

WHITE PAPER - **PART 1**

Strengthening Customer Experience in the Age of AI and Marketplaces



Spryker

*The Strategic Case
Why DACH manufacturers must act
now and what is at stake if they don't.*



Part One of a Two-Part Series

THE SERIES

DACH manufacturers face a defining moment. AI agents and third-party marketplaces are reshaping how B2B buying decisions are made and the manufacturers who own the digital customer relationship will own the next decade. Those who do not, won't.



Part 1 - The Strategic Case

Makes the business case for action. Frames the market opportunity for DACH manufacturers, quantifies the risks of disintermediation by AI and marketplaces, and lays out the strategic principles for strengthening direct customer relationships. Written for executives and decision-makers who need to understand the “why” before committing to the “how.”

Part 2 - The Practical Playbook

Walks through the Spryker Self-Service Portal in detail and a concrete 10-step framework for building it, with the operational detail and customer evidence needed to plan and execute. Written for the leaders, product owners, and architects who need to build the thing.

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The defining moment for DACH manufacturers

DACH manufacturers possess one of the most valuable and most vulnerable assets in the global economy: deep customer relationships built over decades, often across generations of family ownership.

These relationships are now under threat from four sides. Foreign manufacturers are closing the gap in quality and performance, increasing price pressure and eroding the product-based differentiation that once justified premium pricing. As products become more comparable, customer experience and total cost of ownership – less downtime, faster resolution, easier reordering – become more important in purchasing decisions. AI agents are beginning to mediate B2B purchasing decisions, reducing complex supplier choices to algorithmic comparisons. Third-party marketplaces like Amazon Business, Alibaba & OpenAI are capturing the customer interface. And digital-native competitors are offering 24/7 self-service experiences that phone-and-email workflows cannot match.

But the same depth that makes DACH manufacturers vulnerable also makes them uniquely positioned to win. No AI agent can replicate 30 years of installed-base knowledge, machine-level service history, or customer-specific pricing agreements if that knowledge is digitally accessible.

This two-part whitepaper series covers the **why** and the **how** of Self-Service Portals for DACH manufacturers: Part 1 builds the business case for action, and Part 2 introduces a practical 10-step framework to build a portal that turns institutional knowledge into a digital competitive moat – improving service outcomes while accelerating aftermarket revenue.

The framework is not theoretical: companies like Ricoh and Meusburger have already built Self-Service Portals on Spryker.

65%

of organizations now use generative AI regularly

McKinsey, 2025

23%

are scaling agentic AI into production

McKinsey, 2025

83%

of B2B buyers prefer ordering digitally

McKinsey B2B Pulse

Customers shift spend to the supplier that makes buying and service easiest. Once they rely on that digital experience, the resulting switching costs make it hard to win them back.

Why B2B customer relationships are your greatest asset

The DACH region is home to the densest concentration of world-class B2B manufacturers on the planet. Germany alone has over 1,300 "hidden champions" consisting of mid-sized companies with global market leadership in their respective niches. Austria and Switzerland add hundreds more. These companies are the backbone of European industrial competitiveness.

What makes these companies exceptional is not just their engineering excellence. It is the depth of their customer relationships. Many DACH manufacturers have served the same customers for 20, 30, or even 50 years. Such customer lifetime value is unmatched across the globe compared to other industries.

These companies know their customers' machines, their production processes, their seasonal patterns, and their growth plans. This institutional knowledge is irreplaceable.

Manufacturing accounts for ~20% of Germany's GDP, compared to 11% in the US and 9% in the UK (World Bank, 2023). Austria sits at ~18%, Switzerland at ~17%. This means DACH economies are structurally more dependent on strong B2B customer relationships and more exposed if those relationships erode through digital disintermediation.

Germany exports over 50% of its manufactured goods; Austria and Switzerland are similarly export-heavy. Many DACH manufacturers serve customers in 50+ countries via distributors and intermediaries.

Despite engineering leadership, DACH manufacturers lag behind Nordic and UK peers in B2B digital commerce maturity. Only ~25% of German "Mittelstand" companies offer full digital ordering, compared to ~45% in Scandinavia (Roland Berger, 2024). The opportunity to close the digital engagement gap is the core thesis of this white paper.

1,300+

"Hidden Champions" in Germany alone – more than any other country in the world.

Simon-Kucher / Hermann Simon

90%+

of German companies are family-owned, contributing >50% of GDP.

Stiftung Familienunternehmen, 2024

~20%

of Germany's GDP comes from manufacturing – vs. 11% US, 9% UK.

World Bank, 2023

50%+

of German manufactured goods are exported, often to 50+ countries.

Destatis

The untapped digital opportunity

Despite this relationship depth and the size of the DACH market compared globally, the digital maturity of most B2B manufacturers remains surprisingly low. Customer interactions still rely heavily on phone calls, faxes, emails, spreadsheets, and individual sales representatives. Orders are placed manually. Service requests go through call centers. Documentation is shared via email attachments.

3-5x

Aftermarket revenue

Aftermarket revenue (spare parts, consumables, services) is often 3–5x more profitable than new product sales yet most manufacturers have no digital ordering channel for aftermarket products.

30-50%

Service cost reduction

Service and support costs can be reduced by 30-50% by establishing digital channels that deflect calls, automate ticket creation, and provide customers with 24/7 access to information.

Daily

Customer engagement

Customer retention improves dramatically when customers have a personalized digital environment they use daily. A positive experience ensures customers come back and competitors cannot easily overcome customer loyalty.

Leverage

Data foundation

Data-driven insights from digital interactions enable proactive engagement, predictive maintenance, and personalized recommendations that deepen the relationship further.

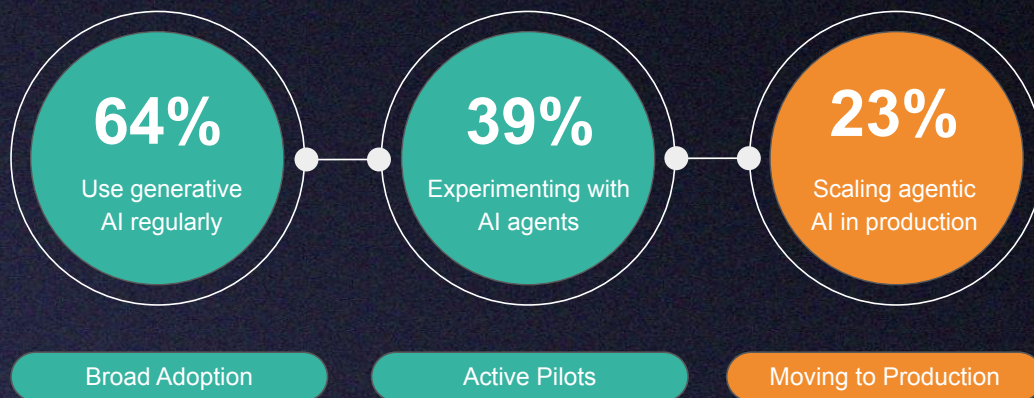
The window of opportunity is open now but it is closing. Early movers are already setting the standard. Companies that wait risk having customers buy through a competitor's portal, a marketplace, or an AI agent that treats the OEM's products as interchangeable commodities.

“The question is no longer whether B2B companies should invest in digital customer engagement - it is whether they can afford not to.”

ROLAND BERGER (2024): B2B Digital Commerce Study.

AI adoption and the threat of disintermediation

As AI becomes a more common interface for research and evaluation, the strategic question for manufacturers is shifting. The issue is no longer only whether customers can buy digitally, but whether the manufacturer is digitally legible in the moments that shape supplier selection.



Source: McKinsey & Company (2025): *The state of AI in 2025: Agents, innovation, and transformation*.

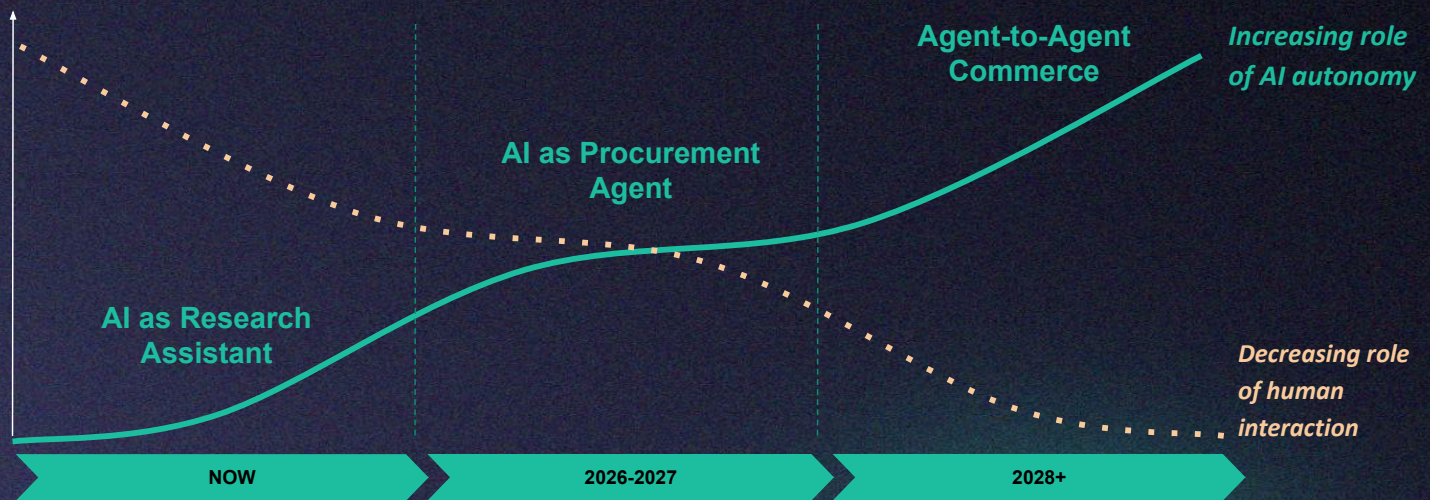
- ◆ **AI adoption is accelerating rapidly across enterprises.** McKinsey reports that 23% of organizations are already scaling agentic AI in at least one business function, showing how quickly the technology is moving from experimentation to operational use. For manufacturers, the immediate implication is that buyers increasingly use AI tools to research, compare, and evaluate suppliers. As AI becomes a more common interface for discovery and evaluation, digital discoverability becomes more strategically important.
- ◆ **Buyers increasingly use AI tools to express detailed requirements and preferences.** According to research by Gartner*, sellers that expose richer, machine-readable information are more likely to appear in evaluations and match those criteria. Those that invest now can improve digital discoverability, make their value easier to assess, and strengthen their position in AI-mediated buying journeys.
- ◆ **Manufacturers that don't act now are at risk of becoming harder to find, harder to compare, and easier to replace.** The threat is not only that transactions shift elsewhere, but that the customer interface shifts elsewhere – to platforms, intermediaries, and AI-mediated workflows that prioritize what is digitally accessible and machine-readable. In that environment, manufacturers that do not digitize their customer-facing channels risk losing influence over how their value is presented, understood, and chosen.

* Gartner, Inc. (2025): *Winning Product Discovery on AI Platforms*.

AI is becoming a force, not a tool

AI is shifting buyer behaviour from using AI as a tool to relying on AI agents that act on their behalf. Today, buyers research and compare suppliers through AI assistants like ChatGPT and Copilot. Soon, autonomous procurement agents will be able to request quotes, negotiate terms, and shortlist suppliers with little human involvement.

The AI evolution appears in three waves while human interaction is decreasing, autonomous AI agents are increasing.



Buyers use AI tools like ChatGPT, Copilot, and Gemini to research and compare suppliers. Product data, pricing transparency, and digital presence determine whether you appear in AI recommendations.

AI agents request quotes, negotiate terms, and recommend purchases. Procurement systems interact with suppliers via APIs and structured data. Without machine-readable catalogs, suppliers become invisible.

Buyer AI negotiates directly with seller AI. Routine transactions become fully autonomous. Products must be machine-readable, and traditional SEO shifts to “agent engine optimization.”

“Many organizations are unprepared for agentic commerce because their product data is insufficient for AI platforms to accurately interpret, evaluate, and recommend products.”

GARTNER, Inc. (2025): Optimize Product Data for Agentic Commerce.

The threat manufacturers can't ignore

AI is rapidly becoming the interface for B2B purchasing. Buyers increasingly rely on AI tools and autonomous agents to research, compare, and transact. For manufacturers, this shift creates new strategic risks: invisibility to AI, algorithmic commoditization, platform dependency, and the loss of direct customer relationships.

01 Invisible to AI = Invisible to Buyers

AI agents optimize for measurable factors like price, availability, delivery time, and specs. Intangible value – expertise, support, reliability, relationships – is harder to evaluate. If this differentiation isn't digitally encoded, it becomes invisible in AI-driven comparisons.

02 Commoditization Through Algorithmic Comparison

As AI commerce consolidates around a few platforms, manufacturers risk dependency on intermediaries. Like supplier portals in automotive, this leads to margin pressure and lost customer relationships.

03 Platform Dependency and Gatekeeper Control

When transactions happen inside AI agents or procurement platforms, the AI becomes the interface – and brand loyalty or relationship history disappears unless embedded in your own digital platform.

04 Loss of Direct Customer Relationship

If transactions happen inside AI agents or procurement platforms, manufacturers lose direct buyer contact. The AI becomes the interface, and relationship history disappears unless embedded in your own digital platform.

The marketplace trap

Third-party marketplaces present equally well-documented structural risks for B2B manufacturers in the DACH region. While they offer reach, they fundamentally shift control away from the manufacturer.

Loss of Customer Relationship

Marketplaces own the customer interface. For B2B companies built on long-term relationships and service agreements, this is critical.

Source: BEVH

Margin Erosion

B2B marketplace fees typically range from 10–20% of transaction value, shifting value from manufacturers to platform operators.

Source: Roland Berger

Loss of Pricing Control

Marketplace transparency undermines negotiated contracts, customer-specific pricing, and regional price strategies.

Source: IFH Köln

Channel Conflict

Selling through marketplaces can disrupt established distributor relationships that generate significant revenue.

Source: VDMA

Brand Commoditization

Standardized product listings reduce differentiation, pushing technically complex products into price-driven comparisons.

Source: European Commission

Marketplace Dependency

As sales grow on a marketplace, suppliers become dependent on it for demand. Commissions, rankings, or ad rules can change at any time.

Source: BEVH



THE COST OF WAITING

Standing still in a market that's moving without you

The convergence of AI and marketplaces creates a compounding risk.

Every month that a B2B company operates without a direct digital customer channel:

- ✗ **Customer data flows to third parties** instead of building your own intelligence.
- ✗ **Competitors with self-service portals** and superior CX become harder to win against.
- ✗ **AI agents learn to route business to digitally accessible suppliers** (if you're not accessible, you're invisible).
- ✗ **Your sales team spends time on manual processes** instead of high-value relationship building.

THE ANSWER

Mastering the customer relationship.

The answer is not to fight AI or avoid marketplaces entirely. It is to strengthen your direct customer relationship so comprehensively that it becomes the preferred channel for both your customers and any AI agent acting on their behalf.



As B2B buyers face information overload from generative AI tools, they will increasingly seek validation from human experts. Trust and nuanced understanding will make expert interactions critical again.

FORRESTER (2026): Buyer Insights 2026

Strengthening your customer relationship

The single most effective response to the threats of AI disintermediation and marketplace dependency is to strengthen the direct customer relationship through a digital self-service portal that you own and control. A self-service portal is not a "nice-to-have" digital project. It is a strategic initiative that enables you to:



Own the Relationship

Anchor customers in a digital platform you control – a persistent, 24/7 touchpoint.



Deliver Immediate Value

Self-service access to orders, assets, documentation, service, and purchasing.



Reduce Operational Costs

Fewer manual calls, emails, and order processing steps.



Create Switching Costs

Installed base, spare parts, and service management keep customers loyal.



Build a Data Foundation

Every interaction generates insights for personalization and AI-readiness.



Future-Proof and AI ready

Structured data and APIs make your business accessible to AI agents on your terms.

“ Companies investing in their own digital channel today are building the foundation for the next generation of customer engagement.

STEFAN ROPERS | Chairman & CEO, Spryker Systems

The five pillars of a strong digital relationship

A self-service portal does not replace the human relationship – it amplifies it. Five pillars separate a generic catalog from a true digital relationship.

- 01 Continuity**

The relationship must persist regardless of personnel changes on either side. If a key account manager leaves, the customer's history, preferences, and agreements must remain intact in the system.

- 02 Accessibility & Ease of Use**

Customers must be able to interact with your company 24/7, not just during business hours. This includes checking order status, finding documentation, creating service tickets, and placing orders.

- 03 Personalization**

Every customer should see their world their products, their prices, their contracts, their service history. A generic catalog is not a relationship.

- 04 Value Beyond the Transaction**

The portal must provide value even when the customer is not buying. Documentation, asset management, service tracking, and knowledge resources create daily engagement.

- 05 Trust and Control**

Customers must trust that their data is secure, that pricing is accurate, and that they control their own account. Transparency builds trust; trust builds loyalty.

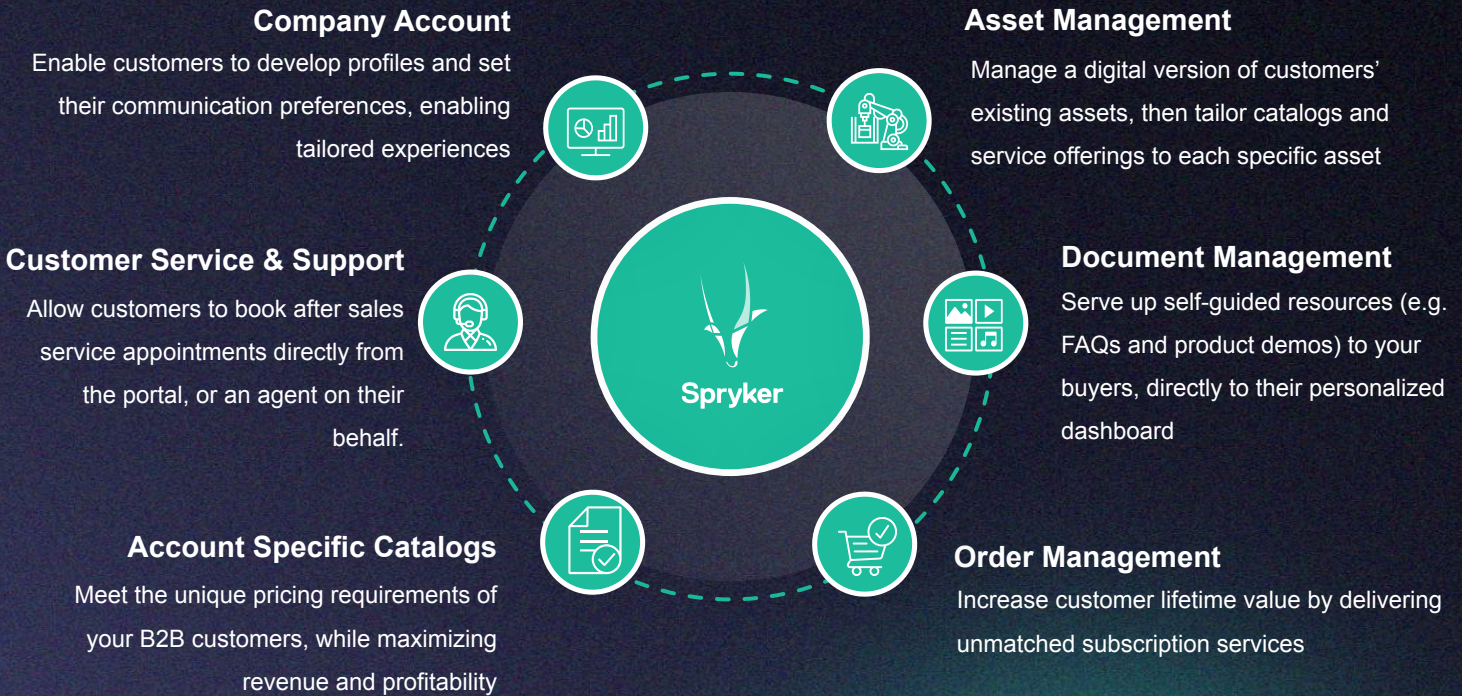
A common concern is that a self-service portal will replace the sales team. The opposite is true. A well-designed portal eliminates low-value manual tasks (order status inquiries, document requests, routine reorders) and frees the sales team to focus on high-value activities: solution design, technical consultation, strategic account development, and relationship building.

The portal does not replace the human relationship but amplifies it. Sales representatives become more effective because they are supported by a digital platform that works 24/7 alongside them.

THE SOLUTION

The Spryker B2B Self-Service Portal

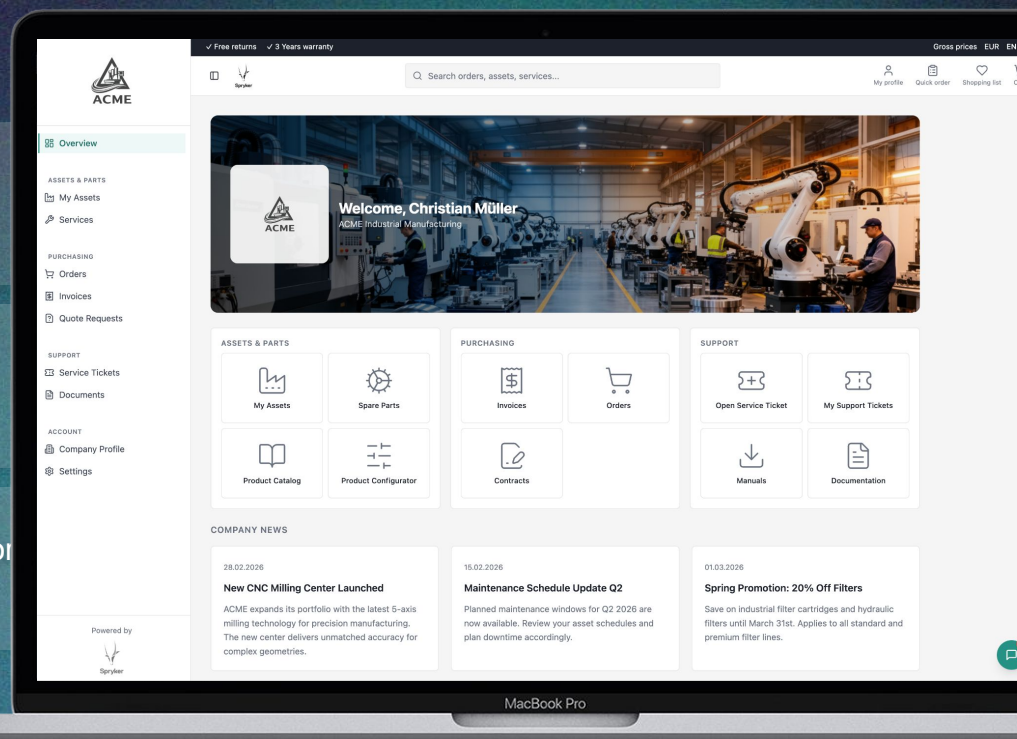
Spryker delivers a single, integrated platform that **improves** the customer experience, **strengthens direct customer relationships** and **reduces** cost to serve while **increasing** customer lifetime value. Spryker doesn't retrofit B2C tooling for B2B. The Self-Service Portal is purpose-built for manufacturers.



Transforms interactions into seamless, unified experiences

Optimizing customer service, enhancing asset utilization and driving business growth

Improve ease of doing business for your customers and partners



Designed for your business needs

01 Purpose-built for B2B

Spryker's Self-Service Portal is designed for asset-heavy manufacturers, serials, warranties, multi-site roles, complex pricing rather than adapted from B2C e-commerce tooling.

02 Focused on Business Outcomes

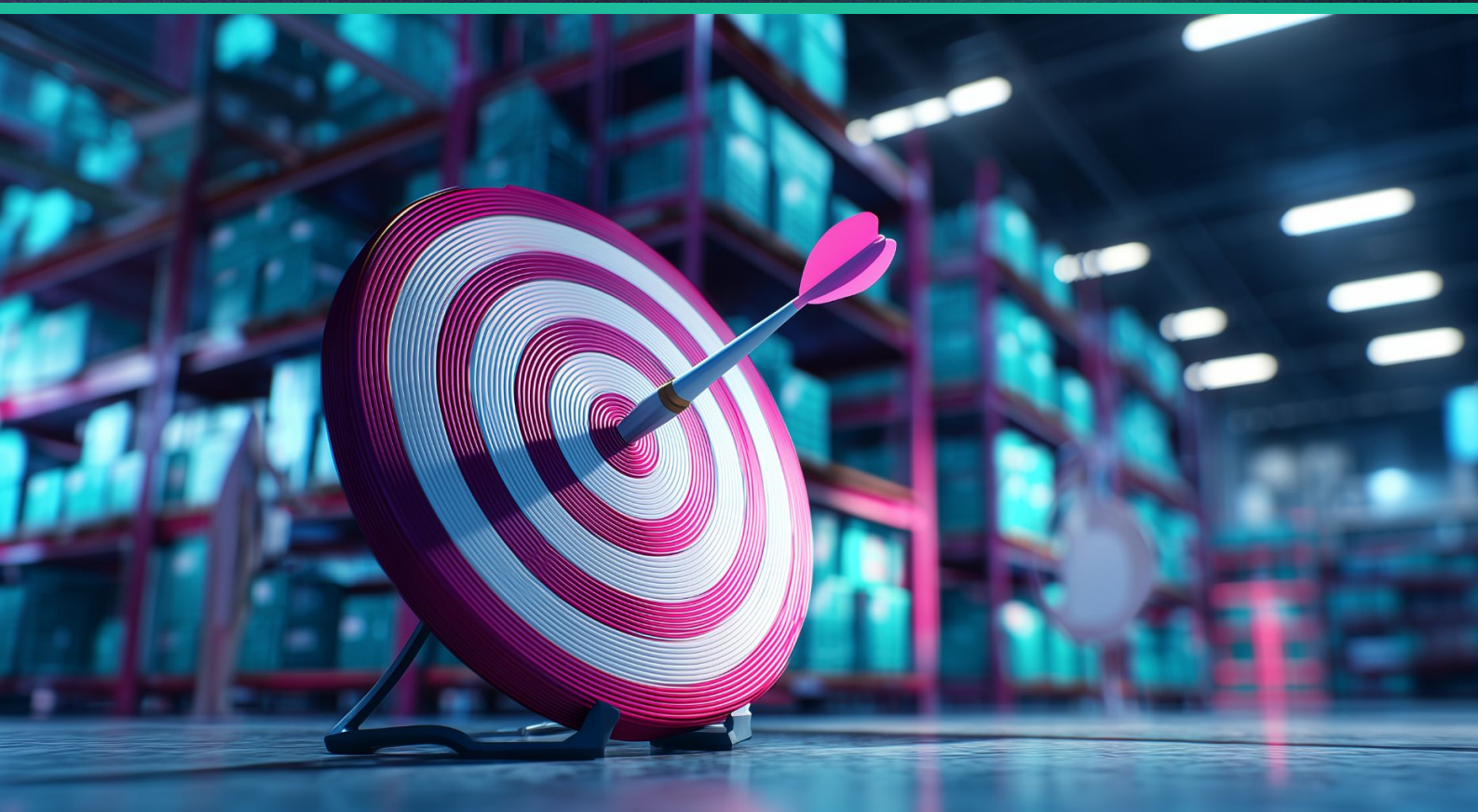
Fast time-to-value: Customer self-registration and asset registration and visibility can launch in as few as 30 days. Our customers have seen a 60% reduction in web requests and a 30% in call volume reduction

03 Adaptable and Scalable

Add capabilities at your own speed without the burden of costly replatforming. Start with a non-transactional portal and evolve to full digital commerce when you're ready. The shift from one to the other without breaking the bed.

04 EU Data Sovereignty

Full deployment flexibility: Spryker Cloud (managed, within the EU), sovereign cloud (your own data center), or hybrid. Critical for DACH companies in regulated industries.



The Spryker value in a nutshell



Improved Customer Experience

Accelerate sales cycles by giving customers instant 24/7 access to their complete list of assets, order history, claims, interactions, audit trail.



Increased Loyalty & Conversion Rates

Tailor every interaction with personalized catalogs based on existing assets, increasing customer loyalty while driving higher conversion rates.



More Cost-Efficient Operations

Empower your team to focus on high-value tasks by streamlining customer relationship management and reducing the need for offline interactions.



Reduced Costs with Integrated Customer Experience

Boosting satisfaction and reduce cost to serve by providing your sales team and customers with the convenience of managing *everything* from a single, intuitive portal.



CUSTOMER REFERENCES

How B2B manufacturers capture customer lifetime value

The framework is not theoretical. Two examples show what is possible when manufacturers build their own digital customer relationship on Spryker.

meusburger®

GLOBAL | GO-LIVE 2021

Manufacturer of high-precision standard parts

>53%

of orders processed online

100k+

SKUs live

1M+

orders processed digitally

Challenge

Highly complex, engineer-driven product logic (configurators, CAD, BOMs). Legacy landscape built over 20+ years. Need to scale global digital business without increasing engineering load.

Solution

Composable B2B customer portal powered by Spryker. Unified platform for shop, self-service, and customer account. Deep ERP integration, advanced product configurators, and buying assistants.

"The Meusburger portal is much more than a classic B2B store, it supports our customers throughout the entire product lifecycle."

Thomas Jennerwein, Mgmt Board, IT & Digital Business

RICOH

APAC | GO-LIVE 2024

Office Equipment, Printing & Digital Services

45 days

to initial Go-Live

-80%

cost expected for machine moves

-30%

reduction in call volume

Challenge

Fragmented customer touchpoints via phone, email and web forms. High volumes of routine queries (delivery status, invoices, service tickets) with high cost and response times. Manual machine-move scheduling.

Solution

Spryker-based digital self-service portal for service & commerce. One login, one portal for assets, tickets, invoices, deliveries and orders. 24/7 self-service to view, create and track service and logistics requests.

"5,000 manual requests per month shifted to self-service and still climbing."

Ricoh APAC Customer Operations

The next decade belongs
to whoever owns the digital relationship.

Ready to turn the strategic case into action?

In Part 2, we share a practical 10-step playbook for building a customer portal that centralizes contacts, agreements, history, and preferences, creating an institutional memory for the customer relationship without requiring a massive, multi-year program.

Continue to Part 2: The Practical Playbook



[Download Part 2](#)

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