

# How To Sell Better With a Self-Serve Channel

HeadQ Digital Commerce

@mikkoseppa  
headq.io



# Hi there



## I'm @mikkoseppa

CEO & Co-Founder @HeadQ

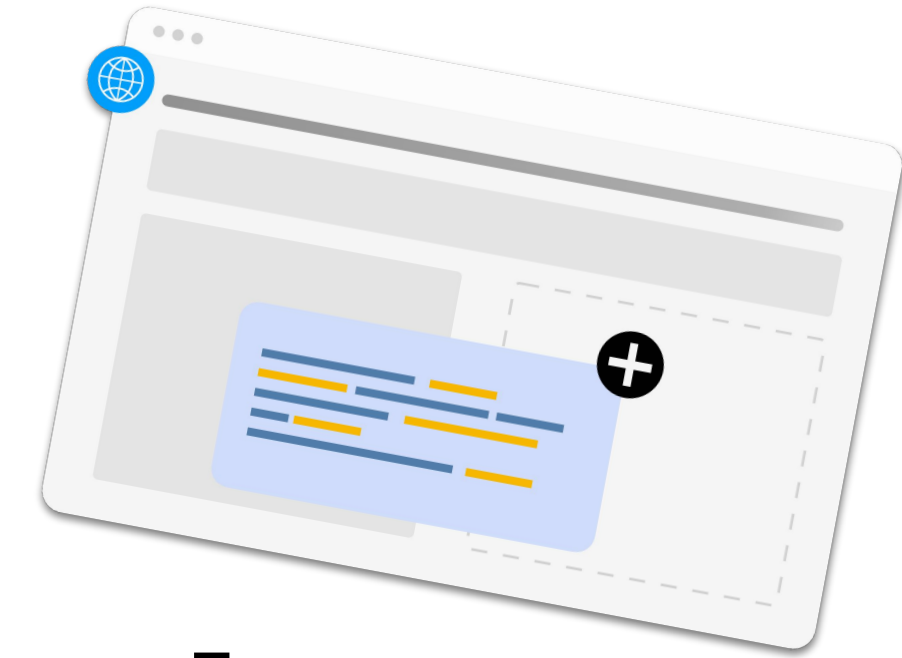
Serial entrepreneur, angel investor, author



**HeadQ is the easiest way to turn any website into a sales channel**



*Add just few lines of javascript  
and you're ready to sell*



**HeadQ is the **easiest way** to turn any website into a sales channel**



# HeadQ is the easiest way to turn **any website** into a sales channel

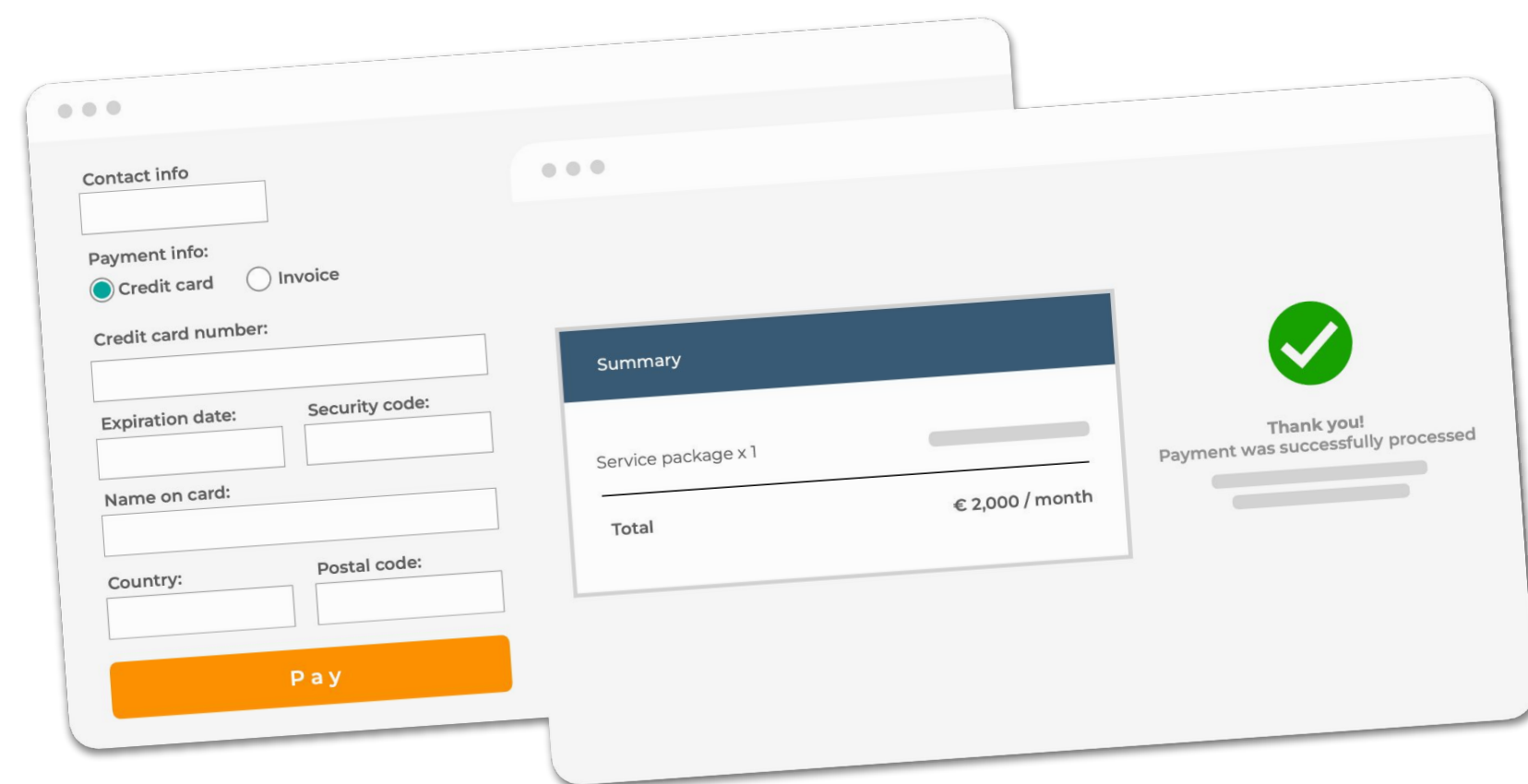
Works with any CMS



WIX



# HeadQ is the easiest way to turn any website into a **sales channel**

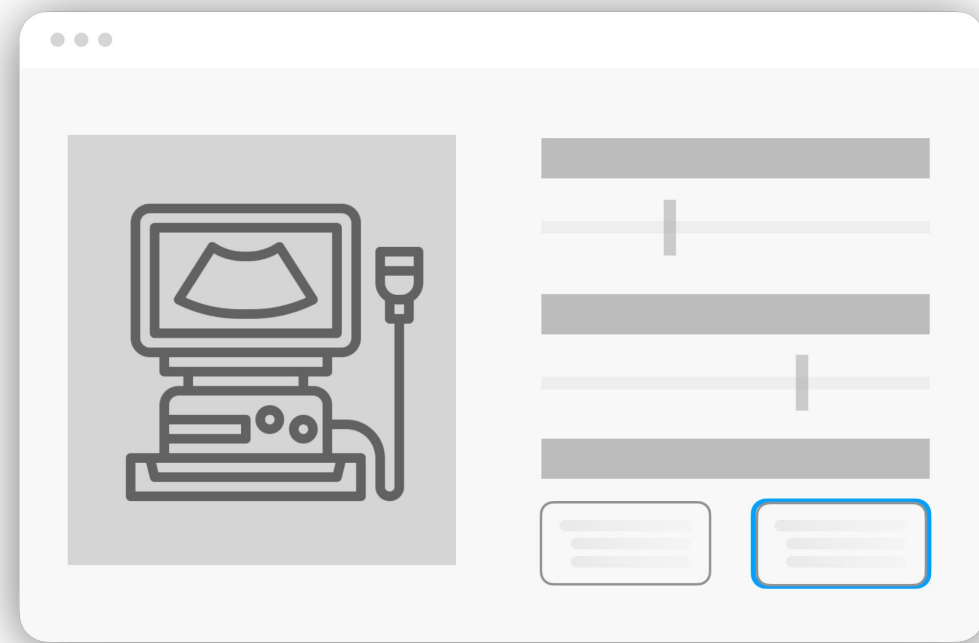


*Start getting orders in, send better quotes and collect payments*



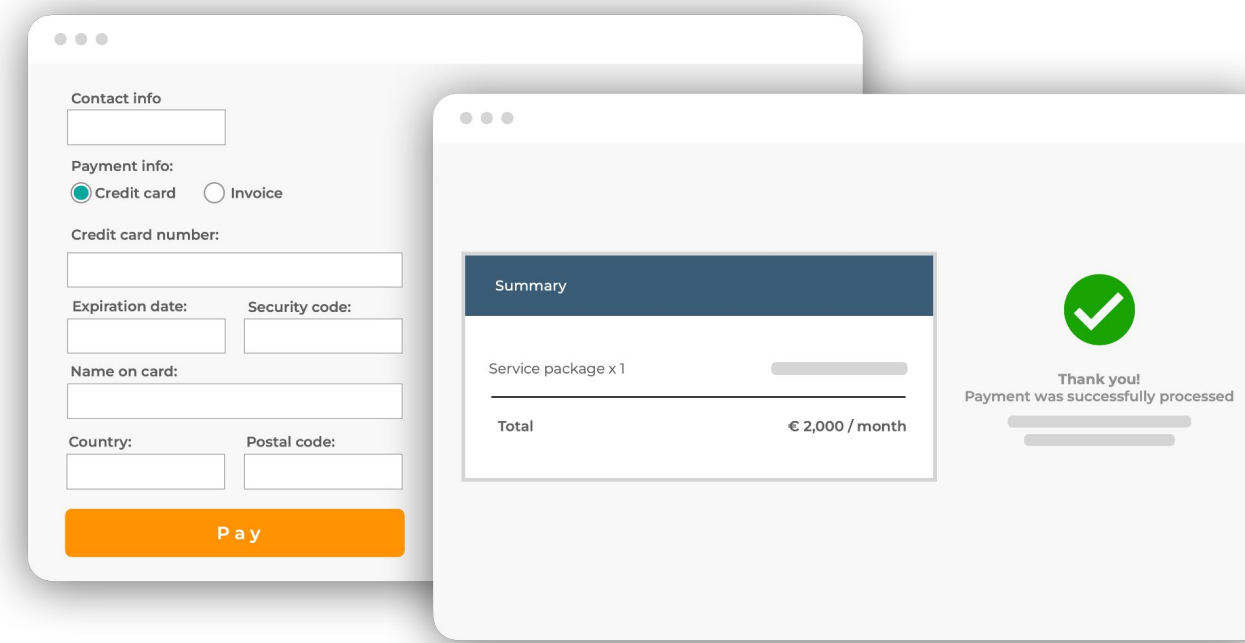
# Digital Sales, Redefined

HeadQ powers the next generation of digital sales solutions



Let customers build their own solution with...

Configurators



Let customers buy directly from you through customized...

B2B Checkout

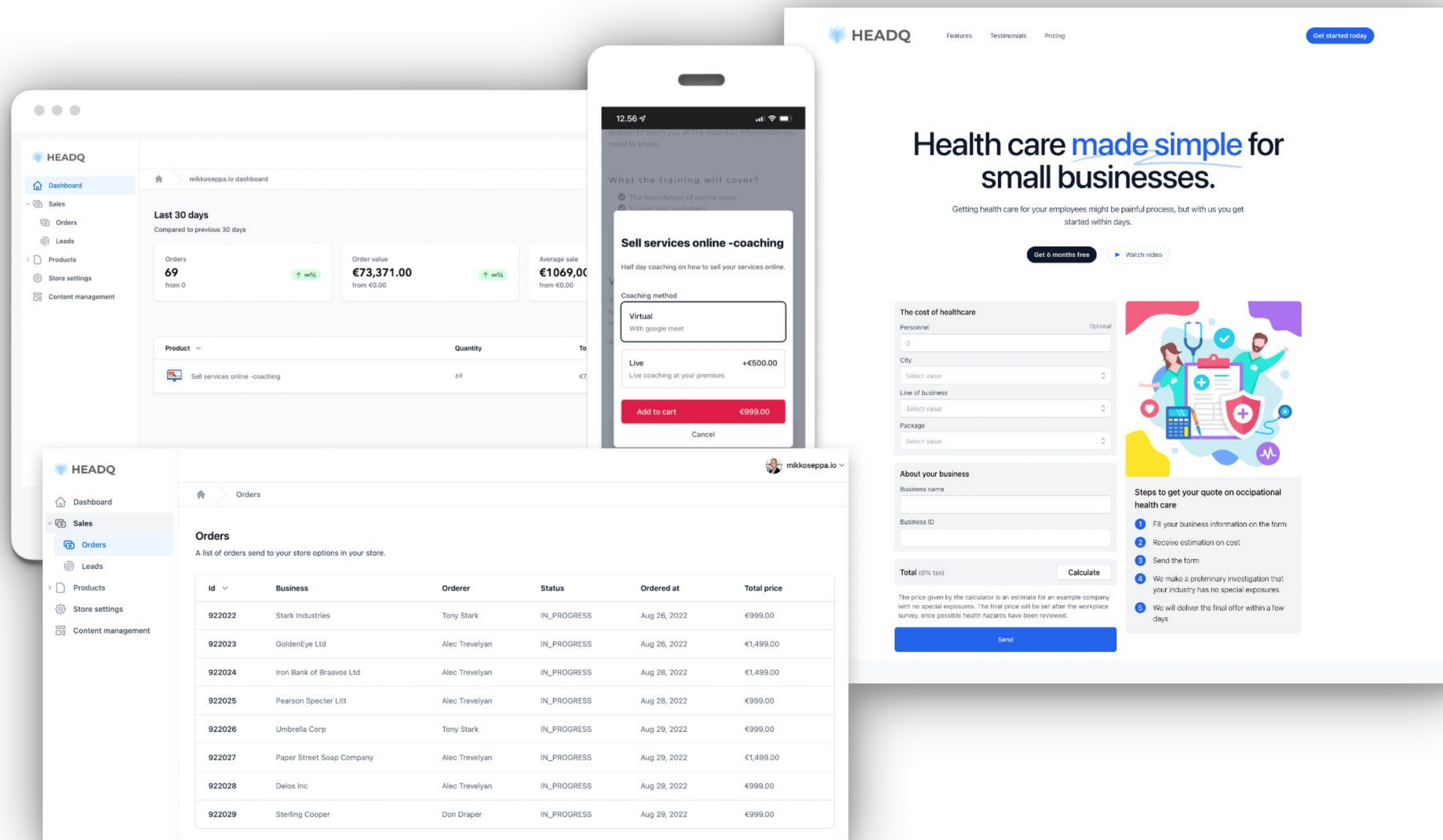


Let your sales reps close more deals faster and more accurately...

Quoting tools



# HeadQ Commerce



Launching in  
Q1 / 2023







**Exclusive offer**

**Join our **Waiting list** and get a access to **FREE** product before everybody else!**

[headq.io/get-early-access](https://headq.io/get-early-access)



# How To Sell Better With a Self-Serve Channel

**Why are we talking about self-serve  
within *B2B context*?**

**Shift happens**



# Shift happens

Buyers prefer *rep-free buying experience*

**29%**

**Of Baby Boomers**

\*People born from 1946-1960



# Shift happens

Buyers prefer *rep-free buying experience*

**29%**

Of Baby Boomers

**43%**

of all respondents



# Shift happens

Buyers prefer *rep-free buying experience*

**29%**

Of Baby Boomers

**43%**

of all respondents

**54%**

Of Millennials



**What about the companies then?**





Who led the digital transformation of your company?

A) CEO

B) CTO

C) COVID-19



# There's a divide between how companies sell and how customers would like to buy



Companies take orders by phone, email and require customers to fill horrendous *Contact us* -forms

#Inefficient  
#BadCX

Customers prefer self-service and only wish to talk to sales reps when it make sense to them

#Selfserve



**What used to be sold F2F / on the  
phone is now sold **online****





**EVERYTHING IS SOLD ONLINE**



# Sales evolves



Pay just  
~~\$5000~~  
**\$4500**

Buy



**By 2025, 80% of B2B sales interactions will occur in digital channels**



**Marketing becomes sales**



**What is a self-service  
channel anyway?**



# “Self-Service Channel”

*noun*

*“the system whereby customers select goods for themselves and pay at a checkout.”*



**Now, *if* you want to be a purist, feel free. But I'd like to extend the definition a bit.**



**Self-service doesn't need to mean an end-to-end self-serve buying**



**After all, in most B2B eCommerce use-cases customer don't pay in the checkout**



**B2C ≠ B2B**



**B2B self-service sales is a very different animal**



*My suggestion*

**When customer is able to conduct **key buying jobs online** without any assistance from the sales rep**



**Self-service sales looks totally  
different based on *what you sell***





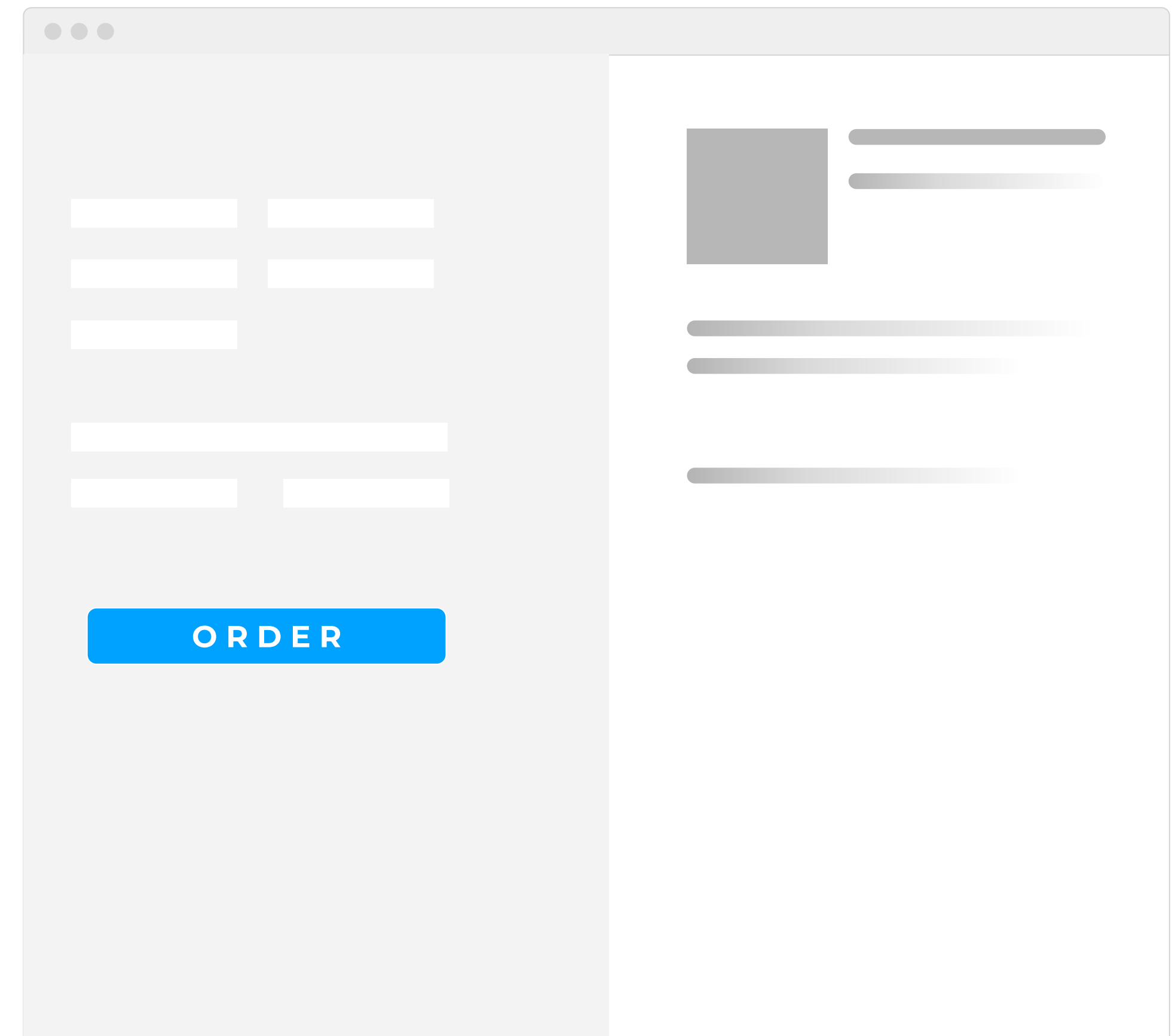
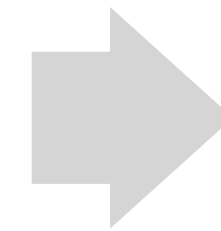
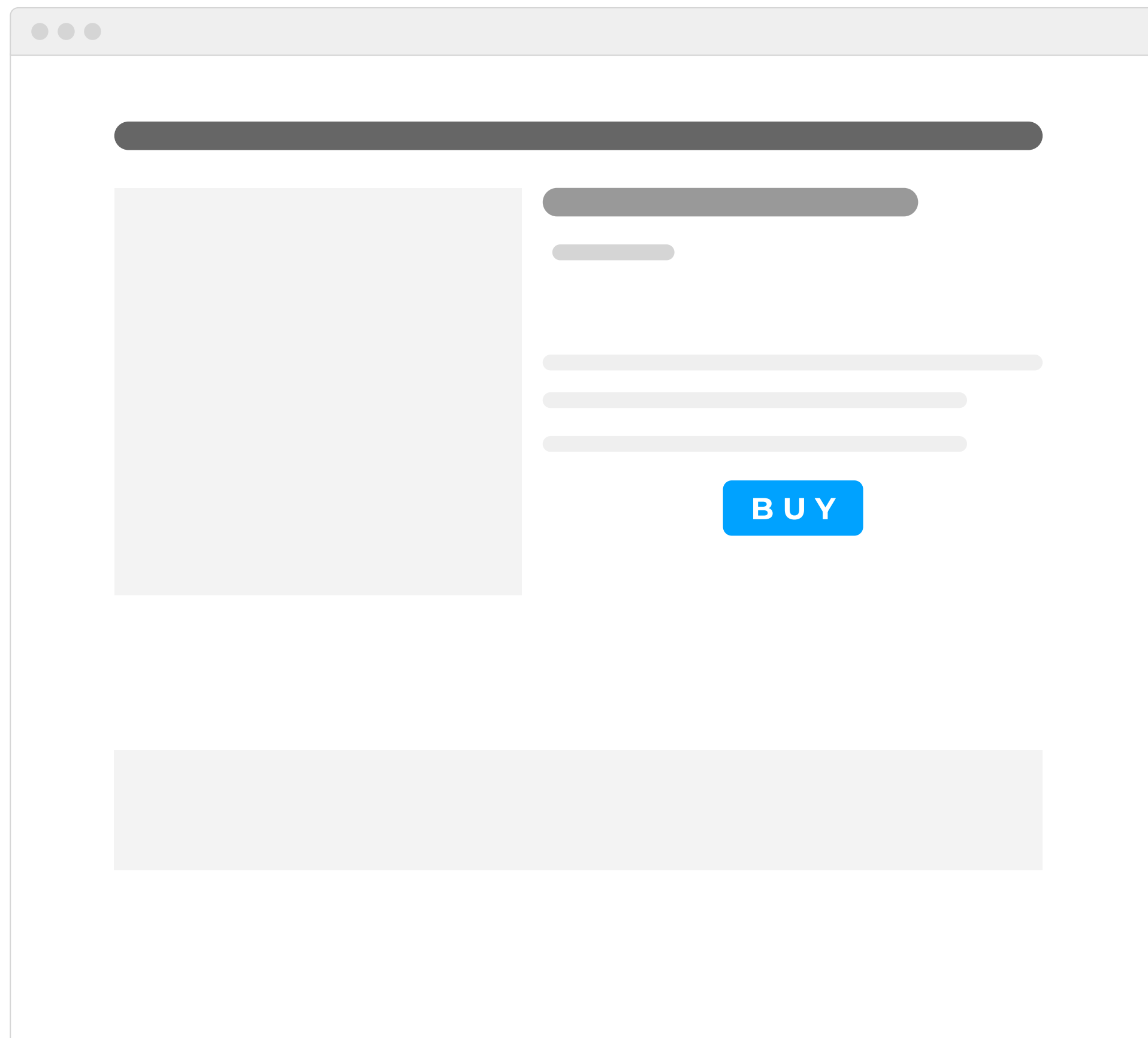
# 4 different ways to sell online

# **1** Direct buy



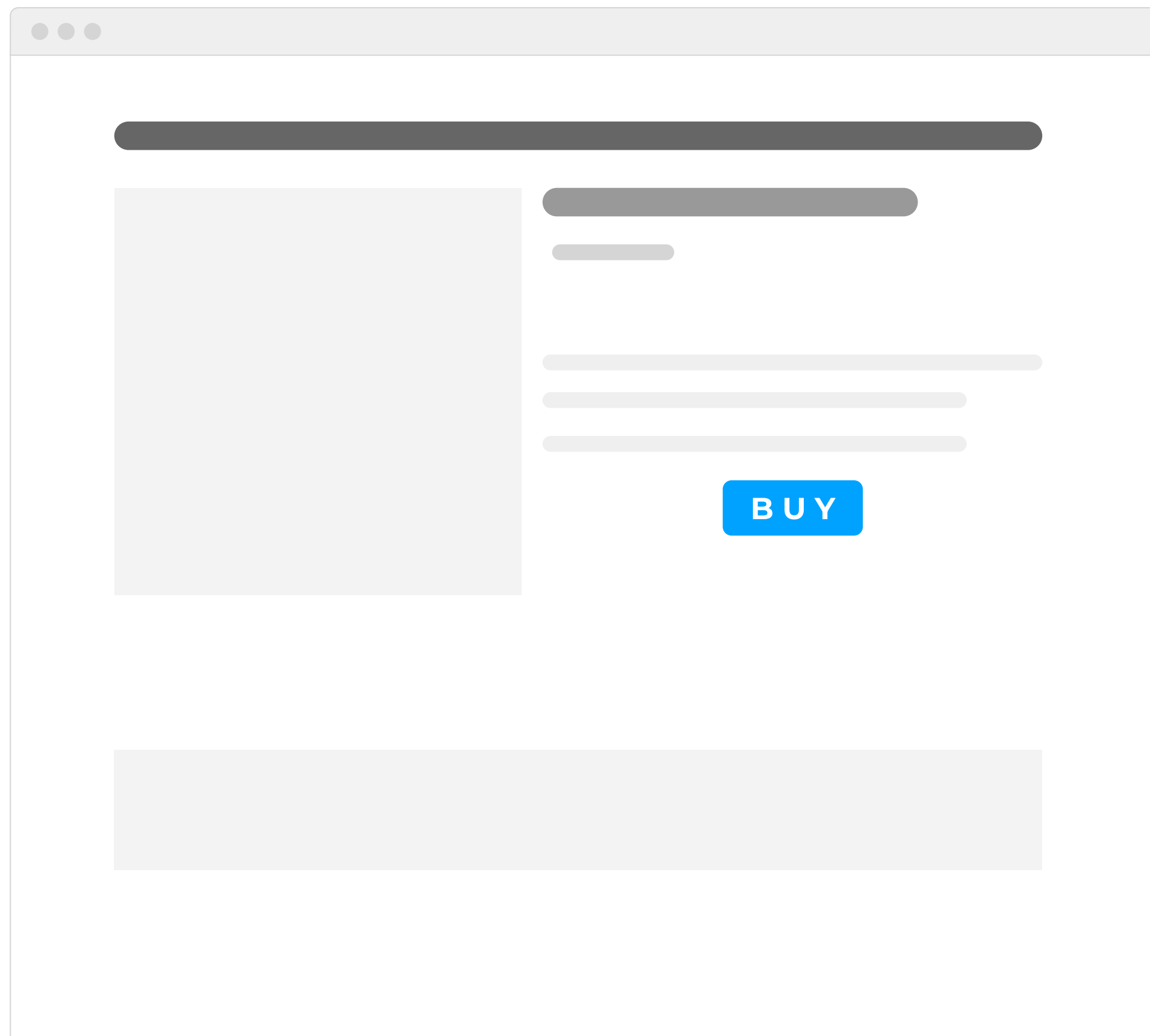
# Direct buy

Simple checkout for simple. Aim for consumer grade easiness



# Direct buy

Add-ons & upsell play big part in B2B



When you're selling a limited number of different products, having a very basic checkout for your product makes sense.

Easy upsell with quick configuration + add-ons.



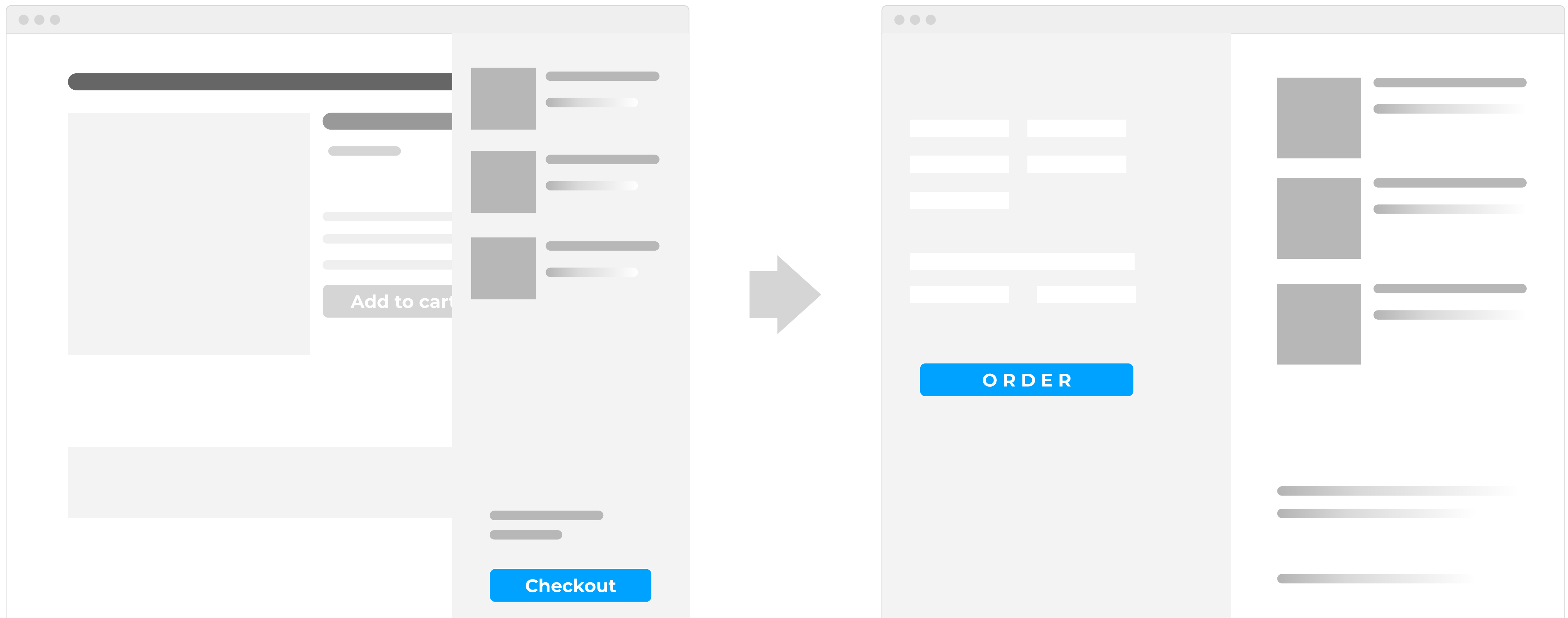


## **Shopping cart**



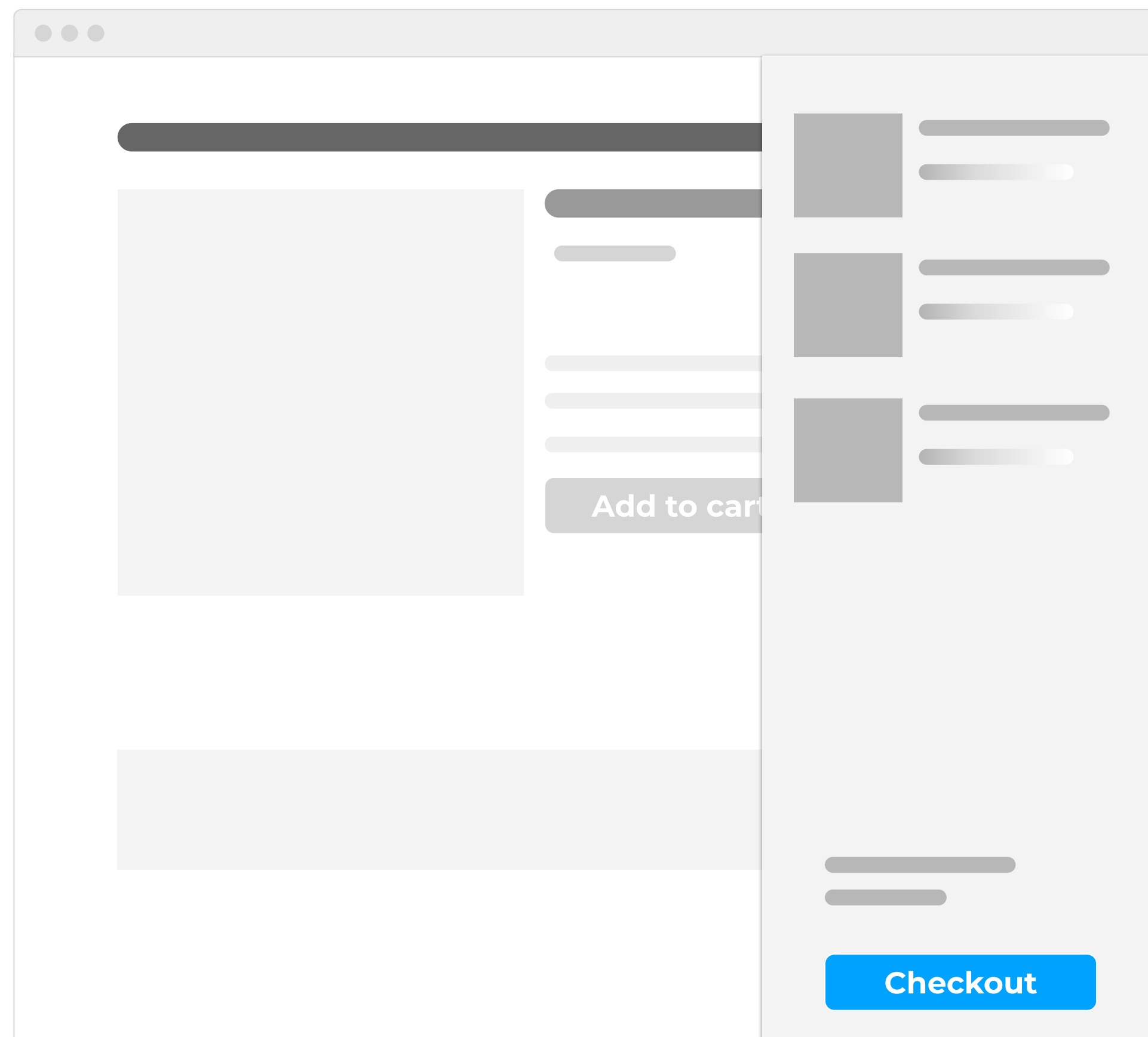
# Shopping cart

When your customers buys usually multiple products at the same time



# Shopping cart

When your customers buy usually multiple products at the same time



*“They might look the same, but...”*

What's different to B2C:

- Shared carts
- Split carts
- Approvals
- Multiple shipping addresses
- etc



**3**

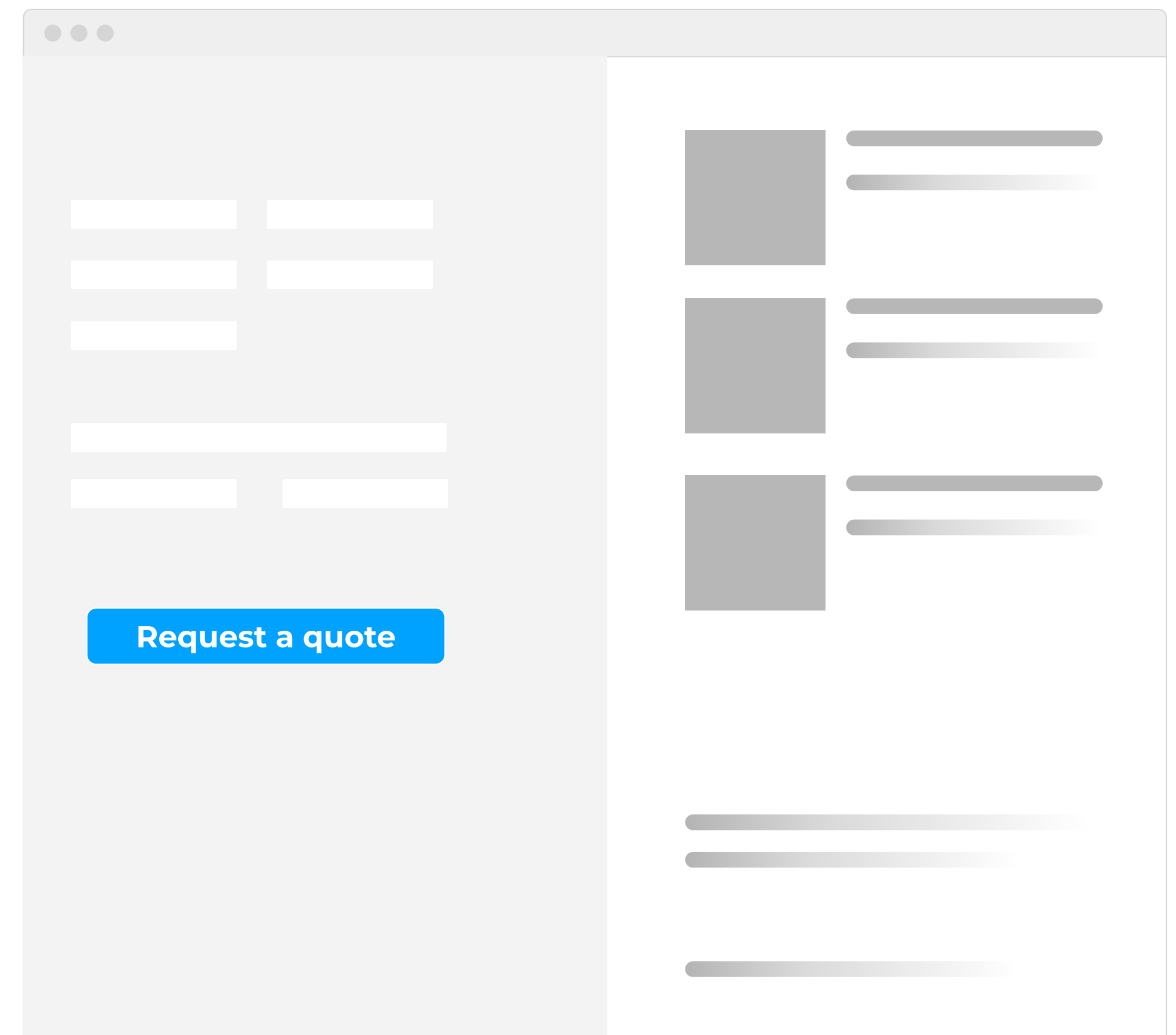
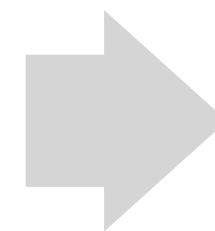
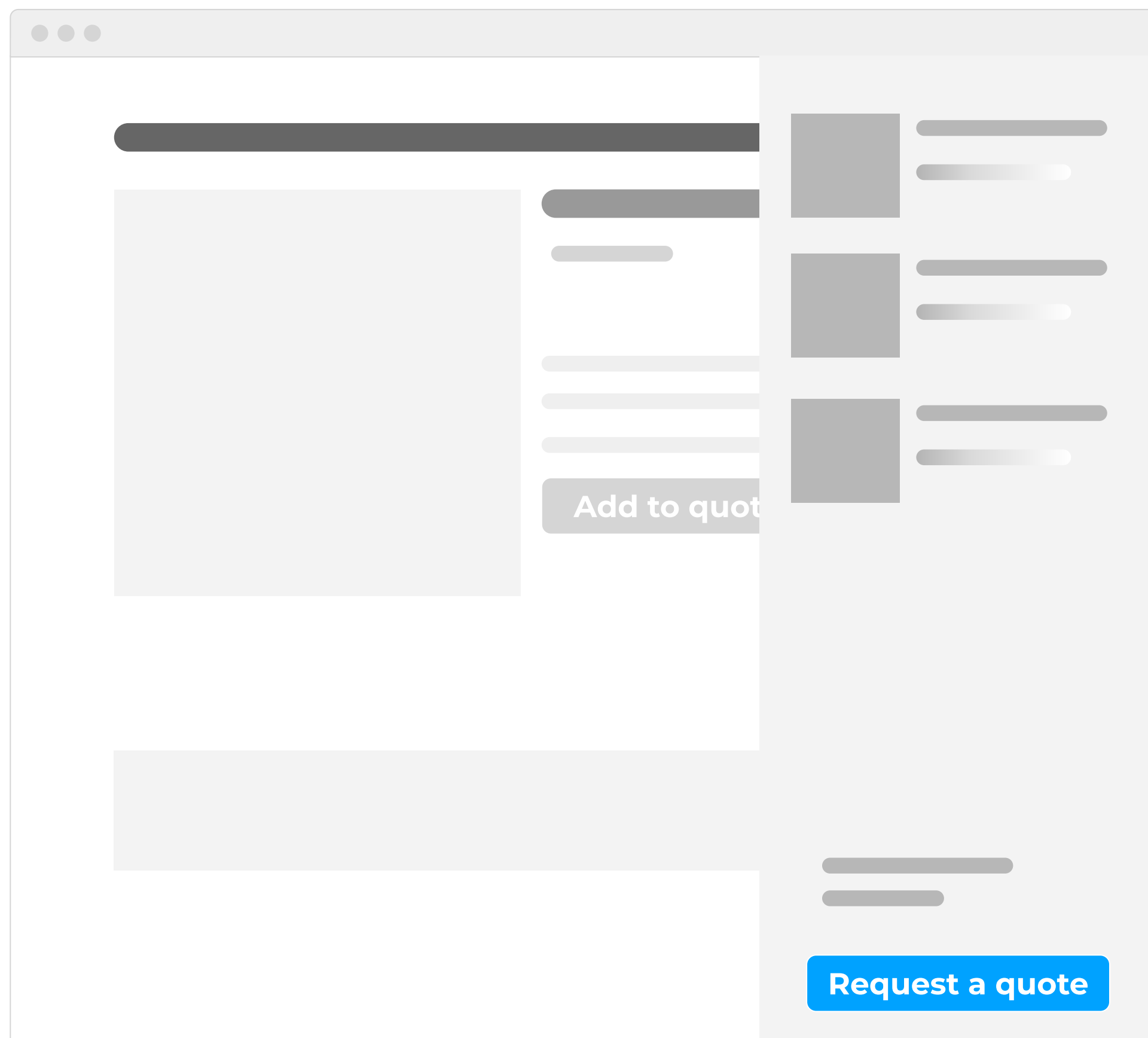
**Quote cart**





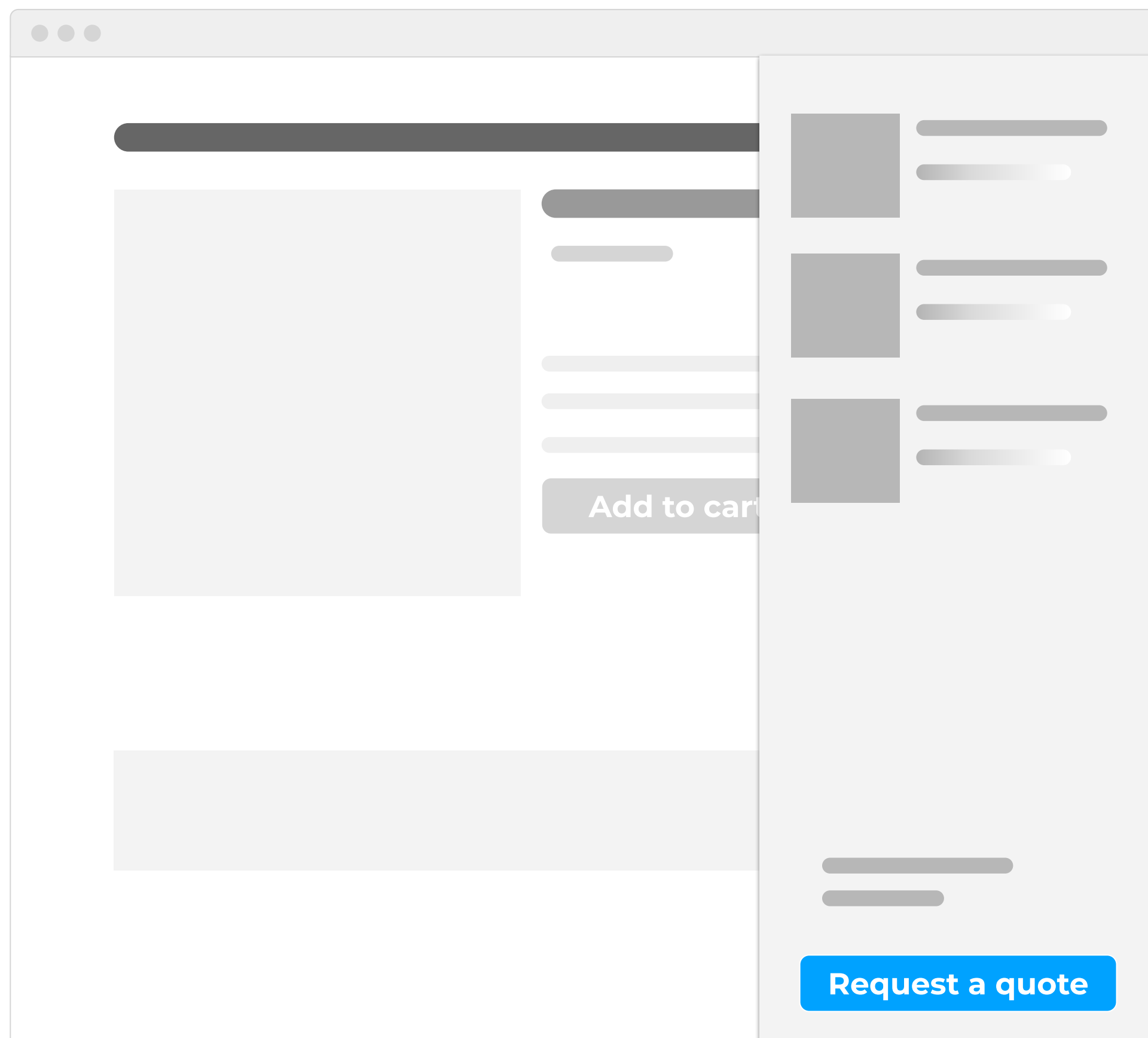
# Quote cart

Give your customers more tools for buying, maintain control of the pricing



# Quote cart

Give your customers more tools for buying, maintain control of the pricing



Quote carts are usually followed up by sales reps, but there are ways to automate this, too.

Some products might be available for direct purchase *and* quote

Customers often need more information!

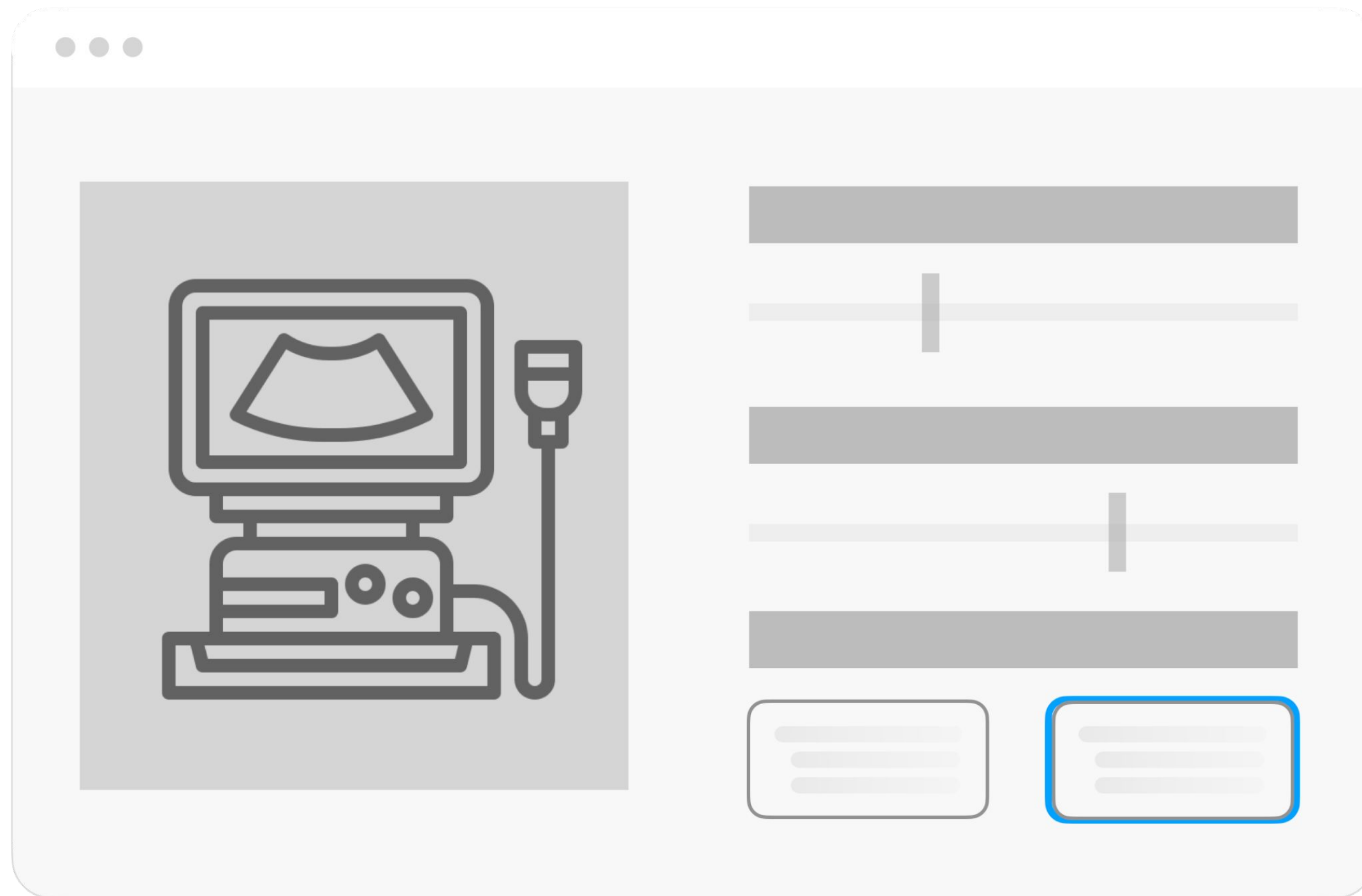


# **4 Configurators**



# Configurators

Let your customers build the product by themselves



Two ways:

1) Build a product, get price and buy

2) Build a product, get price range and request a quote for your company



**Email marketing ❤️ Self-service channel**

**“Build it and  
they will come”**

**vs**

**Marketing  
is sales**



**Email is the **easiest** and **fastest** way to increase sales on B2B ecommerce.**



**And yet, it's still widely *overlooked*.**





**You should use email for...**

- Abandoned carts**
- Abandoned configurations**
- Next-best offer
- Upgrades, services etc
- Loyalty-programs
- Educating customers



# Forgot something?

Don't leave carts behind.

Abandoned carts are real thing with B2B as well



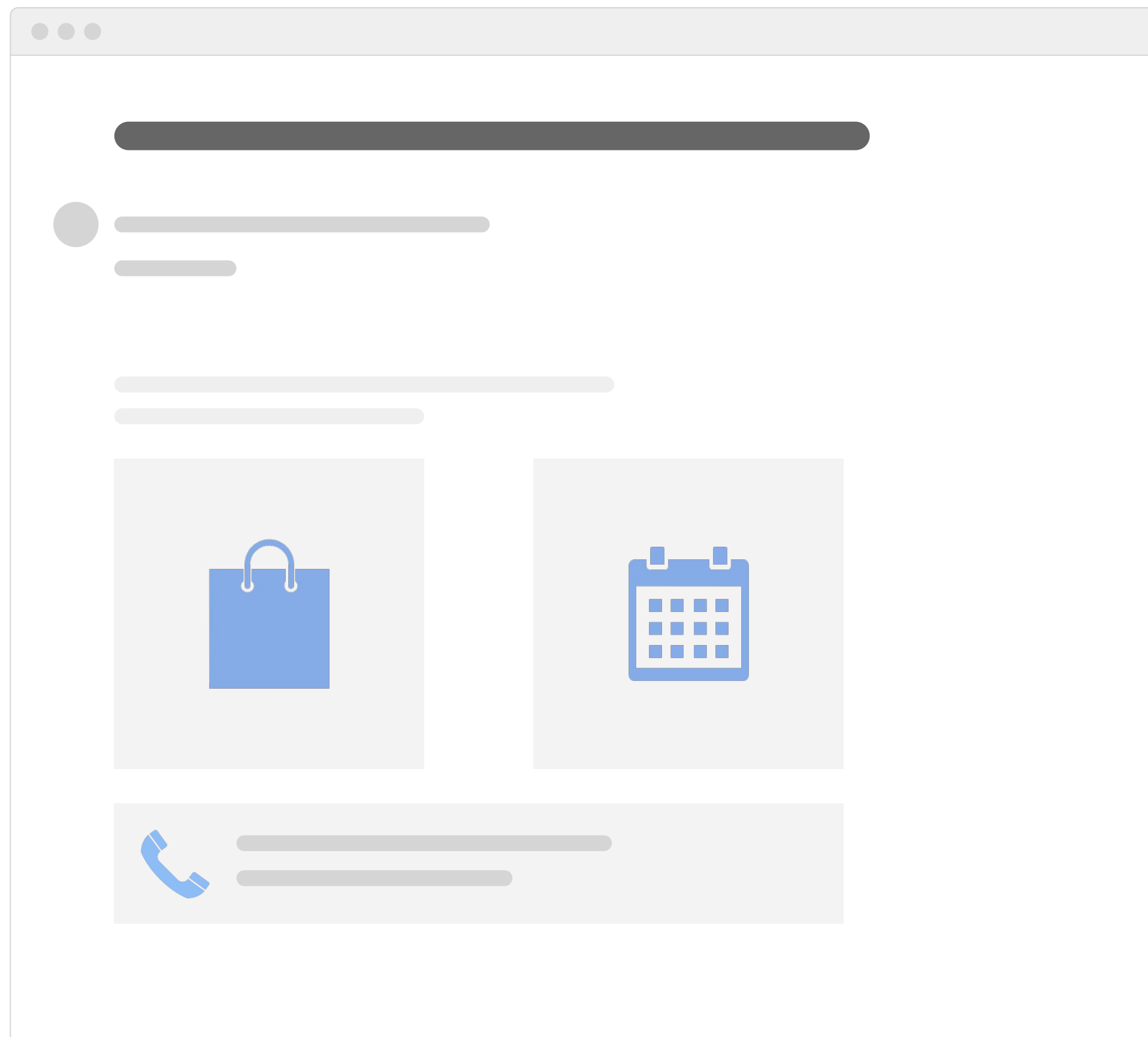
# Abandoned carts happen for many reasons

- If there's no Save cart / send cart / RFQ-feature available, customer might need to get an approval from their boss to complete the purchase
- If your store doesn't allow customer to ship different products to different addresses (enable shipping address per line item)
- If the product is not available in the quantity or time customers wants



# Omnichannel FTW!

Self-service + sales rep = WIN!



Most **companies have sales people**, so you can offer a help from sales rep OR incentivise self-serve buying with a coupon code (yes, it works for B2B as well)

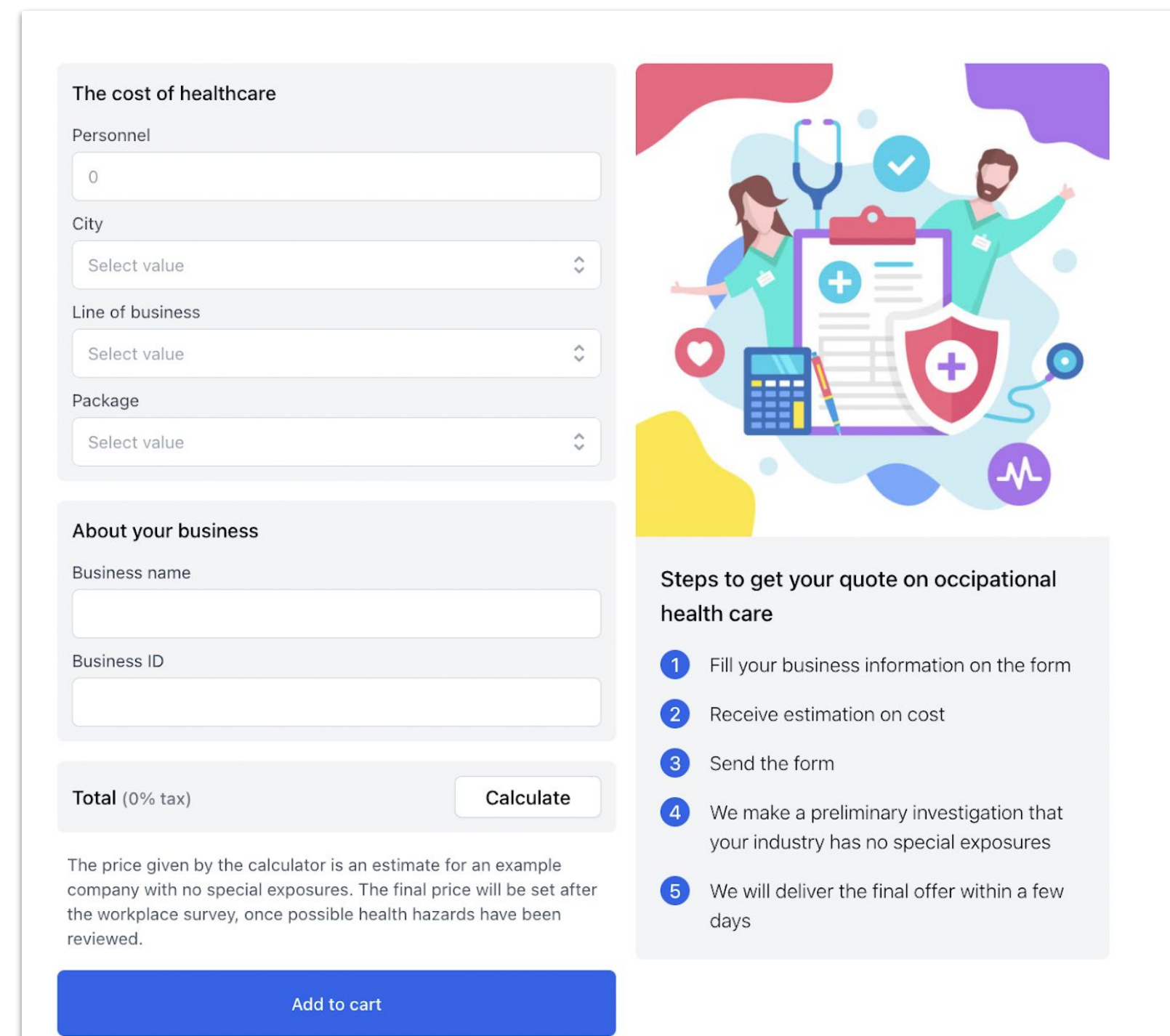


**You should use email for...**

**Abandoned carts**  
**Abandoned configurations**  
Next-best offer  
Upgrades, services etc  
Loyalty-programs  
Educating customers



# Carts are not the only thing that gets abandoned



The cost of healthcare

Personnel  
0

City  
Select value

Line of business  
Select value

Package  
Select value

About your business

Business name  
Business ID

Total (0% tax) Calculate

The price given by the calculator is an estimate for an example company with no special exposures. The final price will be set after the workplace survey, once possible health hazards have been reviewed.

Steps to get your quote on occupational health care

- 1 Fill your business information on the form
- 2 Receive estimation on cost
- 3 Send the form
- 4 We make a preliminary investigation that your industry has no special exposures
- 5 We will deliver the final offer within a few days

Add to cart

People actually spend relatively much time with configurations and building their desired solution

HeadQ dataset proves that an average customer completes **3.2** different configurations before continuing to checkout.

Bring the information from your commerce tool to email to remind the customer of the work that needs to be done.



**You should use email for...**

Abandoned carts  
Abandoned configurations  
**Next-best offer**  
Upgrades, services etc  
Loyalty-programs  
Educating customers



**Next-best-what?**





# Next-best-offer?

*“A next best offer (NBO) is a highly customized offer by a company or marketer, that guides the customer to the right merchandise, services, or information”*

*Requires quite a bit from your  
data strategy*



# Next-best-offer, made simple

Takes a bit more effort, but when working with decent volumes can result in significant gains



Next-best-offer is often made too complex. AI driven tools can make it significantly simpler for you, but if you work with limited budget here's what you can do:

- 1) Offer related products
- 2) Offer upgrades (from older equipment to newer)
- 3) Offer accessories



# Where to pull this information from?

- 1) **Your CRM:** allow sales reps to mark the product / service they've discussed that would be the next thing customer should buy / might be interested in
- 2) **Digital Commerce Platform:** other products viewed
- 3) **PIM:** related products, etc

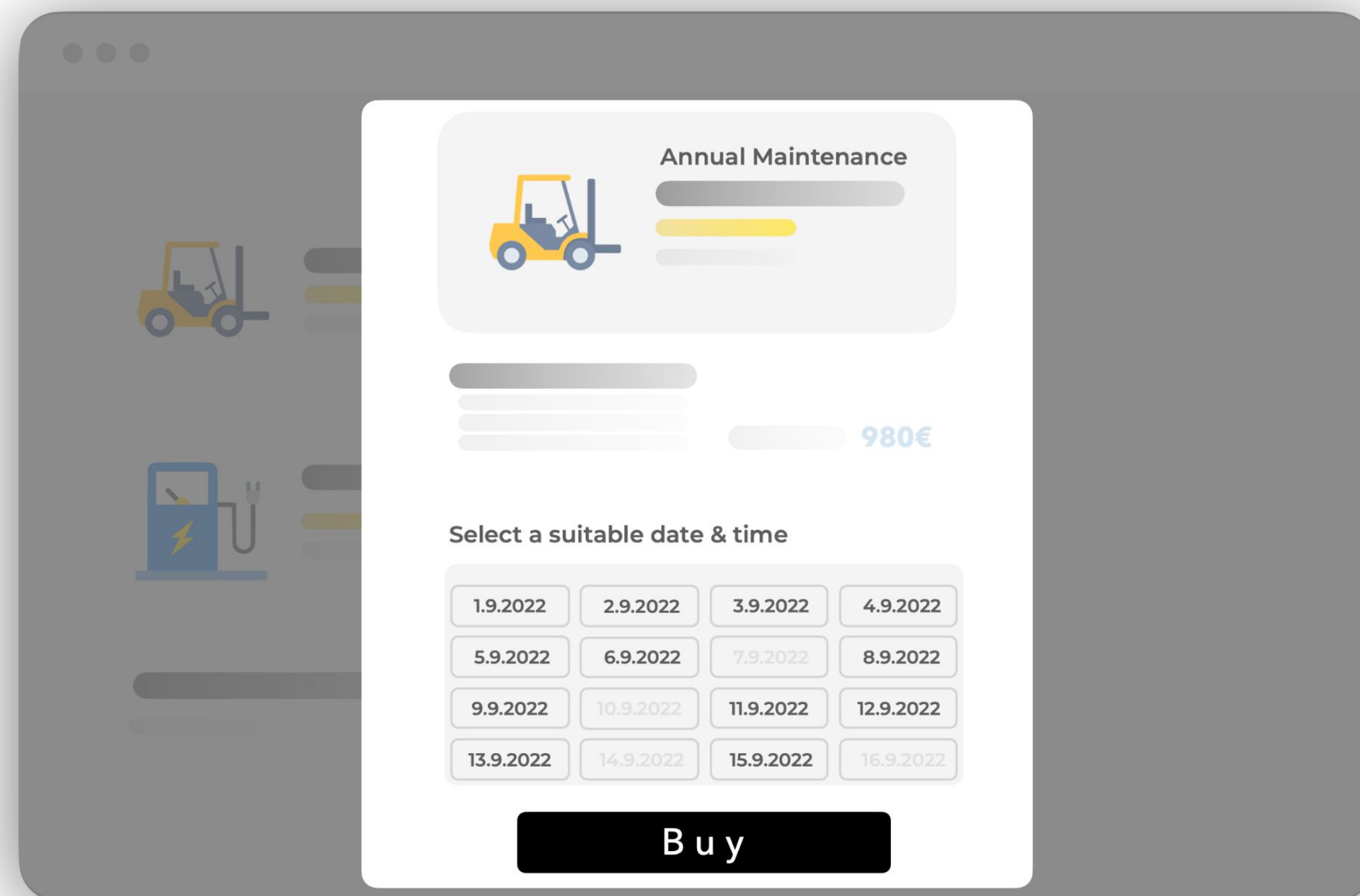


**You should use email for...**

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# Upgrades & services



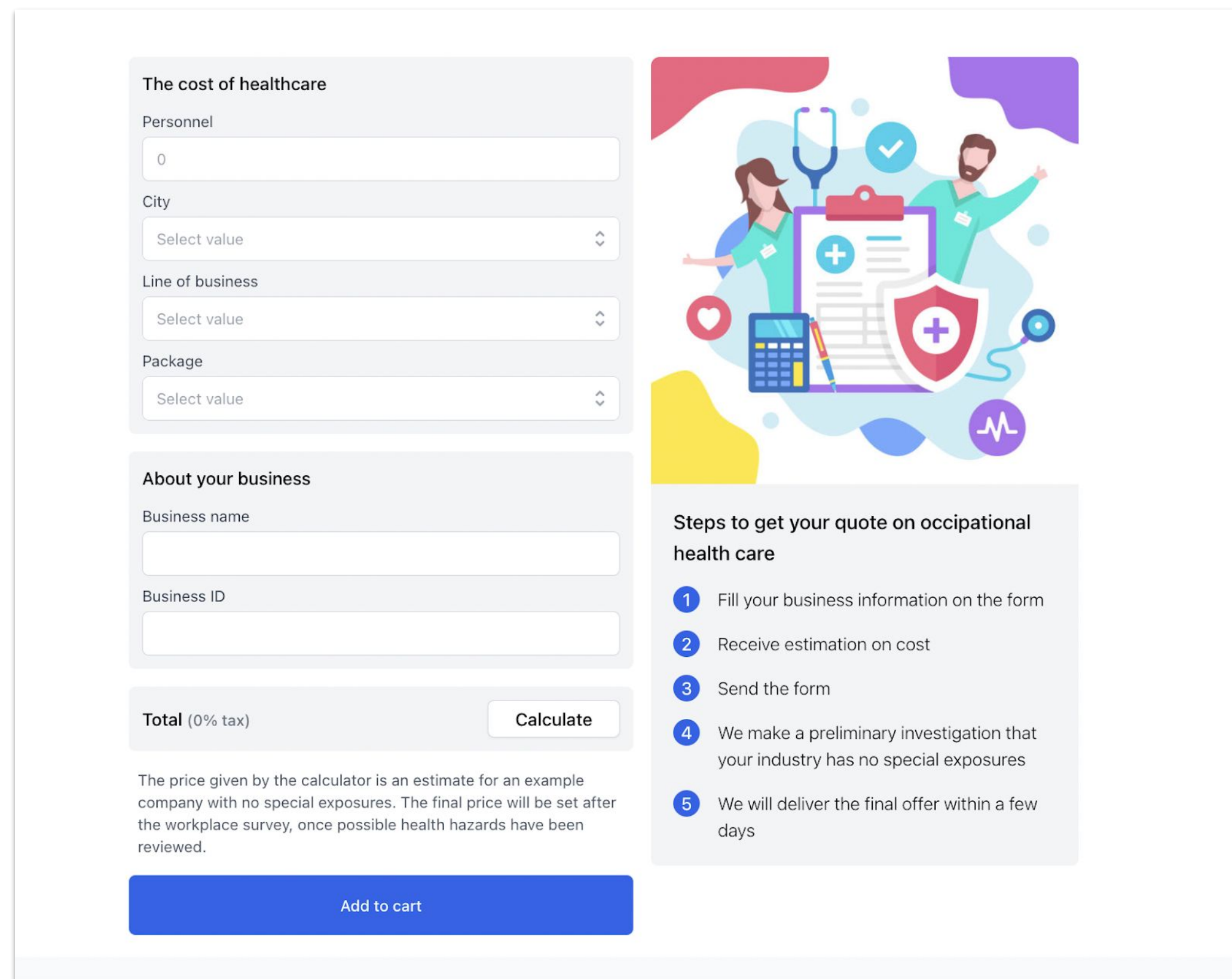
Selling upgrades and related services e.g **yearly maintenance**, is a great way to increase your customers' LTV.

E.g

- Yearly maintenance
- Upgrade to service level
- Upgrade in your service package
- Extended warranty



# Example: Occupational healthcare company



The screenshot shows a web form for calculating the cost of occupational healthcare. It is divided into several sections:

- The cost of healthcare:** Includes input fields for Personnel (0), City (dropdown), Line of business (dropdown), and Package (dropdown).
- About your business:** Includes input fields for Business name and Business ID.
- Total (0% tax):** A summary section with a 'Calculate' button.
- Disclaimer:** A note stating that the price is an estimate and the final price will be set after a workplace survey.
- Steps to get your quote on occupational health care:** A 5-step process: 1. Fill your business information on the form, 2. Receive estimation on cost, 3. Send the form, 4. We make a preliminary investigation that your industry has no special exposures, 5. We will deliver the final offer within a few days.
- Illustration:** A colorful illustration of healthcare professionals, a stethoscope, a clipboard, and a shield.
- Buttons:** A blue 'Add to cart' button is located at the bottom.

Besides selling their core occupational healthcare service (retainer), they should upsell one-off services

- Influenza vaccination (autumn)
- TBE-vaccination (spring)
- First aid training

Selling additional services often has a positive effect on customer retention rate!



**...speaking of retention rate**



**You should use email for...**

Abandoned carts  
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Educating customers





# Leaky bucket syndrome

If you can't retain your customers...



# Leaky bucket syndrome

...you can't really grow effectively.

**Retention is the  
key to #GROWTH in B2B.**



# Loyalty-programs

Majority of any given B2B-company's revenue comes from selling to existing customers. Retaining customers is the key



## Pro Tip

Incentivising B2B-loyalty is underutilized.

Gamify: get better discount levels when you buy more (EUR / volume thresholds)

Make a "Membership" / "Loyalty-program" all about *customer success*, not only about discounts and offers.

- Customers value education & help
- Improve Loyalty



**You should use email for...**

Abandoned carts  
Abandoned configurations  
Next-best offer  
Upgrades, services etc  
Loyalty-programs  
**Educating customers**



# **Educating customers**





**Avoid unnecessary  
content gating.**



**Your purpose is not to generate a lead,  
but to educate a prospective customer.**

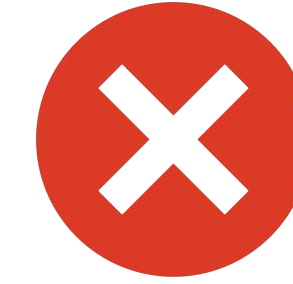




## Do

- How to solve the problem with X
- Build trust with references
- Inspire with examples!
- Sell the *pain of same*

vs



## Don't

- Send a general weekly newsletter
- Just send links to your latest blog posts
- Send general product information, make it a real value





# Recap



# Recap of this presentation

- ✓ Self-service as a B2B sales channel is here to stay and only will grow bigger
- ✓ There are many ways to sell online, not all need to go to the payment
- ✓ Email-marketing is key to improve your sales in B2B Commerce
- ✓ “Value” doesn’t need to mean discounts or campaigns, but help & information
- ✓ Launch your digital sales channel already today to reap the benefits





**HEADQ**