

Challenges and opportunities in the digitalization of the B2B customer journey

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Abstract

Purpose – This study aims to explore challenges and opportunities in the digitalization of the business-to-business (B2B) customer journey in different buying situations. It also investigates where in the customer journey digital marketing is most efficient.

Design/methodology/approach – This research adopts a single case study approach to examine a B2B company that implemented digitalization in its customer journey in different buying situations. Data were collected through semistructured interviews, complemented by internal documents and information from the company's website and social media, to identify reasons for and against the decision to digitalize the B2B customer journey.

Findings – Digitalization can offer firms a cost-effective and value-creating way to interact with customers in a B2B context. The B2B buying situation, however, plays a significant role in decisions on how to implement digitalization. Moreover, in the prepurchase phase, digital marketing is more effective in building awareness; in the purchase phase, personal selling is more effective in addressing customers' needs.

Research limitations/implications – The use of a single case study cannot produce results directly generalizable to other contexts. However, the findings are applicable to the digitalization of B2B customer journeys in similar industrial contexts.

Practical implications – To successfully implement digitalization in the customer journey, B2B firms should choose digital tools according to different buying situations and phases in the customer journey, segment buyers by their needs rather than individual characteristics and integrate the sales and marketing functions.

Originality/value – This study contradicts prior research that claims that digital marketing can be used in a similar way in both B2B and business-to-consumer contexts. It further shows that the relevant demarcation is not between personal sales and digitalization but between automated digital marketing and individualized personal sales, regardless of medium.

Keywords Business-to-business, Digitalization, Customer journey, Buying situation

Paper type Research paper

1. Introduction

New communication and information technology advances in digital content and social media are changing how individuals and businesses interact (Greenberg, 2010; Järvinen and Taiminen, 2016; Kietzmann *et al.*, 2011). The COVID-19 pandemic accelerated this transformation, as it hindered personal, face-to-face contacts. Especially in the business-to-business (B2B) sector, in which personal selling is the predominant way of doing business, the pandemic drastically changed the relationship patterns between buyers and sellers (Hayes and Kelliher, 2022). Consequently, the pandemic has increased the relevance of digital tools in the B2B context (Hu, 2022; Hu and Olivieri, 2023).

However, this transformation began earlier than that. A study in 2012 of more than 1,400 B2B buyers found that customers rely heavily on online information sources and complete nearly 60% of the typical purchasing process before contacting a seller (Adamson *et al.*, 2012). A Gartner (Bryan, 2018) report also indicates that more than 80% of B2B buyers

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search for information on the internet in the prepurchasing phase. The COVID-19 pandemic affected the customer journey or customers' processes, needs and perceptions throughout all their touchpoints and relationships with a seller. Research examining the customer journey has assessed what this journey consists of, including its phases (i.e. prepurchase, purchase and postpurchase) (Frambach *et al.*, 2007; Lemon and Verhoef, 2016) and touchpoints (Steward *et al.*, 2019). However, that research focuses mainly on the business-to-consumer (B2C) sector, leaving the customer journey in the B2B context largely unexplored (Homburg and Tischer, 2023). The use of digital marketing in B2B firms is also less explored than in a B2C context (Brink, 2017; Kim and Moon, 2021; Leek *et al.*, 2019; Setkute and Dibb, 2022). The B2B customer journey is characterized by more complex processes, more touchpoints and more involvement of multiple people from different units in the buying firm, with different functions and skills than in the B2C customer journey (Fraccastoro *et al.*, 2021; Homburg and Tischer, 2023; Witell *et al.*, 2020). Recent years have witnessed a growing interest in the digitalization of B2B customer journeys. Lundin and Kindström (2023) identify three key dimensions of B2B customer journeys affected by digitalization: the digitalization of touchpoints, the change of roles in digitalized journeys and the digitalization of the overall process. Rustholkarhu *et al.* (2022) examine the effects of artificial intelligence (AI) in B2B customer journey management by identifying AI functions in digital tools and analyzing their benefits in certain phases of the journey. However, knowledge on how the implementation of digital tools affects the customer journey in different buying situations and different phases of the journey is still lacking.

The buying situation determines the complexity of the buyer–seller relationship (Wilson, 2000). From a firm perspective, the various ways to deal with different buying situations introduce challenges and opportunities for the digitalization of the B2B customer journey. How different buying situations influence the digitalization of B2B customer journeys has not been addressed before in the literature and represents a gap that deserves academic attention.

As such, the aim of this study is to explore challenges and opportunities in the digitalization of the B2B customer journey in different buying situations. The study also investigates where in the customer journey digital marketing is most efficient. We intend to answer the following research questions:

- RQ1.* How do sellers use digital tools in the B2B customer journey?
- RQ2.* What are the reasons for or against implementing digital tools in the customer journey? and
- RQ3.* What are the challenges and opportunities in the implementation of digital marketing in different B2B buying situations and different phases of the customer journey?

Our findings add to existing knowledge on the digitalization of B2B customer journeys and offer managerial insights into how to implement digital tools in different phases of the journey. They also show how different buying situations affect the efficiency of digitalization. We conducted an in-depth investigation of a B2B

company that has implemented digital tools in the B2B customer journey. We first present the theoretical background with a focus on the study's most important concepts: digitalization of the B2B customer journey and B2B buying behavior. We then discuss our method and describe the data collection and analysis. Next, we present the study findings and related propositions. Finally, we discuss the study's theoretical contributions and managerial implications and suggest avenues for future research.

2. Literature review

2.1 Business-to-business customer journey

We use the customer journey terminology identified in the literature (i.e. prepurchase, purchase and postpurchase) to explore challenges and opportunities in the digitalization of different phases in the customer journey (Frambach *et al.*, 2007; Lemon and Verhoef, 2016; Lundin and Kindström, 2023). Research examining the customer journey has focused mainly on the B2C sector (Frambach *et al.*, 2007; Lemon and Verhoef, 2016; Steward *et al.*, 2019), while research on customer journeys in the B2B context is scant. However, having knowledge of the customer journey is crucial for understanding business customers (Lingqvist *et al.*, 2015). The B2B customer journey is more complex than the B2C customer journey, as it involves multiple people from the buying firm with different functions and skills (Homburg and Tischer, 2023). Thus, the seller's interactions with the buyer involve many different units, including marketing, sales, customer support and logistics. This involvement of different departments in the customer relationship can create tension between marketing and sales (Kotler *et al.*, 2006; Wang *et al.*, 2019), with sales focused on personal selling and marketing on digital media communications. The lack of alignment between the marketing and sales functions can be a challenge in many organizations (Patterson, 2007). In their literature review on key contributions in the B2B customer journey, Rustholkarhu *et al.* (2022) identify only a few studies examining digitalization in a B2B customer journey context (Lundin and Kindström, 2023; Marvasti *et al.*, 2021). We complement that review by identifying new studies dealing with digitalization in the B2B customer journey (see Table 1). However, we found no studies that address in depth how different buying situations influence the implementation of digital tools in different phases of the customer journey.

2.2 Digitalization of the business-to-business customer journey

Digital developments have created opportunities for companies to change how they interact with business customers during the customer journey. Customers can now seek out necessary information with digital tools and compare different offers. This means that potential buyers spend time searching for relevant digital information about a company or a product before making a buying decision. According to Matias (2018), buyers are already 60% into the B2B buying journey when they contact a salesperson.

The internet has brought significant changes to B2B companies' marketing efforts, such as digital content, search engines and social media marketing (Cheng *et al.*, 2023; Opreana and Vinerean, 2015). B2B companies with high digital capability tend to do better financially because this capability allows them to communicate and collaborate with

Table 1 New research on the B2B customer journey

Article	Aim/research questions	Method	Findings/contributions	Digitalization
Lassila et al. (2023)	The study examines the role of interaction in supporting value cocreation during prepurchase customer journey stages when selling professional B2B services	Qualitative, semistructured interview data collected from potential B2B customers	The study indicates that interaction plays a crucial role in prepurchasing stages of the customer journey	No focus on digitalization
Homburg and Tischer (2023)	(1) How can B2B customer journey management capability (CJMC) be conceptualized and operationalized? (2) What are the bright and dark sides of B2B CJMC? (3) Does B2B CJMC pay off? (4) When does B2B CJMC pay off?	Mixed-methods approach	B2B CJMC has an indirect effect on firm performance (i.e. return on sales) through two opposing mechanisms: customer loyalty and customer-related coordination costs	No focus on digitalization
Purmonen et al. (2023)	The study conceptualizes B2B customer journeys. It synthesizes the literature on customer journeys, B2B purchase processes and buying centers, as well as business relationships	Literature review	The study explicates the conceptual underpinnings and core elements of the B2B customer journey and provides a novel, customer-centric definition of the concept	No focus on digitalization
Rusthollkarhu et al. (2022)	The study analyzes how AI empowered tools and their functions help companies manage B2B customer journeys	Literature review, mapping of digital tools and identifying and analyzing AI functions in those tools	The study enriches understanding on the effects of AI in B2B customer journey management by identifying AI functions in the tools and analyzing their benefit for each customer journey management activity in certain phases of the journey	Focus on digitalization
Terho et al. (2022b)	The study conceptualizes digital content marketing (DCM) in B2B markets and pinpoints contingencies that affect its performance	A theories-in-use approach, building on 56 interviews with managers at 36 B2B companies	The study provides an actionable roadmap for effective implementation of DCM for managers in business markets	Focus on digitalization

Source: Authors' own work

their customers more efficiently ([Liu et al., 2023](#)). In the past decade, essential changes in technology development and process automation have also occurred in the B2B ecosystem. Therefore, in today's digital marketing, understanding customers and their journey is essential to acquire new leads and improve the sales process ([Maier, 2021](#); [Saura et al., 2021](#)). A sales lead refers to a person who has been in contact with a company regardless of buying intention and who often sets requirements to buy in the future ([Joshi, 2021](#)). Digital tools can be used to match leads to salespeople and to give salespeople the information they need to close the sale ([Baumgartner et al., 2016](#)).

The development of new technologies has made availability and information gathering easier for buyers ([Maier, 2021](#)). New digital technology has also led to significant changes in sales and marketing processes, which has changed how sellers interact with buyers ([Edelman and Singer, 2015](#); [Maier, 2021](#); [Pandey et al., 2020](#); [Rusthollkarhu et al., 2022](#)). Buyers in the B2B context use digital means to compare different products or brands, analyze the market for the best fit and establish contacts with sellers ([Corsaro and Maggioni, 2022](#); [Edelman and Singer, 2015](#); [Itani et al., 2017](#); [Steward et al., 2019](#)). [Terho et al. \(2022a\)](#) identify marketing and organization contingencies that affect the digital marketing performance. In addition, research has found that while digital tools can be used in all stages of the customer journey, emotional and social competences are still required in the B2B selling process ([Paschen et al., 2020](#); [Rodríguez et al., 2020](#)).

Digitalization has made it easier for B2B buyers to research, compare and order offerings and, thus, has changed B2B buying

behavior ([Edelman and Singer, 2015](#); [Steward et al., 2019](#); [Terho et al., 2022b](#)). To be visible to potential customers and to guide them through the customer journey, B2B sellers need to be prominent on digital platforms, websites and social media ([Corsaro and Maggioni, 2022](#)).

[Terho et al. \(2022a\)](#) define "social selling" as a selling approach in which the salesperson uses social media at relevant touchpoints during the customer journey to understand, connect with and engage influencers, prospects and customers. [Schmitt et al. \(2021\)](#) argue that social selling can be integrated into the whole sales process, from prospecting to closing the sale to maintaining customer relationships. Content marketing uses social media to communicate with different stakeholders, such as customers, employees, potential customers and suppliers ([Andersson and Wikström, 2017](#)). Digital content in a B2B context is often about industry issues, phenomena and trends ([Taiminen and Ranaweera, 2019](#)). Obtaining users' demographics (e.g. age, gender) through social media can be an easy task, and doing so is useful when products relate to segments that can be identified through demographic data. These factors also influence the use of digital marketing. [Hu and Olivieri's \(2023\)](#) recent study shows that B2B companies rely more on digital marketing; however, traditional marketing and communication tools for personal selling have not been completely replaced. Therefore, gaining more insight into when digital tools are more effective and when digital marketing or personal selling is more effective is important. [Terho et al. \(2022b\)](#) investigate digital content marketing in a B2B context and identify generating intelligence about

customer journeys, creating a portfolio of valuable content and engaging customers through content sharing as key activities, but they do not investigate how different B2B buying situations influence digitalization of the customer journey.

2.3 Business-to-business buying behavior

In contrast with consumer buying behavior, B2B purchases can involve multiple individuals and functions driven by various organizational and individual goals (Johnston and Bonoma, 1981; Lewin and Donthu, 2005; Macdonald *et al.*, 2016). Few studies have focused on customer journeys in a B2B context, in which decisions are made by collectives rather than individuals (Hamilton *et al.*, 2021; Purmonen *et al.*, 2023). With technology development, B2B buying behavior has changed drastically in recent years (Chatterjee *et al.*, 2022; Matias, 2018). As mentioned, B2B buyers search for information on the internet before contacting potential suppliers. Prior research has also shown that differences in the complexity of the buyer–seller relationship influence the buying behavior between sellers and buyers in a B2B context. High complexity in the buyer–seller relationship requires a deeper understanding between the parties (Andersson, 2002; Andersson and Servais, 2010).

Research has identified three B2B buying situations: straight rebuy, modified rebuy and new task (Gustafson *et al.*, 2021; Robinson *et al.*, 1967). These different buying situations present opportunities and challenges to implement digital tools in the customer journey, as each situation requires a different level of problem-solving. Straight rebuy situations involve little problem-solving, as the buying situation is a routine decision (Hill and Hillier, 1977; Nicosia and Wind, 1977; Osmonbekov and Johnston, 2018) and, therefore, the need for new information is low (Gustafson *et al.*, 2021). Modified rebuy situations involve a higher level of problem-solving than in a straight rebuy situation, and the need for information is greater (Robinson *et al.*, 1967). New task buying situations have the greatest need for extensive problem-solving, as the buyer does not have knowledge of or experience with the products and services offered. These buying situations strongly influence the use of digital means in the buyer–seller relationship. In a straight rebuy, a buyer can go directly to a website and order what is needed. However, in a modified rebuy or new task situation, the process is more complicated, as the offer needs to be adapted to each situation. In a new task situation, salespeople need to undertake more than just sales; they also need to serve as consultants and experts. Thus, more knowledgeable salespeople who can provide more customized solutions are required in these situations. The sales job includes guiding customers through their individualized journeys and providing tools to help them in their decisions (Corsaro and Maggioni, 2022). The efficiency of these digital efforts can vary significantly across different phases of the customer journey.

3. Methodology

3.1 Research strategy

We adopted a qualitative, single case study approach as our research strategy. This approach is appropriate when little is known about a phenomenon and when existing theory is not exhaustive or adequate (e.g. Eisenhardt, 1989; Eisenhardt and

Graebner, 2007; Johnston *et al.*, 1999; Miles *et al.*, 2013; Yin, 2014). Single cases are especially useful when exploring new phenomena under rare or extreme circumstances (Eisenhardt and Graebner, 2007), when phenomena are initially examined in a given field (Eisenhardt, 1989) or when an opportunity to collect unusual research becomes available (Yin, 2014). The COVID-19 pandemic fulfills these criteria, as it forced firms to interact in new ways with customers (due to restriction of personal contact). Case studies are recommended for studies in a B2B context because the buyer–seller relationship is difficult to access and more complex in structure than in consumer markets (Dubois and Gibbert, 2010). Case study methodology also allows multiple data collection methods, such as interviews, observation and analysis of websites and company brochures. In addition, the case study approach is favored when studies examine real-life instances of contemporary phenomena and when boundaries between phenomena and contexts are not evident (Yin, 2014). Finally, a single case study is appropriate when examining a process (here, customer journey) as it enables identifying how different factors affect the process over time (Langley, 1999). In this study, “case” refers to B2B firms’ challenges and opportunities in the digitalization of the customer journey.

3.2 Selection of the case company

The selection of the case company followed a purposeful sampling strategy, in which a case that is special in some way is selected (Patton, 2002). Purposeful sampling facilitates rich and meaningful information instead of generalization (Lincoln and Guba, 1985). We identified a B2B company that had integrated digital marketing into its marketing and sales approach and whose customer journey included different buying situations. As the firm desired anonymity, we use the pseudonym “Alfa.”

3.3 Data collection

We collected the primary sources of data through semistructured interviews. We prepared an interview guide based on the literature on the digital transformation of B2B customer journeys and discussions with Alfa’s management (see the Appendix). Semistructured interviews allow the interviewer to present a list of topics or scenarios, which gives guidance to the interview. They also allow respondents to talk freely about what they consider most relevant to the topic. That is, instead of being limited by other research findings, we were open to new insights from the respondents (Zeithaml *et al.*, 2020). We developed the interview guide over time, and data collection and first analysis were interrelated processes. For example, when analyzing the interviews with management, we obtained insights into crucial parts of the customer journey and the factors influencing it that we could draw on in interviews with marketing and sales personnel (Corbin and Strauss, 1990).

The main interviews for the study took place in 2022. The interviews were recorded, and respondents were informed about the purpose of the study and the topic of the interview. After completing all interviews and writing the empirical section, we sent a draft of the work to all respondents and asked them to validate that we had interpreted their statements correctly and to approve publication (Sekaran and Bougie,

2016). With the ongoing COVID-19 pandemic and the need to interview employees from other countries, we conducted most of the interviews through computer-assisted technology such as Zoom and Microsoft Teams (Sekaran and Bougie, 2016).

The respondents for the study were selected by Alfa's management. These respondents had knowledge about various stages of the customer journey and, therefore, could offer valuable insights into Alfa's activities. Thus, we used purposive sampling, specifically selecting key informants with expertise and experience across different phases of the customer journey (Johnson, 2015; Sekaran and Bougie, 2016). The primary focus was on staff who had firsthand knowledge of the digitalization of Alfa's customer journey. Alfa also had conducted a recent customer survey that we reviewed to understand the customer perspective. We conducted an interview with one customer to reinforce the findings from the survey. Data collection ceased upon reaching saturation, signifying a comprehensive understanding of Alfa's customer journey and digitalization (Strauss and Corbin, 1998).

We interviewed employees from Alfa's marketing, customer support and sales departments, representing Alfa Sweden, Benelux (Belgium, The Netherlands and Luxembourg), Germany and Great Britain, as well as one Swedish customer. Table 2 shows the details of the interviews. We presented the preliminary results to the marketing and sales managers in June 2022. In September 2022, we met with the sales manager to gain complementary insights into the latest sales developments. In 2024, we conducted a follow-up interview with the sales manager with a main question: how has the digitalization of the customer journey developed since 2022?

To complement the interviews, we obtained secondary data, including annual reports, newsletters, newspaper articles and company-produced digital content on the website and social media (LinkedIn, Facebook and YouTube). In addition, we received internal material from the company about the customer journey, an internal survey, a customer survey and the basis for its brand platform. We have cooperated with the case company for more than 15 years and possess deep

knowledge about its overall strategies, which gave us additional insight into the company's background.

3.4 Data analysis

We recorded all interviews and took detailed notes. We triangulated the interview data by comparing data from the different interviewees and secondary data. We contacted firm representatives if we found facts that were unclear. Data triangulation yielded a high level of validity (Beverland and Lindgreen, 2010; Piekkari *et al.*, 2010). We structured our findings in line with themes we identified as important to answer our research questions and the phases of the customer journey (Miles *et al.*, 2013). We also carried out an inductive analysis driven by empirical insights emerging from the data (Gioia *et al.*, 2013). We inductively identified reasons to adapt to digital marketing and to retain personal sales in the customer journey.

To organize and analyze the findings, we considered how the observations could be grouped, what they were examples of and how they related to the decision to digitalize the customer journey. The data analysis process followed the recommendations of Gioia *et al.* (2013), in which the data undergo a "step-up" in abstractness from raw data in first- and second-order themes to aggregate dimensions. Doing so set the foundation for balancing the informants' view of the phenomenon with the helicopter view, which is required to glean theoretical insights. Figure 1 depicts the data structure.

4. Alfa

4.1 Alfa's offer to customers

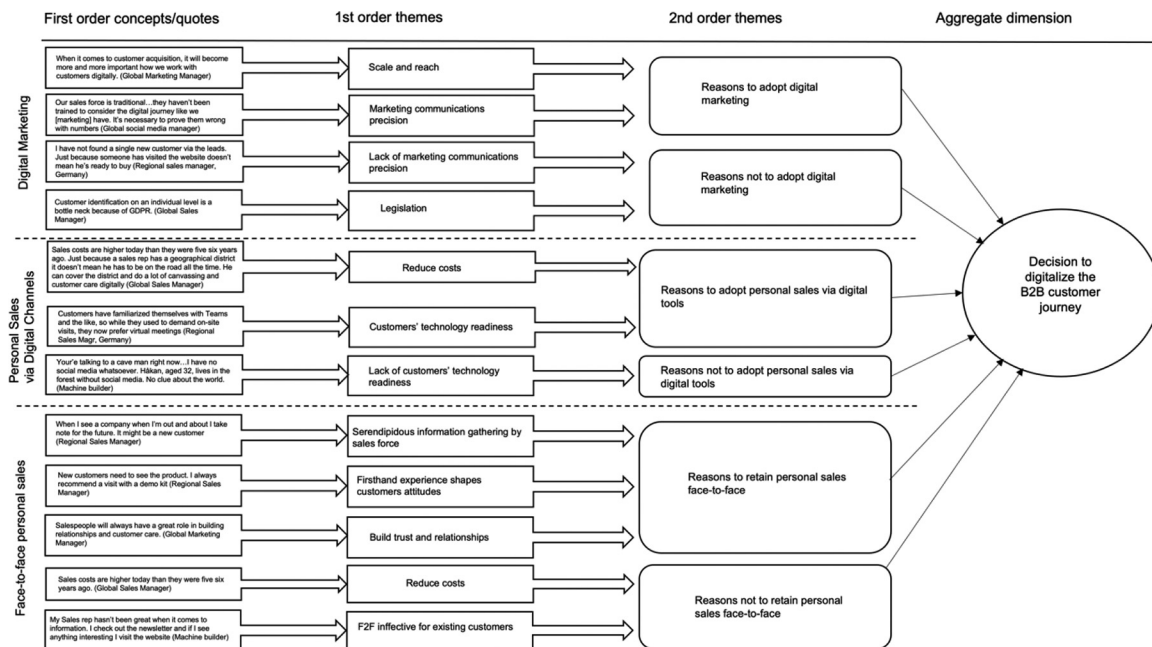
Alfa offers a safe work environment to customers to reduce injuries among customer employees and prevent costly delays due to incidents requiring production stoppage. Compliance with health and safety laws also avoids costly legal processes. Alfa's products serve as a kind of insurance against several possible negative outcomes that could stop customers from making money. Its offer can be categorized as unsought capital

Table 2 Interview details

Position	Worked at Alfa	Interview date	Length of interview
Global sales manager	17 years	December 3, 2021	47 min
Global sales manager	17 years	February 23, 2022	58 min
Marketing manager in Sweden	2.5 years	February 23, 2022	55 min
Marketing and customer support in Benelux	4.5 years	March 11, 2022	55 min
Global account director	4 years	March 16, 2022	51 min
Sales and marketing in Germany	1.5 years	March 22, 2022	45 min
Salesperson in Sweden	8 years	March 22, 2022	45 min
Social media manager in Sweden	14 years	March 29, 2022	48 min
Customer from Sweden	Worked with Alfa for 7 years	March 30, 2022	27 min
Salesperson in Germany	4 years	April 6, 2022	55 min
Coordinator for global sales	8 years	April 13, 2022	45 min
Customer support in Germany	7 years	April 13, 2022	43 min
Customer support/inbound sales in Sweden	1.5 years	April 13, 2022	41 min
Global sales manager	17 years	September 13, 2022	49 min
Global sales manager	19 years	February 26, 2024	46 min
Global sales manager	19 years	April 16, 2024	22 min

Source: Authors' own work

Figure 1 Summary of data coding from interviews



Source: Authors' own work

items (Aagerup *et al.*, 2022) because customers do not tend to focus on them; instead, they focus on the machinery because it is central to operations and requires greater investment.

Alfa also offers an attractive manufacturing environment. Alfa's products are assembled around high-value machinery, which customers are proud to show off. Therefore, aesthetics are important to project a positive impression of the customers' factories. Machines are large investments, so Alfa needs to install the safety equipment quickly in accordance with regulations so that customers can start production. Alfa helps customers design their protection solutions and then delivers the modules. The production is automated to manage a high volume. The product comprises standardized modules; however, all installations are customized to individual buyers.

Typical customers do not buy Alfa's products every day or every month, so having Alfa top of mind is critical when they need to buy protection for machineries. Alfa presents itself as a deliverer of customer utility (safety), not products *per se*. All projects are unique in terms of conditions, requirements and preferences. Even so, the components that make up the offer are standardized, which provides advantages. First, standardization helps Alfa keep all products in stock, which enables it to ship orders the same day they are placed. Second, because the system must meet the European Union regulations for machinery protection, the most stringent requirements in the world, the products can be used anywhere. Flexibility is important because machinery is installed in different types of facilities with different distances to walls and ceilings; thus, installation needs to accommodate each customer's unique requirements. In addition, solutions need to be tailored for every installation because equipping all machinery with the same safety equipment is not possible. Flexibility comes from innovative product design. Alfa has developed a system of

modules that feature a proprietary fitting system that allows flexible configurations. Moreover, unlike most competing products, Alfa's modules can be assembled without the use of tools. Alfa invests substantial resources in product development focused on both functionality and design.

4.2 Alfa's marketing strategy

Alfa promotes its offer through ads in professional magazines, by taking part in exhibitions and trade shows, by sending newsletters to customers and by maintaining a website and a presence on social media. The goal is to carry out more marketing through digital means. Alfa's marketing communication spending is high, but the company deems this necessary because much of the continued growth comes from new customer acquisitions. Thus, raising awareness among potential customers is important.

5. Findings: digitalization of the customer journey

5.1 COVID-19 pandemic's impact on digitalization of the customer journey

Digitalization had already influenced Alfa's marketing function before the COVID-19 pandemic; however, the pandemic made face-to-face personal sales, which had until then dominated B2B marketing, impossible. These were, therefore, supplanted by content marketing and online meetings. This change forced both buyers and sellers to learn to use new tools, which, in turn, increased their readiness for digital sales technology. In effect, the pandemic changed the communication from face-to-face personal sales to personal sales via digital channels (e.g. videoconferencing via Zoom and Microsoft Teams).

Our findings show that there is not a digitalization versus personal selling dichotomy. Rather, categorical differences exist between automated sales via digital channels and individualized personal sales, and the latter can occur via digital channels or face-to-face. We refer to the different types as digital marketing (e.g. content marketing and behavioral online targeting), digital sales (e.g. telephone, e-mail, chat, moderated responses on social media, Zoom and Teams meetings) and face-to-face personal sales (e.g. sales calls, trade shows and on-site customer support).

Employees' opinions about how digitalization will play out in the future vary across departments. In 2022, the sales organization viewed personal sales via digital channels as the most effective substitute for face-to-face personal sales. Marketing staff, by contrast, regarded automated sales via digital channels (digital marketing) as the more promising way of doing business going forward. The groups' preferred strategies directly related to their functions. This means that if personal sales via digital channels were to become the most important sales method, the sales department would retain control over the strategy and marketing would remain a service function. Conversely, if the strategy were shifted to automated sales via digital channels (digital marketing), marketing would be in charge of making the important decisions. However, despite the differing opinions in the organization about the form that digitalization would take in the future, all respondents agreed that it would continue to be an important marketing tool. Even so, after the pandemic, personal meetings, including trade fairs, began to come back.

The COVID-19 pandemic affected Alfa like most other companies. In general, Alfa's sales force connects with customers in person. Since the pandemic, however, the sales force has been forced to adjust its way of working, from visiting customers and meeting face-to-face to undertaking more work and holding more meetings digitally:

Covid has affected how we meet our customers and follow up [on] quotes; for example, since we have not been able to make visits, there have been more phone calls, emails, and digital meetings than before. Therefore, we have increased our digital marketing efforts and engagement in social media and LinkedIn channels. We have seen that the sales results regarding the new customer acquisition remain the same, even though we make way fewer physical visits. (Global sales manager)

In a customer survey that Alfa sent to its customers in 2021, most customers agreed that the internet was the first way to get in touch with Alfa. However, in some markets digital tools were not implemented. The Benelux market kept the more traditional business approach, just with fewer visits. In

Germany, the pandemic had a significant effect on how the company conducted business because of the difficulty of physically visiting customers. However, the sales results remained the same as before the pandemic, leading the sales force to realize that in some cases, especially for smaller projects, physical visits were not always required to make a deal. Thus, the focus shifted to digital channels and digital inbound marketing, and the Swedish headquarters worked to help the subsidiaries digitally during the pandemic. As mentioned previously, Alfa was already moving to digital transformation before the pandemic; however, the pandemic accelerated the transformation. Although not being able to conduct business as usual with physical visits was a challenge, it enabled digital tools to be used to a greater extent than before. Digitalization facilitated the sales process in arranging meetings with customers in a faster and easier way. In Sweden, the marketing department also received more inquiries during the pandemic, as salespeople were not physically visiting customers. This situation opened the door between marketing and sales and allowed the salespeople to better understand the potential of digital marketing:

Salespeople will always have a great role in building relationships and customer care. But when it comes to customer acquisition, how we work with customers digitally will become more and more important. (Marketing manager in Sweden)

In 2024, a hybrid structure among digital marketing, digital sales and sales was implemented. Personal sales are important in all stages of the customer journey; however, digital tools are also now included in all stages. Table 3 shows the dominant marketing modes in the different phases – before, during and after the pandemic.

5.2 Alfa's customers and their buying behavior

In 2022, the marketing department identified different customer personas (common characteristics, needs and behaviors; Fergnani, 2019) by their demographic profiles. The traditional persona buying Alfa's products is an older man. However, the marketing department discovered that younger decision-makers and more women were becoming more involved in the buying process and that the younger generation was more familiar with digital tools and expected to find more information online. Different types of personas can be leveraged to communicate with customers in different ways.

In 2022, the sales force helped the marketing department identify two distinct customer groups, each characterized by unique buying situations and needs: machine builders and end

Table 3 Alfa's dominant customer interactions and marketing tools

Phases in the customer journey	Personal prepandemic	Impersonal during pandemic	Hybrid approach postpandemic
Prepurchase	Personal sales, trade fairs	Digital marketing, digital content on social media and websites and search engine optimization	Digital marketing, digital content on social media and websites, search engine optimization and trade fairs
Purchase	Personal sales, on-site visits	Digital sales through computer-assisted technology (e.g. teams), digital design system	Personal sales at customer, more personal sales through digital channels and digital design system
Postpurchase	Personal sales, personal service	Digital service and marketing, instruction videos	Digital service and marketing, instruction videos and personal service

Source: Authors' own work

customers. Machine builders are responsible for designing and delivering new machinery, including safety equipment, to end customers. These machine builders, who are often existing customers, possess superior knowledge about safety and are familiar with Alfa's products and operational procedures. Some machine builders have a close relationship with Alfa, incorporating Alfa's products into their own design software. These machine builders take on Alfa's customer-facing role and in this case, transactions involve minimal personal contact between Alfa and the end customer.

The second customer group, end customers, comprising companies intending to use the machinery themselves, typically has limited knowledge about safety. End customers, who are often new customers or infrequent buyers, not only require Alfa's physical products but also need guidance on designing and constructing a safe machine plant. Unlike machine builders, end customers may lack prior familiarity with Alfa's offerings and working practices. As a result, interactions with end customers often necessitate a more comprehensive approach to providing both products and expertise.

After the COVID-19 pandemic, Alfa began segmenting its customers by their needs and potential for future sales. Before the pandemic, the sales organization was geographically segmented, with all salespeople dealing with all types of customers. Through digital tools, combining information from prospects' digital interactions with Alfa, information from the customer relationship management (CRM) system and historical sales patterns, segmentation is now possible. Alfa now has global account managers, that is, local sellers dealing with specific accounts. Through digital means, the sales process can be better planned, enabling these sellers to visit fewer customers and focus these visits on more complicated and large projects.

5.3 Prepurchase phase

In 2022, Alfa found that potential customers first got in touch with Alfa through the internet via a customer survey. When customers have a need for machine safety, they search online, so being at the top of search results is important for Alfa. Alfa works actively with the Web page content and with internet channels to move customers closer to a buying decision.

The company uses an inbound marketing strategy to attract new customers. The focus is on persuading potential customers to contact Alfa and on identifying leads that can be handed over to the sales department for contact. This marketing strategy also focuses on creating relevant and personalized content for different target groups to attract and engage potential customers to move them further along the sales process. For example, Alfa has a specific account for global customers (those with activities in many countries), which are targeted directly from headquarters. The aim here is to establish engagement and build rapport. At new product launches, Alfa contacts its subsidiaries in different markets to give input about relevant content and to identify target groups. Alfa uses Google Ads (formerly AdWords) and search engine optimization, together with paid and organic content in social media, for account-based marketing and new customer acquisition. Alfa also uses LinkedIn to target customers, while it uses Facebook and Instagram mainly for employer branding. Alfa has a digital tool that enables it to plan and manage all social media content and

campaigns in the same place. Furthermore, Alfa works at retargeting people interested in its content and reaching out to new potential leads. With insights into large global accounts, the company is able to target them with personalized content.

In Germany, Alfa uses social media, mainly LinkedIn and other similar German channels; LinkedIn serves as a digital business card for the company. Google, however, is its most important channel because most customers in Germany find Alfa through that search engine. Alfa Germany also acquires customers from previous projects and participates in exhibitions to showcase products. In general, Alfa's different subsidiaries have good knowledge about who their potential customers are. The sales force finds many new customers through the internet; it also uses Google and LinkedIn to find new potential leads. However, some customers also contact Alfa directly through customer support, if they found information about the company online or were even recommended to Alfa by other customers:

Many customers search for information digitally and have already made a decision before they contact Alfa. (Social media manager)

The marketing department uses two ways to identify visitors to the home page and to classify them as leads. First, it uses calls to action on the website (e.g. "Contact us" and "Work with Alfa") for visitors to provide their contact details and posts whitepapers for download. Second, the marketing department identifies who has been active on the website. However, this method does not allow Alfa to identify individuals, just the internet protocol (IP) address used to connect to the organization. The marketing department then creates a list of the organizations that have visited Alfa's home page and sends it to the sales organization:

Today we follow up on leads manually and have a lot of communication back and forth, but it would be good to have a system that facilitated this process. (Global account director)

The sales force, however, is not convinced that these leads are useful:

You cannot sell Alfa's product if there is no actual need. If a prospective customer is interested in our product they will contact us. If someone browses our website, it is not enough sign that they need our product. (Salesperson).

In 2022, the marketing department, which provides leads to the sales department, became frustrated when leads were not followed up on. However, from the sales organization's point of view, many of these leads were not useful. Often, leads come from identifying IP addresses from visits to the company's Web page; however, as mentioned, the information only indicates which organization visited the website, not which person.

Now in 2024, the interaction between sales and marketing has improved and in every country, a digital marketing coordinator works in close connection with the sales organization. Through digital tools, information about customer needs and potential sales can be acquired that give more meaningful information for the sales organization to plan their sales activities.

5.4 Purchase phase

When customers approach Alfa to buy products, they have the opportunity to use Alfa's design program for free; this program helps calculate which and how many products are required to be in accordance with European Union regulations for machine

safety. The customer can place orders based on the program's calculations.

Most actual sales, however, come from direct personal selling. Personal sales happen during traditional sales calls but also at trade shows, which have become an important marketing tool for Alfa (for both new and existing customers). Often it is the customer that contacts Alfa. Customers need safety equipment around a new machine and need advice on which safety solutions fit their installation. Most deliveries are tailor-made for each customer. In the customer survey from 2021, customers ranked flexible solutions as the most important factor to choose Alfa as a supplier. Salespeople also visit potential customers and help with the design of safety products. During the COVID-19 pandemic, personal visits were replaced by digital meetings via Zoom and Microsoft Teams. During these meetings, the sales force used digital content produced by the marketing department:

We have produced videos and other material to help salespeople in digital selling that they can show to their customers digitally and help customers show it to their colleagues. One example is the virtual tour on the home page. We produce two-three well-planned content in a week, and it would be great to automate some parts of this process, so it fits even better with the target audience/recipients. Creating content takes time since we are a global company and have to translate everything into seven different languages. (Marketing manager in Sweden)

Now in 2024, the new segmentation has made the sales process more effective. As such, sales can invest more effort in customers that have larger and more complex installations.

5.5 Postpurchase phase

Alfa's flexibility and quickness are important ingredients in the postpurchase phase. The importance of these factors is spread throughout the organization, and personnel at all levels (e.g. warehouse employees and salespeople) are aware of these values:

I know if I do something to help a customer [such as] arranging delivery of a spare part. I do the right thing even if the delivery is expensive. I do not need to ask a manager. Everybody in our firm know that it is important for us with quick deliveries. It is great marketing for us, if customers talk about our quick deliveries. (Salesperson)

The Swedish customer we interviewed also highlighted Alfa's flexibility and quickness:

If we have made a mistake when ordering products. Alfa is always very fast helping us to get the right parts. If we have made the mistake, of course we need to pay for it, and if Alfa have made a mistake they correct it very fast.

End customers, who infrequently purchase equipment and lack a close relationship with Alfa, receive swift and efficient assistance from Alfa in the postpurchase phase to address needs such as service, assembly or spare parts. This proactive approach aims to generate positive word of mouth from these customers. Machine builders, who enjoy a closer connection with Alfa, have the option to use Alfa's design program or seamlessly integrate Alfa's products into their own design programs. Given their familiarity with Alfa's products and systems, machine builders require less frequent service and assembly support in the postpurchase phase than end customers. Nevertheless, this customer segment also values Alfa's rapid responsiveness in addressing issues that may arise in the relationship with the company.

6. Propositions

In the previous section, we described how the case company uses digital tools in the B2B customer journey. In the following paragraphs, we discuss the reasons for and against implementing digital tools in the customer journey and the challenges and opportunities in the implementation of digital marketing in different B2B buying situations.

Personal, face-to-face meetings are still important in the B2B context, especially in the beginning of the buyer-seller relationship, when a seller needs to physically introduce a new customer to the product and build trust. In the Alfa case, this situation is common among end customers, who are often new buyers or buyers that buy only seldomly. Prior research refers to this buying situation as a new task situation (Gustafson *et al.*, 2021; Robinson *et al.*, 1967). However, when customers have a longer relationship with Alfa, they acquire knowledge about Alfa's digital touch points. Accordingly, we propose the following:

P1. Digital marketing becomes more efficient the longer the customer's relationship with the buyer.

However, while customers that have bought before but need a new solution for each new project can take more responsibility for their order, they may still need help. Over time, these customers, which are most likely machine builders, build on their ongoing relationship with Alfa. They get to know the staff in different departments, not just the assigned salesperson. This allows customers to order products directly from customer service and to address specific questions to product specialists in the organization. This type of buying situation constitutes a modified rebuy (see Gustafson *et al.*, 2021; Robinson *et al.*, 1967) and typically occurs via telephone or video conference calls.

When buyers have become established return customers that know Alfa well, they tend to take on more of the work, using digital tools. Their familiarity with the Alfa environment enables them to easily find information about the offer on the company's website. If customers need to learn about the regulations for machine safety, they can find these online as well. In a straight rebuy situation (Gustafson *et al.*, 2021; Robinson *et al.*, 1967), in which customers know what to buy, a digital order is an uncomplicated way to obtain the product. Accordingly, we propose the following:

P2. Digital marketing becomes more efficient as the buying situation becomes less complex.

If a repeat customer needs information on how to design and assemble machine protection solutions, Alfa's design software shows how to configure the required safety installation, what to order and how assemble it. The viability of digital tools in this buying situation relies on customers who know their way around the Alfa environment and, therefore, do not need personal guidance during the purchase process. By contrast, a customer who only buys the products every 10 years will lose touch with the process, and in such cases, it is more efficient for Alfa to treat purchases as new tasks or modified rebuys and revert to personal selling in some form. Accordingly, we propose the following:

P3. Digital marketing becomes more efficient as customers buy more frequently.

It is, however, not only knowledge of Alfa's systems that enables customers to use digital tools but also their knowledge of machine safety in general. For example, a machine builder is likely to use more digital tools in the relationship with the seller. By contrast, an end customer that produces electric equipment for cars and does not have primary competence in machine safety might need more information about which products can fulfill its needs. For a customer of this kind, personal interactions are likely to be more important. Accordingly, we propose the following:

P4. Digital marketing becomes more efficient as customers gain more knowledge about the offer.

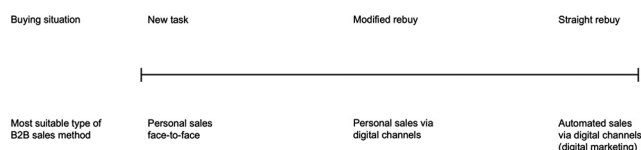
In summary, the feasibility of digitalizing the customer journey generally depends on the buying situation. Face-to-face personal selling is most suitable in a new task situation, personal selling via digital channels is most suitable in a modified rebuy situation and automated sales via digital channels (digital marketing) is most suitable in a straight rebuy situation. Figure 2 illustrates how types of B2B sales fit different buying situations.

7. Discussion

7.1 Theoretical contributions

The findings make several important theoretical contributions. First, by showing that the relevant difference is not between personal sales and digitalization but between automated digital marketing and individualized personal sales (via digital channels or face-to-face), the study provides a more nuanced view of the activities that make up the customer journey. The study also gives a more nuanced view of the use of digital tools in the B2B context; mechanisms that promote digitalization are cost-efficiency, repetitive customer behavior and customer knowledge about the seller and its products. Terho *et al.* (2022a, 2022b) show that marketing and organization contingencies affect digital marketing performance. However, in this study we found that the B2B buying situation plays a significant role in decisions about which type of sales is most suitable. How the buying situation influences the decision to digitalize the B2B customer journey has not been investigated before. In a context in which an offer needs to be customized for each buying occasion or in a new task situation, personal contacts can still be more valuable for customers than digital marketing tools. This study, therefore, contradicts previous research that claims that digital marketing can be used in a similar way in both a B2B and a B2C context, for example, Järvinen and Taiminen (2016) found that integrating digital

Figure 2 Most suitable types of B2B sales methods in different buying situations



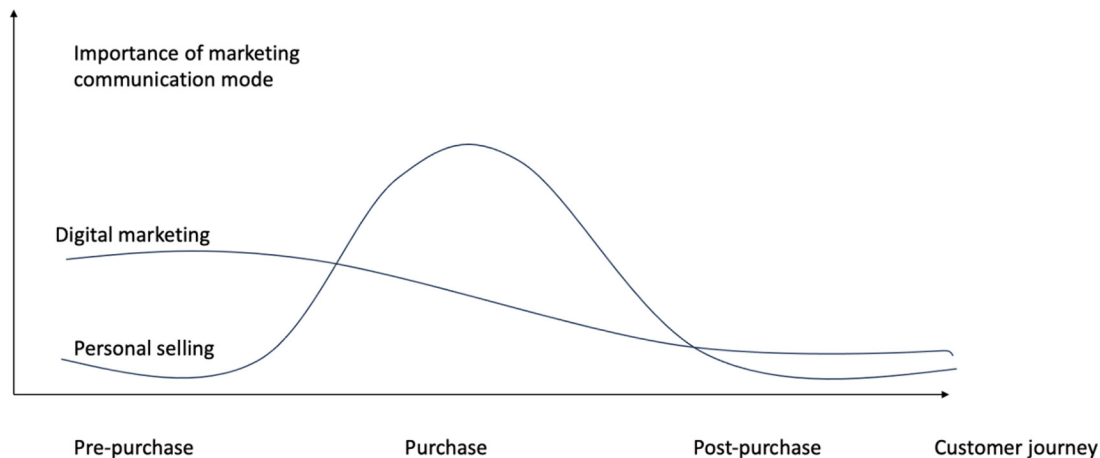
Source: Authors' own work

content marketing and marketing automation efforts generated high-quality sales leads and increased efficiency. In our study, we found that digital marketing efforts can be insufficient in identifying high-quality sales leads. In 2022, information about potential customers (leads) did not include the buying organizations' needs but focused on individual factors, such as age, sex and position in the company. Now in 2024, the case company has changed its segmentation base, focusing on customers' need and potential sales (e.g. longevity of the buyer-seller relationship, frequency of transactions, complexity of buying situation and customer's knowledge of the offer). With this segmentation, the company can better plan sales activities, focusing sales efforts on customers' needs and potential sales. Thus, our study helps resolve the debate on segmentation and personas in a B2B context. Our study adds to the research stream that promotes buying organizations' needs and behavior (vs individual characteristics) as most relevant for segmentation (Lingqvist *et al.*, 2015). We also show that the buying situation is a relevant segmentation variable that affects the efficiency of digital marketing implementation.

Second, prior research on the customer journey is primarily located in the B2C sector and focuses on the early stages of the customer journey (Frambach *et al.*, 2007; Lemon and Verhoef, 2016; Steward *et al.*, 2019). A challenge in earlier stages is to better coordinate different departments of the selling firm as well as digital tools and personal contacts. We advance previous research findings by addressing this challenge and by providing examples on how to deal with them.

Third, we identify where in customer journey digital marketing is most efficient. We found that in the prepurchase phase, digital marketing is more efficient to build awareness while in the purchase phase, personal selling is more efficient to adapt to individual customer needs (Figure 3). These findings partly contradict earlier findings on the importance of personal selling in the early stages of the customer journey (Angevine *et al.*, 2018). We also identified how the longevity of the buyer-seller relationship, the customer's knowledge about the offer and the customer's purchase frequency affect the efficiency of digital marketing. When customers have limited knowledge of the offer and seldom buy, they often prefer personal selling.

Fourth, whereas previous customer journey research has focused on how to make the customer journey more effective (Baumgartner *et al.*, 2016; Feiz *et al.*, 2021), we explicitly tie the customer journey to the firm's overall strategy, branding and promise to the customers. The customer journey is part of how the selling firm provides value for the buyer. Flexibility, speed and service are important value factors for Alfa's customers. We found that Alfa uses social media to communicate with its employees to effectively build a culture based on the company's core values (speed, quality, innovation and flexibility). This underscores the importance of a consistent brand and corporate culture so that all employees and departments know what to do to deliver value to buyers in different phases of the customer journey (Agerup *et al.*, 2022; Baumgarth, 2010; Baumgarth and Schmidt, 2010). B2B customer journeys include many touchpoints. From the first contact to the design of the offer, quotation, delivery, installation and after-sales, consistent behavior from the firm's personnel helps enhance the buyer experience. Prior studies have also argued that a close geographical distance is important

Figure 3 Importance of marketing communication mode in different phases of the B2B customer journey

Source: Authors' own work

in complex buyer–seller relationships (Andersson and Servais, 2010). Our study shows that geographical distance is less important when a company uses digital technology. However, personal contacts are still important when relationships are complex. After the COVID-19 pandemic, our case study began using digital tools not only in all parts of the customer journey but also to make the sales more efficient. Digital tools generate knowledge that can help optimize the sales force's interactions with customers.

7.2 Managerial implications

7.2.1 Digital marketing

This study shows the opportunities digitalization of the customer journey brings. Digital content marketing is an efficient way to attract target audiences, create awareness on social media and bring more visitors to the website in the prepurchase stage. However, in the B2B context, following customers' buying journeys further into the process is still a challenge.

Prior studies in the B2B context have identified challenges in the cooperation between the sales and marketing functions (Kotler *et al.*, 2006). An opportunity for B2B firms is to better integrate their sales and marketing functions. Traditionally, salespeople have preferred personal sales and marketing personnel have preferred digital marketing. During the COVID-19 pandemic, personal contacts were not possible and digital communications became a successful way to create awareness early in the customer journey, with hybrid sales (both personal contacts and digital tools) becoming successful in later stages. A closer connection between sales and marketing departments can lead to more efficient communication with customers. Marketing departments can produce videos on the assembly and use of products that are helpful for salespeople in communication with customers.

Gathering data has become easier with digital technology. Data from the early stage of the customer journey typically come from social media and visits to the website. Data also come from CRM systems, in which sales staff fill in data. Integration of different systems is also required to use the data

efficiently. Our case company also has a digital design tool that enables customers and/or sales to design a solution and prepare an offer. Customers can also integrate Alfa's products into their own design systems. Information technology systems for production, planning, warehousing and invoicing also exist. Thus, identifying which data are useful for improving the customer experience is important. Sales staff may find that they need to add data to the system even if they do not understand their usefulness; by contrast, they may miss having access to data they find useful (e.g. in our case, salespeople only have access to customers in their own sales district). In our case company, analysis of data occurs manually (e.g. leads from the website are inserted manually into a spreadsheet and this spreadsheet is sent to the responsible people in different markets). We recommend that firms carefully analyze which data are useful so as to ensure an efficient customer journey and use digital tools when appropriate. Firms need to be careful not to collect too much data or undertake too much data analysis when doing so is not helping to improve the customer experience.

7.2.2 Segmentation and personas

In 2022, Alfa identified different customer segments, predominately based on personas built on individual demographic variables such as age. However, our study shows the difficulties of directly using implications from the customer journey literature, which focuses predominantly on a B2C (vs B2B) context. In that research stream, concepts such as personas based on individual characteristics and behavior are common. However, in the B2B context, the focus is not on the individual but on the organization's needs and behaviors. Therefore, Alfa changed to segmentation variables more suitable for the B2B context, such as the longevity of the buyer–seller relationship, transaction frequency, complexity of the buying situation and the customer's knowledge of the offered products. Thus, we recommend segmenting B2B customers after identifying their buying organization needs and potential sales, as our study shows that they require different types of support.

7.2.3 Brand building

Alfa builds its brand on a promise to customers to be fast, innovative and flexible and by delivering quality. It also uses social media to create awareness among customers; however, another important function of social media is internal branding. Activities tied to Alfa's brand values are communicated to all Alfa's personnel, and this is then mirrored in activities involved in all touchpoints with customers.

Following up after purchase is important to ensure that customers are satisfied with the delivery; in turn, satisfaction with the firm may prompt customers to spread word of mouth about Alfa to other potential customers and other stakeholders. Another important part of Alfa's after-sales service is to continue delivering digitalized personalized marketing to customers, which can help them remember Alfa for future purchases. That is, communicating a consistent brand promise to all stakeholders is especially important in a B2B context when different employees meet customers in many touchpoints throughout the customer journey.

7.3 Limitations and future research

This study is based on a single case and, therefore, we cannot claim statistical generalizability (Dubois and Gibbert, 2010; Yin, 2014). However, we aim to achieve analytical generalizability in the special context in which we focus – that is, digitalization of B2B customer journeys in different buying situations. In the study, we primarily consider the seller side. Thus, a research design (quantitative or qualitative) focusing on different types of costumers would provide deeper insights into the customer journey from the customer perspective.

In addition, as our study is based primarily on data from the case company, a future research suggestion is to investigate the customer journey with data from the customer side. Our study is context specific and is likely to be relevant to B2B firms with the same customer structure (many customers) as our case company and with similar buying behaviors. We recommend that future research investigate other industries and buying situations.

Another liability of our study is that it is primarily based on developed markets. Future research should investigate challenges and opportunities in the digitalization of the B2B customer journey in markets with different technology maturity and institutional and cultural differences. We also recommend that quantitative studies test the propositions proposed in our studies in different contexts. To test *P1*, we suggest that researchers measure the outcomes generated by digital marketing initiatives in B2B companies and then test whether the span of the customer's relationship with the seller positively moderates those outcomes. A moderation analysis of purchase frequency on outcomes would test *P3*. To test *P2* and *P4*, we suggest vignette experiments, in which decision-makers on the buyer side respond to scenarios that manipulate the complexity of the buying situation. The next step would be to measure buyers' knowledge of the offer and use it to probe possible moderation effects on outcomes. A series of inquiries of this kind could produce quantitative evidence of the propositions presented herein. Research could test them in different industries to validate them, making them more robust each time.

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Appendix. Interview guide

We asked the respondents to discuss challenges and opportunities in the digitalization of the B2B customer journey and if there were differences between different customer groups. We used this guide to check that respondents had dealt with important factors influencing the customer journey and adapted the questions in relation to respondents' position in the firm. The guide developed over time as we gleaned more insights into the customer journey.

Introductory points for all respondents

- Describe your role/position and what you do at Alfa.
- Describe Alfa's customer journey and how different functions in Alfa are enrolled in the customer journey.
- Are there different customers/customer groups?
- Describe a typical customer journey for different customer groups.
- Describe how Alfa is acting in different touchpoints.
- Describe how digital tools are used in different steps of the customer journey.
- Which factors are influencing the digitalization of the customer journey?
- Describe how the COVID-19 pandemic has influenced the customer journey and implementation of digital tools.

Management

- How do you measure and track the performance of your sales reps?
- How do you encourage your sellers to provide feedback from the front lines? How do you take advantage of this feedback to improve your insight generation?
- Do you have a cross-functional team (marketing/sales/information technology) that can drive digital transformation or do you have the possibility to establish one?
- What kind of technology and data analytics skills do you have in-house?
- How can you extract the knowledge from the data collected and use this as a base for marketing decisions? (both strategic and tactical)
- How can you establish a learning process for iterative testing and optimizing the results?

- How can you spread new learnings and knowledge further in the organization?

Marketing

- Who and where are your buyers?
- What (customer) insights are most important to your organization?
- How do you use the customer life cycle from acquisition to retention as a road map for sales and marketing?
- Do you use different segments/personas in your marketing activities?
- What type of content will each type of persona/segment most likely respond to? How do you measure this?
- What communication channels do you use?
- How do you store internal and external data?
- Which key performance indicators do you use?
- Which kind of analytical tools/applications do you use that enable you to identify new opportunities and prioritize them?
- What are the strengths and the weaknesses of your CRM system?
- Which marketing/sales processes do you automatize today?
- Do you use targeted campaigns in your marketing? In that case, how do you optimize these campaigns for value at the customer level?
- How do you work with your buyer personas?
- How do you identify leads for your sales organization?

Sales

- Which sales channels do you use to create an optimal customer experience and maximize sales?
- How do you combine digital and traditional channels in your sales operations?
- How do your customers prefer to engage in the sales process? How do you measure this?
- What are the strengths and the weaknesses of your CRM system?
- How do you work with leads that the marketing department has identified?
- How useful are the leads you get from the marketing department?

Customer support

- How do you support your customers and sales organization?

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