A Method for Marketing and Sales Optimization of Enterprise Software Applications

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Abstract: Marketing and Sales departments are closely related but there is also underperformance within this collaboration. Multiple strategies exist to improve collaboration or integration between the two. This paper focuses on the Discover Your Potentials method which uses a combination of different models to improve business performance in enterprise software companies. A qualitative case study approach was used to find out how successful the method is in designing marketing and sales potentials. The paper discusses how the method was executed at a company developing and selling accounting software extensions. Based on this study some preliminary findings and conclusions can be formulated.

1 INTRODUCTION

Marketing and sales departments are closely related, working together to drive business growth and revenue (Baycur et al., 2022; Le Meunier-Fitzhugh and Massey, 2019; Le Meunier-FitzHugh and Piercy, 2007a). Although they have similar goals, there is often a lack of coordination (Malshe et al., 2017). The departments have different viewpoints, mindsets, and motivational factors, leading to friction between them (Beverland et al., 2006; Rouziès et al., 2005; Mühlbäck and Rosenow, 2022). This friction is nothing new, as it has been a persistent challenge for many years now. It has been documented in the literature, for instance, as early as 1993 (Crittenden et al., 1993). An article published in 1997 even showed that the differences between the marketing and sales departments are already of greater importance than initially anticipated. It becomes evident that solving this is crucial for the success of an organization (Montgomery and Webster, 1997). Because of this absence of collaboration between the two departments, significant challenges arise. For instance, when the efforts are not aligned between the two departments, it may lead to missing out on potential customers, which will impact the generation of revenue (Biemans, 2023). Another challenge that is a result of this friction is a lack of coordination, which can cause the overall business performance to also be affected (Le Meunier-FitzHugh and Piercy, 2007b; Watson, 2017).

Some existing studies have delved into resolving the underperformance between marketing and sales, a topic that will be further discussed in the subsequent chapter of this paper. Some research has already been done regarding finding a solution to minimize the underperformance between marketing and sales or even solve this completely (Enyinda et al., 2023). For example, researchers did find that the type of difference between marketing and sales matters in how significant the underperformance is within an organization. As it turns out, some differences can also positively impact performance. So to perhaps solve the underperformance between the two departments within an organization, it is crucial to fully understand their differences and their impact on the business performance (Homburg and Jensen, 2007; Lauzi et al., 2023). While efforts have been made to develop tools and strategies that try to solve the marketing and sales friction, one of the main limitations is that there are little to no real-world case studies that demonstrate if the tool or strategy is effective. And having a lack of evidence that shows success stories, makes it challenging for businesses to adopt these tools (Atteya, 2012).

A tool that is designed to assist in solving the underperformance between marketing and sales is the Discover Your Potentials (DYP) method introduced by Wim van den Brandt (hereafter referred to as ex-

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pert), which is the tool that this study will focus on. This method is designed to improve business performance, focusing on marketing and sales from software and hi-tech organizations. The method follows five comprehensive steps in order to identify business potentials. It combines two popular marketing and sales modeling techniques: the Business Model Canvas and the Customer Journey Map. This innovative combination has the potential to significantly mitigate the risks associated with unsuccessful software implementations.

The main focus of this study is to observe the impact of the DYP method within an organization concerning the development of marketing and sales strategies. As this method will provide an innovative insight into finding a suited strategy for enterprise software companies, seeing how this method facilitates a real-world case study will be very insightful in observing its effectiveness. This leads to the main research question guiding this study to be:

To what extent does the 'Discover Your Potentials' method lead to useful marketing and sales strategies for enterprise software companies?

To answer this question, an in-depth exploration is undertaken through a combination of a literature review and a detailed case study analysis.

The DYP method was designed for software and hi-tech organizations so that is also where the focus in this paper will be. Nevertheless, the popularity of the Business Model Canvas and Customer Journey Map implies that the DYP method can be applied across diverse organizations. In this research, one case study of the DYP method was performed at a software company in the Netherlands, here referred to as 'S-Pack', with the company's identity anonymized to maintain confidentiality and privacy. All other names in this paper have also been anonymized. The scientific contribution of this study will be that it adds to the evidence that shows the practicality and effectiveness of the DYP method in real-world cases. It will show that the DYP method is an effective method to use for addressing marketing and sales optimalization. And it will, thereby, also show the applicability of this innovative tool into an actual existing organization. Besides having a scientific contribution, this study will also have a societal contribution. Because the DYP method assists in better collaboration between the marketing and sales departments. This does not only benefit software and hi-tech organizations but also other organizations in various industries facing the same kind of challenges. Providing strategies that will contribute to the overall business performance, will also be a valuable contribution to the overall business community.

In the upcoming chapter, more depth to the topic is given. Subsequently, the research method is explained. In chapters four and five, results from the performed case study will be discussed, afterward, leading to conclusions and implications.

2 THEORETICAL BACKGROUND

2.1 Marketing and Sales Collaboration

The collaboration between marketing and sales within an organization can be a challenge that has gained attention in the field of strategic organizational management (Malshe, 2009; Dewsnap et al., 2020; Malshe et al., 2022). Several studies have indicated and confirmed the challenges in trying to harmonize these two departments. For example, Beverland, Steel, and Dapiran's (2006) research explored the underperformance between the marketing and sales departments and concluded that these are driven by differences in belief (Beverland et al., 2006). Several additional pieces of research confirmed these indicated differences between the two departments. They emphasize the importance of reaching a consensus and meeting regularly since improving this collaboration is essential (Strahle et al., 1996; Le Meunier-FitzHugh and Piercy, 2010; Arnett et al., 2021). Better collaboration and overall communication between these two departments will also lead to better outcomes (Smith et al., 2006; Hauer et al., 2021). Based on these multiple pieces of research, it becomes clear that there is a challenge in trying to create an effective collaboration between the marketing and sales departments within an organization, but achieving this can be crucial for success.

While previous research has mostly focused on identifying and describing the underperformance between the marketing and sales departments, some more recent studies attempt to explore these differences a bit further by trying to quantify them as a way to measure and prioritize the differences that can occur between these two departments within an organization. The results of this quantifying research showed that task-related differences and communication challenges are the primary drivers behind team underperformance (Enyinda et al., 2023). Another study also noticed the increased attention in trying to solve the marketing and sales underperformance. That research looked into the unique roles that marketing and sales have within an organization. While marketing is strategic and product-oriented, sales primarily focuses on short-term tasks and customer needs. This research also recognizes the need for better collaboration between these departments and proposes a framework to improve teamwork. However, further research into this framework is needed to guarantee success in real-world organizations (Rehme and Rennhak, 2012). Overall, these studies emphasize the significant importance of creating a better collaboration, however, they also underscore the need for further research to find possibilities and innovative ways to enhance marketing and sales cooperation.

2.2 BMC, CJM and Case Studies

The studied DYP method makes use of a combination of the Business Model Canvas (BMC) and the Customer Journey Map (CJM). Through a case study done by Sort and Nielsen (2018), it has been made clear that by using the BMC, communication is improved. It enhances feedback, increases chances of funding, and better matchmaking between entrepreneurs and investors (Sort and Nielsen, 2018). It has also been identified as an effective and efficient way to guide an entrepreneurial journey, and is perceived as a useful tool to conduct business model innovation (Murray and Scuotto, 2015)(Qastharin, 2016). The CJM is another model used in the DYP method. It is an already widely used tool to represent a customer's experience with a certain service (Moon et al., 2016). This helps to understand a customer's needs and, therefore, can assist an organization in improving their customer experience (Rosenbaum et al., 2017).

Based on the descriptions given in the literature, using the BMC and the CJM together can be a strategic approach to enhance the collaboration between marketing and sales. As the BMC is a well-designed tool to identify the key components of a business and the CJM is very useful for understanding and improving the customer's experience. Combining these two tools allows the team to get an overall view of how the business operates through the BMC and, thereby, understand what the customer goes through in the process, by creating and analyzing the CJM. The combination will help the marketing and sales teams to better know if they match the customer's needs.

The implementation of the Discover Your Potentials method has been tested by executing a case study. Case studies are extremely useful and an important strategy to conduct organizational analysis (Feagin et al., 2016).

2.3 The Steps of the DYP Method

The Discover Your Potentials method is a method that aims to assist in this better collaboration between the marketing and sales departments. This method consists of five different steps. Executing each of these steps will result in possible new marketing and sales potentials for a specific enterprise software organization. The different steps in this method are as follows:

- Step 1: Exploration. In this first step, a as-is business model canvas is mapped out, based on the company's goals and available information. For an extensive analysis, the method provides questions specified for four different types of software companies: Value Added Resellers (VAR's), Systemintegrators (SI's), Software Factory's (SF's), and Softwarehouses (SH's). After this first analysis, the involved company can decide if they want to continue with the DYP method or if the insights gathered from this step are sufficient enough for them. If the insights are deemed sufficient enough, the DYP method will be concluded.
- Step 2: Strategic analysis using the Business Model Canvas. From 148 applicable analysis tools, the suitable tools are performed on the company to optimize the business model canvas. The business model canvas is a powerful tool to gain a complete picture of the existing business model of a software company, identify strategic alternatives, and prototype the adapted business model with a value proposition.
- Step 3: Analysis using the Customer Journey Map. An as-is customer journey map is analyzed and improved to a to-be model. With a customer journey map, an organization discovers how its prospects and customers perceive the contacts in the company about the products and services. The map visualizes all relevant touchpoints and interactions between customers and the company. The customer journey map is used to analyze and optimize marketing, sales, implementation, and service strategies which helps to, among others, reengage customers after an extended period of time when they will be replaced. This is important because loyal customers mostly yield a better margin than new customers.
- Step 4: Analysis using the Business Control Process Structure (BCPS). In this step, the as-is BCPS is adapted to a to-be BCPS. A BCPS is composed of a framework of processes, arranged by execution stage, and helps to visualize the workflow of a company's processes, collect data about the processes, identify bottlenecks in the processes, and improve the processes. The aim is of course to have efficient and smoothly running processes that can be monitored and evaluated.

- Step 5: Realization management actions. From the previous three steps, there are multiple action lists delivered. In this last step, these lists are combined, and based on this result, so-called potentials are generated. These potentials, or management actions, will improve the business performance.

A visual overview of the different steps of the DYP method can be seen in Figure 1.

3 RESEARCH METHOD

The goal of this study is to understand the practical workings of the DYP method. Given this goal, a qualitative case study approach was adopted.

3.1 Procedure

An important aspect of the preparation for the case study is the weekly sessions between the expert and the observers. For eight weeks, a 2.5-hour session was held, each focusing on a different step in the DYP method. Simultaneously, a literature study was performed using scientific papers retrieved via Google Scholar and hand-out documentation from the expert. To find companies where a case study could be performed, the observers were dependent on the expert. Eventually, one case study was performed at a company where the expert was already involved. In the weekly sessions, the observers were informed about what was already discussed in prior meetings.

3.2 Study Setting

Accounting software company S-Pack was visited, where step two and step three from the DYP method were discussed. S-Pack is a company that provides an integration platform with which they offer functional applications with the software from another company called S-Accounting. They aim to provide their variants of the software that is produced by S-Accounting. By offering tailored software to a specific customer need, they can provide more specific software and better comply with the needs of customers. During the case study, the observers mostly observed the conversation between the expert and the spokesperson from S-Pack. There was also the opportunity to provide input. The interview was semi-structured since it was mostly a two-way conversation without set questions, but there were some documents to be discussed as guidelines.

A few days later, a follow-up session was held where the rest of step 3 was executed. The procedure of this session was the same as the first session.

3.3 Research Questions

One main research question and two subquestions were designed:

To what extent does the 'Discover Your Potentials' method lead to useful marketing and sales strategies for enterprise software companies?

To focus the analysis of the case two subquestions were formulated (1) How does the DYP work and what are its key components?, and (2) When is a potential that resulted from DYP perceived as useful?

Subquestion 1 can be answered solely from the literature review. To answer the main research question and the second subquestion, the data gathered from the case study is used. We hypothesize that the success of the DYP method strongly depends on the company. The more information the organization can give on its processes, the more detailed the outcomes of the method will be. Additionally, some software companies will of course expect more outcomes than others.

3.4 Data Analysis

During the case study sessions, notes were made on the discussed documents. This made sure findings could easily be discussed for separate topics: the business model canvas (steps 1 and 2) and customer journey map (step 3). These findings will be listed and interpreted in the next chapters.

4 CASE STUDY

From the two case study sessions executed, findings on the practical workings of the DYP method were noted. These results are sorted per method step. First, some general findings are discussed.

4.1 General

For this research, a case study at software company S-Pack was conducted. First of all, the reason why a company wants to have the DYP method performed is important. For S-Pack, business processes actually went very well in the beginning. After a while, growth problems were discovered. These growth problems included issues with planning and initiating projects for new clients, which led to confusion and client loss. Another challenge came through failing to follow up on signed orders, resulting in a loss of revenue. A

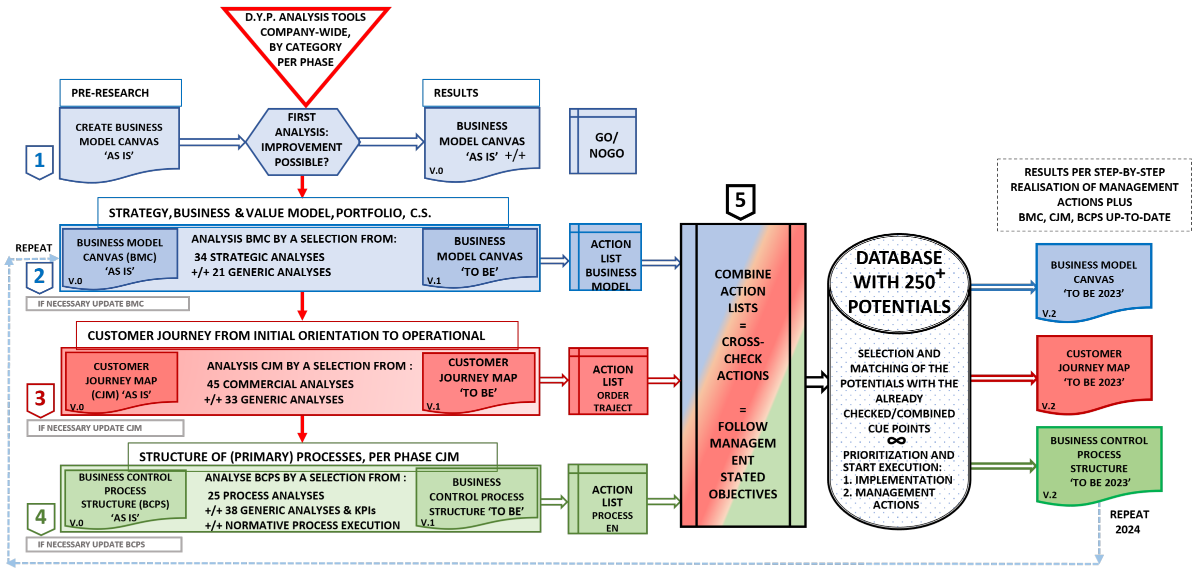

Figure 1: Illustration of the DYP method.

third growth challenge was because pre-sales and detailed instructional materials got mixed up, leading to missed sales opportunities. The last growth problem was caused because of only partially considering expansion proposals due to confidentiality reasons. To clarify the cause of these challenges and to clarify further growth scenarios, the management decides to have analyses carried out on the desired strategy and on the possible variants of the business model. The order-acquisition process should also be examined for growth opportunities and bottlenecks. It was decided to carry out this method using the DYP method.

The expert executes the complete method at the company's office. The first and second author acted as observers and were present during two sessions. This first session was dedicated to discussing the Business Model Canvas (BMC) and the second was used to discuss the Customer Journey Map (CJM). For both of these sessions, the observers detected the different suggestions that the expert made and how S-Pack was planning on implementing them. It was also discussed how the BMC and CJM could be adjusted to more specifically represent the S-Pack company structure.

4.2 Step 1: Exploration

As said, it was the management team that initiated the analyses. Therefore, they were, next to the business owner and an external DYP partner, present at the first meeting. The management team consists of a marketing and sales manager, a development manager, and a services manager. The business owner chairs the management team. Since the documentation needed for the business model canvas is not available yet, it was decided to start with the order-acquisition process: the customer journey map. To optimize this model, three separate sessions with the marketing and sales manager are held, two conversations with the business owner are assembled and there is continuous contact over the phone and email.

In a new 1,5 hour meeting, the as-is BMC is established. This is always done by adjusting a template. The DYP method makes use of four BMC templates for the four different software companies (VAR's, SI's, SF's, and SH's). The business owner thoroughly reviewed and provided the adjustments when necessary to the BMC.

4.3 Step 2: Business Model Canvas

During the first session, the business model canvas, which can be seen in Figure 2, was further discussed. According to the method planning, the as-is BMC is converted to a to-be BMC in step 2. In this session, there were therefore suggestions made, mostly for the customer segment. S-Pack currently aims only at trading companies with accounting software S-Accounting. However, expanding on this was not necessary for S-Pack's objectives. S-Pack is currently the specialist in the field of extensions to S-Accounting software. Because of this reseller-relation, they will have a continuous customer inflow. In Figure 2, it can be seen that there was originally more written in the customer segment section. The parts marked in grey were actually already removed from the BMC in a previous session. These parts are kept in the model to keep track of changes.

A suggestion that do was welcomed by the business owner was the introduction of competence centers between S-Pack and partners such as S-Accounting. Both benefits and downsides of competence centers were discussed since this does lead to a significant change in an organization's structure.

It was remarkable to see that the expert makes sure to pay attention to the manner of working in the organization. In particular, the large paper sheets with brainstorming notes, which were located next to the workplace of S-Pack's young employees, were discussed. This turned out to be the result of a customer day organized by S-pack. On such a customer day, customers could provide input on S-Packs products. The expert linked this to 'feedback sessions', which was already included under customer relations in the BMC (3c in Figure 2). It was also suggested that good customers could also be used as references to make sure their relationship circle would also become customers at S-Pack. The business owner agreed to this suggestion and mentioned that the customers present at the customer day would also be willing to do this.

S-Pack's ecosystem (point 7 in the BMC) was also discussed. Usually, instead of ecosystem the name 'key partners' is used. However, the expert has adjusted this in the DYP method because he felt that 'key partners' does not fully cover the load. In this part, there are also parts marked in grey, which already had been removed by the business owner in a previous session.

The last segment of the BMC that was discussed is the value propositions. According to the expert, this is the most important aspect of a company, which is why he always pays extra attention to this segment. Because the expert believes that the value proposition of S-Pack is not clear enough, extensive brainstorming sessions are conducted on this matter. Eventually, the two parties came up with a new slogan that accurately captures the commercial essence.

4.4 Step 3: Customer Journey Map

The second session was a follow-up from the first session. In this session, the main focus was on discussing the Customer Journey Map (CJM) for the S-Pack company. A first impression of the CJM was already made in step 1 of the DYP method process, which was based on general information, but further details were still missing. These all were made clear in this session, as the whole customer's experience was discussed. When creating the enhanced version of the CJM, the focus was on identifying different touchpoints made with the customer. Thereby also indicating how the first contact between a potential customer and S-Pack is established.

For the current customer journey, the as-is CJM was established as follows: first, the way in which a customer gets to know about S-Pack is discussed. This is currently done in two separate ways, one is through a potential customer clicking on the website of S-Pack. Another way is through the partner of S-Pack, which is S-Accounting. When a customer seems interested in the S-Pack software, they can then ask for more detailed information. If the potential customer is still interested after that, and after a few emails have been sent back and forth, it is time to send an offer to them. If they then agree with the given offer, they are going to exchange some further details and may meet face-to-face for the first time. Within this meeting, or further meetings, they discuss what the customer wants from S-Pack and if additional customization is needed for the software. If this is all clear, S-Pack will tailor the software to the needs of the customer and test it. If this all goes well, the customer will eventually receive the final software and S-Pack will install it on the customer's systems. A visual overview of this CJM can be seen in Figure 3.

Multiple suggestions were made concerning the discussed CJM. First of all, the expert observed that the explanation videos that the customers will see when they are on the landing page of S-Pack are a bit boring. Since the landing page is a part of the initial contact with potential customers and serves as one of the first and most important touchpoints, it is important that the potential customer is immediately drawn to what S-Pack has to offer. The experts suggested that there is a need for better material for these instruction videos. By making the instructions more engaging and addressable, the acquisition of new customers could be improved. The expert strongly suggests the use of visually pleasing material, such as pictures and small videos that show the implementation of the products that S-Pack offers. Another observation based on the CJM is that the implementation phase often goes wrong, especially when additional work is required. This results in irritation and dissatisfaction among customers. The expert suggests looking into preventing this when possible. A third observation as part of the CJM was that the conversion rate was quite low, which shows that customers often back out. A suggestion was made to look into the time it takes between signing a contract and receiving further communication to progress with the customer. As an extended time between these two steps of the CJM can result in uncertainty and a lack of commitment to the purchase.

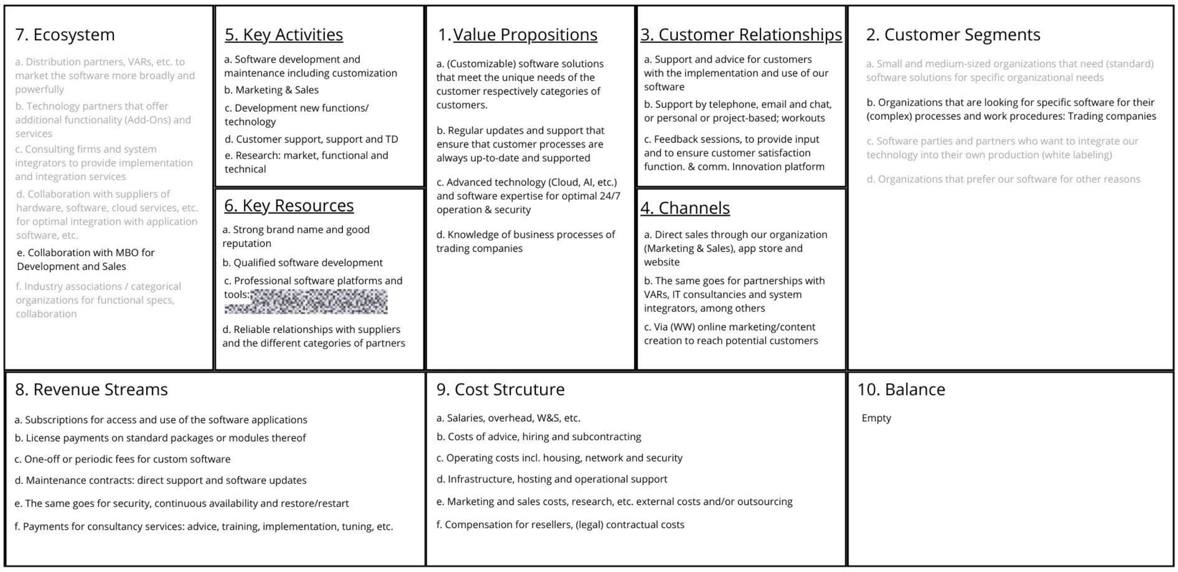

Figure 2: Illustration of the Business Model Canvas for S-Pack (Some cells are left empty due to confidentiality).

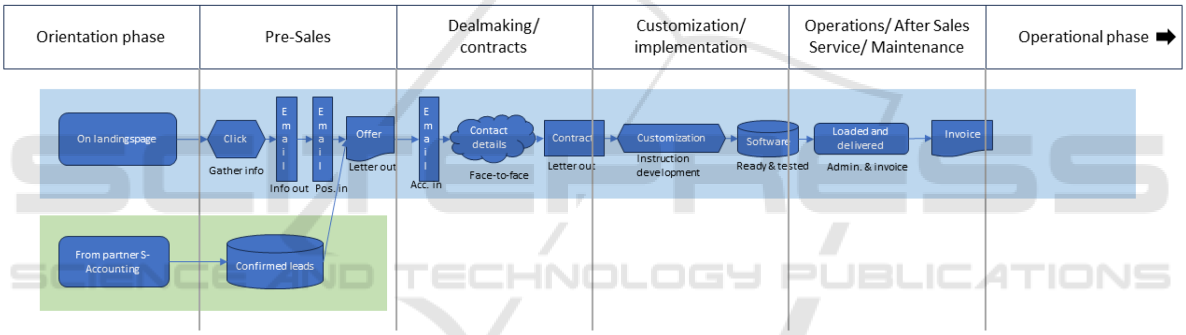

Figure 3: Illustration of the CJM for S-Pack.

4.5 Step 4: Business Control Process Structure

The fourth step of the DYP method is dedicated to an analysis of the Bussiness Control Process Structure (BCPS). The BCPS helps to achieve your goals, improve your (financial) performance, and make better decisions. Within, S-Pack, it was not necessary to perform this step of the method.

4.6 Step 5: Management Actions, Potentials

Based on the BMC and CJM, the expert has become aware of bottlenecks. Solutions to these problems are based on a potential from the DYP's extensive potentials database.

From the BMC, it was found that S-Pack solely works with S-Accounting and their customers. S-Accounting can therefore be seen as a VAR partner. This dependency can bring risks. Additionally, it limits the opportunity for expansion. The company must therefore consider broadening and deepening its commercial activities. The expert designed four figures visualizing ideas on how to expand. Figure 4 visualizes the current state of S-Pack, with partner S-Account as VAR partner. Figure 5 shows how the structure would look when a competence center would be introduced. If S-Pack expanded to more partners, there would also be another competence center. This change can be seen in Figure 6. If the company would also expand to another customer segment, the structure would look as in Figure 7.

From the CJM, multiple bottlenecks were found. First of all, S-Pack uses three instructional videos on their website, explaining their software. According to the expert, the long screen instructions in these videos quickly become boring. Better videos will strengthen the acquisition of new customers and the

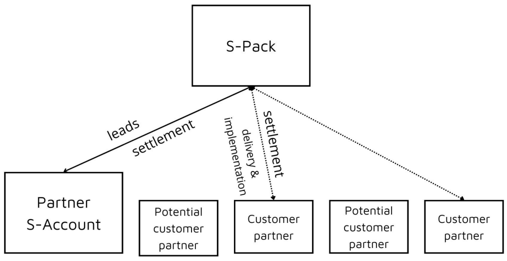

Figure 4: Current situation S-Pack.

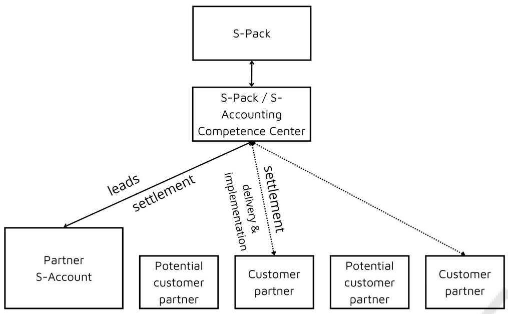

Figure 5: S-Pack with competence center.

instruction for the new users of those customers will become more attractive in terms of attention and more addressable. A tip from the expert is to shoot material from a good customer with a nice and tidy company. This solution is based on the potentials *Instruction material, Acquisition, and MarCom*.

Secondly, the planning for preparing the software, developing, installing, and implementing it goes wrong too often. This is especially the case if extra work is necessary. This error causes internal confusion and discussion; Which then causes irritation for the customer about unclear agreements et cetera. The expert solution to this problem is based on the potentials *Project management, Development planning, and Profitable additional work.*

Lastly, some time ago, a quotation signed by the customer was chosen as the contract format. When this signed quotation had to be implemented, the conversion factor turned out to be much too low. About 15% of signed quotations are not implemented for various reasons and/or the customer drops out. The cause appears to be mainly a too-long time between signing the summary quotation and further notification/action from S-Pack. Besides, the contract terms and conditions turned out to be incomplete. The consequences are a lack of clarity and a reduced sense of obligation. The expert solution to this problem is based on the potentials *Contract formation, Starter kit, Implementation planning, Down payment, and Covering standard contract.*

5 DISCUSSION

Multiple sessions discussing the DYP method implementation at S-Pack were held and are, due to the postponement of steps 4 and 5, still to be held. In this chapter, three main findings of this case study will be discussed.

Finding 1: Discussions are much broader than strict DYP execution. From the overall execution of the method at S-Pack, it can be seen that the focus is actually not always on the DYP method. It is mostly the expert's knowledge and long-lasting experience in the field that was much appreciated by S-Pack.

Finding 2: Low-impact suggestions are not taken as action points. Some suggestions made by the expert are more drastic than others. Subjectively, it can be said that there appears to be a relationship between the degree of drasticness and whether the business owner immediately agreed with the suggestions or was still unsure. Suggestions that S-Pack immediately agreed to also do not come back in the management actions in step 5, at least not for now. Examples are the use of good customers as references, mentioned in section 4.3 or the change in value proposition, also discussed in step 2, which was started immediately.

Finding 3: High impact suggestions need careful follow-up. Several suggestions might have a higher or unknown impact on the current business process. The business owner did agree to the idea of competence centers but was not completely sure how this would work out. That is why this does come back in the management actions. The expansion in the customer segment, which the business owner did not seem enthusiastic about, is also mentioned again in the management actions (Figure 7).

6 CONCLUSION

The Discover Your Potentials method was designed to improve marketing and sales in enterprise software companies. To see whether the method actually leads to useful marketing and sales strategies, the expert of the method was observed during two method performance sessions at company S-Pack. To correctly answer the research question, there are simply too few observations made.

It is also important to mention that the method is still under construction and that the execution would be different at every company. One should see it as iteration, and not as a waterfall method so steps can be executed in a different order just as happened at S-Pack for instance. Besides, the last step, where the ac-

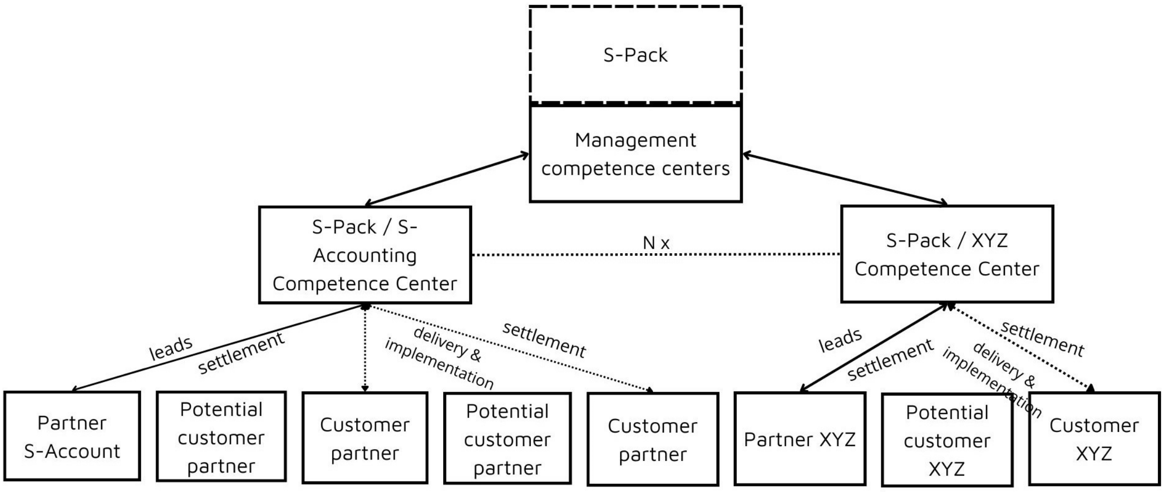

Figure 6: S-Pack with more partners and more competence centers.

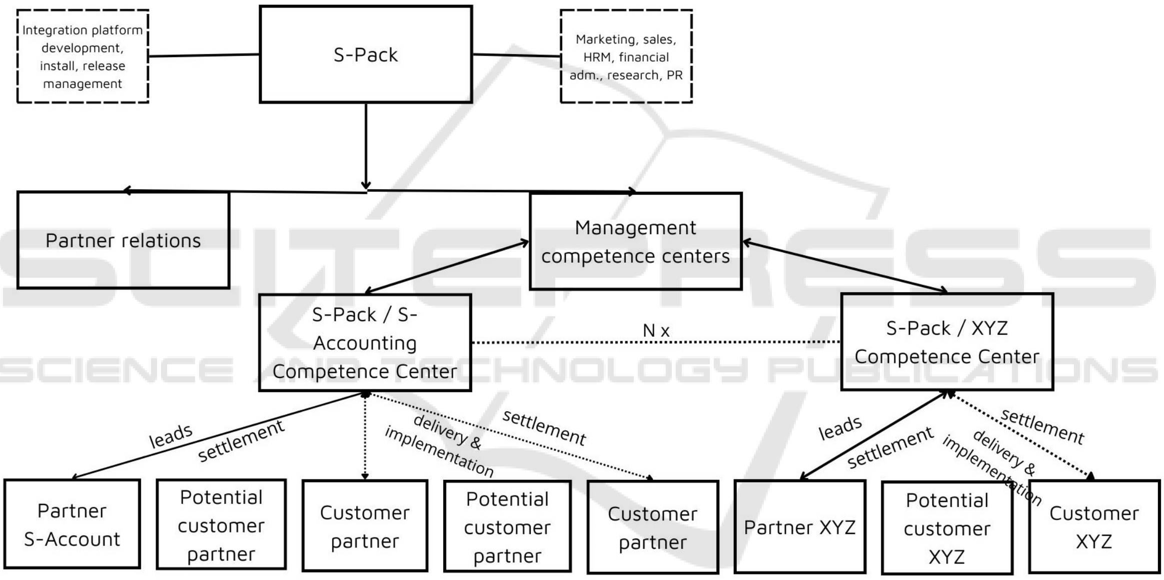

Figure 7: Situation three with a new customer segment.

tual management actions are planned to be presented and discussed, was not included in the case study.

Despite these limitations, it is expected that S-Pack will be satisfied with the management actions discussed in section 4.6 and that the DYP method does indeed lead to successful marketing and sales strategies. In addition, S-Pack seemed satisfied with the way of working. It is of course not yet possible to assess whether the same conclusions can be drawn for another company.

Future research should conduct more and complete case studies at diverse companies. This should be combined with an extensive evaluation to assess whether the company is actually content with the marketing and sales strategies or not. This should be discussed directly after the method execution but also especially suitable time after the company has implemented a management action. Only then can be really seen whether the strategy actually worked. But to be completely honest, it is concluded that the Discover Your Potentials method is not yet ready to be scientifically investigated in this way. As long as the work plan is still being tinkered with in between, good comparisons between companies cannot be made. It is of course true that after each implementation the expert can apply new experiences to another company and the management actions will therefore generally continue to improve. However, the planning of the five steps should be the same at every company in order to make comparisons.

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