

A large digital display in a factory setting showing a "Self-Service" dashboard. The dashboard includes a "Trio Service" section with a line graph, a "Order Status" section with a list of metrics, and a "Create Log" button at the bottom.

Self-Service

Order Status

Order Status	8042,000
Amount	325,440
Priority order	1293,000
Inter-branch	20,000

Create Log

Build vs Buy for B2B Customer Self-Service and Dealer Portals in Mid-Market Manufacturing

Executive summary

B2B buyers increasingly expect to research, order, and resolve issues through digital self-service, often preferring "rep-free" or self-directed journeys for at least part of the buying process. A 2024–2025 swing in research reinforces this: Gartner[1] reports a majority of B2B buyers prefer a rep-free buying experience, and McKinsey continues to observe durable "rule of thirds" buying-channel preferences that include digital self-serve interactions. [2]

For manufacturers, the "build vs buy" decision is rarely binary. In practice, three approaches emerge:

Commerce-centric SaaS platforms

Optimized for digital ordering and shopping experience. ERP is integrated to support transactions, but the portal typically carries limited operational logic.

Native-integrated / ERP-centric platform

Optimized to extend ERP-driven processes to customers and dealers. ERP remains the system of record for operational rules and status, and the portal is designed to reflect that reality with fewer approximations.

Fully custom build

Optimized for maximum control and unique workflows. ERP interaction is defined by the architecture you design, and the organization takes on end-to-end lifecycle responsibility for the solution.

Almost every manufacturing portal ends up including some combination of ordering, order visibility, invoices/documents, warranty claims, account management, and documentation. The real difference is not feature availability. It is ownership, operating burden, and integration depth. To make the decision more repeatable, use gating requirements to remove non-starters, then apply weighted scoring across the remaining tradeoffs with sensitivity analysis.

If you want a faster way to run this exercise, Corevist has a tool that mirrors the gating plus scoring approach here. It captures assumptions, runs the weighting math, and generates an AI writeup with suggested next steps. [Access it here →](#)

Scope boundaries that matter for build vs buy

The build-versus-buy decision changes based on how the portal needs to behave in relation to your ERP system and how much complexity you are prepared to manage. In practice, three architectural approaches emerge:

1. Commerce-Centric SaaS Platforms

These platforms are built primarily to support digital ordering and catalog management. They can integrate with ERP systems for data synchronization and pricing updates, but they are not designed to act as a full operational layer over ERP. For manufacturers with straightforward pricing models, limited account hierarchy complexity, and a primary goal of enabling online transactions, this approach can work well. The limitations become more visible as operational complexity increases.

As those requirements grow, the platform either requires increasing customization or the business continues to rely on manual processes outside the portal. This model works best when digital ordering efficiency is the primary objective and when ERP integration supports transactions rather than governs them.

2. Native-Integrated or ERP-Centric Portal Platforms

These platforms are designed specifically to expose ERP-driven processes to customers and partners in a controlled way. ERP remains the system of record for pricing, availability, credit status, and order state, and the portal is built to reflect that logic accurately rather than replicate or approximate it. This matters in manufacturing because pricing rules, account hierarchies, and service workflows are often more complex than standard commerce models anticipate.

The advantage of this approach is tighter alignment between what customers see and how the business actually operates. The tradeoff is that integration design cannot be superficial. System-of-record decisions, data ownership, and ongoing integration management become central to the implementation. This model fits manufacturers that need the portal to behave as a reliable extension of ERP processes without taking on full custom software ownership.

3. Fully Custom Build

In a custom build model, the organization owns the full stack — application logic, integrations, security controls, infrastructure, and release cycles. This path provides maximum flexibility and control. It allows workflows and user experiences to be designed exactly as needed, without adapting to vendor product models. However, ownership extends beyond development. It includes long-term integration maintenance, security management, uptime responsibility, and continuous enhancement. Custom build makes sense when portal workflows are strategic differentiators or when regulatory and data constraints require full architectural control. It is less about what can be built and more about whether the organization intends to sustain that ownership long term.

Rigorous build vs buy tradeoffs across decision factors

Tradeoffs Dimension	Buy (Commercial Platform)	Build (Custom Ownership)
Time to Market	Faster when requirements align with platform capabilities. Core infrastructure already exists.	Slower due to discovery, engineering, integration design, and operational setup.
Upfront vs Ongoing Cost	Lower upfront investment; recurring subscription and services over time.	Higher upfront build cost; ongoing cost shifts to internal team and infrastructure.
Long-Term Cost Profile	Predictable subscription base; cost scales with usage and complexity.	Maintenance, integration evolution, and enhancements become internal budget lines.
ERP Integration	Platform APIs and connectors available, but fit must be validated. Deep ERP coupling may require structured extension.	Full control over integration patterns, but full responsibility for versioning, monitoring, and reconciliation.
Workflow Flexibility	Configurable and extensible within platform model; extreme uniqueness may require workarounds.	Maximum flexibility; workflows can reflect exact business rules.
Security & Compliance	Vendor provides core controls and evidence; manufacturer retains configuration and data responsibility.	Full control of security architecture; full accountability for posture and audits.
Reliability & Operations	Vendor operates infrastructure; internal team focuses on configuration and integration oversight.	Organization owns uptime, patching, scaling, and incident response.
Change & Upgrades	Vendor release cadence; extensions must be maintained against platform changes.	Organization controls release cadence but must fund continuous modernization.
Lock-In Risk	Commercial lock-in via contracts and pricing structure.	Technical lock-in via bespoke architecture and internal knowledge concentration.
Organizational Impact	Smaller internal product team required; focus on integration and governance.	Requires sustained product team mindset (engineering, DevOps, security, QA).

Evaluation criteria and scoring framework

A decision framework should combine:

1. Gating requirements. If any non-negotiable fails for a given option, remove it from consideration.
2. Weighted scoring across tradeoffs that are negotiable, with sensitivity analysis

Weighted scoring

First, weigh each factor based on importance so they add up to 100 (e.g., 15 = 15% of the decision). Then rate each option 1–5 for each factor (1 = poor fit, 5 = excellent fit).” A sample rubric:

Factor	Weight (% of total)	What "5" looks like
Time-to-market	15	MVP in weeks, minimal custom dev
Integration fit	15	Proven ERP integration
Customization & differentiation	15	Can encode unique dealer/service flows without breaking upgrades
Security & compliance	15	Evidence-backed controls (SOC 2 / aligned frameworks)
3–5 year TCO	15	Predictable, transparent cost drivers
Operating model & staffing	10	Sustainable with current team; clear RACI
Lock-in / exit risk	5	Documented export; practical migration plan
UX	5	Dealer-friendly workflows, retraining low
Scalability & performance	5	Meets peak loads and global use

Example scoring (illustrative)

Factor	Weight	Buy (score 1–5)	Build (score 1–5)
Time-to-market	15	5	2
Integration fit	15	5	3
Customization & differentiation	15	3	5
Security & compliance	15	4	4
3–5 year TCO	15	3	3
Operating model & staffing	10	4	2
Lock-in / exit risk	5	4	3
UX & adoption	5	3	5
Scalability & performance	5	4	3
Weighted total	100	359	348



If you want a faster way to run this exercise, Corevist has a tool that mirrors the approach here. It captures assumptions, runs the weighting math, and generates an AI writeup with suggested next steps. [Access it here →](#)

References

[1] <https://www.gartner.com/en/newsroom/press-releases/2025-06-25-gartner-sales-survey-finds-61-percent-of-b2b-buyers-prefer-a-rep-free-buying-experience>

[2] <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/five-fundamental-truths-how-b2b-winners-keep-growing>