

Sales & Ecommerce Alignment

A practical checklist to ensure you're building systems to make each other stronger



B2B²

Instructions

Use this checklist to evaluate how well your ecommerce and sales teams are aligned — and where friction may be slowing growth.

1. Executive & Strategic Alignment

- We have a shared definition of the role ecommerce plays in the sales strategy (replacement vs. redistribution of tasks).
- Sales leadership and ecommerce leadership meet on a regular cadence (at least monthly).
- Ecommerce KPIs and Sales KPIs are visible to both teams.
- Digital channel goals are explicitly tied to overall revenue strategy — not treated as a side project.
- We communicate how ecommerce helps sales win (not just how it reduces cost).

If 3 or more boxes are unchecked → Alignment risk is high.

2. Compensation & Incentives

- Sales compensation reflects desired digital behaviors.
- Reps receive credit for ecommerce orders placed by their accounts.
- There are incentives tied to digital adoption (e.g., % of account migrated to ecommerce, digital contract adoption, online quote use).
- Digital usage metrics are visible on sales dashboards.
- Reps understand how ecommerce activity impacts their earnings.

If comp plans don't align, behavior won't align.



3. Rep Enablement (Not Just Customer Enablement)

- We provide rep-facing digital tools (not just customer-facing ecommerce).
- Reps can:
 - □ Access real-time pricing and availability
 - □ Generate quotes quickly
 - □ Compare competitor pricing (if appropriate)
 - □ Calculate ROI or business cases
 - □ Configure complex products digitally
- Reps can complete transactions on-site (mobile-friendly tools).
- Our systems reduce manual work instead of adding administrative burden.

If ecommerce only serves customers, you're missing half the value.

4. Search & Product Data Readiness

- Our product data is structured, complete, and optimized for search.
- Industry terminology and common alternate language are mapped into search logic.
- Customers (and reps) can use conversational search or natural language queries.
- If a customer can't find it via search, a rep can find it instantly.
- We regularly test search from a rep's point of view.

If your own reps can't find products easily, customers won't either.



5. Ease of Use & Workflow Simplicity

- Rep workflows are intuitive and require minimal training.
- Digital tools are faster than legacy processes.
- Required fields and toggles are minimized.
- We have conducted usability testing with sales reps.
- When a deal is on the line, reps feel confident using the digital tool.

If it's even slightly clunky, reps will revert to what they know.

6. Hybrid Selling Capability

- We support blended workflows (self-service + rep assistance).
- Customers can:
 - □ Research independently
 - □ Configure digitally
 - □ Escalate easily to a rep
- Reps can:
 - □ Continue digital carts or quotes started by customers
 - □ Finalize transactions digitally
 - □ Access customer browsing/order data
- Digital tools support complex sales – not just reorders.

Complex sales don't eliminate ecommerce. They require smarter ecommerce.



7. Adoption & Cultural Buy-In

- We identified early rep advocates during rollout.
- We celebrated early wins publicly.
- Sales reps share success stories with peers.
- We communicate digital progress regularly.
- Feedback loops are active – reps see changes based on their input.
- The first 90 days of any rollout are structured and intentional.

Culture shifts through proof, not policy.

8. Competitive Positioning

- Sales teams understand how ecommerce helps compete (including against Amazon or digital-first competitors).
- We track and communicate:
 - Sales cycle reduction
 - Quote turnaround time
 - Account adoption rates
 - Close rate improvement tied to digital tools
- Digital tools are positioned internally as a competitive weapon – not a compliance requirement.

Digital speed is a competitive advantage – if you use it.



Scoring Your Alignment

Count your unchecked boxes.

- 0–5 unchecked → Strong alignment
- 6–12 unchecked → Moderate friction
- 13+ unchecked → High risk of channel conflict

Final Reflection Questions for Leadership

1. Where does digital remove low-value work from reps?
2. Where does digital unintentionally create friction?
3. Are we asking reps to change behavior without changing incentives?
4. If a top rep left tomorrow, would our ecommerce system protect revenue?





About

Lost in digital? We're the GPS for your digital roadmap.

B2B Squared guides B2B companies through the chaos of digital evolution with the precision of turn-by-turn navigation. We pinpoint where you are (digital maturity assessments), map the smartest route (strategy workshops), find the right technology pit stops (Platform Genius selection tool), optimize your journey (Flywheel B2B marketing automation and SKU Factory for product data), and help navigate the roadblocks (The Digital Roadmap newsletter).

No guesswork. No detours. Just the fastest, most-efficient route to delivering the digital experience your customers deserve.

For More Information:

262.682.0550

www.b2b-squared.com

sales@b2b-squared.com

