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Background:

- Awarded MS MVP in BizApps in 2014
- Have worked with AX since 2007
- Have worked with D365FO since 2016

Lessons learned from implementing a D365 eCommerce B2B and B2C site in 14 weeks

In this session, we'll talk about D365 Commerce's eCommerce B2B and B2C solutions and their use cases. Specifically, we'll discuss the lessons learned in implementing these the B2B and B2C solution in a ground up Dynamics 365 Commerce implementation for a manufacturer in 14 weeks.

Dynamics 365 Commerce is not just for retailers, especially when looking at the B2B side of the house for customers. In my experience, almost all D365 companies could benefit for implementing a B2B portal. But is D365 Commerce the right solution?

In addition to the lessons learned, we'll also discuss alternatives, benefits, and best practices for implemeting an eCommerce solution holistically.

About Dynamics 365 eCommerce B2B and B2C

- Fully integrated NATIVELY in both B2B and B2C

- TRULY unique in the industry

- Expensive and tough to implement
  - Longer than competition
  - New tech so few experienced resources
  - New product with few implementations

Anatomy of a 14 week eComm implementation

- Must be competitive and always compared to alternatives, despite the unrecognized upsides
- Optimistic project timeline
- High expectations from customer
- Stressed out developers
- Stressed out project manager
- Lots of ideas from stakeholders and end users
- Big ideas from stakeholders and end users
- Out of scope ideas from stake holders and end users (you get the trend…)
- Everyone is a graphic artist
- Questionable scope

Adventure-works B2C Demo site

Adventure-works B2B Demo site

Quick add

Enter product SKU# to find a product. Select product variants and add to the Quick order. You can review all the products before adding them to the shopping bag.

✓ Added to your cart

Product	Size	Color	Quantity	
61101	S	Comet	5	**ADD TO BAG**

Shipping
(6 items)

Cozmino Men's Coat
Size: S
Color: Comet
$160.00

Quantity
− 6 +
ea

$960.00

Add to order template   Add to wishlist   Remove

Order summary

Subtotal	$960.00
Shipping	TBD
Estimated Tax	TBD
Total	**$960.00**

Purchase in bulk

Enter quantities across multiple products and add them to the shopping bag all at once.
Change the sequence of the columns by clicking the column label.
Example: Color, Style or Size.

+ Enter all quantities ⌄   ✕ Clear all quantities

Color ⌄	Size ⌄	7	7.5	8	8.5	9	9.5	10
Grey		Out of stock	Out of stock	Out of stock	Out of stock	Out of stock	Out of stock	Out of st
Red		Out of stock	Out of stock	Out of stock	Out of stock	Out of stock	Out of stock	Out of st
Black		Out of stock	Out of stock	Out of stock	10	Out of stock	Out of stock	Out of st
Green		Out of stock	8	Out of stock	Out of stock	Out of stock	Out of stock	Out of st

18 Items

Add items to bag

The challenges

- Scope creep/understanding
- Getting images on time
- KEEPING it minimum viable product (MVP)
- Thorough testing
- Customer onboarding
- Taxes and Payment processing
- OneVersion updates
- Personnel
- **Customer's customers expectations**
- Budget

Payment processing selection

- Make sure this was not skipped in sales cycle

- Is card on file needed?

- Does the selected solution actually support D365 Commerce e-comm channel? BE VERY SPECIFIC

- We really should talk about paym proc selection.

- Can we talk about paym proc selection?

- Yes lets talk about paym processing…

Hot Tips

- Get all the project planning done before the project starts

- Any ISV selection needs to exist BEFORE the start date of the project

- Don't split payment processors

- Meet daily, at least at the start

- Revisit scope and expectations DAILY or at least 2-3 times a week

- CRP 1 POC should be as soon as possible

- Create a RACI matrix

The 'Gotchas'

- Uninvolved execs/investors
- Stalled rollout from customer
- Issues with marketing decisions
- Features that 'should just be there' (e.g. abandoned cart)
- Budget overruns
- Team burnout

Rollout – The roadblock you will probably be out of your control

- Send initial email to existing B2B customer
- Provide them with a 'How to' guide to provide B2B customers
- Create a customer approach profile
- Schedule a walk through with customer
- Schedule first order

Send initial email

- What is the new portal
- Why it is being implemented
- How it will help streamline their activities
- Feature by feature highlight and how it can help the customer save time/money

Provide them with a 'How to' guide to provide B2B customers

- Where to find the site

- Bookmark the given site.

- Maybe create a video that highlights the specific features such as 'bulk ordering'

- Provide a link to a FAQ or a power virtual agent support chat bot

Create a customer approach profile

- Identify buyers who will need logins
- Identify when they will likely order to schedule support for first few orders

Schedule a walk through with customer

- Walk through the B2B guide

- Show all features

- record the video but get the customer a reference copy

Schedule first order

- Only one chance to make a first impression so guide them through the first

- Submit the order

- Show how they can pay bills, view outstanding invoices, use past orders to reorder

Q&A