drives B2B commerce with a mobile solution that works online and offline.** New York-based Handshake takes a mobile-first approach to B2B commerce. The company began by creating a sales order-entry app to make it possible for sales reps using ERP systems to go "mobile." Over time, Handshake productized mobile commerce applications and a basic eCommerce website into a fully functional platform. Handshake's product is a multitenant SaaS

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

solution that works both online and offline and is purpose-built for customers whose reps or buyers spend their days on the shop floor or in the field. Customers report that Handshake's app is business-user friendly (one customer called it "incredibly easy to use") and relatively simple for technology neophytes to deploy.

Handshake falls short in the B2B commerce space in online-only environments where mobile is a secondary or tertiary priority. In addition, Handshake does not offer some of the functionality that is now table stakes for the space (e.g., industrial-strength reporting capabilities and full support for Android devices). Customers we spoke with indicated that Handshake is going through some growing pains and is thus unable to deliver consistent 24x7 support, which, as one customer described, "is a problem for companies where issues lead to disrupted transactions — and therefore disrupted revenue."

Handshake is a best fit for companies that need an easy-to-use and intuitive mobile interface with a basic web eCommerce storefront — and that sell primarily by way of mobile sales reps or directly via end users in the field.

- › **BigCommerce offers consumerized headless commerce for midmarket B2B.** Based in San Francisco and Austin, Texas, BigCommerce is a platform with a midmarket B2C heritage that has pivoted into the midmarket B2B space. BigCommerce's multitenant SaaS solution offers facilitated onboarding, easy initial configuration, and a smooth upgrade path. It increasingly does so in a headless commerce fashion in response to customer calls for a platform that only manages transactions. The BigCommerce solution is relatively inexpensive for a basic B2B eCommerce site and is easily augmented with several hundred apps from the BigCommerce Apps Marketplace that were created by several thousand developers worldwide.

BigCommerce trails its competitors in the B2B commerce space in terms of out-of-the-box functionality. For example, customers we interviewed were frustrated that BigCommerce did not have out-of-the-box ERP integration. In addition, customers reported that the out-of-the-box search capability was subpar and required them to purchase add-on search functionality from the BigCommerce Apps Marketplace. Add-ons can be both relatively expensive and risky, as the third-party providers operating in BigCommerce's Apps Marketplace are not governed by a rigorous user ratings system.

BigCommerce is a best fit for midmarket customers looking for a B2C-like headless commerce solution that can be augmented by BigCommerce marketplace apps — as long as customers are prepared to support app integrations and app upgrades on their own.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

To help you put research into practice, connect with an analyst to discuss your questions in a 30-minute phone session — or opt for a response via email.

[Learn more.](#)

Analyst Advisory

Translate research into action by working with an analyst on a specific engagement in the form of custom strategy sessions, workshops, or speeches.

[Learn more.](#)

Webinar

Join our online sessions on the latest research affecting your business. Each call includes analyst Q&A and slides and is available on-demand.

[Learn more.](#)



Forrester's research apps for iOS and Android.

Stay ahead of your competition no matter where you are.

Supplemental Material

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at Forrester.com at the beginning of this report to download.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by July 2017.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

- › **Hands-on lab evaluations.** Vendors spent one day with a team of analysts who performed a hands-on evaluation of their products using a scenario-based testing methodology. We evaluated each product using the same scenario(s), creating a level playing field by evaluating every product on the same criteria.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three to five of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, please visit [The Forrester Wave™ Methodology Guide](#) on our website.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

The Forrester Wave™: B2B Commerce Suites For Midsize Organizations, Q3 2017

The 11 Providers That Matter Most And How They Stack Up

Endnotes

- ¹ See the upcoming Forrester report “Forrester Data: Commerce Platform Technology Forecast, 2016 To 2021 (Global).”
- ² Omnichannel B2B buyers are more active, generate more incremental revenue, and cost less to serve than single-channel customers. But as customer expectations rise, B2B buyers are becoming fickle and demanding a full spectrum of self-service, full-service, and hybrid purchase options. The following report is designed to help B2B digital business professionals make the case for building better omnichannel experiences. For more, see the Forrester report “[The Case For Omnichannel B2B.](#)”
- ³ While B2B buyers overwhelmingly prefer to research, and increasingly buy products and services, via a self-service website, B2B sellers still force buyers to interact with their salespeople as part of the purchase process. The following report describes how and why B2B eBusiness and channel strategy professionals must radically transform their historical sales models to accommodate a real-time and global buying environment where websites, not salespeople, are at the heart of how B2B companies buy and sell. For more, see the Forrester report “[Death Of A \(B2B\) Salesman.](#)”
- ⁴ In today’s world, lines of demarcation between competitors and partners are fuzzy. B2B players must adopt ecosystem-based models that prioritize delivering customer value over assigning credit for sales. The following report describes how age-of-the-customer digital forces are creating a challenging new reality, but also compelling new opportunities, for digital business professionals working at B2B manufacturers and channel partners. For more, see the Forrester report “[Realign B2B Channels For A Post-Disruption World.](#)”
- ⁵ Early winners in the B2B space have successfully incorporated proven B2C features and functions into their B2B eCommerce shopping experiences. B2C sites have successfully used personalization and customization to increase conversion rates and customer satisfaction for the past several years. Now, B2B companies are getting in on the act. The following report provides a road map for eBusiness professionals in the process of developing and executing their B2B eCommerce strategies. For more, see the Forrester report “[B2C Sets The Standard For B2B.](#)”
- ⁶ Source: “Oracle Buys NetSuite,” Oracle press release, July 28, 2016 (<https://www.oracle.com/corporate/pressrelease/oracle-buys-netsuite-072816.html>).
- ⁷ Source: “Salesforce Signs Definitive Agreement to Acquire Demandware,” Salesforce press release, June 1, 2016 (<http://investor.salesforce.com/about-us/investor/investor-news/investor-news-details/2016/Salesforce-Signs-Definitive-Agreement-to-Acquire-Demandware/default.aspx>).
- ⁸ Source: “Magento Commerce Launches as Independent Company Backed by the Permira Funds,” Magento Commerce press release, November 2, 2015 (<https://magento.com/press-room/press-releases/magento-commerce-launches-independent-company-backed-permira-funds>).
- ⁹ Source: Chris Dalton, “CloudCraze Secures Investment by Insight Venture Partners and Salesforce Ventures,” CloudCraze, January 4, 2017 (<http://www.cloudcraze.com/cloudcraze-secures-investment-by-insight-venture-partners-and-salesforce-ventures/>).
- ¹⁰ See the Forrester report “[The Forrester Wave™: B2C Commerce Suites, Q1 2017](#)” and see the Forrester report “[The Forrester Wave™: B2B Commerce Suites, Q1 2017.](#)”
- ¹¹ See the Forrester report “[Market Overview: Commerce Solutions For Digital Products And Services, 2015.](#)”
- ¹² See the Forrester report “[The Forrester Wave™: Web Content Management Systems, Q1 2017.](#)”

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

- › Core research and tools
- › Data and analytics
- › Peer collaboration
- › Analyst engagement
- › Consulting
- › Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

Marketing & Strategy Professionals

CMO

B2B Marketing

B2C Marketing

Customer Experience

Customer Insights

- › **eBusiness & Channel Strategy**

Technology Management Professionals

CIO

Application Development & Delivery

Enterprise Architecture

Infrastructure & Operations

Security & Risk

Sourcing & Vendor

Management

Technology Industry Professionals

Analyst Relations

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.