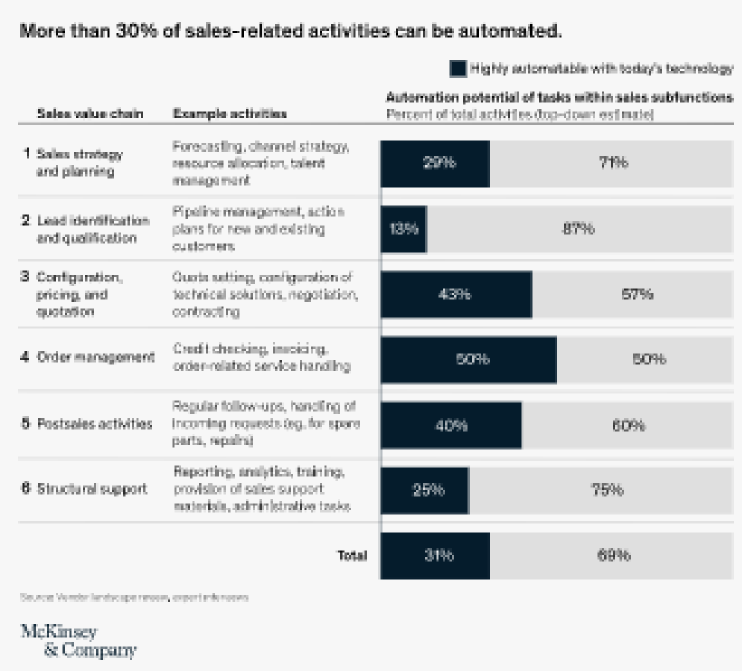
How To Scale Your CPG B2B Business with Workflow Automation

October 12, 2021 By Yana Persky

A recent McKinsey study shows that approximately a third of sales and sales operations tasks can easily be automated using today's technology to improve efficiency and effectiveness.



However, despite its enormous potential, many CPG and FMCG businesses are unaware of the breadth and depth workflow automation brings, and of the value it may unlock. Many business leaders haven't taken advantage of workflow automation, despite the fact that it has become a global phenomenon across various industries and regions.

What is workflow automation?

[Workflow automation](#) is the process that automates a set of manual, repetitive tasks using rule-based logic. Once the rules and logic are established, automated workflows allow anyone on your team (without touching a single button) to configure actions such as:

- Sending an email when an order is submitted, or exporting the order to the ERP once approved
- Displaying an alert to the customer about credit limits and blocking an order
- Running a webhook to get a real time inventory check/approval from the ERP

- Approving special discounts or transactions above a certain value
- Validating credit before an order is submitted
- Verifying an address when a new user account is created

Why workflows are crucial in B2B eCommerce?

Unlike in the B2C world, B2B eCommerce workflows are entirely determined by the buyer and not the seller. Different business buyers may have different requirements for various use cases that can trigger special workflows.

To illustrate this point, let's look at some of the promising workflows that can be applied to any industry.

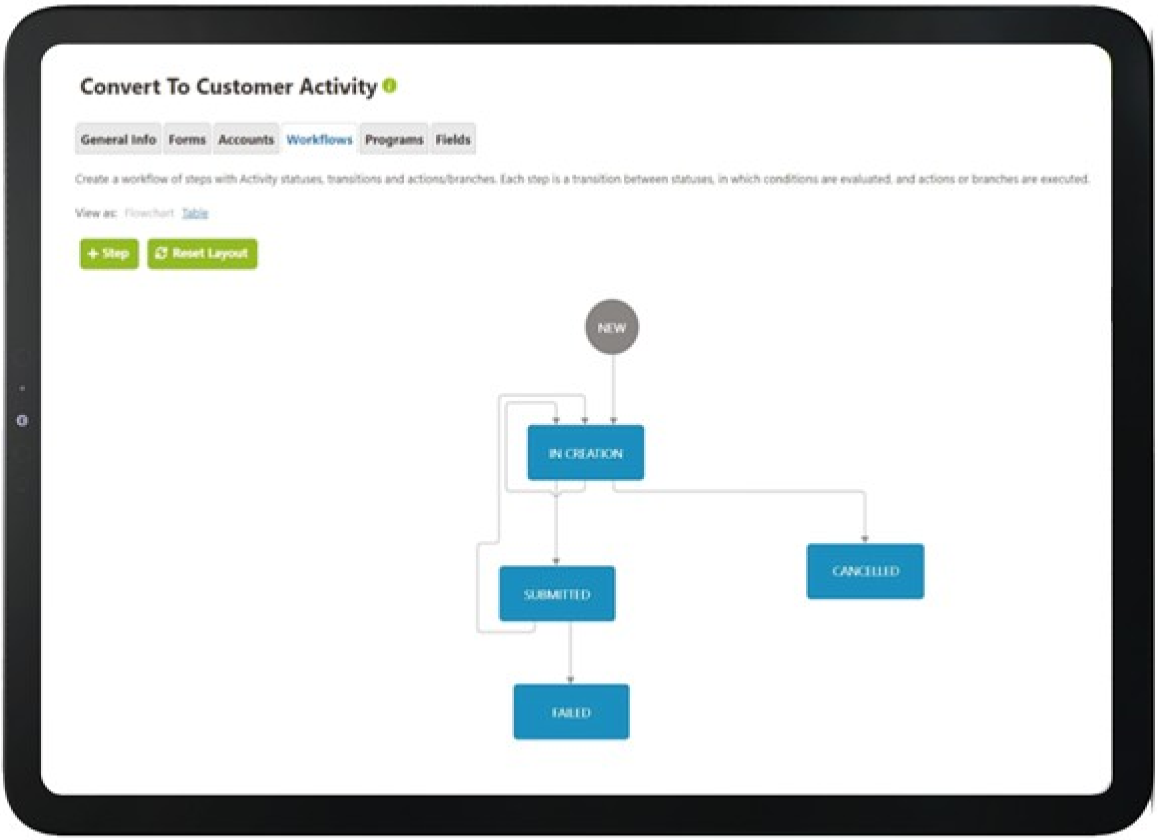
Automated "Account Set-Up" Workflow

Professional skin care brand Dermalogica, sought to automate the set-up process with a unified, digital and interactive solution that would work with their New Account Portal and JD Edwards and where Business Consultants could generate and qualify leads and Finance could convert them into customers.

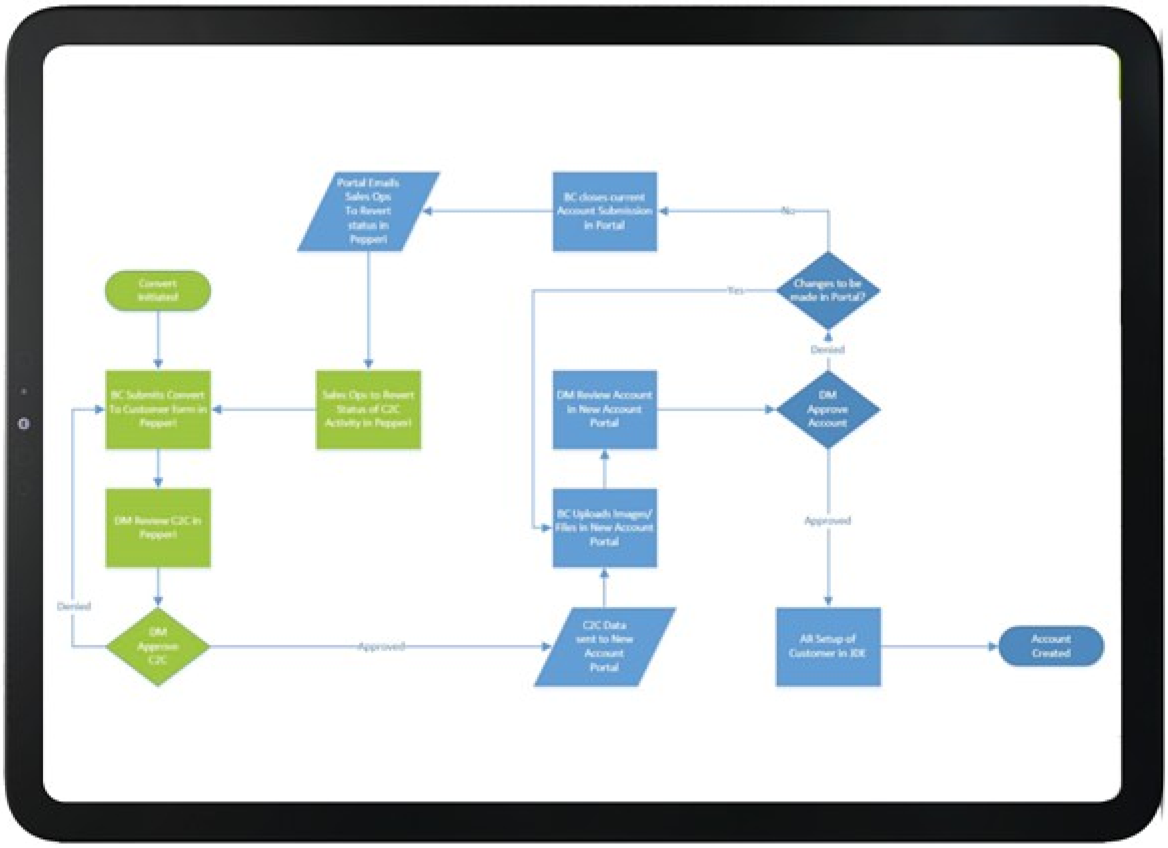
In order to set up an account, the Business Consultant needs to verify licensing, gather pertinent contracts and documentation, then work with their District Manager and Finance to communicate account set up. Details they communicate to Finance include account segment, address classification, tax status, applicable price list, etc. A new business account setup request starts with an inquiry form on the company's website, which is integrated with Pepperi using Pepperi API.

The initial review process is done by Business Consultants and involves gathering account details, which are then submitted through Pepperi into their New Account Portal. Once the Consultant uploads relevant documentation into the New Account Portal and the District Manager reviews and approves, a Finance approval triggers the automated account setup in JD Edwards, and the lead record is subsequently updated as an account in Pepperi.

Upon account setup, the Owner record is marked to automatically be setup as the B2B Buyer, and an email notification is triggered to go to the account with login instructions. Most changes to established accounts - be it location, certification, name or credit terms - require a form request from the Business Consultant, which then triggers an automated workflow to ensure changes are valid and updated in the system.



Onboarding workflow

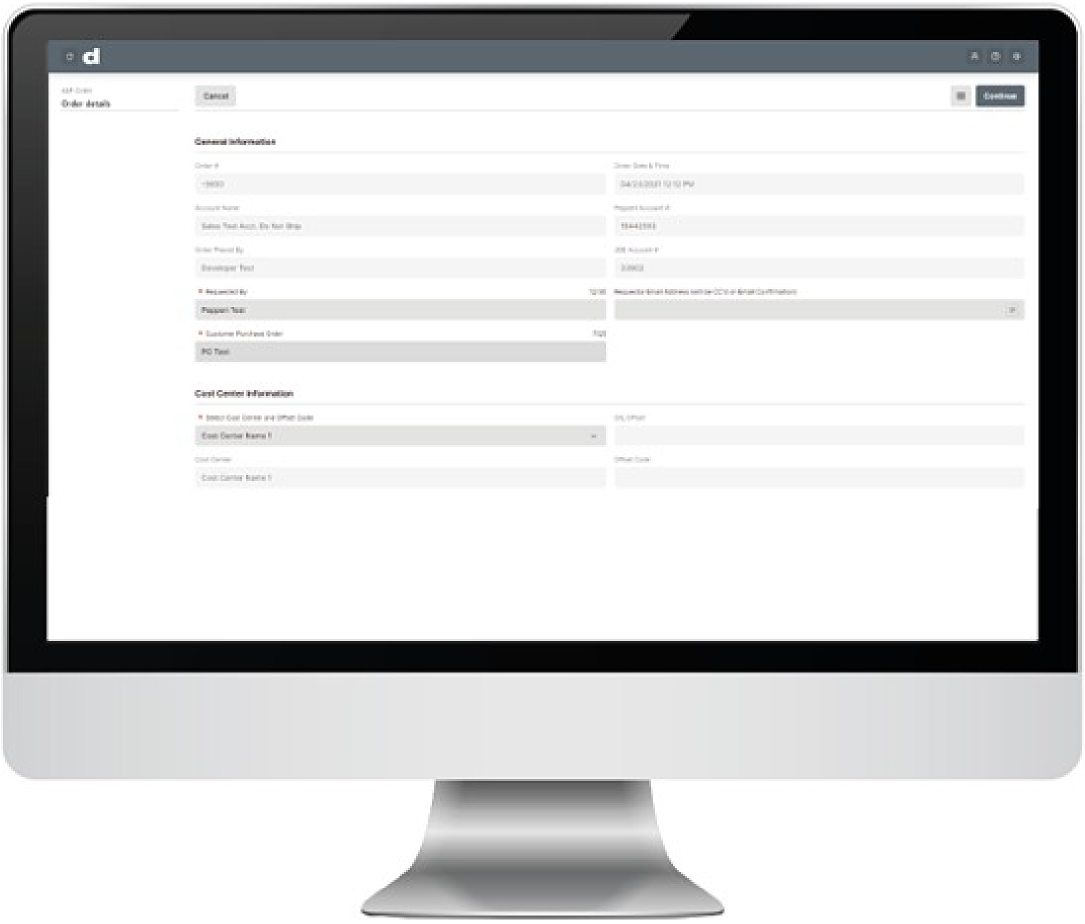


Onboarding workflow

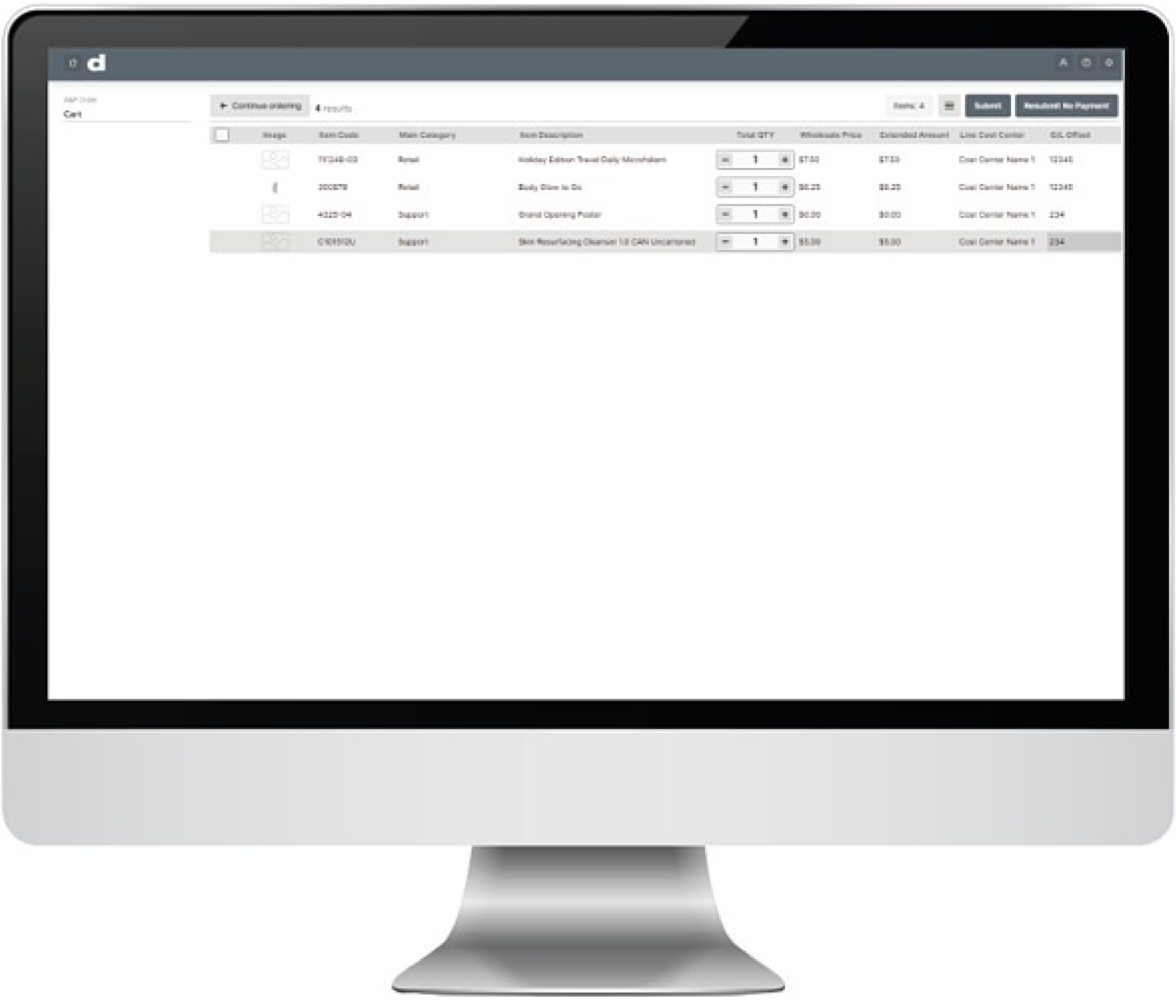
Dedicated ‘Advertising and Promotion (A&P) Order’ Workflow

Dermalogica Marketing collaborates with social media influencers for product launches to boost sales and increase consumer awareness, averaging 6 new product launches annually and over 5,000 product giveaways per launch. Dermalogica’s Sales team also has various needs to place A&P orders that support growth of the business through prospecting, account events, etc. Dermalogica sought a way to eliminate the Customer Service step of processing no-charge A&P orders.

By using a dedicated A&P workflow, Marketing and Sales can choose the relevant cost center and place no-charge orders on their own. Customer Service intervention to process A&P orders that do not require approval or review has been completely eliminated.



A&P order details

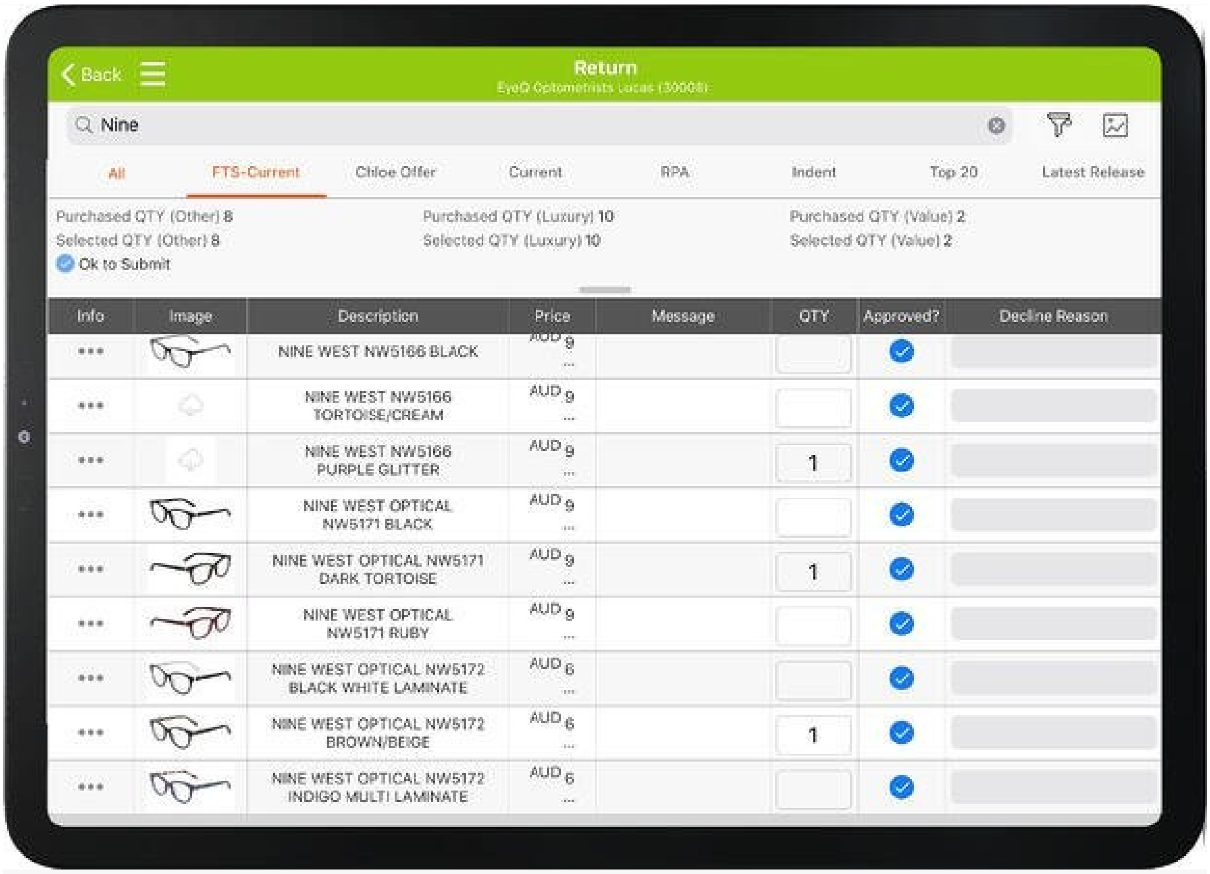


A&P cart

Customer Service savings: 12K fewer A&P orders to process annually (Customer Service involvement eliminated)

‘Configurable Returns’ Workflow

Marchon Australia sought to create a more controlled returns experience across multiple sales channels. A return rate that could be as high as 25% is quite common in the eyewear industry. The rotation policy protects the investments the retailers make by enabling them to exchange the items that are not selling well. To the distributor it comes at a high price though, and requires configuring additional business processes and workflows to support return-related activities including stock movement and updates, approvals, physical condition of returned items, repackaging and shipping.



A new returns workflow created consistency and boosted efficiency across multiple sales channels by having all returns-related info in one place

Non-authorized returns were significantly reduced as a result of allowing customers to submit their own requests for returned merchandise authorization using pre-defined rules and criteria

Conclusion

CPG brands and distributors should be relying more on automated workflows as part of their digital transformation journey if they are looking to eliminate repetitive tasks, human errors, streamline approval processes, boost efficiency across multiple channels, save time and labor costs.

How quickly can you respond to meet new workflow requirements, especially if they entail extra logic and sophisticated business rules? Can you create them on the fly and with no coding?

Don’t compromise on less than a flexible B2B sales platform that can easily define what happens at every point in your business processes using a ‘drag and drop’ workflow engine like Pepperi’s B2B sales platform.

About The Author

Yana Persky

Seasoned marketing professional with over 20 years of experience in the hi-tech and software industry. An expert in leading in-depth strategic market analysis, evaluating worldwide technology trends, and understanding the competitive market to support new strategic leads and business opportunities.

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