



# Managing the sales transformation process in B2B: between human and digital

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## Abstract

The sales function is experiencing a process of transformation developing across different industries and company types. This transformation redefines the role of salespeople and organizations within the broader service ecosystem by introducing new technological applications and enhancing relationships with customers, internal and external stakeholders. As many companies are facing challenges related to sales transformation, this phenomenon requires further investigation from a practical and theoretical standpoint. This paper proposes a theoretical framework to understand the nature and the dimensions contributing to sales transformation. Based on thirty in-depth interviews and two focus groups, the study identifies four dimensions of sales transformation (1) People, (2) Digitalization, (3) Integration, (4) Acceleration and discusses fifteen factors driving this phenomenon. The study offers insights on relevant factors for successfully implement sales transformation within companies and enhance the value generated through the sales function.

**Keywords** Sales · Transformation · B2B · Business relationships · CRM

## 1 Introduction

The sales function is an engine of growth and sustainability within organizations. Sales contributes to understanding customers' value drivers, communicates the company's value proposition, and spreads insights stemming from the market within the organization (Haas et al., 2012; Lacoste, 2018).

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As the focus of sales processes has shifted from a transactional perspective to a relational one rooted in value-based selling (Anderson et al., 2008), a significant change in markets and social contexts is currently pushing organizations to rethink the role of sales. This evolution originates from a series of modifications impacting the business environments including a growing strategic role played by the purchase function (Sheth et al., 2008), the process of servitization, which shifts the dominant logic based on value-in-exchange towards value-in-use and value-in context logics (Fliess & Lexutt, 2019), and the introduction of smarter and artificial intelligence-based tools to enable sales automation and streamline human–machine interactions (Kaptein et al., 2018; Paschen et al., 2020).

These shifts are leading organizations to rethink the role of sales, converging on a new theoretical foundation for selling (Hartmann et al., 2018). Indeed, Moncrief (2017) highlights the need for a conceptual model that could capture the sales transformation under way with a very thought-provoking statement “Are sales as we know it dying ... or merely transforming?”. As this process is affecting companies operating in different industries, the analysis and understanding of its effects and implications are extremely relevant and important for the future of the sales function (Hartmann et al., 2018). However, the sales transformation phenomenon seems to remain quite ambiguous and not thoroughly explored from a theoretical perspective (Corsaro, 2018; Cuevas, 2018; Hartmann et al., 2018; Moncrief, 2017).

Furthermore, rethinking the role of sales has become a pressing concern for many senior executives (McKinsey, 2016). According to Miller Heiman Group (2019), the percentage of companies that have introduced a sales enablement program has increased from 19% in 2013 to 36% in 2018. Nevertheless, only 31.3% of organizations consider themselves satisfied with the results obtained from these programs and only 25% of companies believe they can adapt their sales development plans to changing environments (Sales Management Association, 2017).

This research aims to understand and conceptualize the sales transformation phenomenon by proposing a holistic framework to support the implementation of sales transformation in organizations. We adopt an interpretative approach rooted in the experiences of sales directors and executives and we offer insights through thirty interviews and two focus groups conducted with key informants from different industries.

We provide a conceptualization of the sales transformation process in B2B organizations and investigate the dimensions through which this phenomenon unfolds. Four dimensions of Sales Transformation are identified (1) People, (2) Digitalization, (3) Integration processes, (4) Acceleration processes. Each dimension is further discussed in terms of factors and policies that enable the rapid change and evolution of the sales function. A theoretical framework is presented together with managerial recommendations and guidelines for a successful implementation of Sales Transformation within B2B organizations. The remainder of this paper is structured as follows. First, a review of the evolution of sales and the changing forces behind it is presented, followed by a description of the methodology applied in this study. The paper proceeds with outlining and discussing the research results and concludes with implications for theory and managers.

## 2 Background

### 2.1 An evolutionary perspective of selling

The role of salespeople has profoundly evolved over the past few decades. Since the “birth” of the modern salesperson dated back to the late-nineteenth (Friedman, 2005), the role of the selling function has become more sophisticated and embraced different sales orientations (Hartmann et al., 2018) (Table 1). In the early days, the role of salespeople focused on the facilitation of the negotiation by providing information to customers, presenting the available products and services, receiving and managing orders and ensuring the correct functioning of the supply chain. In this transactional selling orientation, the contribution of sales to the business was to align the exchange of objects (i.e., the products and services purchased) with the needs of the customers and make them available. According to this orientation, value was mostly considered a function of the quality and attributes of the offer (Haas et al., 2012).

Through time the transactional selling orientation evolved to include a focus on stimulating demand, convincing customers to purchase the company’s products and services and contributing to short-term results (Jolson, 1997). This is accomplished through persuasive sales techniques, namely ‘hard selling’. According to this model, the contribution of sales to value creation is based on exchange (Arli et al., 2018). The sales force plays an active role, although limited to the identification of customers that can be influenced to purchase products and services that they do not yet know.

Since the late 1970s scholars and practitioners have started to realize that customer orientation is key to develop relationships aimed at long-term satisfaction, even in sales (Dwyer et al., 1987; Weitz and Bradford 1999). Salespeople who show high levels of customer orientation are also the most active in helping clients identify their needs and provide detailed and accurate information. According to Terho et al., (2012), there are three dimensions that make up a customer-oriented sales strategy; understanding the business model, formulate the value proposition, and communicate value to the customer by stressing the most relevant aspects of the offer. However, this approach is rather unidirectional and does not include all the possible behaviors aimed at generating value in the relationship; it is more linked to communication than to a holistic view of the possible value drivers (Haas et al., 2012; Keränen et al., 2020).

The adoption of a relational perspective has led to rethinking the value creation process, recognizing that, instead of being incorporated into the products or services provided between buyers and sellers, value originates in relationships (Kienzler et al., 2019; Ulaga & Eggert, 2006). A first guideline to be considered in this logic is relationship selling, a strategic approach developed by the supplier in order to establish long-term and mutually profitable relationships with customers (Paparoidamis & Guenzi, 2009). Relationship selling leads to a direct contact with the customer to whom are offered customized products and services and dedicated resources.

**Table 1** The evolution of selling

| Selling orientation   | Source of value  | Role of the salesperson   | Sources  |
|-----------------------|--|---|--|
| Transactional selling | Value is embedded in goods through the manufacturing process                         | Facilitation of the negotiation and transfer the value from sellers to buyers. Focus on stimulating demand, convincing customers to purchase the company's products and services and contributing to short-term results | Jolson (1997);<br>Friedman (2005)  |
| Relationship selling  | Value originates in relationships and benefits are both functional and psycho-social | Establish long-term and mutually profitable relationships with customers based on a tailored approach and dedicated resources. Focus on building of mutual trust within the buyer–seller dyad                           | Dwyer et al. (1987);<br>Weitz and Bradford (1999)<br>Sisti et al. (2015);<br>Arlti et al. (2018) |
| Adaptive selling      | Value stems from the ability to adapt to different contexts and sales situations     | Modify sales behavior and interactions based on the sales situation to address customers' heterogeneous needs   | Franke and Park (2006)   |
| Challenger selling    | Value is created through knowledge sharing and education                             | Educate information-empowered customers who have already identified a solution, or examined multiple approaches to solve their problems by sharing aspects that cannot be self-learned                                  | Osmonbekov et al. (2019)   |

In a value-oriented logic, the benefits that sales staff provide to the customer can be both functional and psycho-social in nature and therefore linked to the pleasure of interaction with the person (Sisti et al., 2015). In particular, the literature proposes four main characteristics of value creation processes that can shape the sales approach (Haas et al., 2012): jointness, balanced initiative, interacted value, socio-cognitive construction. This value-based selling in turn determines the search for more refined models of supplier portfolios, which are able to measure even the most intangible aspects of relationships.

When the relationship becomes a partnership, additional efforts to specify a more complete sales concept exist, focusing on the benefits for both company and customers (Weitz and Bradford 1999, p. 243). Partnership orientation gives a central role to the coordination of solution customization efforts. Suppliers and customers invest together and share risks.

However, in contexts characterized by higher complexities, such as modern markets, adaptive selling seems to prevail. Defined as the ability to modify sales behavior on the basis of the specific nature of the sales situation (Franke & Park, 2006), adaptive selling reflects the capability of changing and adapting in increasingly complex markets to address customers' heterogeneous needs, proposing complex products and services in a context where information requirements and relationship risks are particularly high.

In adaptive selling, sales staff apply multiple sales approaches to approach the interaction with customers in different ways and is able to modify and adapt them with respect to the development of interaction and change of context. The ability of the sales force to adapt is influenced by the flexibility of the sales process, while the willingness to adapt depends on the extent of the company management and the entire organization supports adaptation.

According to the most recent literature, a debate focused on the challenger sale approach is emerging. The challenger sale approach can be applied when dealing with information-empowered customers who have already identified a solution, or at least examined multiple approaches to solve their problems, and are simply searching for a supplier to meet their need at the lowest cost possible. In this environment, salespeople should concentrate on educating customers by sharing aspects that cannot be self-learned and highlight the importance of this activity (Osmonbekov et al., 2019).

As discussed, sales management is a research area that has always been in constant evolution, experiencing different sales orientations over time. Nevertheless, the sales transformation phenomenon we are referring to in this contribution has much broader implications as it affects nearly all aspects of the selling process and organization of the sales function. The next section will explore the determinants of sales transformation which is key to understanding the phenomenon more in depth.

## 2.2 Business market changing forces and sales transformation

The process of sales transformation is part of a broader changing process that is affecting business markets and B2B organizations. At the basis of this evolution

are three driving forces, which re directly or indirectly affecting the evolution of business markets globally changing B2B client behavior, servitization and the role of technological advancements.

In this section, we provide a background to our study by analyzing these forces and discussing how these catalysts of change in business markets have initiated the process of sales transformation.

### 2.2.1 Sales transformation and changing customer behavior

In B2B the purchasing function has seen a strong increase in its sophistication, playing a more strategic role than in the past (Sheth et al., 2008). The complexity of customer relations has grown in recent years, shifting the balance of bargaining power from the supplier to the customer, increasingly actively and creatively involved in the more remote phases of the sales process. Sellers are therefore required to offer customized solutions with high added value, which require a deep level of interaction with customers to understand their needs, objectives and business processes (Sharma & Iyer, 2011).

A research conducted by Salesforce (2016) identified the 6 main features that are changing the attitude of business customers towards their providers; (1) customer needs are more sophisticated; (2) their reasons have shifted from price to value; (3) there is more experience in drawing up the tender specifications; (4) the client expects the same level of service in every interaction; (5) customers expect the sales staff to be present 24/7; (6) customers do not search for a supplier but a "trusted" advisor.

The management of the purchasing function is becoming increasingly intricate, in search of greater efficiency and larger suppliers. The high amount of resources that companies allocate to the purchase of goods and services leads them to analyze their purchasing practices in a timely manner. In different words, customers are sophisticated and are adopting strategies aimed at effectively managing their supplier portfolio and accurately measure its performance (Cuevas, 2018).

The increasing availability of information has then generated greater transparency and reduced the asymmetry between supplier and customer. Offerings are more easily evaluated and comparable, also thanks to the presence of feedbacks from current and past customers. This led the buyers to have a better knowledge in technical characteristics of the product. In addition to that, there has been a growth in mergers and acquisitions of companies or business units that have had as a direct consequence an increase in the bargaining power of customers towards suppliers. In line with this evidence, 60% of industrial buyers increased the level of centralization in purchasing decisions and improved their negotiating position (Riesterer & Collins, 2018), while 70% of B2B buyers prefer to engage sellers late in the purchase process. That puts even more pressure on sales calls to result in valuable outcomes (Miller Heiman Group, 2018).

### 2.2.2 The servitization process

The servitization of many industries has shown that organizations, markets and society are very focused on the exchange of services. Vandermerwe and Rada (1988) defined servitization as market packages or ‘bundles’ of customer-focused combinations of goods, services, support, self-service and knowledge. In recent years, manufacturing companies around the world have invested in developing additional services to their traditional business, in order to ensure long-term growth and remain competitive in the market (Ruiz-Alba, 2019; Neu & Brown, 2005). Manufacturing companies are placing increasing effort in trying to develop services to complement the traditional product offering.

This also translates into the change of many business models, which are becoming more customer centric. A typical example in the area of servitization is Xerox; born as a printer manufacturer, over time Xerox has changed its business model to become a service company operating in the field of document management without losing its identity.

In line with this evolution, the value-in-use logic has replaced the exchange value logic. The value-in-use logic is particularly widespread in B2C (e.g., car sharing), while in B2B is still emerging. Some examples in this arena are SaaS providers (software as a service), who allow companies to use software without buying licenses, but they just subscribe as consumers would do with pay-tv and other subscription-based services.

The diffusion of the value in use logic deriving from servitization has a strong impact on selling as customers are less constrained by long terms contracts and, in turn, the process of trust building in the relationship modifies.

More recent contributions are discussing how servitization is currently converging with digitalization, particularly in B2B (Kamalaldin et al., 2020; Paschou et al., 2020). Digital servitization can be defined as “the transformation in processes, capabilities, and offerings within industrial firms and their associated ecosystems to progressively create, deliver, and capture increased service value arising from a broad range of enabling digital technologies such as the Internet of Things (IoT), big data, artificial intelligence (AI), and cloud computing” (Sjödin et al., 2020). Digital servitization requires a change in provider–customer relationships whereby B2B relationships should be analyzed in a dynamic way (Iansiti & Lakhani, 2014).

Kamaladin et al. (2020) studied the phenomenon of digital servitization drawing on a relational view and propose a relational transformation framework for digital servitization that includes four relational components: complementary digitalization capabilities, relation-specific digital assets, digitally enabled knowledge-sharing routines, and partnership governance.

As digital services are notably transforming inter-firm relationships and influencing governance patterns within the service ecosystem, companies are looking into new ways to increase customer value by integrating themselves into their customers’ business processes (Matthyssens & Vandenbempt, 2008) adopting a ‘longitudinal relational process’ between provider and customer (Storbacka et al., 2013).

### 2.2.3 A technology-driven change in sales

Traditionally, the sales force was the customer's main source of information on products and services. With the web, customers have become much more independent in the search for information and are inclined to buy through e-commerce sites or company contact centers. The fast pace of technological change is driving innovation to new forms of clients' and stakeholders' engagement involving smart machines (Storbacka, 2019). The usage of customer big data analytics is widespread to improve the accuracy of decision-making processes and deliver more value to customers. However, big data strongly promotes sales growth and enhances the customer relationship performance in firms that have a culture which supports marketing analytics (Hallikainen et al., 2020). According to Salesforce (2016), predictive intelligence, lead-to-cash process automation, and artificial intelligence- are expected to grow dramatically over the next three years. McKinsey forecasted that in 2020, about 85% of transactions will be processed by machines (Baumgartner et al., 2016): product recommendations, lead scoring, email response and even day-to-day administrative tasks will be seamlessly and autonomously integrated. 79% of organizations currently use or intend to use technologies based on sales analytics (Miller Heiman Group, 2016). Artificial Intelligence will increasingly influence marketing and sales strategies. Davenport et al. (2020) propose a future scenario in which salespeople will be assisted by AI agents monitoring conversations in real-time and inferring from a customer's tone of voice the presence of an unsolved issue, providing feedback and real-time guidance to the salespeople and augmenting their capabilities. However, the implementation of technology such as AI chatbots could also trigger negative consequences as privacy concerns and the immaturity of the bot technology could have negative effects on usage intention (Rese et al., 2020).

Thanks to the spread of digital environments, business customers tend to behave similar to consumer ones: recent research reveals that 49% of business buyers prefer to make purchases from the same sites to which they are addressed as consumers. We must also consider that the business buyers of the future will be gradually more Millennials, who are looking for care and sophistication in the interaction with the business brands similar to those they find when they interact with consumer brands. Consequently, it is expected that 52% of industrial purchases over the next 3 years will take place online (Miller Heiman Group, 2019).

Technological change generated new spaces for interaction dedicated to actors within business networks. The number and type of touchpoints available to salespeople has exponentially risen (Jaakkola & Alexander, 2014; Shams & Kaufmann, 2016). This abundance of touchpoints has resulted into a wider active and passive audience in the sales area, which implies that different and sometimes contrasting views will arise during negotiations among multiple actors (Rampersad et al., 2010). At the same time, by generating higher interconnectivity, technological change allows different contexts to communicate, where structural boundaries have become less meaningful in favor of contextual boundaries. This change turned sales market boundaries more blurred and multidimensional (Hodgkinson, 2015).

Nevertheless, there are further aspects which deserve to be mentioned. For instance, industrial convergence, which leads to the redefinition of the boundaries of



various sectors and even market segments. In today's globalized and digital world, industry boundaries are blurring, creating trans-territorial and trans-sectoral opportunity spaces characterized by a mix of excitement and confusion perceived by B2B actors. Indeed, industrial convergence is an expression of hybrid customer needs, which require sellers to move to new grounds with their selling approach and consider new competitors operating in different industries.

### 3 Methodology

#### 3.1 Research approach

A qualitative research design was employed to generate rich and in-depth descriptions of significance, both complex and multifaceted, related to the nature of the sales transformation phenomenon. Specifically, an abductive research logic has been chosen to create synergy and simultaneous development of theoretical and empirical material. A reflexive process informed this study with researchers intimately involved with data collection, analysis, and interpretation, being aware of the assumptions and preconceptions brought into the research (Creswell & Creswell, 2018).

#### 3.2 Data collection

We conducted 30 semi-structured interviews (Appendix, Table 2) and two focus groups involving 11 sales directors (Appendix, Table 3) carried out in 2019. A purposeful sampling approach was applied to identify and select information-rich individuals and cover a variety of industries and sectors. This approach allowed to identify commonalities in the sales transformation process, while gaining a multifaceted perspective of the phenomenon (Creswell & Creswell, 2018).

Most of the participants in the study held a sales director position in leading companies and were thus considered key informants, having a holistic and strategic view of the sales transformation process. At the same time, these professionals provided key insights into the implications and consequences of sales transformation on sales executives and salespeople within their teams (Ivanova-Gongne & Törnroos, 2017).

Participants shared their experiences following a semi-structured interview protocol, including a series of open and probing questions. After a brief introduction of their profile and professional experience, participants were introduced to the topic of sales transformation and asked about the meaning and the nature of this phenomenon within their organizations. The interviews proceeded with a retrospective exercise asking participants to reflect on key changes that had affected their sales departments and functions over the past 5 years. As a result, a series of themes and sales transformation drivers were identified and further discussed with probing questions aimed at uncovering challenges, opportunities and coping mechanisms characterizing such sales transformation in their organizations. A particular focus was placed on discussing the relevance and interactions of the human and the technological

aspects of sales transformation and the policies introduced by the organization to keep pace with an ever-changing sales and business environment.

During the focus group discussions and the in-depth interviews, participants shared several narratives of specific events, which have been considered to be a critical point for accessing knowledge related to structuring of social action in time, with the opportunity to connect processes to spatial and temporal settings (Halinen et al., 2013) and deliver a deeper understating of the changes over time and subsequent to the discussed events (Beeler et al., 2017a, b).

### 3.3 Data analysis

This research adopts the interpretive paradigm and explores and analyses the sales transformation phenomenon based on the assumption that social reality is shaped by human experiences and social contexts (Creswell & Creswell, 2018). The analysis process develops through an oscillation between the parts and the whole, where the researcher can give meaning to each part only if included into a systemic and holistic context (Gummesson, 2003). As researchers, we adopted an interactive consultant role, stepping into the participants' world and understanding the phenomenon and the environment from their perspective (Saunders et al., 2019). Data were analyzed following an inductive and deductive process. We built patterns, categories and themes using a bottom-up approach and organized data into increasingly abstract units of knowledge (Mason, 2017).

We adopted a systematic coding procedure articulated in three stages (1) open-coding; (2) axial coding; and (3) selective-coding (Strauss & Corbin, 1998).

We first identified a list of factors, events and practices referred to sales transformation which were derived from the narratives of the interviewees and we assigned meaningful quotations to the identified categories of information through in vivo coding (Gioia et al., 2013). In this step, we identified the 15 sub-dimensions presented in the model (Fig. 1). Then, we further analysed the open codes to uncover the core dimensions of the phenomenon and conceptually clustering the categories developed in the previous step. We identified overlapping and complementary categories that conceptually grouped into second-order themes (Gioia et al., 2013) that represent four key areas in which sales transformation occurs in businesses (People, Digitalization, Integration, and Acceleration). This process supported the

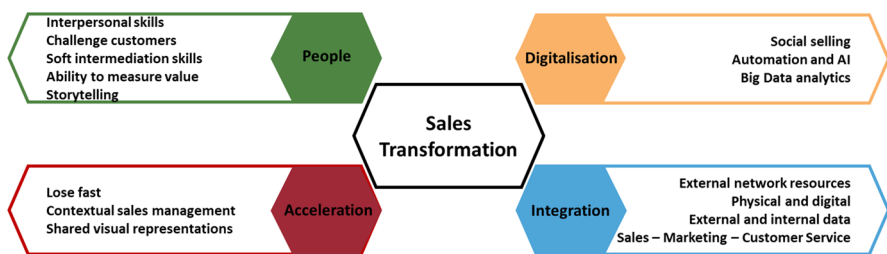


Fig. 1 A framework of the sales transformation process in B2B

identification of key concepts and second-order categories in order to achieve the desired outcome of a rich description of the sales transformation phenomenon. Interview and focus group transcripts were analyzed line by line through the constant comparison method, noting emerging themes and comparing them across transcripts to ensure consistency, identify commonalities and negative cases (Goulding, 2005).

Once the initial coding was complete, we searched for links and associations between first-order concepts (factors of sales transformation) and categorized them into second-order concepts (dimensions of sales transformation). For example, the activities we labelled ‘lose fast’ and ‘access from mobile’ were aggregated to the dimension of acceleration. In this way, preliminary insights were formed and confirmed, disconfirmed, or edited through additional data with the above process repeated until achieving theoretical saturation.

We ensured that any idea or insight derived from the analyses can be applied beyond a specific organizational or industry context and validated by multiple participants (Bendapudi & Leone, 2002). Through the narrative approach (Czarniawska, 2004; Hummel, 1991) we analyzed interview data. Narratives supported and validated specific outcomes the related series of events, limiting the risk of ambiguity (Weick, 1995). In the findings section, we provide relevant quotes that exemplify and demonstrate insights derived from interviewees’ experiences.

## 4 A framework for interpreting sales transformation

We combined insights at theoretical level with empirical findings in order to identify the building dimensions of sales transformation. Figure 1 presents the dimensions and factors that characterize the process of Sales Transformation.

Four crucial dimensions emerged from the discussions held with professionals and sales experts denoting the domains in which sales transformation occurs. These dimensions are People, Digitalization, Integration processes and Acceleration processes. Sales transformation was unanimously acknowledged by the informants and linked to a phenomenon involving contextual changes across spatial and time-related dimensions. Specifically, sales transformation is reflected by a fundamental change in clients’ needs and expectations, focusing on perceived value and becoming more sophisticated. This leads salespeople to search for new models and solutions to interact with their clients through a differentiated relational approach and acting as advisors.

The following sections are dedicated to the analysis of the dimensions of Sales Transformation and their related sub-dimensions.

### 4.1 People

The role of salespeople, their capabilities and skills are of critical relevance for the sales transformation phenomenon. Five factors have been identified as catalysts of sales transformation in terms of People; (1) Interpersonal skills, (2) Challenge customers, (3) Soft intermediation skills, (4) Ability to measure value, (5) Storytelling.

Salespeople key skills are evolving to respond to the challenges emerging from sales transformation.

I don't think our market will move into completely digital sales. I think there will still be plenty of space for human contact because empathy is still key. (Food & Beverage, Sales Director).

*Interpersonal skills* The traditional role of salespeople is focused on understanding customer needs and acquire extensive knowledge about the goods and services they sell. However, the shift towards a dominant logic of value co-creation has forced salespeople to increasingly ponder on the relational nature of sales processes (Cor-saro, 2019; Sheth et al., 2008). Studies show that companies whose sales force develop solid interpersonal skills can achieve higher performances, performing 2.1 times better than companies with less developed interpersonal skills and attitude for collaboration (Salesforce, 2016).

Interpersonal skills remain one of the pillars of sales even during this process of deep transformation. Being perceived as a distinctive character of a company, interpersonal skills can make or break not only the closure of a sale, but also the long-term development of a relationship with the client.

When hiring salespeople, one of the main skills we search for is social and relationship building skills. Empathy is crucial and without that it is impossible to gain clients' trust, even with a solid and extensive technical knowledge. (Medical Equipment, Sales Director).

Even in the tender phase, sometimes the proposals are very similar, and it is difficult to be able to distinguish ourselves from the mass. This is where the relational approach plays a fundamental role. (Travel, Sales Director).

Although interpersonal skills are critical, the failure of business interactions due to misaligned communication is still occurring and represents one of the main challenges faced by companies going through the sales transformation process (Miller Heiman Group, 2016).

Sellers' task is to align their decision-making style with the client's one to increase the probability of success. Understanding the decision style of the customer will become increasingly important in the future, also to prevent customers from procrastinating their decision. (ICT Security, Key Account Manager).

*Challenge customers* Dixon and Adamson (2011) analyzed 1,400 client companies in B2B and found that 60% of purchase choices (including solutions analysis) had been completed before contacting the sales force. These data are even stronger now and corroborate the need to evaluate the context in which the buying and selling processes take place, as many organizations have not yet developed solid skills to manage sales framed as solutions.

I am not looking for people who are only actively listen, but who show a proactive attitude and are willing to contribute to solving clients' issues.

The market is constantly evolving, and people who are working in the market every day can assist with understanding or improve a system. (Fitness equipment, Sales Director).

We realize that people in our sector are often much less humble and presume to know everything, they think they have already experienced everything. If we do not question this type of belief, it becomes difficult to obtain any results. (Beverage – Coffee, Sales Director).

Indeed, studies have shown that high-performing sellers can be also referred to as “challengers”, that is, those who dare to challenge the clients’ positions and value idea, offering a unique perspective aimed at assist customers with making better decisions. Leaders in sales should have a wider view and be able to see the bigger picture, focusing on the best solution regardless of past and consolidated practices (Weinfurter & Donlon, 2016).

They have a fresh mind. When they join from a different sector, salespeople are more open-minded and willing to question clients. This allows them to work together on projects without any filter, preconception, or prejudice. (Beverage – Alcoholic Drinks, Sales Director).

Challenging customers behavior entails an attitude to challenge established business and industry practices. This translates into approaching clients with a thorough analysis of their needs to propose a solution focused on the optimization of their performance and communicating in-use-value.

One of our salesmen achieved excellent results by selling equipment for body treatments in the off-season period. His colleagues asked him how he did it. He replied “Sorry, what is the facial treatment season?”- He did not have the preconceived ideas his colleagues had. (Beauty, Sales Director).

*Soft intermediation skills* Soft intermediation skills are more and more important to shape the relationship across digital and physical contexts, i.e. business, cultural and social contexts (Hall et al., 2017). Through soft intermediation, salespeople become promoters of change and are able to generate new patterns of thought and offer insights that challenge the status quo.

By combining and integrating knowledge, salespeople create spaces for new value generation within which client needs are central. Sellers increasingly act as advisors and should focus on understanding what type of knowledge is most useful to their clients (Verbeke et al., 2011).

Sellers are required to anticipate trends by combining information with different nature and origin. They link such trends to different perspectives of observation and interpretation of phenomena. This behavior is fundamental to capture the “bigger picture” that stems from the business context. Contextualization is also crucial and translates into a representation of phenomena and events occurring in a specific spatial context at a certain point in time.

The intelligence activity should be part of the DNA of the commercial function and not be seen only as a sporadic activity made ex-post only when important events occur. (Fashion, Sales Director).

Applying soft intermediation skills also implies the ability to contextualize the approach through a diagnostic, preventive and continuous activity. The tendency to look ahead should be established as a conventional norm in each organization. Salespeople are also transforming their selling activity into consultancy, becoming advisors and focusing on solution delivery, working shoulder to shoulder with their clients to understand their problems and develop joint solutions. This evolution is in line with the phenomenon of servitization that is among the driving forces of the sales transformation process.

We promote a selling approach strongly oriented towards the identification of problems and the proposal of solutions in a candid and transparent way. When I meet my clients, my goal is not merely selling my new product, but understanding and showing how this new product can bring value to a client's business. (Baby Products, Sales Director).

*Ability to measure value* The measurement of value is of fundamental relevance for sales transformation. As the pace of transformation accelerates, the traditional value measurement systems become obsolete and a new attention is required to estimate the value of relational investments and to evaluate the return on relationship. Therefore, buyers are beginning to focus on measuring the ROI of their relational investments and require measurable and convincing evidence of the ability to add real value to their business by salespeople (Lambert & Enz, 2012).

In big corporations and multinational companies, the financial perspective is fundamental. Thinking about local companies that is a little less pressing point, but in multinationals it has become almost the fulcrum. (Pharmaceutical, Sales Director).

At the same time, clients often find it difficult to assess and compare the value of the different solutions, and even more the value of multiple and diverse relationships with their suppliers. This aspect can be managed by getting as close as possible to the customer's context, limiting the use of catalogues and trying instead to support customers and retailers in assessing the value and the gain in performance of the proposed solutions. Developing value measurement skills is instrumental to implementing KPIs that reflect the context in which the solution is put into use. This requires a joint assessment of the value-in-use of such solution and the intangible aspects of relationships (Corsaro et al., 2013).

Today, there is certainly a need to hire salespeople that, in addition to turnover, are able to calculate and make estimates. Buyers give a higher attention to marginality than in the past when that aspect was perhaps not so important. (Advertising, Sales Director).

*Storytelling* As the global attention span narrows, we observe a growing contextual complexity combined with information overload. The interplay of these phenomena

highlights an urgent need of simplification of the communication of process, which conveys key meaning without losing customers' attention. Often, salespeople have only one chance to visit a company and pitch their offering. Furthermore, the purchasing department and top-level executives have little time available for commercial meetings, and they quite frequently get distracted while attending. New ways to engage and develop an emotional bond with clients are emerging. Among them, the practice of storytelling is of crucial importance to capture the attention while effectively showing the potential benefits that will derive from the relationship.

Storytelling is fundamental in our business because it allows to build a bond with the client from the beginning of the relationship. We always start from numbers, but we present them in a story fashion to simplify the communication and convey our key message more effectively. (Advertising, Key Account Manager).

The ability to deliver engaging narratives taps into the emotional sphere of managers and buyers, developing empathy in the early stages of a business relationship. *“Simply telling the truth is not enough, the truth must be made alive, interesting and theatrical”* (Carnegie, 2008). When storytelling, the goal of salespeople is to create a “value story”, a narrative focused on communicating value which allows emotional engagement and empathy development with the buyers.

People do not buy what you sell, but they buy the reason you do that and how you do it. We are not interested in salespeople that act as ‘speaking catalogues. (Publishing, Sales Director).

## 4.2 Digitalization

Digitalization is another driving dimension of the Sales Transformation phenomenon. Over the years, many studies have focused on the role of technology in modern selling environments (see Christ & Anderson, 2011). However, there is still a need for companies to adapt their practices to fully embrace digitalization.

We have launched an e-commerce about 2 years ago, but sales are still insignificant compared to the overall volume. We also want to preside over that channel waiting to see what will happen. It is obvious that a share will move, but we must still think that customers buy as a company and not as private individuals, so even our client companies have to structure themselves to buy digitally. For example, many companies do not have a company credit card to place orders, or an integrated management systems. (Pressure and temperature instrumentation, Sales Director).

Our study identifies three sub-dimensions of digitalization that are currently disruptive the status-quo of the sales function; (1) Social selling; (2) Automation and Artificial Intelligence; (3) Big Data Analytics.

*Social selling* The usage of social media in B2B contexts is increasing, however most of the interviewees acknowledge that some platforms are still

completely ignored. A recent research also reveals that 49% of business buyers prefer to make purchases from the same websites that they turn to as consumers (IBM 2016).

Even in B2B, people are like consumers because they get information and look at social networks. So, our presence on digital channels is increasing. It can be a preliminary touchpoint before our salespeople visit clients. (Business travel solutions, Sales Director).

We are active exclusively on LinkedIn and on YouTube. Still the company does not see Facebook, Twitter, Instagram as suitable channels for our world. (Healthcare, Sales Director).

This phenomenon has extended the practice of sales in social contexts with social media such as LinkedIn becoming increasingly relevant for lead generation and identification of new business opportunities.

LinkedIn is an evolution of the approach to people. We increasingly use it to reach out to the market and to potential clients. It makes it simpler to retrieve past contacts or approach new clients avoiding call calls. (Classification and certification services, Sales Director).

In more sophisticated and advanced settings, social media are also employed to understand clients' behavior and develop tailored solutions.

We study their behavior over time, and we qualify the leads. Indeed, in our field we call it Digital lead generation. It is a tool through which we try to qualify the type of interest showed by existing customers or potential customers. (Export Consultancy, Sales Director).

As social selling is growing, the implications of such situation are by no means certain. The growing opportunity for customer–salesperson contact could increase the importance of a relationship-oriented behavior. However, one could argue that the potential burnout caused by an always-online environment could lead to just the opposite (Marshall et al., 2012).

*Automation and Artificial Intelligence* Advances in autonomous technologies provide interesting prospects for integrating human-based interactions with machine-to-machine interactions or creating more customized and contextual forms of human-to-machine interactions (Gensler et al., 2013).

Over the next three years, companies will embrace a completely new and smarter sales process, fueled by automation and artificial intelligence. For example, product recommendations, email responses and daily administrative tasks will be integrated effortlessly and independently, so that salespeople will be able to focus on what really matters: the customer's experience.

We obtained some results through the application of artificial intelligence systems to our client database and identified up-selling and cross-selling opportunities. We have a department dedicated to business intelligence that works with big data. (Business travel solutions, Sales Director).



The automation of the sales process is still an emerging phenomenon, with benefits acknowledged by many companies. However, the shared opinion is that technology should act as an enabler and enhancer of the buyer–seller relationship, instead of replacing the seller. The role of salespeople remains central and it is expected to maintain this centrality also in the future.

It is essential to devote as much time as possible to negotiation, to the relationship with clients and less to the management of the external customers, filling forms, sending orders and other internal procedures. Automated systems that provide a fast and suitable service to humans are fundamental. (Cloud computing, Sales Director).

Specifically, automation is seen as an opportunity to reorganize time management and refocus on developing the relationship with clients, leaving automation to carry out chores and reducing the time to customer. Automation is linked to the acceleration processes that characterize sales transformation and it increases the resources available to salespeople and enables a more focused and dedicated approach to the management of client relationships.

Wasting time in entering orders, checking discounts, etc. means arriving later at the sale closing and therefore reducing the level of service provided to our customers. (Packaging and printing, Sales Director).

*Big data & Analytics* Digitization has generated unimaginable opportunities to storing, synthesizing, and analyzing complex data. Analytics support the generation of new and unique insights about the customer. Such insights can be accessed on demand regardless of where they are stored, giving a critical role to the ability of obtaining information about the customer, which is now considered a key sales management competence (Maklan & Knox, 2009). Making the sales smarter from a technological point of view (social selling, CRM, use of big data and sales analytics, automation of activities) means rethinking companies' sales model, transforming both people, processes and technology.

Leads are attracted by digital tools. We see these applications already widespread in the B2C world; while we are strongly pushing them this year with a system that gives us the possibility to trace everything that happens in the digital world. In this way we can isolate the event we should take action on. (Rolling element bearings manufacturer, Sales Director).

The difficulty sales managers are experiencing can be ascribed to the intensive implementation of CRM systems and the consequent management of extensive amount of data and information, particularly when CRM is integrated with social media (social CRM). The drawback of such complexity results in a limited usage of the wealth of information generated through these systems. This is the space where analytics come into play and assist with summarizing information and extracting actionable insights.

### 4.3 Integration processes in sales transformation

Sales transformation is heavily reliant on integration of processes across different areas that support collaboration within and between companies. The study identifies four sub-dimensions of integration; (1) External network resources, (2) Physical and digital, (3) External and internal data, (4) Sales—Marketing—Customer service.

*Integration of external network resources* As a consequence of the relational complexity that digitalization has generated, sales teams are pushed to re-imagine the traditional approach to collaboration, in an attempt to build a stronger ecosystem, more effective cross-channel interaction and immediate engagement (Plouffe, 2018). The relational network and the external resources associated to this system represent two fundamental aspects in salespeople management and selection.

A salesman who does not have a loyal customer portfolio, has no value for us. So, introducing a junior position at a commercial level is absolutely unthinkable. (Travel, Sales Director).

Earlier on, we preferred to recruit new salespeople from other industries so that they had a fresh perspective and could learn our approach without resistance. Over time, we changed strategy and now we select them based on their portfolio of contacts. (Consultancy, Sales Director).

Interviews revealed that some actions to promote integration within the inter-organizational network exist. These actions translate into ensuring that people have access to tools and resources that enable them to co-create value with other actors; develop a shared vision of the network; put on the table what each sales can bring in terms of relational value; align languages; and create formal meeting opportunities to share experiences and knowledge.

*Integration between physical and digital* The sales of the future will be increasingly smart, thanks to new forms of automation and human–machine interaction. The idea is to satisfy customers by entirely automating the frontline entices investors. Conversely, several authors consider automation complementarity rather than a mere substitute of the humans (Bitner et al., 2000; Marinova et al., 2017).

The challenge is to integrate the human and digital touchpoints in fluid way; to do that you do not need technology, but a focus on redesigning the company's processes with a customer-centric logic (Strategic consultancy, Business Developer).

We have a tool that acts as a customer portal and looks like a complete e-commerce dedicated to our customers: they find prices and can configure the product and then lodge the order. We try to take advantage of digitalization, but at the same time we prioritize a mix between traditional sales and digital sales. (Pressure and temperature instrumentation, Sales Director).

Managers reported that investment in sales technologies often fail not because of the technology itself, but because people are reluctant to change their mindset

and daily practices. In some cases, also, the company implements technology with very broad scope and potentialities, and salespeople make a very limited use of them, which also affect their final judgment about its usefulness.

*Integration between internal and external data* An important part of the process of integration deals with the role of CRM. Developing an effective CRM strategy is crucial in business due to the growing complexity of companies' business networks and the strong interconnectedness of people. However, we observed that some companies have a traditional approach to CRM and the integration of CRM is still a challenge.

In our company, the CRM system is based only on the traditional sales network and is not much connected with the other company platforms and databases. (Food, Sales Director).

We were reluctant to change our CRM, even if it is old-fashioned. This was because it contained historical information which unfortunately cannot be entirely exported to the new one. (Rolling element bearings manufacturer, Sales Director).

Our Crm was not integrated with the other software in the company, it was only part of the ERP system. Two years ago, we implemented a new solution that collect data from all departments, branches and subsidiaries, and now are working on the integration with distributor data. (Business travel solutions, Sales Director).

If correctly implemented, CRM contributes to the process of sales transformation. Specifically, CRM 2.0 (CRM with social functions) is an example of advanced application of these systems. CRM 2.0 provides large data capabilities for scouting external information and integrating it with internal ones; in this way we can provide insights for the business, obtaining much more sophisticated analytics compared to the electronic spreadsheets of traditional CRMs.

Social CRM are now able to integrate data from inside and outside the organization, in order to propose (few) relevant insights, in real-time, easy to understand, also thanks to the support of dashboards. (CRM solution provider, Sales Director).

Top managers always try to predict future scenarios; it is part of their job. The power of CRM 2.0 is that it collects all the internal and external data. For instance, it could capture online conversations about a brand and automatically predict scenarios. This supports human intelligence. The most sophisticated systems can also suggest the best course of action in any given situation. (Key Account Manager, Vending Machines).

To make this process work effectively, the company invests in granting a connected experience everywhere. CRM was launched as a native mobile tool, allowing to exploit all the potentialities of mobility.

Welcome to the Internet of customers, where every company can connect every app, employee, partner, product, and device with its customers using the power of social, mobile, and cloud. (Key Account Manager, Advertising).

*Sales—Marketing—Customer Service Integration* The traditional B2B customer journey is undergoing a process of deep transformation primarily fueled by technological innovations, an unceasing sophistication of customer needs, and a proliferation of sales channels increasing the complexity of markets. Such modifications are requiring organizations to rethink the relationship among sales, marketing and customer service as a more structured, formalized and vigorous collaboration among these departments is needed.

As a sales director, I always wanted to use customer satisfaction as a KPI to incentive my salespeople. The point here is how to measure the contribution of marketing and the one of sales to customer satisfaction. (Hospitality, Sales Director).

The importance of synchronizing operational and strategic activities among marketing, sales and customer service has been widely discussed by academic literature (Baumgartner et al., 2016). However, the implementation of such integration is rather scattered in the practice world.

For B2B companies, the sales department has always prevailed over the marketing one. In recent times, things have changed. They are understanding that collaboration is not an option anymore, but the only way to survive with such increasing complexity surrounding us (Pressure and temperature instrumentation, Sales Director).

Vision heterogeneity is one of the main obstacles to an effective integration of these functions. This negatively affects the degree of involvement of sales in the development of marketing strategies as sales is still seen as an operative function focused on the implementation of strategic plans (Malshe & Al-Khatib, 2017; Malshe et al., 2017).

Recently, I have introduced this practice: I ask marketing people to take part to salespeople meetings and the other way around. Generally, salespeople are more reluctant to that, they want to stay out in the field and not in the office. (Pharmaceutical, Sales Director).

I noticed that the most difficult thing for people is to adopt the other party's perspective. I believe this is also due to our society where people tend to be self-referential. (Beauty, Sales Director).

#### **4.4 Acceleration processes in sales transformation process**

With reference to the temporal dimension, Sales transformation is fueled by a process of acceleration that is pervasive across the different activities conducted by the sales force. Exploring this acceleration process, this study identifies three

sub-dimensions of acceleration; (1) Lose fast, (2) Contextual sales management, (3) Shared visual representations.

*Lose fast* According to a survey that involved 277 marketing and salespeople, more than 2/3 of the respondents consider themselves ineffective in convincing the customer not to postpone their purchasing decision (Martin, 2017). Business proposals that remain in a “no decision” status are definitely a big threat in the management of the sales pipeline: it has been estimated that they generate losses higher than the deals that are won by competing companies.

Since we know that 70% of deals will be lost, what is really important is to lose fast, in order to free energies to invest in other opportunities. (Training consultancy, Sales Coach).

The idea of losing fast also connects with technological development; automatic lead generating, for instance, is opening much more opportunities for business in the past, but at the end the time salespeople have to dedicated to these new prospects is given.

In addition to this, salespeople are often blamed for being too focused on their funnel and too little on the buyer’s one and its purchasing processes, i.e. the customer funnel (Paesbrugge et al., 2017; Viio & Grönroos, 2016). In fact, the purchase cycle for the customer can differ greatly from the process envisaged by the seller. Interviews and focus groups support the importance of understanding the funnel of the buyer and challenge clients’ inactivity and push them to take steps forward, even at the risk of losing them.

*Contextual sales management* implies having client information available in real-time to address clients’ needs. Going mobile is a way to promote contextualization. Mobile devices have simplified and made more intuitive and immediate CRM updates, which can be applied right after meeting clients. Through mobile, physical interactions are represented in the digital space almost in real time.

Of course, we do strategic sales plan, but we have also learnt that we need to remain the closest as possible to customers and their context to catch weak signals that can transform into opportunities or threats faster than in the past. (Fitness equipment, Sales Director).

Thanks to technology, sales managers will soon find themselves an experience in a decision-making approach based on immediate wear and tear on interactions with the market.

Compared to the past, through mobile I can monitor customers and my salespeople and solve problems and meet their requests as they happen. (Banking, Area Manager).

Customers now want their offering to be ready in one day, and when they get in touch with you, they expect immediate response. This is becoming a bit stressful. (Baby products, Sales Director).

*Shared visual representations* Salespeople are often facing major difficulties in merging and integrating scattered pieces of individual cognitive visions. Through

shared representation, salespeople are provided with guidelines that assist with a better understanding of the value of business relationships, improving the interpretation of reciprocal actions. For instance, in the ICT market we observe an ambiguity of representations, where many system integrators have started to perform the functions of distributors, and the distributors themselves are becoming value-added-resellers, superimposing their activities on those of the system integrator. Shared representations support adaptation and reduce the likelihood of conflict, increasing the productivity of each interaction with customers. Through shared representations it is possible to increase mutual knowledge and reduce the effort to empathize with customers' situation, challenges and problems. Explanations and discussions should focus on objects that are actual or on representations that make the subject real. This is why representations must be easily understandable (Corsaro, 2014).

Shared representations are of particular use in digital settings to summarize complex information derived through analytics and reduce the cognitive effort caused by information overload. Thus, companies acknowledge a critical advantage in terms of business intelligence and are creating cross-functional teams involving marketing, communication professionals, computer scientists, and designers specialized in information aesthetics.

The visualization is adapted according to the user. This is because the machine elaborates all your past data and knows what is more effective for you. It is subjective, some people are very visual some less, some focus on details. some other on the general picture. Visualizations should be aligned with your cognitive processing and learning style. (Food & Beverage, Sales Director).

As the value generated by business relationships is mostly intangible, the challenge is identifying new ways to illustrate and represent this intangibility by concurrently including management's judgment and assessment of the created value. Salespeople should simplify future scenarios that describe value, representing them with respect to the context of use of the product / service, but also find new ways to provide a broad representation of the different contexts in which the customer operates, including details and drawing links between different aspects and perspectives.

## 5 Discussion

A sales transformation process is taking place within companies operating in different industries, which makes it relevant to understand its effects and business implications (Moncrief, 2017). This transformation implies not only a change in the role and skills of the commercial function, but also in the tension towards the search for an alignment of the entire organization and in the relationships with the external context.

Our study proposes a model to interpret sales transformation. The model is composed of four dimensions: People, Digitalization, Integration processes and Acceleration processes.

As for the people dimension, past literature has established that the job of sales managers is becoming more and more transversal and includes different roles such as, a partner to customers, collector of market information, cost analyst and technologist (Sisti et al., 2015). Sales skills are therefore configured as a set of technical, relational and interpersonal skills that make their combination and amalgamation quite complex. In addition to those that have emerged so far, we carried out a more detailed analysis of the skills that need to be strengthened in the future for sales transformation purposes.

Salespeople of the future will be more and more hybrid figures that combine soft and hard skills, have an in-depth knowledge of customer processes, operations and performance measurement metrics. They will have to develop capacity for adaptation, relational intelligence, being ready to challenge the status quo of the customer context and offering unique perspectives. Put differently, they are moving from the role of a salesman to that of advisor ‘in context’.

This implies that in the future the sales force will increasingly act as boundary spanner, whose purpose is not only linking the supplier’s capabilities with the client’s needs (Lysonski & Johnson, 1983) but also being an intermediary in a broader sense. They will need to influence and shape the client’s cognitive processes through interaction, often in a holistic manner, that goes beyond the characteristics of the product and take into consideration together the business, cultural and social context. Adopting a relational perspective centered on people, which is now prevalent in sales, means seeing customers holistically and consider their different identities: the corporate decision-maker, and the individual personality. Based on this, it is possible to change approach according to specific social and business contexts.

Consequently, being charismatic is not sufficient anymore for salespeople (Dubinsky et al., 1995). On the one side, they should be very prepared and informed on the customer processes and provide facts about the economic and non-economic impact of their solution on the customer’s business. On the other side they should be able to communicate the ‘value story’, and thus develop storytelling skills by creating a narrative of the value. This is becoming important also in B2B where it is increasingly shown that buyers are not only involved on a rational level, but an emotional one too.

In regard to sales technology, we observed that B2B companies are increasingly looking to B2C in order to better understand the social selling practices that they can adopt for their customers (Marino et al., 2020). For example, it has been demonstrated that corporate buyers involved in non-complex purchases, are seeking purchasing experiences that are similar to those that B2C consumers experience: immediacy, simplicity, mobile access, engagement and socialization (Stephen et al., 2020). Our analysis revealed that managers are understanding that proactive and intelligent sales through virtual assistants, predictive and artificial intelligence will allow salespeople to focus on activities that provide the great return or those that motivate them the most rather than spending time on administrative or low value adding activities. However, people and technology are not

sufficient to understand the sales transformation that is taking place. Processes of integration in space and acceleration in time are also needed to stress the contextual nature of sales transformation.

Integration makes the change fluid and comprehensive and occurs at different levels. First of all, integration occurs between physical and virtual sales. This focuses on taking advantage of technology to enable an integrated strategy across multiple sales channels and markets. The use of Social CRM is becoming more widespread in order to reach this goal. These systems are able to integrate data from inside and outside a company and offer summarized and relevant insights in real time, and easy to understand format thanks to visual dashboards. The business customer journey is mapped, guaranteeing a smooth customer experience along all the touchpoints by offering content studied together by marketing and sales. Technology is used to listen, attract, and engage customers, to improve human–machine interaction and integration, as well as to empower people’s abilities (Paschen et al., 2020). The process of integration entails new forms of interaction among the sales force, channel partners, and other actors operating in the inter-organizational network. This is enabled by technological tools to support information sharing across the network and create multi-channel sales dashboards.

But integration also occurs at intra-organizational level, especially between marketing and sales (Rouziès et al., 2005) which should be based on a formal process of collaboration, and not informal as often happens. The two areas begin to exchange information through CRM and contribute to qualify leads and to guide management. Our study found a trend showing the collaboration of marketing and sales. They are working together by identifying market opportunities, participating in mutual meetings, carry out job rotation activities and finally implementing KPIs to measure the performance of common initiatives.

Lastly, our study acknowledges the relevance of the acceleration process to compete in an ever-accelerating world. Companies are called to identify and master new ways to address the challenges posed by velocity without endangering the relationship with their customers. Organizations that have a dynamic sales process are not only able to adapt better to change but to also do it quicker. Clearly, technology plays a critical role in making the sales process smart, capable of shaping itself with respect to changing contexts (and to also changes subjects in different contexts). Technology will be able to enhance and accelerate the management of the sales funnel, especially in the qualification phase of the leads. But velocity is also about moving deals in a ‘no decision state’ to the next level, even if it would imply to lose the deal.

Mobile devices facilitate real-time interactions with business customers and provides real-time analytics and granular data which improve the degree of adherence to the context. As modern CRM systems are becoming “native mobile”, they are able to offer both predictive and prescriptive analytical capabilities, providing



recommendations to sales managers whose decision-making process can benefit from data about the interactions with customers as they occur.

Lastly, the study confirms the importance of leveraging visual representations and symbols to facilitate interpersonal and offline/online communication (Corsaro, 2014). It is extremely important to generate sufficiently flexible representations that can be quickly transferred to different contexts and communicated to different interlocutors.

## 6 Conclusions, limitations and future directions

With this study, we propose a framework for interpreting sales transformation, offering a holistic and systemic view of sales that allows to understand the complex transformation process that selling is currently experiencing. Our study reveals that the conceptualization of sales transformation requires the adoption of a broad perspective, which also explains why in reality many of the investments in technology or in soft skills training have failed to reach a transformative scope. Sales transformation should be analyzed as a system and not as a standalone phenomenon, evolving along one dimension at a time.

Although People and Digitalization are acknowledged as key pillars of this process, our study shows that their changing action can be fully understood only when interrelated with spatial and temporal dimensions, i.e. Integration and Acceleration.

The proposed model contributes to the debate on sales transformation by introducing the Acceleration and Integration dimensions and discussing their interplay with the human and technological side of the phenomenon. This represents a novel insight not addressed in extant literature. The process of Integration occurs at a spatial level and involves internal and external sources of data, digital and physical channels, and internally within Sales, Marketing and Customer Service. Through the process of acceleration, we highlight the tensions and paradoxes that arise from sales transformation and which force salespeople to adopt new operative models and relationship approaches. The study dispels the myth of digitalization being the only catalyst of sales transformation and proposes a complex framework to interpret this phenomenon.

As this is an early contribution to the area of sales management, our study comes with some limitations. Although qualitative research provides rich and detailed information and is particularly appropriate for explaining complex phenomena, caution should be used in applying our results across different sales organizations and service ecosystems. Further research surveying a larger sample of companies would be needed before drawing final conclusions about the impact of the four dimensions of sales transformation. Moreover, the sales professionals interviewed in this research work for companies with different backgrounds and have experienced different stages and forms of sales

transformation. In this study, we did not measure the actual perception of the degree of sales transformation perceived by key informants, but we investigated their experience and examples of transformative practices in the sales function. This creates an opportunity for future research to test and confirm the validity and generalizability of our results. Specifically, future research should investigate the interrelationships between the dimensions of sales transformation and more specifically, the roles integration and acceleration processes play through empirical testing. The dimension of ‘losing fast’ is a clear example of how space and time interrelate for sales transformation. The extension of the space of interaction due to novel opportunities enabled by technologies has led to the acceleration of the sales funnel being sustainable. It would be interesting to understand how acceleration correlates with integration and thus how sales transform considers different combinations of acceleration and integration levels. This framework also needs to be investigated across different types of companies and industries to generate more actionable insights tailored to the needs of specific organizations.

## 7 Managerial implications

Sales transformation is driving companies to rethink their sales processes and offer customized solutions developed in alignment with customers’ needs, objectives, and business processes.

The conceptualization of Sales Transformation we developed represents a roadmap for companies and managers to understand at what stage of the Sales Transformation process are and which areas should further develop to leverage the benefits of this changing process. We also identify key areas that managers can focus on when approaching for the first time a Sales Transformation process. Our recommendation leans towards a balanced approach involving the four dimensions of Sales Transformation, people, digitalization, integration and acceleration. From a recruitment and salesforce management perspective, our insights show that there is a need to carefully select sales talents by assessing their personality traits and their emotional intelligence to leverage on cognitive diversity and at the same time create an environment that supports salespeople productivity. Talents can only flourish if supported by a customized training focused on developing sales skills tailored to the individual characteristics and combining first-hand experiences with sharing practices and dynamic coaching programs. The trainee attitude should shift from a ‘know-it-all’ approach to ‘learn-it-all’

approach. Such training should occur at both individual and team level and should be monitored with dedicated KPIs assessing the skills acquired during the coaching sessions.

The topic of KPIs is also critical to support sales transformation. We recommend the implementation of heterogeneous KPIs assessing both short- and long-term performance. Specifically, combining economic and financial KPIs (turnover, margins, growth, etc.) with the evaluation of softer and more intangible dimensions (effort, empathy, alignment, relational atmosphere, opportunism) allows monitoring the degree of sales transformation and guiding the salesforce's efforts.

Our study also identifies the critical role of the integration between marketing and sales. Companies should enable such integration through job rotation, joint KPIs and a social media marketing strategy that should be aligned with that of social selling. The implementation of social CRM system available on cloud, mobile, and highly customizable could support the integration among department through data sharing using dashboards and analytics while allowing for richer insights through internal and external data integration.

We recommend a gradual approach to automation, promoting human–machine interactions but at the same time training service personnel to interact with technology in a purposeful way. Investments in and enthusiasm for technology must not overshadow the pivotal role of people who require to be encouraged through clear incentive plans and performance metrics to motivate them deliver a relevant experience to customers.

The above recommendations need to be enabled by a strong sales leadership that creates a collective and shared vision about the role of sales, while promoting an inclusive environment respectful of individual perspectives, generating trust, credibility, and mutual respect.

## Appendix

See Tables 2 and 3.

**Table 2** In depth interviews: Key informants detailed by participant job position and industry

| Participant job positions | Industries                                |
|---------------------------|---|
| Sales director            | Pressure and temperature instrumentation  |
| Sales director            | Pharmaceutical                            |
| Business development      | Strategic consultancy                     |
| Sales director            | Fitness equipment                         |
| Sales director            | Classification and certification services |
| Sales director            | Packaging and printing                    |
| Sales director            | Beverage                                  |
| Sales director            | Medical equipment                         |
| Sales director            | CRM solution provider                     |
| Sales director            | Cloud computing                           |
| Sales director            | Market research                           |
| Sales director            | Export consultancy                        |
| Sales director            | Co-Working spaces                         |
| Sales director            | Coffee equipment manufacturer             |
| Sales director            | Pharmaceutical                            |
| Sales director            | Food & Beverage                           |
| Sales director            | Beauty                                    |
| Sales director            | Travel                                    |
| Sales director            | Consultancy                               |
| Area manager              | Banking                                   |
| Sales director            | Beverage—Coffee                           |
| Sales director            | Rolling element bearings manufacturer     |
| Key account manager       | Advertising                               |
| Sales director            | Food                                      |
| Sales director            | Publishing                                |
| Sales director            | Beverage—Alcoholic Drinks                 |
| Sales director            | Fashion                                   |
| Key account manager       | Vending machines                          |
| Sales director            | Business travel solutions                 |
| Sales director            | Food                                      |

**Table 3** Focus groups: participants detailed by participant job position and industry

| Companies           | Industry             |
|---------------------|----------------------|
| Sales director      | Hospitality          |
| Sales director      | Healthcare           |
| Branch manager      | Banking              |
| Area manager        | Banking              |
| Sales coach         | Training consultancy |
| Sales director      | Publishing           |
| Sales director      | Food                 |
| Key account manager | Art & Graphics       |
| Key account manager | ICT Security         |
| Sales director      | Baby products        |
| Sales director      | ADV agency           |

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