



Digital Transformation of B2B Sales Processes

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Abstract: This paper explores the impact of digital transformation on sales practices. It emphasizes how businesses adopt new digital technologies to enhance efficiency, customer engagement, and overall business outcomes. Digital transformation involves both digitalizing analog processes and leveraging innovative technologies like artificial intelligence and automation in sales operations. Some companies have successfully integrated digital tools to improve B2B sales effectiveness and profitability. However, challenges persist, including organizational resistance and the need for updated managerial practices and performance metrics. The main contribution of this paper is the identification of changes in sales caused by digital transformation. Despite these changes and challenges, digital transformation in sales signifies a shift towards more consultative and adaptive sales approaches. This shift necessitates a re-evaluation of traditional sales practices and a proactive embrace of technological advancements for sustained competitive advantage in dynamic markets.

1 INTRODUCTION

This paper examines the profound impact of digital transformation on sales processes. Digital transformation, characterized by the integration of advanced digital technologies into business processes, has reshaped traditional sales paradigms. It encompasses both digitalization—transforming analog processes into digital—and broader business improvements facilitated by new technologies (Reis et al., 2018; Überwimmer et al., 2021).

Key findings include that while some companies actively drive digitalization for efficiency gains, others are compelled by external pressures (Überwimmer et al., 2021). Digital transformation has significantly altered sales dynamics, enhancing revenue, effectiveness, and customer understanding through digital tools (Mattila et al., 2021). However, challenges persist, with anticipated gains in productivity often unrealized (Wengler et al., 2021).


The advent of novel technologies, like artificial intelligence and machine learning, has further accelerated above mentioned changes, prompting a shift towards digital sales channels and automation of routine tasks (Syam & Sharma, 2018). This evolution


necessitates a rethinking of sales strategies and roles, with a growing emphasis on consultative selling and multi-channel engagement (Singh et al., 2019; Thaichon et al., 2018).

As organizations undergo these transformations, they must overcome barriers such as technological adaptation, organizational readiness, and the evolving role of sales personnel (Alavi & Habel, 2021; Wengler et al., 2021). This paper provides a comprehensive overview of the current landscape and future prospects as businesses pursue to leverage digital transformation for sustained competitive advantage in sales processes and practices. The paper contributes also by identifying the key changes in B2B sales caused by digital transformation.

2 SALES PROCESSES

Digital transformation has a potential to change the way companies operate and do business. In sales the digitalization has been commonplace in the sales of non-complex consumer goods markets (Mahlamäki et al., 2016; Rodríguez et al., 2020) and now the B2B sales processes are following suit. This paper will

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therefore focus on the transformation of B2B sales processes.

As the focus of the paper is on B2B sales processes as a whole, it is therefore important first to understand the individual processes and tasks taking place within B2B sales. Moncrief and Marshall (2005) present “the oldest paradigm” of sales, which constitutes of seven steps: prospecting, pre-approach, approach, presentation, overcoming objections, closing and follow-up. The authors say that the model has changed very little over the years, but the orientation has altered to more customer-oriented (Moncrief & Marshall, 2005). Sales processes vary depending on the industry and even between companies within the same industry, but the principles are the same. Rodríguez et al. (2020) identified that different markets have commonalities in sales processes. In business-to-business (B2B) markets sales processes call for strong efforts by the seller in reaching out, closing deals and maintaining relationships with customers compared to another traditional market, business-to-customer (B2C). The B2B sales process is also more detailed in stages and retaining customers is a key to generating higher sales and thus long-term customer relationships are necessary. (Rodríguez et al., 2020). The next section takes a closer look at the features of the industrial sales process.

3 INDUSTRIAL SALES PROCESS

An explicit way to describe sales is to define it as an action, where value is created through an interaction between individuals who either represent themselves or an organisation. As a result, customer’s problem is solved, the monetary exchange takes place and thus value is created for all parties involved. (Hänti et al., 2016) Around this core, the implementation of sales might differ not only between industries but within companies of the same kind.

In B2B context one way of organizing sales and operation processes is make-to-order (MTO) method. MTO refers to the manufacturing implementation where the products are produced partly or entirely only after the customer order has been received; the opposite approach is make-to-stock where the production and customer orders are not connected but the products are complete when the customer places an order (Kingsman et al., 1996). Sales and production are strongly connected in MTO companies; production is demand-driven and allows product customization. The products are configurable according to customers’ requests but yet designed to

be manufactured in an efficient way that keeps the cost at the level of mass-produced products (Custódio et al., 2018).

Dealing with customer inquiries is an essential issue for MTO companies (Kingsman et al., 1996), but before that the customer’s inquiry or request for quotation (RFQ) needs to be initiated and that is the responsibility of sales. In a “traditional” sales process the salesperson spends time learning the customer’s processes and then makes a lucrative offer to the customer to attract the customer’s interest in the company’s offering (Kotler et al., 2010). Figure 1 below presents three traditional B2B sales processes recognized in the literature: a six-step process from the 1920s in *How to Increase Your Sales* (1920, 17th ed. as cited in Moncrief & Marshall, 2005), the seven-step process by Moncrief & Marshall (2005) and the six-step process by Kotler et al. (2010). The content of each process is largely the same, only labelling differs.

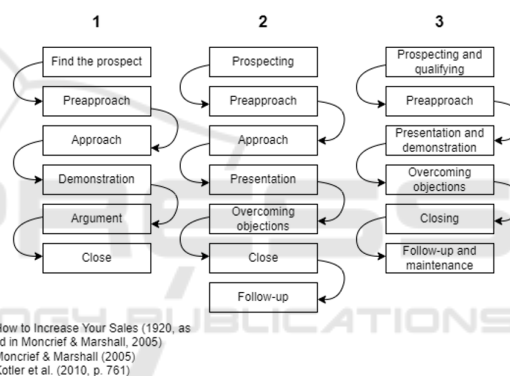


Figure 1: Traditional sales processes presented in the academic publications.

Figure 1 shows that the steps of the B2B sales process have remained almost unchanged over a century, the only remarkable change being the addition of the last step, “follow-up” (Moncrief & Marshall, 2005). According to Kotler et al. (2010), this step is vital to ensure customer satisfaction and loyalty in terms of repeat business. The approach to sales has shifted from forceful, closed means to a relationship-selling approach (Moncrief & Marshall, 2005) where long-term buyer-seller relationships lead to higher sales through rebuys and follow-up orders (Rodríguez et al., 2020). Especially in an industrial context the relationships between buying and selling companies are important, however, the nature of the relationship depends on the strategic importance of the product and process of the two companies; the importance and closeness of the relationship are different with office supplies provider and the

supplier of a product which is essential to buyer's offering. (Ford, 1980) The original advantages of relational selling were cost-benefit consequences for both parties (Hohenschwert & Geiger, 2015) and for the selling company to ensure market position as the close, long-term relationships would pose a barrier for new players to enter the market (Ford, 1980). However, the perception of relational value has recently changed towards cross-organizational problem-solving, where monetary value for customers is created through gains in efficiency and improved processes, for instance (Hohenschwert & Geiger, 2015). The value is co-created with customers (Viio & Grönroos, 2014). Salespeople have a key role in value creation in B2B relationships as they have an excellent position to understand customers' value drivers and try to influence customers' value perceptions in favour of the selling company (Hohenschwert & Geiger, 2015).

The creation of exceptional customer value is a necessity for companies' long-term survival and growth (Terho et al., 2012). Customer value creation is so important that new sales approaches have emerged around it: solution, consultative and value-based selling (Hohenschwert & Geiger, 2015). Many companies are in the process of transitioning to more value-driven sales by developing their solution offering and sales. This is a wider trend in the B2B markets, where even more often the value is created through solutions selling – meaning that products and services are sold as a complete package rather than separately (Brady et al., 2005). Solution-based selling enables companies to go “down-stream” in the value chain (Salonen et al., 2021) which offers an initiative for business-to-business companies to maintain a close buyer-seller relationship (Wise & Baumgartner, 1999 as cited in Salonen et al., 2021). The sales team is a key enabler of this transition as it is up to them to craft a solution offering and communicate its value to the customer (Salonen et al., 2021). With the transition towards solution selling the position of sales changes from being an independent and somewhat isolated function to becoming an integrated, cross-functional part of customer management (Storbacka et al., 2011).

The process of selling a solution is different to selling a product (Brady et al., 2005; Salonen et al., 2021). First, selling solutions is a cyclical process where the post-project services act as an igniter to a new sales project. In traditional product sales, the handover of the product marks the end of the project, but in solution sales, the responsibility of maintenance, support and other lifecycle services remains with the seller (Brady et al., 2005). Second,

the stages of solution selling are different from those of product selling. Solution selling comprises four relational stages (Salonen et al., 2021): (1) definition of customer requirements, (2) integration and customization of goods and/or services, (3) project execution and (4) post-project support. From salespeople point of view this means having to understand customers' businesses better and making more customized solutions for customers' needs (Salonen et al., 2021). Ulaga & Loveland (2014) claim that selling solutions requires different skills and attitudes than selling goods – solution sellers benefit from general intelligence and learning orientation. On the other hand, Storbacka et al. (2011) argue that instead of individual salesperson's skills the unit of analysis should be shifted to the capabilities of the sales unit as sales is becoming an important part of driving strategic initiatives.

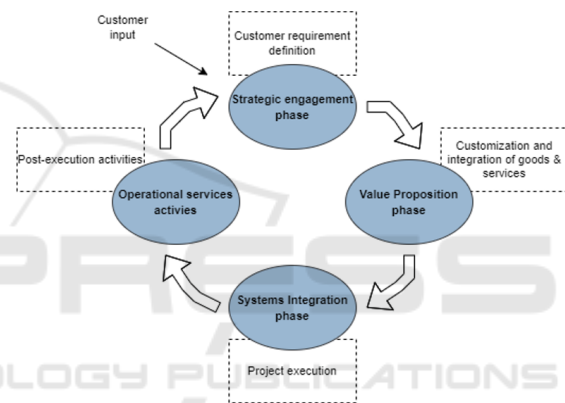


Figure 2: Sales process of selling solutions (adapted from Brady et al., 2005; Salonen et al., 2021).

Figure 2 shows the main stages of the solution sales process. The process is superficial and does not reveal the micro activities happening throughout the sales process, such as customer touchpoints, capabilities needed and so forth. Rabetino et al. (2018) have recognized that existing research tends to simplify the sales process and not go into the individual tasks and interfaces within the process. They've formed a five-step framework for selling solutions in an industrial context which is a consensus of the traditional 7-step sales paradigm (Moncrief & Marshall, 2005) and the solution selling frameworks (Brady et al., 2005; Salonen et al., 2021; Storbacka, 2011). The steps are (Rabetino et al., 2018)

- 1) Information acquisition
- 2) Initial negotiation
- 3) Value proposition and real negotiation
- 4) Offering deployment and value authentication
- 5) Customer operations maintenance and support

The most important purpose of the information acquisition -step is to find customers whose needs match the seller’s resources (Storbacka, 2011). This is done, for instance, by regular visits to customers by a dedicated salesperson (Rabetino et al., 2018) who engages the customer in a discussion of their business problems before any official invitation to tender has been issued (Brady et al., 2005). This ensures the right contacts in the customer company and acts as an ignitor for preliminary negotiation in step 2 (Moncrief & Marshall, 2005). The aim is to make the customer interested in the seller’s offering (Töytäri et al., 2011).

In value-based selling the value is determined iteratively together with the customer preferably in a cross-organizational team and this is what happens in step 3 (Storbacka et al., 2013; Töytäri et al., 2011). In the actual negotiation the quantified value should be turned into an offering which meets or even exceeds the customer’s expectations (Brady et al., 2005; Töytäri et al., 2011). Steps 4 and 5 take place in parallel and are initiated when the customer and seller have reached a mutual contractual agreement (Brady et al., 2005; Rabetino et al., 2018). The solutions are usually difficult to price as the lifetime costs of the solution must be considered and a common understanding of how value will be measured in terms of pricing needs to be formed together with the customer. In addition, differing from traditional product offerings project managers in steps 4 and 5 have to pay attention to customer satisfaction besides the usual constraints of budget and schedule. (Brady et al., 2005)

Though companies’ offering still rely heavily on products, they are heading more and more towards solution offering and value-based selling and their sales processes resemble the above-mentioned industrial B2B solution sales process very much. This can be explained by the nature of MTO products, which require more interaction between customers and sales than make-to-stock products which are sold from an inventory and customers cannot affect the product design (Parente et al., 2002). So, selling MTO products includes cooperative problem-solving and value-creation between seller and buyer by default. In some cases, it is noteworthy that the sales scene is determined by competitive bidding: when a customer decides to enquire about a product, the inquiry is usually sent to all suppliers simultaneously and the competing quotes will be evaluated before selecting the company with which the order will be placed (Kingsman et al., 1996). This means that even though the seller has been negotiating closely with the customer over several months the customer might end

up choosing another supplier and the seller is left with empty hands; Tobin et al. (1988) argue that the percentage of quotes becoming firm orders varies from 3 % to virtually 100 %. Another determining factor of the sales process of MTO products is the cooperation of production and sales units. Production is driven by demand and on the other hand production capacity sets limits to selling products (Feng et al., 2008; Tobin et al., 1988).

Production and sales are traditionally two non-coordinated business units whose decisions have a significant impact on the company’s financial performance and operational efficiency (Feng et al., 2008). Ideally, the process of bidding or quoting for orders (which is part of sales) should be used to some level to design the order book so that it can be produced profitably (Tobin et al., 1988). Sales and Operations Planning (S&OP) is a tool used to bring the two departments together strategically (Feng et al., 2008), but on a daily basis, this means that the salesperson and product manager are in close contact during the bidding process. This is illustrated in Figure 3 below, which draws a consensus on the sales processes presented in this section.

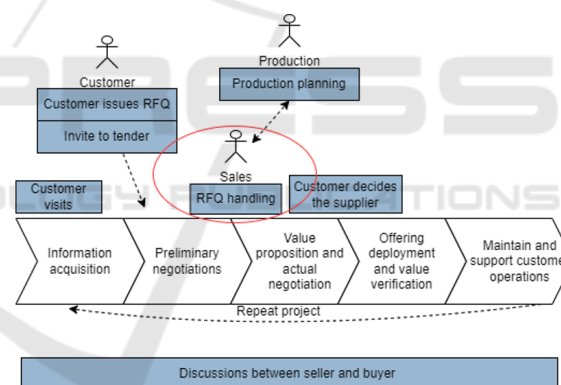


Figure 3: Solution selling process (adapted from Feng et al., 2008; Kingsman et al., 1996; Rabetino et al., 2018).

4 EFFECTS OF DIGITAL TRANSFORMATION ON SALES

This section discusses both digital transformation and digitalization and reflects towards our future research. Digital transformation means the use of new digital technologies that enable extensive business improvements and influence customers’ life thoroughly (Reis et al., 2018). Digitalization means altering analogue processes into digital processes (Überwimmer et al., 2021). According to Überwimmer et al. (2021), companies either

proactively drive digitalization in their operations or are forced to digitalize by external pressure. Companies driving digitalization consider improvements in efficiency as one of the primary goals to be achieved with digitalization. (Überwimmer et al., 2021) Despite the efforts made to enhance digital transformation the gains in productivity and efficiency have hardly materialized (Wengler et al., 2021). On the other hand, some studies reveal that technologies and digital tools have improved B2B sales in terms of revenue, effectiveness, profitability and understanding of customer's needs as argued by Mattila et al. (2021). Nonetheless, companies are often forced to change by the market and their customers (Überwimmer et al., 2021) and by major disruptions brought about by advancements in digital technology, such as artificial intelligence and machine learning (Singh et al., 2019). Even though the current sales practices and theories are threatened, new opportunities for sales practice and research are opening (Singh et al., 2019) and companies need to embrace this development to stay competitive (Überwimmer et al., 2021).

In sales, digital transformation can be defined as improving customer outcomes in existing business models and advancing competencies and rethinking the value proposition of the firm by applying digital technologies to current company resources. Digital transformation requires digitalization. (Singh et al., 2019) The applied digital technologies fall into three categories (Ahearne & Rapp, 2010): salesperson-oriented, customer-oriented or shared. Salesperson-oriented and customer-oriented technologies are used exclusively either by sales or customers and shared technologies are interactive, social media being an example of this. (Ahearne & Rapp, 2010) Überwimmer et al. (2021) see the shared technologies profoundly changing the way of contacting and communicating with customers: first contacts are preferred to be made in social media and meetings with customers are reduced, but simultaneously the speed of response is expected to increase. Singh et al. (2019) say that B2B companies are launching self-service platforms for customers to browse items and track or place orders; similarly, buyers are introducing online platforms for suppliers to participate in tender processes.

Sales channels are being rapidly digitized, again, to stay competitive and save on costs, improve selling efficiency and improve customer value (Thaichon et al., 2018). Überwimmer et al. (2021) consider the biggest changes brought about by digitalization in sales to be the new channels to communicate, the need for real-time data availability and the role of

sales. Many studies proclaim the need for a multichannel approach to contacting customers (Ramos et al., 2023; Thaichon et al., 2018). According to Syam and Sharma (2018), the sales processes will be impacted by robotics, machine learning and artificial intelligence causing the automation of routine sales tasks. The automation is targeted to routine, non-productive processes and this will free up salespersons' time for more productive, customer-facing tasks. (Syam & Sharma, 2018) Automation of sales is called sales force automation (SFA) which together with related digital sales tools is profoundly changing the work division and dynamics between the selling and buying companies (Mahlamäki et al., 2020).

Automated sales processes enable customers to find appropriate information about products and services fast and even perform simple transactions without the involvement of a salesperson (Thaichon et al., 2018). Also, more refined tools are available, such as sales configurators – digital tools designed to guide the user through a service or product configuration process (Rogoll & Piller, 2004, as cited in Mahlamäki et al., 2020). The configuration process produces a configuration which describes the make-up of an instance of a product customized to the customer's requirements within the limits set by the product architecture (Tiihonen et al., 1996). The demand for customized products is increasing from the customer side (Hvam et al., 2008) and configurable products are the answer to that, having a pre-designed basic structure that is adaptable to customer requirements (Tiihonen et al., 1996). At first, these kinds of configurators were made to assist sales representatives in their job, but recently the configurators have been made available for buyers' independent use as well without the salesperson being present (Mahlamäki et al., 2020). Configurator is just an individual example of SFAs - some professionals estimate that even over a third of the sales processes could be automated (Mattila et al., 2021).

So, digital transformation changes the role of sales from "selling classical products with the classical tools" (Überwimmer et al., 2021). The ways of interacting change and the roles each user (buyer or supplier) plays become blurred in the digital platforms (Kumar et al., 2018; Mathmann et al., 2017). Nonetheless, salespersons still have a valuable role when customers request more complex solutions (Ahearne & Rapp, 2010) and today's buyers are increasingly asking for complex combinations of services and products (Singh et al., 2019). When the solution is complex the sales process itself tends to be more complex and the deal is not made just between

two people but also the hierarchical levels of both buyer and seller companies must be considered. Selling complex solutions requires more face-to-face encounters to close deals compared to selling simple solutions and products and therefore the digitalization of a complex sales process is slower. (Rodríguez et al., 2020)

Digital transformation and sales channel digitization change many things in sales, such as the value creation of salespeople which will shift from order handling to a more consultative role, especially for complex products (Thull, 2010 as cited in Singh et al., 2019). Though, some argue that value-creation function in sales profession will diminish (Singh et al., 2019). In any case, ways of working are changing quickly in the complex digital environment which requires quick learning, especially in terms of the above-mentioned customer value creation (Hartmann et al., 2018). Therefore, the sales force needs to develop a new mindset that welcomes and fosters change (Überwimmer et al., 2021). Table 1 gathers subjects affected by digital transformation in sales.

Table 1: Changes in sales caused by digital transformation and related phenomena like digitization.

Change	Source
Selling activities take place online via digital sales channels	Alavi & Habel, 2021; Überwimmer et al., 2021
Customers can place purchase orders without the involvement of sales representatives	Mahlamäki et al., 2020; Thaichon et al., 2018
More consultative role especially in the sales of more complex products	Ahearn & Rapp, 2010; Thull, 2010 as cited in Singh et al., 2019
Ways of contacting and communicating with customers	Singh et al, 2019; Überwimmer et al., 2021
Automation of routine tasks	Mattila et al., 2021; Syam & Sharma, 2018
Unlearning old routines	Mattila et al., 2021
Reorganization of the structure and roles of the sales force	Singh et al, 2019
Hybrid sales structure	Ramos et al., 2023; Thaichon et al., 2018
Multichannel strategies	Ramos et al., 2023; Thaichon et al., 2018

Mattila et al. (2021) emphasize the importance of unlearning beliefs and practices as part of digital transformation. According to Klammer and Gueldenberg (2019), individuals refrain from relinquishing their current habits and ways of working as long as the existing methods remain successful. However, when the environment changes it is necessary to unlearn outdated practices and discard false knowledge. (Klammer & Gueldenberg, 2019) This allows organizations to change processes into more efficient ones (Becker, 2010). Things to be

unlearned in sales due to digital transformation have been studied by Mattila et al. (2021) and they identified the change of mindset organization-wide as one of the main themes. Also, they speak up for actively searching and identifying the need for unlearning by critically reviewing the “old” sales and managerial processes, for instance. (Mattila et al., 2021) Digital transformation also affects the structure and roles in the sales organization. Singh et al. (2019) claim that there is little information on how to structure and organize the sales force to operate soundly and effectively in the new environment. However, they’ve found out that many companies have altered the roles in sales into more specialized and the number of generalist salespeople is diminishing. (Singh et al., 2019)

Also, Thaichon et al. (2018) claim that digital transformation and the rise of e-commerce are evolving the sales structures – the traditional focus on the outside sales force has shifted to valuing the inside sales force which is extended with the successful use of online channels. They consider the hybrid sales model as the sales structure of the e-commerce era. (Thaichon et al., 2018) Hybrid sales model combines outside and inside sales and online channels (Ramos et al., 2023; Thaichon et al., 2018). Inside sales refers to salespeople who are remote and not engaged with any traditional face-to-face customer interaction, but they use different communication technologies. The role of inside sales has evolved into having strategic importance in customer value creation and different inside and outside sale configurations. (Ramos et al., 2023) Hybrid sales model requires cooperation between all the discrete parties in the hybrid sales model - inside sales, outside sales, and online channel - and value co-creation with the customer through all three contact points (Thaichon et al., 2018).

Dynamic capabilities are the enablers of hybrid sales (Ramos et al., 2023; Thaichon et al., 2018). According to Wilson and Daniel (2007), the required capabilities are 1) active review of “route to market” structures, 2) aligning sales structures with products and services, 3) creating innovative (sales) channel combinations, 4) integration of processes and IT to assist multi-channel customer relationships. Implementation of sales technologies, such as SFA, enables sales forces to accomplish their tasks faster and more efficiently and supports seamless, real-time communication between inside and outside sales and sales forces and customers which is central to the hybrid sales in general (Thaichon et al., 2018).

Digitization and digital transformation act as enablers of many improvements, but as in all major changes there are obstacles hindering the

development. In their article, Wengler et al. (2021) studied major barriers to digital transformation in sales and in all hierarchical levels time constraint was named the number one barrier. The top three perceived barriers differed between managerial and employee levels otherwise: managers see the company's lack of know-how and sales processes, which are not defined well enough to proceed with digital transformation as main barriers for digital transformation along with time constraints. However, employees consider the company having sufficient knowledge but see customers' know-how or use of different systems as barriers along with budget constraints. (Wengler et al., 2021) Organizational readiness in terms of capabilities and processes is important for a successful digital transformation process (Vial, 2019).

Alavi and Habel (2021) state that the human factor can hardly be overestimated when it comes to digital transformation in sales. They claim that digital transformation projects rarely fail because of technical issues but of companies' poor management of human factor. Salespeople are not afraid of new technologies as such, but they feel positive about the potential of digital sales technologies. However, they have concerns regarding job autonomy, for instance, being afraid that they could be monitored to a larger extent through the new technologies. (Alavi & Habel, 2021) Mattila et al. (2021) found that sometimes the digital transformation progress is slow due to unwilling individuals and slow changing organizational processes. This type of problem can be solved with managerial practices. (Mattila et al., 2021) Lastly, Wengler et al. (2021) claim that managers still follow "old KPIs" to measure performance and those are not applicable anymore. Suitable KPIs are needed as it is hard to manage a business properly in the digital era without those. (Wengler et al., 2021)

Unarguably digital transformation is going to change the role of sales. Some transactions take place online without the involvement of a sales representative, but offerings in B2B markets are getting growingly complex and customers more demanding – therefore, sales has a strategic role as the sales activity is changing to a more consultative, solution-selling approach and maintaining customer relationships is of great importance (Ramos et al., 2023). Digitization and digital transformation are underway and related challenges remain to be dealt with. As mentioned above, the human factor, both on an individual and organizational level, plays a big role in the success of the digital transformation.

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