

The Forrester Wave™: B2B Commerce Suites, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

by John Bruno and Bruce Eppinger
September 13, 2018

Why Read This Report

In our 33-criterion evaluation of B2B Commerce Suites providers, we identified the 12 most significant ones — Apttus, Episerver, Handshake, IBM, Insite Software, Intershop, Magento, Oracle, Salesforce, Sana Commerce, SAP, and Unilog — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital business professionals select the right provider for their needs.

Key Takeaways

SAP, Intershop, And Insite Lead The Pack

Forrester's research uncovered a market in which SAP, Intershop, and Insite Software are Leaders; Magento, Salesforce, IBM, Oracle, and Unilog are Strong Performers; and Episerver, Apttus, Sana Commerce, and Handshake are Contenders.

Access Rights, Personalization, And Search Are B2B Commerce Suite Key Differentiators

As it becomes the norm to deliver B2C-like experiences in B2B, businesses need to emulate their offline relationships via well-developed access controls, and they must use stronger content management, testing, and search capabilities to make purchasing more personalized and efficient. Businesses that successfully accomplish these objectives will drive more sales online, reduce their cost to serve, and nurture greater customer loyalty.

The Forrester Wave™: B2B Commerce Suites, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

by [John Bruno](#) and [Bruce Eppinger](#)

with [Fiona Swerdlow](#) and [Sara Sjoblom](#)

September 13, 2018

Table Of Contents

2 Digital Commerce Isn't New, But B2B Commerce Is Just Now Maturing

2 Evaluation Summary

7 Vendor Offerings

8 Vendor Profiles

Leaders

Strong Performers

Contenders

14 Evaluation Overview

Vendor Inclusion Criteria

15 Supplemental Material

Related Research Documents

[The Forrester Wave™: B2C Commerce Suites, Q3 2018](#)

[Make Omnichannel Real In B2B Commerce](#)

[Now Tech: B2B Commerce Suites, Q2 2018](#)



Share reports with colleagues.
Enhance your membership with Research Share.

FORRESTER®

Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA

+1 617-613-6000 | Fax: +1 617-613-5000 | [forrester.com](#)

© 2018 Forrester Research, Inc. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. Unauthorized copying or distributing is a violation of copyright law. [Citations@forrester.com](#) or +1 866-367-7378

Digital Commerce Isn't New, But B2B Commerce Is Just Now Maturing

Today's B2B commerce suites marry the best from B2C with the nuance that B2B businesses require. For years, B2C businesses were ahead of their B2B counterparts, not just because of the human dynamic of B2B sales but also because technology platforms failed to adequately support the needs of B2B businesses. The notion that a one-to-one relationship must exist between business and customer no longer holds true. One-time discounts and negotiations are commonplace. Payment methods vary greatly between B2C and B2B. And it's only now that businesses no longer need to rely on heavy customization to develop and run their B2B commerce stores.

Commerce suites finally have caught up to the complex needs of B2B businesses. As such, B2B commerce suites customers should look for providers that offer:

- › **Strong flexibility for access and permissions.** B2B businesses are based on relationships, and digital commerce means nothing if it can't emulate those relationships via a digital medium. Businesses need to model the relationships they have with their customers, understanding who can purchase, what those roles and positions can purchase, how much they can purchase, and what guardrails can be put in place to prevent out-of-policy spending.
- › **Detailed control over buying, selling, and purchasing workflows.** In B2B buying and selling, the only rule is that there are inevitably exceptions to those rules. This means that request for quote (RFQ), purchasing approvals, and return merchandise authorization (RMA) processes, among others, are pervasive. Customer satisfaction tends to break down when buyers are forced out of one channel and into another. Commerce suite vendors have focused on work flow as a means to let customers continue to use their preferred channel and keep them satisfied as a result.
- › **B2C-like personalization and experience capabilities.** To win over B2B customers, it's not enough to simply execute on complex transactions with even more complex products and services. B2B customers are the same individuals who buy online from Amazon and other retailers in their personal lives. From that experience, they expect contextually relevant and personalized buying, even when it's for engine parts or agricultural supplies. Savvy vendors have focused on areas like experience optimization with detailed customer segmentation, content delivery, and A/B testing capabilities to deliver B2C-like personalization for their B2B buyers.

Evaluation Summary

Our Forrester Wave™ evaluation highlights the fact that B2B commerce suites vendors still have work to do to marry digital experience and personalization with the complex business and technical requirements of B2B businesses. Overall, this evaluation found that the vendors generally choose one of two paths. One is to excel in the operational aspects like detailed B2B buying workflows, product configuration, and granular access and permissions for B2B buyers and sellers. The other is to focus on experience management capabilities like testing, personalization, and content management. Only

The Forrester Wave™: B2B Commerce Suites, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

a few vendors, like Insite, Intershop, and SAP, delivered sufficient functionality at both ends of the equation. In conjunction with this evaluation, Forrester also completed an evaluation of commerce suite vendors that focus on B2C requirements, some of which provide commerce suites for both B2B and B2C businesses.¹

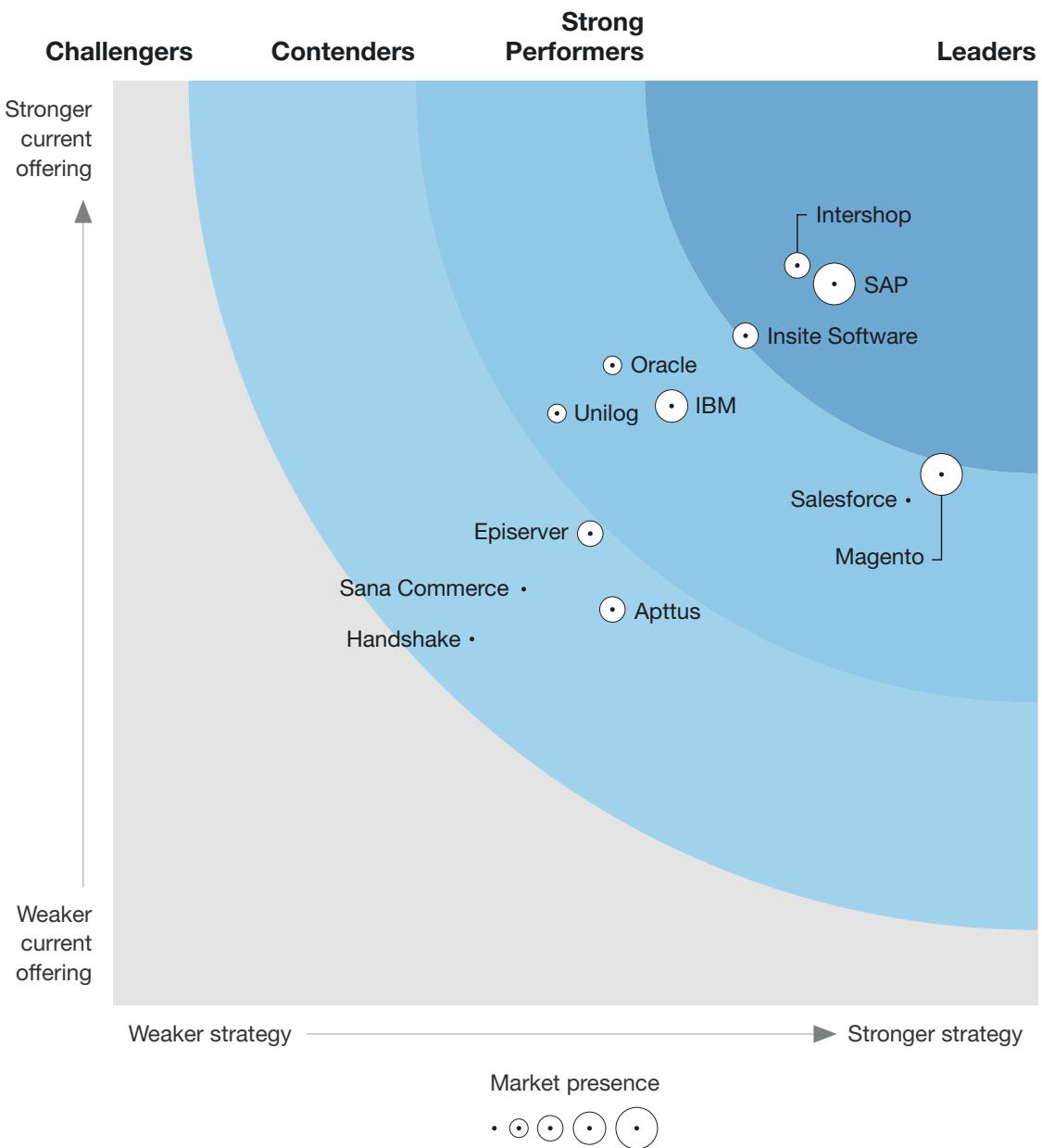
We intend this evaluation of the B2B commerce suites market to be a starting point only and encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

FIGURE 1 Forrester Wave™: B2B Commerce Suites, Q3 2018

THE FORRESTER WAVE™

B2B Commerce Suites

Q3 2018



The Forrester Wave™: B2B Commerce Suites, Q3 2018
The 12 Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: B2B Commerce Suites Scorecard, Q3 2018

	Forrester's weighting	Apttus	Episerver	Handshake	IBM	Insite Software	Intershop
Current Offering	50%	2.14	2.55	1.98	3.24	3.62	4.00
Sales channel support	10%	2.80	2.20	4.20	3.00	5.00	4.40
Personalization	15%	2.20	2.40	1.00	3.00	3.00	3.70
Business intelligence and analytics	15%	1.00	1.00	3.00	3.00	5.00	5.00
Artificial intelligence and machine learning	5%	1.00	3.00	0.00	5.00	0.00	3.00
Commerce suite	20%	1.80	3.60	1.00	3.80	3.00	3.40
Commerce management	20%	2.50	2.80	1.90	3.20	3.60	4.10
Platform	15%	3.10	2.60	2.50	2.60	4.00	4.00
Strategy	50%	2.70	2.58	1.94	3.02	3.42	3.70
Product vision and road map	30%	3.00	3.00	1.00	3.00	3.00	5.00
Delivery model	5%	3.00	3.00	3.00	3.00	3.00	5.00
Support services	35%	3.00	1.80	3.40	2.20	4.20	3.00
Delivery and extensibility ecosystem	30%	2.00	3.00	1.00	4.00	3.00	3.00
Market Presence	0%	2.60	3.00	1.00	3.40	2.20	2.60
Number of live enterprise customers	40%	3.00	3.00	1.00	3.00	3.00	3.00
Total gross merchandise value (GMV)	40%	3.00	3.00	1.00	3.00	1.00	3.00
Product revenue	20%	1.00	3.00	1.00	5.00	3.00	1.00

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

The Forrester Wave™: B2B Commerce Suites, Q3 2018
The 12 Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: B2B Commerce Suites Scorecard, Q3 2018 (Cont.)

	Forrester's weighting	Magento	Oracle	Salesforce	Sana Commerce	SAP	Unilog
Current Offering	50%	2.87	3.46	2.73	2.25	3.90	3.20
Sales channel support	10%	3.00	3.80	4.40	2.20	3.60	3.00
Personalization	15%	2.30	3.60	2.20	1.60	3.70	3.00
Business intelligence and analytics	15%	5.00	3.00	3.00	3.00	3.00	3.00
Artificial intelligence and machine learning	5%	0.00	3.00	1.00	1.00	5.00	0.00
Commerce suite	20%	2.80	3.40	2.20	1.40	4.40	3.20
Commerce management	20%	2.60	3.30	2.40	2.80	4.30	3.70
Platform	15%	2.60	4.00	3.60	3.00	3.60	4.10
Strategy	50%	4.48	2.70	4.30	2.22	3.90	2.40
Product vision and road map	30%	5.00	3.00	5.00	1.00	5.00	3.00
Delivery model	5%	3.00	3.00	3.00	3.00	3.00	3.00
Support services	35%	3.80	3.00	5.00	4.20	3.00	3.00
Delivery and extensibility ecosystem	30%	5.00	2.00	3.00	1.00	4.00	1.00
Market Presence	0%	4.20	1.40	1.00	1.00	5.00	1.40
Number of live enterprise customers	40%	3.00	1.00	1.00	1.00	5.00	1.00
Total gross merchandise value (GMV)	40%	5.00	1.00	1.00	1.00	5.00	1.00
Product revenue	20%	5.00	3.00	1.00	1.00	5.00	3.00

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

Vendor Offerings

Forrester included 12 vendors in this assessment: Apttus, Episerver, Handshake, IBM, Insite Software, Intershop, Magento, Oracle, Salesforce, Sana Commerce, SAP, and Unilog (see Figure 3). Additional vendors worth considering, but not included in this evaluation, can be found in Forrester's [Now Tech: B2B Commerce Suites, Q2 2018](#).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product	Version
Apttus	Apttus E-Commerce	Apttus E-Commerce Spring
Episerver	Episerver Digital Experience Cloud	11; Continuous Release Cycle
Handshake	Handshake Rep and Handshake Direct	5.5.23
IBM	IBM Watson Commerce	18.2
Insite Software	InsiteCommerce	4.4.4
Intershop	Intershop Commerce Suite	7.9/7.10 (7.10 has been released for some SaaS and PaaS customers)
Magento, an Adobe company	Magento Commerce	N/A
Oracle	Oracle Commerce Cloud	18B
Salesforce	Salesforce B2B Commerce	4.8 (January 2018)
Sana Commerce	Sana Commerce	9.2
SAP	SAP Commerce Cloud	6.7
Unilog	Unilog CIMM2	7

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **SAP Commerce Cloud delivers a full-featured suite for enterprise clients.** SAP Commerce Cloud version 6.7 delivers a full-featured suite that leverages the strengths of the SAP ecosystem and integration with the SAP S/4HANA and SAP C/4HANA applications. SAP has a 50/50 revenue split of B2B and B2C clients and is equally adept at both. SAP has been investing heavily in its cloud strategy that now includes deployment on both the private SAP cloud and a Kubernetes-based Microsoft Azure public cloud. The benefits of this investment: half of its commerce revenue in 2017 came from its cloud offering.

SAP boasts outstanding customer references that reported seamless scaling and load management for billion-dollar gross merchandise volume (GMV) loads. As one customer stated, "We can ramp to a million transactions a day with no concerns; the platform is rock solid and enterprise ready." The suite is one of the few platforms to deliver a full PIM solution, as well as a fully supported OEM version of an industry-leading digital asset management (DAM) solution (OpenText).² The product road map includes plans for deeper integration to the SAP C/4HANA suite, with specific plans to embed SAP CPQ (configure price quote) — formerly CallidusCloud CPQ. SAP has made major improvements to the user tooling and integration across the suite, and architectural improvements have significantly shortened lengthy implementation timelines. Even so, customers note, "The platform is only suitable for organizations with deep technical skills or a strong SI partnership." SAP Commerce Cloud is a best fit for firms looking for an industrial-strength, fully functional commerce platform and those with the technical chops to support it.

- › **Intershop combines flexibility and power but lacks the ecosystem to gain visibility.** Intershop is arguably the most tenured eCommerce suite that many still don't know about. After Intershop came out of the gates hot and went public in the 1990s, the early 2000s market downturn hurt the company financially, forcing it to relocate its global headquarters from San Francisco back to Jena, Germany. It has the flexibility to support both B2B and B2C use cases, but a majority of Intershop's business comes from its B2B customer base.

Intershop is a well-rounded eCommerce suite that pleasantly surprises many of its clients — many of whom initially selected it for its flexibility rather than depth. In fact, its customers routinely report that the individual components of the suite are more than sufficient for their needs. For example, several told us that they switched their PIM or CMS back to Intershop after not seeing a big difference with others' standalone solutions.³ Intershop has a solid vision for the future of B2B buying and selling, and its ability to support that vision is even more impressive. It has long valued its in-house development but has recently embraced a more inclusive approach, highlighted by decoupling the solution into microservices and debuting the Synaptic Exchange, its third-party

The Forrester Wave™: B2B Commerce Suites, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

app marketplace. Customers expressed concerns about Intershop's ability to build a strong North American brand. Intershop will need to continue building its ecosystem of delivery resources and attracting leading ISVs. Intershop is a best fit for organizations with complex business structures and selling motions that want the flexibility of the platform to meet their needs rather than conforming to the technology.

› **Insite has rounded out the experience capabilities of its already strong B2B platform.**

Insite has garnered a strong reputation from some of the most complex B2B manufacturers and distributors. It offers a fully integrated suite of products that can get a commerce initiative off the ground or mature a business's digital practice, thanks to its depth in areas like promotions management and B2B quick ordering. Uniquely, Insite takes a hands-on approach from advisory service and best practices all the way through playing matchmaker between customer and implementation partner. Recent enhancements and additions to the suite include a freshly revamped CMS and a fully integrated business intelligence (BI) solution, Insite Analytics.

Insite plays equal parts teacher and student. For edgling digital businesses, it offers a plethora of best practices. But it also listens closely to customers to understand how to support new B2B needs. Several Insite customers cited the "laser focus" on the capabilities they care about and noted how the things they needed for their business "worked almost right out of the box." By building and deploying native mobile applications for its clients, Insite has taken the next step to help them modernize digital buying and selling. Still, the company has work to do: Insite customers often leverage its PIM or CMS capabilities, but more brand-centric enterprises may consider investing in standalone solutions to replace Insite's offerings in these areas. Customers describe these features as "good enough, but not best-in-class." Insite is a good fit for businesses that want to simplify delivering strong B2B digital buying and selling capabilities. As a result, it fits midmarket and small enterprises well.

Strong Performers

› **Magento Commerce boasts a flexible platform with a vast developer community.**

The Magento Commerce suite consists of its paid solution or its widely adopted open source solution, as well as a BI solution and order management system (OMS).⁴ It is an ecosystem force, with over 3,000 extensions in its marketplace and over 50% of new code coming from community members. In 2015, it moved to the Magento 2 code base and its commerce product to the cloud. Although commerce moved to the cloud, its OMS and BI have been cloud-native since their inception.

Adobe's acquisition of Magento Commerce in June 2018 fills gaps for both companies: Adobe gets a strong commerce platform, and Magento adds best-in-class experience management solutions to its portfolio.⁵

Magento's breadth of functionality and strong developer community have made it a mainstay on eCommerce selection shortlists, but it is still early in its B2B maturation. Customers have historically custom-built B2B capabilities, but Magento only started strategically focusing on B2B

The Forrester Wave™: B2B Commerce Suites, Q3 2018
The 12 Providers That Matter Most And How They Stack Up

in late 2017 via its 2.2 release. Its customers note that Magento has “room to grow,” specifically in areas like workflow and templated role-based access. Still, customers and partners are bullish on the company’s direction, citing its depth in BI, a concerted focus on progressive web applications (PWAs), and community-led innovation. Plus, the bread and butter of Adobe — Web CMS, A/B testing, and personalization — is a perfect complement for Magento. Magento is a good fit for customers that operate both B2C and B2B models and want to leverage the ecosystem to deliver a unique experience more quickly. Brand-centric businesses will also want to carefully track the readiness of new Adobe integrations.

- › **Salesforce adds digital transactions to its leading CRM platform.** Salesforce entered the B2B commerce race in 2018 by acquiring CloudCraze, now called Salesforce B2B Commerce.⁶ Unlike many similar acquisitions, Salesforce is relatively far along the integration path, thanks to CloudCraze having previously built its product as a managed package atop the Salesforce platform — and more specifically Community Cloud.⁷ In addition to taking advantage of Salesforce’s strong B2B data model, B2B Commerce also uses Salesforce’s permissions controls, workflow, and analytics capabilities.

Salesforce excels at understanding the complex nature of not just business relationships but also the relationships that individuals have to the business and to one another. The flexible data model and the extensibility of the Salesforce platform bring even the most complex scenarios within reach of Salesforce admins. Customers rave about how tightly embedded B2B Commerce is within Salesforce and how easily their own staff can support the product. Salesforce, however, is only a few years into commerce, and the capability gaps show, specifically around content management, search, and A/B testing. Still, customers feel confident about where Salesforce will take B2B Commerce, often giving high marks to the company on its customer success initiatives and product road map. Salesforce is a good fit for pure B2B companies, especially those that have complexity in digital selling motions and channels. Multitiered sales models highlight the strength of the platform. Potential Salesforce customers should know that its B2C and B2B products are distinct today, and customers needing to support both business models should evaluate each product independently.

- › **IBM’s comprehensive, if unwieldy, solution needs to modernize more quickly.** A mainstay in the enterprise eCommerce market since the mid-1990s, IBM has continually improved, added, and acquired functionality to Watson Commerce. All that tinkering has created a full-featured (if also large and cumbersome) commerce suite across commerce, content, and order management.⁸ IBM has begun to rearchitect the solution to be nimbler and more modular, but the late start on this effort means it has lost its market leadership position and ground to defter competitors.

IBM delivers well in the areas of transactions, personalization, and intelligence. The company has achieved early success introducing elements of Watson — IBM’s suite of cognitive and AI services — into its commerce offerings. It exposes rich operational trends through Watson Commerce Insights and has plans to add more intelligent automation into administrative process (e.g., cognitive tagging

The Forrester Wave™: B2B Commerce Suites, Q3 2018
The 12 Providers That Matter Most And How They Stack Up

for site content). IBM customers give the solution credit for its advances in AI, but customers don't see the company making enough progress in its platform modernization efforts. Customers also often lament labor- and time-intensive upgrade processes. The legacy of this platform carries over to the user experience, as administration is relatively more complex than that of many of its competitors. IBM is a good fit for large enterprises with the budget, resources, and willingness to bet on the company's ability to execute on its modern platform vision. Less mature organizations will likely find this suite too cumbersome.

- › **Oracle breathes fresh life into its ATG and Endeca assets with Commerce Cloud.** When it acquired ATG and Endeca in 2010 and 2011, respectively, Oracle became an early mover among large CRM vendors that added eCommerce solutions to their portfolios.⁹ Like other leading on-premises software solutions, the original ATG and Endeca solutions have largely taken a back seat to Oracle's cloud offering, Commerce Cloud. The move to the cloud allowed Oracle to rearchitect the solutions to align with the larger Oracle CX suite strategy, data model, and services. Its closest kin are Oracle CPQ Cloud, Sales Cloud, and Marketing Cloud.

Oracle Commerce Cloud is a purpose-built solution with modern architecture, designed to complement its other applications as much as it borrows from them. Customers who use other Oracle solutions like CPQ Cloud cite key reasons for selecting Commerce Cloud as the ease of integration, as well as reusability of assets. Though strong, this platform and portfolio-centric view should go further to standardize their assets; there are few instances of Commerce Cloud customers leveraging Oracle Content and Experience Cloud. Rebuilding their solutions for the cloud was a major undertaking. While racing to bring new functionality to the suite, customers experienced issues around release management early on, but those concerns have since largely subsided. With Commerce Cloud, Oracle is able to address a new and vibrant market: companies that operate in both B2B and B2C capacities. Oracle is a good fit for organizations that are looking for CRM and eCommerce needs across both B2B and B2C business models on one platform, especially those selling complex products.

- › **Unilog extends core B2B commerce capabilities deep PIM functionality.** Born out of outsourced data entry and cataloguing, Unilog has matured from a services firm into a full-featured eCommerce platform. As it has matured, Unilog has leveraged its deep pedigree in data management to offer PIM capabilities on par with best-in-class standalone PIM solutions. The solution as a whole injects the notion that users should be able to control data and access granularly across the suite — which, in turn, makes the solution incredibly flexible, but it also can be a lot for businesses to consume. As such, Unilog still handles most of the implementation work and ongoing support for its clients, with few decoupling the two.

Unilog has benefited greatly from the flexibility and extensibility of its platform; it's allowed them to modify the product for each of their customers and has allowed them to grow considerably in recent years. Since they must rely on the Unilog team for implementation and ongoing support, current and prospective customers have expressed concerns around whether Unilog will be able

The Forrester Wave™: B2B Commerce Suites, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

to keep up and support the demand. Almost universally, customers cite the solution's depth in managing product content as a driving force for selecting this solution. The PIM functionality has helped it garner attention for large distributors and even buying groups like Affiliated Distributors. Unilog is a good fit for companies with expansive product catalogs or catalogs that aggregate products from a wide array of manufacturers. Additionally, distributors that belong to buying groups may be eligible for special licensing terms as part of that affiliation.

Contenders

- › **Episerver is a commerce suite anchored by a leading content management system.** Episerver has added transactional commerce and strong marketing campaign capabilities to what is already a leading web content management platform.¹⁰ The suite is deeply rooted in the .NET ecosystem and delivers a cloud-based agile platform with a continuous release deployment cycle. The company sources 50% of its deals from the partner network, which also delivers the majority of the implementations. Episerver has been growing its presence beyond Europe and into North America while serving both B2B and B2C markets.

Episerver's strengths include a leading CMS, a natively integrated customer data management platform, and a marketing campaign management system. Put together, these capabilities allow Episerver customers to customize experience delivery by segment, user behavior, and even the device that the end user is using. Customers we spoke with all chose the product because of their desire to marry web CMS and their overall digital experience with the ability to transact digitally. Customers rave about the integrations of web content and commerce, but the company needs to fill some gaps. For example, its A/B testing capabilities are lightweight compared to those of competitors, and customers cited recurring issues around indexing and performance with Find, Episerver's site search tool. As the company grows, its customers have expressed that they want better documentation and insight into the product road map. Episerver is a best fit for brand-centric businesses that want to deliver personalized experiences across different devices and regions.

- › **Apttus delivers CPQ and more in a digital self-service world.** Apttus has transformed over the years from contract lifecycle management to CPQ to eCommerce. Simultaneously, it moved from providing just Force.com applications to supporting customers in the Microsoft ecosystem, as well. Throughout all of that evolution, Apttus has focused on what is core to B2B eCommerce: the customer, the relationship, the terms, and the buying channel. Apttus customers applaud the extension from CPQ into eCommerce, but the transitions, including a new focus on delivering its solutions on Microsoft Azure, have caused some customer success issues.

Apttus gets high marks for being one of the first companies to do the inevitable: bringing together CPQ and eCommerce. The company has successfully optimized highly complex sales and selling motions, but in doing so, it has left gaps in some foundational eCommerce capabilities. In terms of key areas for Apttus to focus on, customers cited a need for additional work on store template customization and architectural design to improve performance. Customers are generally excited

The Forrester Wave™: B2B Commerce Suites, Q3 2018
The 12 Providers That Matter Most And How They Stack Up

about the direction in which Apttus is taking Max, the Apttus artificial intelligence offering, but a lack of case studies has them taking a conservative approach to Apttus and AI. Apttus is a good fit for customers that have at least a portion of their product catalog that is configurable and that want to create their own front-end experience. These customers will achieve greater economies of scale between CPQ and eCommerce.

- › **Sana Commerce fills the gaps between eCommerce and ERP.** Unlike others in the market that define an end user's shopping experience and force fit it into other enterprise systems, Sana Commerce has started where most of the business requirements reside: the enterprise resource planning (ERP) system. The company's philosophy is to start from the ERP and add the digital experience and shopping functionality around it. While the digital experience piece comes secondary, Sana Commerce is able to optimize the operational side of customer experience more effectively.

The company currently has nine deep integrations to ERP systems from both Microsoft and SAP. These integrations mean that Sana Commerce can more easily provide real-time inventory levels and availability to promise (ATP) timelines, even as it is still working on improving their content management and personalization capabilities. With ERP requirements often being complex and unique, customers state that both the platform and the team are extremely well prepared for the job, saying that Sana Commerce "didn't miss any of our requirements" and that the vendor is "a great partner," despite much of the work being supported by its offshore teams in Colombia, Sri Lanka, and Ukraine. Sana Commerce currently is focused on its digital experience capabilities, but it has a long way to go to catch up to leaders in content management and personalization. Sana Commerce is a good fit for businesses currently running a Microsoft or SAP ERP system that elect to manage most of their business rules around customers, products, and transactions from that system.

- › **Handshake brings its mobile, rep-centric platform to the customer.** Born out of the requirements for field sales, Handshake excels at making the order capture process seamless for reps. Customers routinely cite ease of use and accessibility as two leading factors that drive rep adoption and business results. Handshake is looking to take the success of Handshake Rep, its mobile field order capture application, and parlay that into customer-facing solutions like Handshake Direct Online and Handshake Direct Mobile. The latter solutions are relatively early-stage compared to competitors' solutions, but they are built on the same platform and leverage the same assets, data, and business logic.

Handshake's mobile order capture capabilities are very strong and have earned it a loyal customer base: Customers say that they are "rooting for them" and hoping that the Handshake team "disrupts the market." However, Handshake is at a critical growth juncture. It's clear that Handshake wants to see its customers succeed. To keep the momentum going, however, it will need to invest more into workflow to support more complex buying dynamics where the seller isn't involved, and it must provide more tooling to optimize how the experience is delivered. Additionally, Handshake must provide a scalable framework to support its customer success processes as it grows. Handshake is a best fit for organizations currently selling through a direct field salesforce and those that aspire to embrace digital self-service.

Evaluation Overview

The Forrester Wave follows a publicly available methodology that involves screening vendors, detailed questionnaires, vendor demo sessions, and customer reference checks. In our scoring, Forrester uses a relative rating system to differentiate the vendor's capabilities. Vendor scores do not reflect a checklist of functionality; they are a comparison of the strengths and weaknesses of the offerings we analyzed. Find more information about the methodology in the Supplemental Material section of this report.

We evaluated vendors against 33 criteria, which we grouped into three high-level buckets:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include the support for various sales channels, personalizing content and product configurations, experience management (e.g., web content management, digital asset management, etc.), platform, and core commerce capabilities (e.g., shopping carts, quick ordering, search, promotions, etc.).
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated each vendor's product vision and road map, software delivery model, enablement and support services, delivery partners, and technology partners.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of enterprise customers in a production environment, the total amount of GMV processed on its platform, and its product revenue.

Vendor Inclusion Criteria

Forrester included 12 vendors in the assessment: Apttus, Episerver, Handshake, IBM, Insite Software, Intershop, Magento, Oracle, Salesforce, Sana Commerce, SAP, and Unilog. Each of these vendors:

- › **Offers the critical components of a commerce suite.** Vendors included in this evaluation offer all of the components necessary for businesses to host and operate an online shopping experience. They all offer elements of web content management, product information management, digital asset management, and order management in addition to core transaction, product catalog, and price management capabilities.
- › **Delivers strong functionality geared toward B2B businesses.** In addition to offering the core components of a commerce suite, the vendors included in this evaluation have demonstrated not only a thorough understanding of B2B needs but also a road map emphasizing future development in areas most critical to solidifying, expanding, and innovating around their B2B functionality.
- › **Earned considerable mindshare among Forrester customers.** Each of the included B2B commerce suites is of high interest to a large sample of Forrester customers, as evidenced by the frequency of appearance in inquiries.

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

We publish all of our scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; access this tool by clicking the link the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

The Forrester Wave™: B2B Commerce Suites, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on a small number of inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors. In accordance with the [Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave document. We evaluated the vendors participating in this Forrester Wave using materials that they provided to us by June 2018 and did not allow additional information after that point. We encourage readers to consider how the market and vendor offerings change over time.

Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors to the best of our ability according to our [Forrester Wave™ Incomplete Vendor Participation Policy](#) and publish their positioning along with participating vendors.

Integrity Policy

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

Endnotes

¹ Vendors that appear in both B2B and B2C commerce suite evaluations include Episerver, IBM, Magento, Oracle, and SAP. Although Salesforce also appears in both evaluations, we are evaluating two different and distinct products. See the Forrester report "[The Forrester Wave™: B2C Commerce Suites, Q3 2018](#)."

² See the Forrester report "[The Forrester Wave™: Digital Asset Management For Customer Experience, Q2 2018](#)."

³ PIM: product information management; CMS: content management system.

⁴ Source: "Magento Commerce Acquires RJMetrics," Magento press release, August 1, 2016 (<https://magento.com/news-room/press-releases/magento-commerce-acquires-rjmetrics>).

⁵ Source: Mark Grannan and John Bruno, "The Magento Acquisition Finally Moves Adobe 'Beyond Marketing,' But It's Just The First Step," Forrester Blogs, May 22, 2018 (<https://go.forrester.com/blogs/magento-acquisition-finally-moves-adobe-beyond-marketing-but-its-just-the-first-step>).

⁶ Source: John Bruno, "Salesforce Acquires B2B eCommerce Platform CloudCraze," Forrester Blogs, March 12, 2018 (<https://go.forrester.com/blogs/salesforce-acquires-cloudcraze>).

⁷ Source: Jeff Barnett, "Salesforce Signs Definitive Agreement to Acquire CloudCraze," Salesforce press release, March 12, 2018 (<https://www.salesforce.com/company/news-press/stories/2018/3/031218/>).

The Forrester Wave™: B2B Commerce Suites, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

⁸ Source: "IBM Agrees to Acquire Sterling Commerce from AT&T for \$1.4 Billion," IBM press release, May 24, 2010 (<https://www-03.ibm.com/press/us/en/pressrelease/31742.wss>).

⁹ Source: "Oracle Buys ATG," Oracle press release, November 2, 2010 (<http://www.oracle.com/us/corporate/press/184062>).

Source: "Oracle Buys Endeca," Oracle press release, October 18, 2011 (<http://www.oracle.com/us/corporate/press/517791>).

¹⁰ 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.