![Corevist logo]

Attract New Customers or Serve Existing Ones: A Platform Decision Guide for Manufacturers

Executive summary

Mid-market and small enterprise manufacturers are being pulled in two directions at once: buyers increasingly expect digital, self-serve experiences, while internal teams are swamped with "where is my order," invoice, credit, and account inquiries that don't create revenue but do consume expensive capacity.

The decision is often framed as "do we need B2B commerce?" but the more reliable question is "are we trying to **acquire and convert** customers, or **service and retain** customers at lower cost-to-serve?" Analyst definitions of digital commerce center on enabling an interactive buying experience that can present orders for payment, while customer portals and self-service are defined around secure access to information and task completion without agent intervention. A digital commerce platform is structurally optimized for **discovery → persuasion → conversion** (even when B2B pricing and catalogs are account-specific). A self-service portal is structurally optimized for **post-order visibility and transactional servicing** (order status, invoices, shipment tracking, account administration, payment status) to reduce inbound contacts and friction.

What fails in practice is not buying the wrong product. The failure is building a high-weight commerce stack to solve an operational servicing problem—or building a thin portal when the business actually needs a competitive, search-and-merchandised buying journey.

Category definitions and comparison

Digital commerce platform

A **digital commerce platform** is a system (or set of systems) that enables customers to evaluate and purchase goods/services through interactive, self-service and/or assisted digital experiences, including pricing, ordering, and payment.

In manufacturing contexts, it commonly includes the following capability families (terminology varies by organization, but the patterns are stable):

- **Storefront and experience delivery:** branded storefronts, multi-site/multi-language experiences, customer journeys across touchpoints.
- **Merchandising and promotions:** campaign landing pages, product grouping/collections, promotions/discount rules, cross-sell/up-sell mechanics.
- **Product discovery:** search, navigation, filtering/faceting, and (in more advanced programs) personalization of discovery and content.
- **Anonymous browsing and conversion mechanics:** the ability to support unknown visitors through discovery, persuasion content, and conversion flows (even if final purchase requires login or a quote/approval flow in B2B).
- **B2B-specific buying rules (often layered on top):** account-based catalogs and pricing, purchasing roles/approvals, contract terms, segmentation by customer type/channel.

Designed primarily for: customer acquisition, conversion, and growth—usually measured by revenue, pipeline influence, digital adoption, and conversion rate.

Typical buyers and sponsors: marketing, digital, growth/revenue teams, sometimes with sales leadership—especially when the initiative is framed as a "digital revenue channel."

Common architectural patterns:

- **Headless / decoupled commerce:** separating the front-end experience from the commerce engine so UI can evolve independently from backend logic
- **Middleware-heavy integration:** because commerce journeys touch ERP, PIM, CRM, pricing, tax, inventory/ATP, and identity, many implementations rely on integration middleware/iPaaS to orchestrate data flows across systems.

Customer self-service portal

A **customer self-service portal** is a secure, usually authenticated digital destination that provides customers a single point of access to **information and tasks** they would otherwise request via phone/email: account information, documents, order visibility, support actions, and operational transactions.

In manufacturing, self-service portals commonly focus on:

- **Order-to-cash visibility:** order status and history, shipment tracking, delivery estimates, backorder information, invoices, payment status.
- **Account operations:** account management, permissions by buyer roles, address books/ship-to relationships, credit exposure and statements (where applicable).
- **Reordering and repeat purchasing:** reorder from history, saved lists, operational "buy again" patterns (often logged-in, contract-priced).
- **Document access:** certificates, manuals, compliance documents, statements, and other account-specific files.

Designed primarily for: operational efficiency and reduced cost-to-serve, by shifting routine inquiries from agents to customer self-service (ticket/case deflection).

Typical buyers and sponsors: IT, customer service leadership, operations, finance (AR), and sometimes supply chain/customer logistics—especially when the initiative is driven by inquiry volume and service backlog.

Common architectural patterns:

- **ERP-centric exposure:** the portal acts as a secure window into ERP-centric truth (orders, invoices, delivery status), sometimes via APIs and sometimes via replicated reporting data (depending on latency and risk tolerance).
- **Lower UX and merchandising complexity:** the portal experience is usually narrower and more task-oriented (find it, download it, reorder it), which can reduce CMS/merchandising overhead compared to acquisition-driven storefronts.

Side-by-side comparison table

Dimension	Digital commerce platform	Customer self-service portal
Primary job-to-be-done	Acquire demand and convert buying journeys into orders/payments.	Reduce cost-to-serve and improve post-order servicing via self-service.
Typical user posture	Includes anonymous visitors; may later authenticate for contract pricing and checkout.	Typically authenticated and account-specific from the start.
"Center of gravity" capabilities	Merchandising, promotions, content, discovery/search, personalization, conversion flows...	Order/invoice/shipment visibility, account management, documents, reordering...
Success metrics	Conversion rate, digital revenue, pipeline influence, CAC reduction, adoption by new segments.	Ticket deflection, reduced inbound calls/emails, faster resolution, improved CSAT for routine needs.
Common ownership	Marketing/digital/growth (with strong IT partnership).	IT + customer service/operations/finance (AR) partnership.
Architectural tendency	Headless/composable options, DXP patterns, integration orchestration across many systems.	ERP-centric exposure, pragmatic integration, narrower experience scope.
When it becomes "too much"	When most usage is logged-in customers doing order lookups and document downloads, and merchandising capabilities sit unused.	When the business actually needs persuasive discovery, campaigns, and conversion for new segments, but the portal can't support that.

The core distinction and why it gets conflated

At a structural level, commerce and portals optimize different "loops":

Commerce loop

Evaluation

Discovery

Persuasion

Conversion

Primary goal: Drive demand, influence buying decisions, and convert interest into orders.

Service loop

Visibility

Order Placed

Documents

Repeat Ordering

Primary goal: Provide post-order visibility and enable customers to resolve routine needs without human intervention.
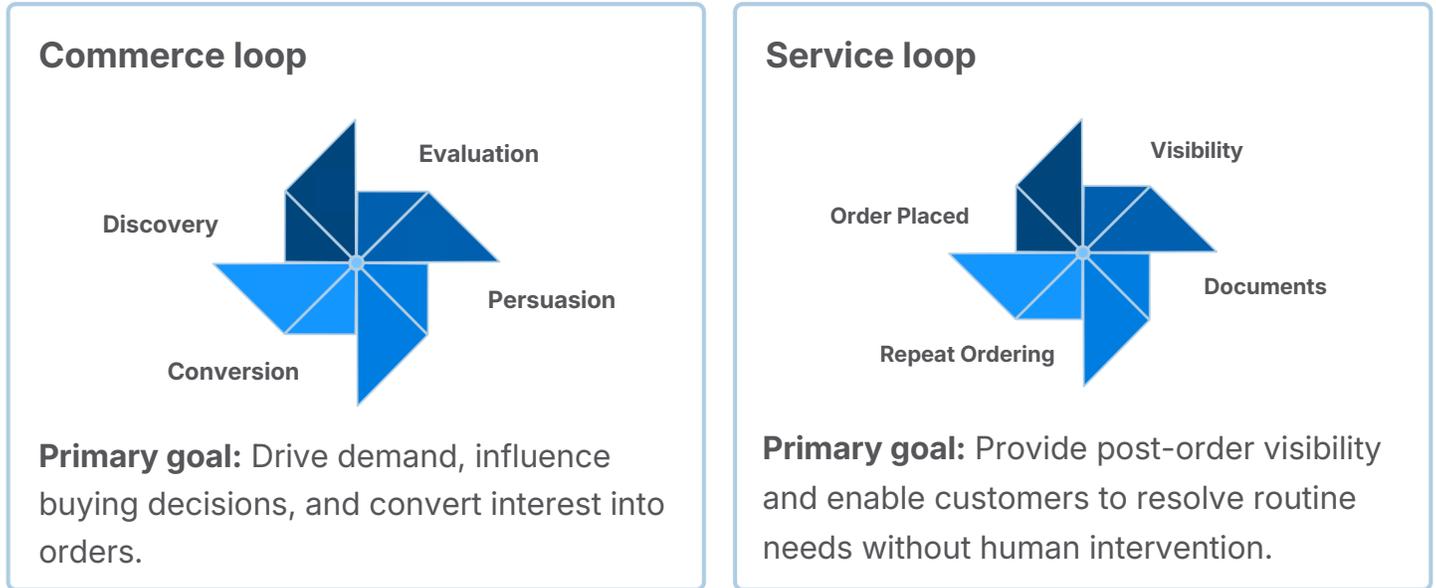
Organizations conflate these for three recurring reasons.

First, "digital commerce" language has expanded to describe the end-to-end journey, including post-purchase support, which makes it easy to treat servicing as "part of commerce."

Second, buyer expectations have shifted hard toward remote and self-serve interactions, including high-value purchases. That pushes executives to say "we need ecommerce," even when the operational pain is driven by order-status and invoice inquiries rather than a lack of discovery and conversion.

Third, digital transformation programs are frequently narrated through experience-layer concepts —content, personalization, experimentation, multi-touchpoint journey design. Those constructs are valuable when the objective is competitive acquisition and differentiated buying experiences, but they can unintentionally overweight the solution when the objective is primarily servicing.

Implementation partners can amplify the conflation. System integrators, by definition, assemble solutions from multiple third-party components and often operate through partner ecosystems and incentive structures; this can unintentionally bias recommendations toward categories that expand scope, integration surface area, and long-run "program" work. This does not imply bad intent—often it reflects where a partner has proven delivery playbooks, staffing depth, and reference architectures— but it is still a selection pressure you should explicitly account for in governance.

Decision framework

The decision is best treated as a **problem-definition exercise first** and a platform selection exercise second.

A practical approach is to score your initiative on two axes:

- **Acquisition & conversion intensity:** How much of the business case depends on attracting new buyers, new segments, and increasing conversion through discovery and merchandising?
- **Service & cost-to-serve intensity:** How much depends on deflecting routine inquiries, exposing operational data, and streamlining post-order workflows?

Neither axis is "better." The right architecture matches the dominant axis and avoids paying for capability weight you will not operationalize.

Decision matrix rule-of-thumb model

A simple rule-of-thumb matrix that works well in manufacturing evaluations:

If **most value** comes from *improving buying journeys* (search, merchandising, campaigns, personalization, conversion mechanics), a commerce platform is usually the correct center-of-gravity—even if you also add post-order self-service.

If **most value** comes from *exposing ERP-centric truth* (orders, invoices, shipments, credit, documents) and deflecting routine inquiries, a portal is usually the correct center-of-gravity—even if you also enable lightweight ordering.

> 💡 If you want to make this framework more tangible, Corevist has a decision tool that walks through this weighting approach. It helps teams clarify which outcomes matter most, assign relative importance to each, and generate a structured summary of how different options align to those priorities. **Access it here →**

Structured evaluation model

The table below provides lean signals, not absolutes. The value is in seeing which column dominates across your situation.

Evaluation factor	Signals leaning commerce platform	Signals leaning self-service portal
Primary business objective	Growth program: new segments, direct channel expansion, measurable conversion lift.	Cost-to-serve and service backlog program: reduce calls/emails for routine needs.
Anonymous vs logged-in traffic	Significant anonymous research/discovery required; you need persuasive journeys pre-login.	Predominantly logged-in users who already have accounts; task completion dominates.
ERP dependency	You can tolerate some decoupling/replication for experience agility, with strong integration discipline.	The portal is a window into ERP-centric processes; real-time visibility is a core requirement.
Channel structure	Direct-to-customer expansion, mixed channels, differentiated experiences by segment.	Dealer/distributor/partner networks needing operational transparency more than marketing journeys.
Internal technical capacity	You can staff ongoing product ownership: UX + content ops + platform engineering + integration.	You can staff a narrower product: identity, ERP integrations, operational UX, support workflows.
TCO over 5–7 years	You can justify higher capability breadth and operational staffing because it produces durable growth.	You prioritize lower capability weight and lower integration surface area to reduce long-run run costs.
Organizational ownership	Marketing/digital owns roadmap and content operations (with IT platform governance).	IT + service/ops own roadmap, with clear service KPIs and governance.

Scenario analysis for manufacturers

1

Legacy commerce platform replacement, but usage is mostly order lookup

Pattern: A historical "B2B commerce" implementation has gradually become an authenticated destination where customers primarily check order status, download invoices, and reorder a few standard SKUs. Merchandising and campaign features exist but are rarely used by marketing.

Structurally aligned approach: Recast the program as **self-service servicing** first. A purpose-built portal (or a portal-style information architecture) usually fits the dominant behaviors: order/invoice/shipment visibility and repeat ordering.

Failure mode if you overbuild: Re-implementing a full commerce platform reproduces the same unused capability weight and adds integration and maintenance cost—especially if you go headless/composable without a clear acquisition roadmap.

2

High phone/email order processing with heavy routine inquiries

Pattern: Orders come in via email/phone/EDI; customer service is overloaded with routine questions: order status, shipment ETAs, invoices, payment issues, documentation.

Structurally aligned approach: A self-service portal targeted at the highest-volume inquiries tends to deliver the fastest operational relief because it is designed around customers resolving routine matters without agents.

Where commerce platforms still fit: If you're simultaneously trying to shift ordering from manual channels into a scalable digital revenue channel (and you will operationalize search, merchandising, and conversion), then a commerce initiative can be correct—but it should be justified as a growth channel, not "because the service team is drowning."

3

Marketing-led digital expansion initiatives

Pattern: The initiative originates in marketing/digital/growth. The company wants to expand into new markets, launch new product lines, improve discovery, and meet higher expectations for consumer-like digital experiences in B2B buying journeys.

Structurally aligned approach: A digital commerce platform tends to be the right foundation because its differentiators are precisely in experience and conversion tooling: search, personalization, content, and merchandising.

Portal-only risk: A portal can expose products and ordering, but it often lacks the operational model for owning campaigns, optimizing discovery, and running a conversion-oriented roadmap.

Architecture and risk

Most failures in these programs are not UI failures; they are **integration, ownership, and risk management failures**

Middleware burden and failure surfaces

When you introduce an integration layer, you gain standardization and orchestration, but you also create a new product surface that must be operated: mappings, retries, error queues, monitoring, and identity propagation across systems.

Commerce-centric architectures tend to touch more systems (content, search, personalization, pricing, tax, ERP, identity). Headless/composable approaches can increase the number of components, and often require more development and integration effort up front, with more distributed operational responsibility.

Upgrade friction and ERP constraints in SAP-centric environments

For organizations running SAP ECC and transitioning to S/4HANA, integration and extension strategy becomes part of platform selection risk.

SAP publishes clear timelines with mainstream maintenance of SAP ECC through end of 2027 and optional extended maintenance through end of 2030. This creates a multi-year window where integrations must survive mixed states (legacy ERP, migration initiatives, parallel landscapes).

S/4HANA extensibility guidance emphasizes keeping extensions separate from core code and using released/public APIs to preserve upgrade stability ("clean core" principles). This matters because customer portals and commerce experiences that expose ERP data are only as stable as the API and extension boundaries they rely on.

Financial considerations

A neutral financial comparison is less about "license cost" and more about **structural cost drivers** over a 5–7 year horizon: implementation scope, integration surface area, operational staffing, and the opportunity cost of complexity.

Cost Profile: Digital Commerce Platform

Commerce platforms are typically operated as ongoing digital growth engines. Subscription fees fund not just software access, but continuous optimization work — merchandising, campaigns, content management, search tuning, experimentation, and analytics. Implementation costs can increase when initiatives include headless front ends, complex discovery and personalization layers, CMS/DXP orchestration, and integration across multiple backend systems. When acquisition and conversion are the primary objective, that investment model often aligns with the business case.

Cost Profile: Customer Self-Service Portals

Customer portals are usually narrower in scope, focused on exposing operational ERP data and reducing cost-to-serve. Cost behavior depends on architectural choices. Custom-built integration layers, middleware sprawl, and bespoke workflow logic increase long-term maintenance burden. Standardized, purpose-built ERP-aligned platforms tend to produce more predictable implementation and subscription costs.

The largest financial swing often comes not from "portal vs commerce," but from custom build vs vendor-operated software. Ownership of code, integrations, security, and lifecycle management materially changes long-term cost. If this dimension is under active evaluation, the **Build vs Buy for Customer Portals Guide** walks through structural cost drivers and ownership tradeoffs in more depth.

→ **Read Here**

Maintenance overhead and staffing model

Commerce

Commerce requires ongoing ownership of merchandising, personalization, and continuous optimization. Staffing typically includes product, UX, engineering, and content/merchandising roles.

Portals

Portals tend to concentrate ongoing work in: identity and access management, ERP/API change management, security, and incremental workflow improvements driven by service metrics.

Practical rule-of-thumb summary

1

Marketing & Revenue Growth

If the initiative **originates in marketing and revenue growth,** and success is measured in **acquisition, conversion, and differentiated experiences**, a digital commerce platform is usually the correct center of gravity.

2

Service & Operations

If the initiative **originates in customer service, operations, or finance,** and success is measured in **reduced inquiries, faster resolution, and operational transparency**, a customer self-service portal is usually the correct center of gravity.

3

Usage Pattern Test

If usage is predominantly logged-in customers accessing ERP-centric data, treat a heavy commerce engine as suspect until you can prove you will operationalize its acquisition and merchandising capabilities—**because the mistake is rarely choosing the wrong product; it is solving the wrong problem.**

Questions? Email info@corevist.com or Schedule a Call