Episode #27 Transcript: Magento Migration: The B2B Elevator [with Kendall Ducote]

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Shiva 00:01
Hi, you're listening to driven e-commerce at work. The podcast where we bring in conversations with the e-commerce experts. We also put together some interesting content from different places, including our monthly sessions, Speaker Series, and anything that's related to e-commerce for manufacturing and distribution. If you're here for the first time, I would highly encourage you to go and subscribe to our show on Apple podcast and Spotify.

Hey, what's going on everybody? Welcome back to another episode of driven e-commerce at work podcast. And I'm your host, Shiva Kumaar. I had a chance to sit together with the distributor on one of our e-sessions and get to know about their integration journey and the process of choosing a Magento agency. So, today, we've got Kendall Ducote VP of technology. I like Danielle, digital marketing designer for Moody Price, operating since 1955 Moody price is one of the largest providers of instrumentation, filtration, measurements and control and high pressure products in the United States. They've been using Profit 21 ERP, since 2008. All right. So, Kendall is gonna give us some background about the company, and the platforms and software they've been using so far.

Kendall 01:31
Appreciate the introduction. As he mentioned, I'm the Vice President of technology at Moody Price. We've been using P 21. Since 2008. We're a industrial distributor that focuses mainly on instrumentation products. And we're spread out across the Gulf region from Odessa, Texas, to the panhandle of Florida, and up through Memphis, Tennessee.

We went live on Epicor B2B Sellers, shortly after we went on P 21 it was part of our installation package. And, so, part of our installation package, and we went live with them back in 2008, in the middle of a hurricane. And that was an interesting scenario. And as it says barbed wire installation, we went live with B2B Seller, it was our first e-commerce attempt that we prior to that it was just a simple, single page website. We ran that for a few years learned a lot. From there, we moved on to Americommerce, which was a disconnected e-commerce solution. Everything was moved back and forth through do imports and exports, there was no integration. But it did allow us to create some things such as search engine optimization, loudest to configure product group

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pages, and more from a marketing side for the website that the B2B Seller just didn't support at all.

And then from there, we got, we have grown the business quite a bit from the e-commerce site and the imports and exports got a little bit too big to to handle. So that's when we started looking into going back integrated ECC was a new product from Epicor, which you joined on in with the hopes of the it was sold to us as one throat to choke. The problem was we ended up wanting to choke it quite a bit. We learned a lot with that integration as well. Web technologies have progressed quite a bit from when we initially went live with B2B Seller. So, we were able to get exposed to more of the modern web look and feel. And then we run into the limitations of what ECC could do for us and limitations of progressing our SEO footprint and the pain points of trying to make changes after the fact we're significant. So, from there, we moved on to DCKAP and we went live in March of 2020. moodyprice.com is our domain. If you'd like to go check out our site after the presentation.

Shiva 04:42
That sounds interesting, right? So, what are we gonna see on this episode? So, four things I'm actually break it down into four things. First, the motivation to move from ECC Epicor Commerce Connect. And second thing the core requirements third Implementation design and SEO overview. And finally, the fourth one, website performance. So, how has the ECC Epicor Commerce Connect be so far? And what was the motivation behind migrating from ECC, let's hear from Kendall.

Kendall 05:19
Primary motivation to start looking for another e-commerce platform is the sunset of Magento. One, which anyone who is on ECC is going to be faced with or if you're on Magento 1 was a different integration. Believe the sunset was supposed to be this month, I haven't heard anything recently, if the latest COVID or anything has extended that. But that was one of our driving forces, we knew we were going to have to move. And so we took a step back to make sure we were selecting the platform and the partners that we're going to be the most effective and make the most sense for us. Another driver was the high cost of ECC subscription.

We were, alright I'm sure every implementation is going to be different. But we were actually able to cover the cost of our Magento to build with a ROI of just the savings from ECC to less than two years. Another issue we're having with ECC was the inefficient and expensive development cost. As many of you may or may not know, with Epicor, you're usually tied in directly to a company called SIL that is responsible for all the design portion. But there's no one at Epicor that understands design. So, anything that you need to change or want to configure, you have to submit a case into Epicor, who then turns around and rephrases that case to suit who then somebody gets in touch with you from SIL, and then you give the requirements and then they're going to give a quote, but you can't get the quote from SIL the quote for the amount of hours and the amount of

time and how much it's going to cost as the funnel back through Epicor. Because it's ultimately built from Epicor. It's just it was a very frustrating path to get support and enhancements done.

Another large driver we have is something called PunchOut. If you're not familiar with PunchOut catalogs, if you have large customers, it's coming if it's not already there, it is a way to leverage your website and tie it into the customer's procurement system. And I'll give a little bit more information on that in just a second. The gist of it is it replaces the shopping cart on your website, customer goes in, they throw items into their cart, quantity item price. And when they go to checkout instead of actually prompting you for a credit card. It returns all of those items and all the information and all the quantities and prices that are in the shopping cart back into their procurement system. Most commonly with us it's a Ariba and Coupa SAP. It looks just like our website, it works like our website, the search works like our website, it's it's a tailored session for that customer. That changes up the checkout process for them. We have one of our largest customers who had a requirement for us to begin using it. And up until this point, we had not embraced it fully. And moving away from ECC into another Magento 2 implementation was going to give us the chance that we were looking forward to integrate PunchOut from the ground up and not as an afterthought.

Shiva 09:05
Alright, so wondering what's PunchOut and how PunchOut works, right. So, here's Kendall of giving us a brief about what it is and how they've been handling it.

Kendall 09:18
Now here's a slide from PunchOut to go they are the vendor that we use, and you'll hear from Brady in a little while that we use to help us configure the PunchOut integration with Prophet 21 for us. You see this is a little busy showing all the ins and outs and and the flows that go in. So, I simplified this a little bit into a single slide that may be a little bit easier to understand. If you're not familiar with PunchOut. The customer starts a session within their procurement system. And within a Ariba and Coupa or within SAP, they see a window that looks exactly like a website, it is a website, it's a version of a website. But there's enough customization within that session to control how the checkout works for that customer. So, they put those items in their cart, the checkout, returns it back to their procurement system, such as a Riba. And then we receive the PO from Reba, and bring that back into P 21. So, it really streamlines the process for those larger customers that have this capability. And I think the price to entry on this has come down quite a bit where I think we're going to start seeing this more and more with even smaller customers.

Shiva 10:35
Alright, so, now we've got a little background about their challenge. So, what are the core requirements actually looks like? Let's get on to the core requirements now.

Kendall 10:47

So, that one of the driving forces that we had here that we wanted to integrate up front, some of the other core requirements we have, obviously, is the P 21 integration with our Americommerce site that we had without the integration was it's entirely too difficult to manage. And it really was not enough for us at this point in our with our growth of e-commerce business. Another requirement we had was robust site search, real limitation that we had with Magento 1, and all of our earlier websites. The latest technology is called Elastic Search, which actually requires its own separate server instance with your hosting. It's very inexpensive, I think we pay roughly around $20 a month, I think for the for the instance that we use for our Elastic Search.

But it takes the search capabilities that most customers are used to with an Amazon like experience with suggestions and digging in and this product goes with and complete customization of the of the site search separate from Magento. And that was one of our core requirements that we had to make sure that our part numbers which are can be very complicated with dashes and spaces and inch marks, and so forth, to make sure customers could find the products that they were looking for.

We had to have a system that was going to dynamically price for our customers that were registered on the website. Again, this is this is this could potentially be a big hurdle for any installation that does not have a dedicated middleware to talk with P 21. And to do it quickly, to calculate real time pricing for customers that are logged in. With ECC, we had something similar, except even the base pricing was being calculated real time which was a was a real drag on performance. And with the integration we did with DCKAP we were able to go through and actually static price all of our items based off of P 21 pricing library. And then we have a job that runs once a week that goes back in and re prices, those static prices based off of the current pricing library that set up in P 21.

We wanted our customers to be able to go in and approve quotes. We wanted the integration to use our Avalara tax integration that we already had in P 21. So, we didn't want to have to go back in and recreate all of our tax rules with the Avalara integration with Magento 2, were able to use our same Avalara account for all of our sales tax calculations on the website. We wanted to make sure we could flag our P 21 customers that were already tax exempt onto the website. So, we didn't have to try and manage that process separately. And another issue we had run into with last two or three years is customers who are checking out online or our website that are tax exempt. But there's no way other than a note on the order to say they're tax exempt. And then they would submit the online order we will receive it and then after we would get it into P 21 and begin processing it we would receive an email from them saying hey, we're tax exempt, please remove the tax off of this order.

So, what we wanted to do with our new implementation was to implement some methodology to where customers could actually upload their tax exemption certificate

as part of the checkout process. This was a really wish it started off as an idea of what would work best for us. And it turned into a customization from DCKAP to Magento that works flawless now, we received probably two dozen orders in the last two months that are that are supplied with both the order information and the tax exemption certificate information whenever it's actually brought into P 21. So, it skips that entire step of trying to fix an order after the fact.

Another, wishlist item that we had that actually is turned into more of a requirement was the need for a product information manager or PIM. If you've heard the term gives us a single point of management of all of our items that we have for sale, both on the website and within P 21. Some of these items are not even on our website. But with P 21. There's very limited storage by default for things such as attributes, and rich product data, like PDF cut sheets, or images or CAD drawings. P 21 does not handle that very well, natively. So the PIM gives us an intermediary step that loads the product data from P 21 to get things like part numbers, descriptions weights. But then it also gives us another place where we can store these cut sheets and CAD drawings and attribute data such as specific sizes or dimensions or pressure ratings that become searchable once they are inside of the Magento portal.

And our last requirement was not only did we want to implement PunchOut, but we wanted to implement it in a way that was going to work best for our customers. Natively in most punch out integrations. you're limited to the items that are on your website for the customer to choose from in order for them to use and their PunchOut integration. Our businesses section where we have a lot of one time purchase items, what we call buyouts. These are items that are not something we would normally stock or sometimes ever stopped, but the customers requested it from us as part of a larger order. So we'll take the task of procuring that item and adding it to the order for them. But that item would never be on our website. Another instance of that would be engineered products, where we have things such as radar level meters, these things are calibrated and have so many different possible configurations that an individual part for an individual customer is going to have an individual part number, again, doesn't lend itself to going through and adding it to our website because it would only ever be purchased by this one customer this one time.

So we needed a way for customers to be able to punch those out through the punch out process without them being on the website. And what we come up with was a way for the PunchOut process to read a P 21 Quote, instead of relying on the shopping cart itself. This allowed us to present to the customer, any item that we have in P 21. And they could retrieve that item by retrieving the quote where that item lives. And whenever they would click the punch out button instead of using the shopping cart to transfer the list of items and quantities and prices, we're actually using our P 21 Quote, to load that data back into their procurement system.

Shiva 18:50

Okay, so Moody Price identify the problem, they would like to make a move figure out the core requirements right. Now, you know, here comes the vendor selection process. This time, they wanted to ensure they have a partner partners, nothing with a strong background on the Prophet 21 ERP integration, and a partner who also helps them with the hassle-free communication and support with the other vendors in the process. Kendall can you explain how, I mean, how did they choose the right partner for this project.

Kendall 19:22

So, we had all these requirements and morts in our wish list. And now we had to find a vendor who could take care of all of it for us. So, we started down the path, we think we had a short list of about three to four partners that we were looking to choose from, which set the DCKAP apart from the others that we looked at one that already had a solid reputation in the P 21 Users Group. The middleware that they were in implementing the Cloras when we watched the demo with DCKAP is very robust. It's Very easy to use, it is much easier to understand than the native Prophet 21 middleware. And it gives a nice web interface for our moves, adds and changes, you don't need to know how to program in an HTML or PHP or JavaScript or any other language, in order to make changes and configuration updates within the middleware.

It looked at all of our customization morts that we had, and come back to us with a commitment some of these they had actually never done, but they'd looked at it from a high level and made a commitment that they would make it work for us. And that was huge, especially with the PunchOut to go implementation. Because at this point, all we had was a concept of using a Prophet 21 quote. And there was a big gap from me, from a technology standpoint, of a quote and Profit 21 and a requisition in the customers procurement system and how to make those, the bridge that gap was beyond my skills from a technology standpoint, but they had the understanding and the partnership with PunchOut to go where they were able to confidently take on the project.

Another benefit we have with them is their partnership with Nexus. We did our own individual research on hosting and Nexus ranked up near the top for Magento hosting everywhere we looked in surveys and various user forums. And with them being tightly integrated with Nexus, it took all the load off of us for having to create and set up our own hosting environments. The configuration for the hosting itself and also the configuration and setup of the Elastic Search instance. We logged into Nexus created an account, we put in our billing information, and we set up credentials for DCKAP and handed it over to them. And short of going in and reconciling my monthly billing. I don't do anything at all with hosting which is very nice for me.

Their FlexiPIM product was very new when we first started looking at DCKAP. And as limited as it was when we first looked it was exactly what we were looking for. We had looked at other PIMs that are on the market, even open source such as a key Neo and

some other PIM that are available and they were just way overkill for what we wanted. We want we wanted a place to go in and house all of our product data and information. And specifically the things that P 21 could not hold. And the FlexiPIM product does all of that for us it holds everything we need. That we haven't, we haven't run into any limitation on what it can do for us. In fact, it can do a lot more than what we're using it for it's it's grown into a product is more similar to some of the larger PIM products that are out there now. But for us, we just needed something basic and easy and also had a direct tie into Magento.

To make the management is almost the same single pane of glass, but it's all integrated in the FlexiPIM data is connected into our Magento site with their own plugin. And we will log into a portal that's outside of our website to manage all the product data. And all of our changes automatically flow back into Magento from the plugin. And of course, as any company, we were looking for something that was going to be cost effective for us, we we had said three different partners that we were looking at DCKAP was the only one that could bring in all of our wants could handle the customization. And they were also the lowest price of the three that we looked at.

So, it was the trifecta of easy decision making. As far as our implementation goes, having been through B2B Seller, Americommerce, ECC. We had a pretty good feel on what to expect going in. Part of that were much better organized for our implementation with DCKAP in the past, we learned lessons from not having organized photos, not having organized categories. All those lessons we had learned prior, we were able to bring to the table with our implementation here.

So it made things a lot easier and smoother. But the one point I want to drive in is how organized the implementation is, with DCKAP so much more than any of the others that we had used in the past. They use a program called or a web portal called Basecamp, if you you're not familiar with it, it's a very easy to use almost user forum like feel to it that makes it very simple to go in and create a case or an instance if you will have an enhancement or a feature or a bug. And then you can follow the conversations all the way through, you can watch DCKAP loop in the correct resources that are needed, we'll have we'll start in a feature enhancement with one person at DCKAP, that'll get it to the point to where maybe it needs data from Cloras we need to bring in a piece from FlexiPIM. And they loop in those resources, real time seamlessly all within the the instance of the request, and you can follow it, there's no need for status updates, there's no need for wondering what's going on.

You can see what's being done as it's being done within the interface. So, that was that was very nice and a welcome change from our experience in the past. Another key differentiator with this implementation was Alex Decherd, which is the UX designer for us, who was really able to take all of our list of wants and what we thought we wanted for our designs, and was keeping the things we requested in the spirit that we were requesting them. But at the same time, he was able to bring in recommendations for

best practices, we could do this, but if we shifted it one way or another, or we added this other piece of information, it would help with our SEO.

He brings a vast experience and knowledge for wholesale distributors, and distributors in general. And knows mostly in generic terms. What differentiate differentiates a distributor customer from say, an Amazon customer, and how, how they shop, and what things are important and what things to prioritize in the design.

And lastly, I would like to bring up that I mean, I mentioned it's efficient, we implemented our DCKAP, Magento 2, P 21, FlexiPIM Cloras, probably in a span of three to four months. It may take a little bit longer than that. But anything that went over that was because of our customization with that we have required with the tax exemption certificate and the PunchOut to go, but the basic site itself was up and running in probably about three months. And that includes design, everything from starting from wireframes to finish proof of design. comparing that with our implementation with ECC, I believe we were probably in the eight to nine month range for the same process. So, I can't say enough about the efficiency and the ease of the implementation process. It was great for us. Now what I'd like to do is bring in Alec Daniel, who is our digital marketing designer, who handles all things with our website with design and SEO. And he had almost complete control over that process. And he can give you a little bit of a insight on how that went for him, and with working with DCKAP.

Shiva 29:25
Every implementation, especially for migration like this. One thing that we always encourage our customers to follow a proper SEO structure to not only make sure we don't lose track of the current traffic, but at the same time, how can we actually increase it? So, here's Alec explaining the design and SEO piece of the implementation.

Alec 29:48
This is my first site with Moody Price. However, I do have experience with a couple dozen websites in sort of a project management role. So, I'm familiar with the process and I had a lot of expectations, I knew that DCKAP would have us covered on the technical side, you know, they're specialized in the middleware, the Cloras. The reason we went with them was because of the PunchOut integration. And there were a lot of technical things they brought to the table, but I just I have to brag on them, I did not expect this pleasant of an experience when it came to our design on this website. So I really, when this all started, I expected to be given a list of templates.

You know, they say your pick a few of these. We'll roll with this. That's not what we got. What we got was, we worked with Alex, we had a discussion, you know, what goals do you have on where your customer is going? How did they get there? How can we improve this process through design. So in doing that, we got a data driven design and call to actions using our previous websites, data and analytics. So we went through, and we did this page by page for the entire site. And the process was just incredible, great

experience, not what I was expecting and better than I was expecting. So we were able to using this method sort of meet any unfulfilled needs we had on our homepage with like, in reference to call to actions and stuff.

So we wanted to really focus on that data. And in doing so we sort of came to the conclusion that we had three top sections of our site, one of the focus on that's where our customers were going, we wanted to help them get there. So we went with, you know, request for, quote, our locations, pages and our services pages, because that's really our big free Moody Price. And a lot of people ask me, why as an e-commerce site, you have your main call to action as request for quote. And the reason is, we looked at the data. And, you know, a lot of our products are modular, they are project specific. They're very specialized.

And so that's why we decided to go with our requests for requests for quote, as our main call to action. And, again, data driven decision on that, we get a dozen, sometimes two dozen requests for quotes on a good day with probably about a 50% conversion rate. So not a web sale, per sec, but a sale, which really is all Kendall and I care about at the end of the day, convert those customers. So that was the homepage locations. Same thing, we went through the data with Alex, we knew that for local SEO reasons, we wanted to create sub pages, which we do not have on our previous website. So each branch would get its own page that we could then talk about the service areas that we cover there, we wanted to include, you know, those high quality photos, one of the show off our inventories, or vehicle fleets and other capabilities we have at these branches that customers would otherwise not know about, had they not seen it.

So that was a big thing for us. And that was something that we were really able to capitalize on. Another one was our services pages. Because we're not just a sales company, we're big on services. And just like locations, we wanted customers to be able to see the services we provide. And if you go to our services pages, now you can actually read, we actually took photos, a lot of our services, and customers can go there and see, okay, these guys seem pretty proficient, they have, you know, they do this a lot. And so they're able to provide that with us.

So that's sort of the design, I kind of wanted to touch on SEO a little bit. And in our previous site, I spent months working on our metadata, you know, our descriptions and page titles and stuff like that we have over 5000 product pages. And that was something that I really worked on. And when we originally started looking into this migration, we were told that this is going to be wiped This is a complete rebuild, you're not going to have this stuff. Well, that wasn't the case of DCKAP, they went ahead and made that happen for us, they got all of that metadata that I had created and spent so much time on, and they were able to put that into our new site, which saved me, I mean, hundreds of hours worth of work. So I was very appreciative of that. There was also a issue on our previous site, I guess it was a setting in Magento, one where every URL ended in dot

html. And so what I was having to do was go through and 301 redirect all of these old pages ending in dot html to our new pages that didn't have dot html.

34:43

I was I spent a couple of weeks post launch on our website on this on this website, and was sort of mentioning it to DCKAP and they were like, well, we can write a script for that. So they wrote a script for that and save me again, I would have had to do this for five 6000 pages. And done do that was it So that was a great experience.

Shiva 35:01

Everything has been done. Ideally, this is not the last phase of the project, actually, this has to be the primary section, which is performance. And from the consumer standpoint, what they're gonna care, you know, finally, is the performance of the website. They don't even care, you know, in the background are, you know, what went beyond this implementation and things like that. So how was the website speed?

Alec 35:25

Moving on to our site speed, this was a huge issue for us, our previous site was so bloated. As you can see, here, we had about a seven and a half second to 10 second page load time, and that was our average. I mean, this thing was bloated, it was slow. Currently, with our new site, we're at about one to two and a half seconds. And one of the reasons for that is DCKAP came up with a design for us. We have a lot of products, I'm going to use something called an FPC. For example, it looks the exact same, there's about let's say, 10 variants of one FPC with a quarter inch difference or something like that. So they all look the exact same, just with minor minor differences that vary from part number. And our Previously, we were showing photos of every single one of these variants, which obviously slowed down our website massively.

And with this new one, they came up with a design or worked with Alex and Miguel, she was great. And they basically showed the one photo at the top and then listed the part numbers underneath, which sounds simple. And obvious now, but you know, we hadn't thought of that. And it just saved us so much time, space. And it really retained a lot of customers who were exiting our site right there due to load speed. So this has been a great experience for Kendall and I, we're very thankful that we found DCKAP, and that we were able to work with them. And we really look forward to this partnership moving forward.

Shiva 36:49

Before we wrap up the episode. One last thing for the non PunchOut customers, how did they handle it? I mean, how Moody Price handling? So let's hear from Kendall I mean, very. So this is the question we asked him so were you able to let customers check out without making payments.

Kendall 37:08

Absolutely. We have three different checkout channels, if you will. We have different levels of customers, we have what we call anonymous, which are customers that do not exist in our Magento site. And they do not exist in P 21, or anywhere. And those folks are limited strictly to credit card checkout. Then we have the next tier what we call our peak point our Magento customers, which these are folks who order online from us, they have elected to save their account information in Magento. But they are not in P 21. These are customers typically from outside of our general sales area, but they come to us for items that they can't find locally on and repeat orders, then we have what we call our P 21. customers. These are the customers that have an account on the website that is directly tied to a P 21 account or P 21 contact within their system.

Once you get to that level, we open up a second and third method of checkout the second thing Moody Price account. So if they have account terms with us, whenever they check out, it actually takes the order brings it into P21. And it is charged to their their terms their open account that they have with us with P21. And then of course the third would be for the next tier of customers that are using PunchOut which that order process actually doesn't directly create a transaction on the website. It simply returns that information to their procurement system. And then we receive a purchase order from that customer via EDI or Riba or one other method that actually goes straight into P 21. That transaction does not occur at all within the budget the Magento space.

Shiva 39:12
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