

# **Effects of the Digitalisation of Sales Processes on the Sales Force in the B2B Environment.**

A case study at the example of the heating industry in Central Europe.

Master Thesis

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## **Abstract**

**Effects of the Digitalisation of Sales Processes on the Sales Force in the B2B Environment.** A case study at the example of the heating industry in Central Europe.

Throughout history, a variety of influences have changed the way we sell our products. Starting with the Industrial Revolution up to the first saturation phase in the 1970s. The question now arises as to whether the heating industry is currently back on an evolutionary development path with the increasing digitalisation of distribution. How the sales process in the B2B sector will change with increasing digitalisation and what effects this will have on sales personnel is only documented by a few sources which do not allow any conclusions to be drawn about the craft or even the heating industry. This results in a research gap which is to be closed in the context of this thesis. The aim of this research project is to find out the effects of a further digitalisation of the sales process on the sales force in the defined environment of the heating industry in Central Europe. For this purpose the following research questions are asked: Which steps in the sales process in the heating industry in Central Europe should be digitalised? How will the digitalisation of the sales process affect the sales force in the heating industry in Central Europe? A case study, according to Yin was chosen as the research method. The data were collected by means of in-depth interviews and analysed qualitatively, according to Mayring. The increasing digitalisation will have a large effect on the sales force, tasks will disappear, new tasks will be added and new ones will replace conventional working methods. In summary, automation will simply make tasks superfluous, software tools will improve quality and increase efficiency, and personal selling will become a premium skill. Companies will try to automate as many back-office activities as possible and reduce the number of office staff if necessary.

## **Kurzreferat**

### **Auswirkungen der Digitalisierung von Verkaufsprozessen auf den Außendienst im B2B-Umfeld. Eine Fallstudie am Beispiel der Heizungsbranche in Mitteleuropa.**

Im Laufe der Geschichte hat eine Vielzahl von Einflüssen die Art und Weise verändert, wie wir unsere Produkte verkaufen. Angefangen mit der industriellen Revolution bis hin zur ersten Sättigungsphase in den 1970er Jahren. Nun stellt sich die Frage, ob sich die Heizungsbranche mit der zunehmenden Digitalisierung des Vertriebs derzeit wieder auf einem evolutionären Entwicklungspfad befindet. Wie sich der Verkaufsprozess im B2B-Bereich mit zunehmender Digitalisierung verändern wird und welche Auswirkungen dies auf das Verkaufspersonal haben wird, ist nur durch wenige Quellen dokumentiert, die keine Rückschlüsse auf das Handwerk oder gar die Heizungsbranche zulassen. Daraus ergibt sich eine Forschungslücke, die im Rahmen dieser Arbeit geschlossen werden soll. Ziel dieses Forschungsprojektes ist es, die Auswirkungen einer weiteren Digitalisierung des Vertriebsprozesses auf den Außendienst im definierten Umfeld der Heizungsbranche in Mitteleuropa zu ermitteln. Dazu werden die folgenden Forschungsfragen gestellt: Welche Schritte des Vertriebsprozesses in der Heizungsbranche in Mitteleuropa sollten digitalisiert werden? Welche Auswirkungen hat die Digitalisierung des Vertriebsprozesses auf den Außendienst der Heizungsbranche in Mitteleuropa? Als Untersuchungsmethode wurde eine Fallstudie nach Yin gewählt. Die Daten wurden mit Hilfe von Tiefeninterviews erhoben und qualitativ nach Mayring analysiert. Die zunehmende Digitalisierung wird große Auswirkungen auf den Außendienst haben, Aufgaben werden verschwinden, neue Aufgaben kommen hinzu und herkömmliche Arbeitsmethoden werden ersetzt. Zusammenfassend lässt sich sagen, dass die Automatisierung einfach Aufgaben überflüssig machen wird, dass Software-Tools die Qualität verbessern und die Effizienz steigern werden und dass der persönliche Verkauf zu einer Premium-Fähigkeit wird. Die Unternehmen werden versuchen, so viele Back-Office-Tätigkeiten wie möglich zu automatisieren und gegebenenfalls die Zahl der Büroangestellten zu reduzieren.

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## List of Abbreviations and Symbols

B2B	<b>Business-to-Business</b>
B2C	<b>Business-to-Consumer</b>
HVAC	<b>Heating, Ventilation and Air Conditioning</b>
IoT	<b>Internet of Things</b>
AI	<b>Algorithmic Intelligence</b>
CRM	<b>Customer Relationship Management</b>
IT	<b>Information Technology</b>
AIDA	<b>Attention, Interest, Desire, Action</b>
FMOT	<b>First Moment of Truth</b>
SMOT	<b>Second Moment of Truth</b>
ZMOT	<b>Zero Moment of Truth</b>
R&D	<b>Research and Development</b>
RFID	<b>Radio Frequency Identification</b>
IDC	<b>International Data Corporation</b>
POS	<b>Point of Sale</b>
POD	<b>Point of Decision</b>

# 1. Chapter of Introduction

With the introductory words the reader of this paper is led into the topic "Effects of the Digitalisation of Sales Processes on the Sales Force in the B2B Environment". The starting point for this is the problem description from which the objective is derived with the help of the research gaps and the research framework. The critical examination of the topic already at the beginning of this master thesis helps the author to derive the research questions and to outline the research process and structure of this thesis.

## 1.1 Topic & Problem Description

*"it is not the most intellectual of the species that survives; it is not the strongest that survives; but the species that survives is the one that is able best to adapt and adjust to the changing environment in which it finds itself"*<sup>1</sup>

**Charles Darwin**

Companies, industries and professions are subject to constant change. There are many examples in recent history, from the demise of Nokia, which in just a few years went from being the market leader in mobile telephony to insignificance,<sup>2</sup> or the rise of Tesla, the electric car manufacturer, which is now the most valuable car company in the world.<sup>3</sup> The change does not stop at the job is selves, however, so jobs such as milkman and elevator operator are mostly extinct today.<sup>4</sup> In return, social media influencers can now earn millions of dollars a year.<sup>5</sup>

A wide variety of influences have also changed the sales over the last 250 years. The industrial revolution was also the beginning of professional distribution. At this time, there were high demand and only a few suppliers, so demand exceeded supply and was no longer sufficient to satisfy existing needs. With the first saturation phase at the '70s of the last century of the market, it became increasingly important to recognise the customer's requirements and satisfy it faster than the competition. With that, the second step in professional distribution was born. With the information offered by the internet at the beginning of this century, customers became more mature and now expects from sales an even faster satisfaction trough the offer.

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<sup>1</sup> cf. 'The evolution of a misquotation' 2016.

<sup>2</sup> cf. 'Why Nokia Failed?' 2019.

<sup>3</sup> cf. Business n. y.

<sup>4</sup> cf. Ladd 2017.

<sup>5</sup> cf. 'The 2019 Most Paid Influencers on Instagram | Hype - Journal | HypeAuditor Blog' n. y.

Furthermore, today, digital marketing takes over a lot of the tasks of the sales force and the customers/buyers have similar product knowledge than the sales force.<sup>6</sup> The more surprising it is that many companies in B2B still rely on proven, complex and cost-intensive sales structure. The same phenomenon can be observed in the HVAC industry. In the field of tension between personal customer interaction (individualisation) and process optimisation (standardisation) was traditionally considered "High Touch, Low Tech" as the recipe for success in sales. However, cost pressures are increasing and forcing companies to be more efficient and use resources much better to be competitive in the future.

Especially since the mid-1990s, the increasing use of digital technologies has added to the competitive and customer pressure.<sup>7</sup> The sales department plays a central role here, as the acceleration of processes with the help of new information and communication technologies make work processes leaner and more efficient.<sup>8</sup> The increasing pressure to reduce costs or increase productivity is affecting customers today, making those more disloyal and cautious in closing new deals.<sup>9</sup> Digitisation could solve this issue. With marketing and sales automation, chatbots, artificial intelligence and digital customer interaction the conventional sales recipe for success will be challenged by "High Touch by High Tech".<sup>10</sup> Müller and Thienen also conclude that current technological trends mean that sales are once again facing a revolution. For them, sustainable success is no longer conceivable without a fundamental change in sales processes.<sup>11</sup> Similar to Darwin's theory "survival of the fittest," in which he describes only the survival of the most adaptable organism.<sup>12</sup>

Changes in the sales process and changes in buying behaviour are to be seen vice versa, as one always influences the other. So buying behaviour has also changed due to digitalisation. According to a study by the Harvard Business Manager from 2016, 50-80% of the sales decisions are already made before a sales representative even becomes active. Also, 74% of all buyers prefer to order via a website rather than over the phone, and 90% of decision-makers ignoring any kind of cold calls.<sup>13</sup> A similar result is also reached by the management consultancy Roland Berger, which surveyed 3000 sales representatives from the B2B environment. According to their research, 90% of buyers google for suitable opportunities, and 70% of buyers watch product videos to obtain information.<sup>14</sup> Both studies conclude that B2C consumer behaviour has long since entered the B2B sector and that the

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<sup>6</sup> cf. Giebelhausen et al. 2014.

<sup>7</sup> cf. Müller; Thienen 2016, p. 66.

<sup>8</sup> cf. Köhler-Schute; Bubolz 2016, p. 24.

<sup>9</sup> cf. Kilian; Mirski 2016, p. 16.

<sup>10</sup> cf. Giebelhausen et al. 2014.

<sup>11</sup> cf. Müller; Thienen 2016, p. 66.

<sup>12</sup> cf. February 27; 2018 n. y.

<sup>13</sup> cf. 'So digitalisieren Sie Ihren Vertrieb!' 2018.

<sup>14</sup> cf. KG n. y.

trend towards "self-educating customers" will continue.<sup>15</sup> In his article "Death of a (B2B) Salesman" the scientist Andrew Horr describes even more drastically the situation in which he assumes that the B2B digital selling model is increasingly displacing the classic B2B salesman.<sup>16</sup> This whole process will be further curtailed by the demographic change in the coming years, as with generations Y and Z there will be so-called "digital natives" in the position as decision-makers.<sup>17</sup>

The worldwide study "The Future of B2B Sales" by management consultants A.T. Kearney with more than 1600 participating companies clearly shows that digitalisation of sales processes pays off. They show that the pioneers of digitalisation in sales and marketing processes grow twice as fast as their competitors<sup>18</sup>. Therefore it is astonishing that only 29% of the German B2B avant-garde use digitisation to automate their sales processes. The Institute for Marketing and Sales Automation describes the lack of knowledge about the actual benefits of digitalisation in the sales and marketing process as an essential reason for this lack of dissemination. Because more than half of the companies who are still planning to implement additional tools for digitalisation in the sales or marketing automation are not able to estimate the benefit of them.<sup>19</sup>

Although digitalisation is challenging the usual sales and buying behaviour in general, the question arises about this development's relevance for the heating industry. The analysis of this is one of the main topics this thesis is dealing with.

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<sup>15</sup> cf. KG n. y.; cf. 'So digitalisieren Sie Ihren Vertrieb!' 2018.

<sup>16</sup> cf. Forrester n. y.

<sup>17</sup> cf. 'sana-digital-transformation-report-18-int.pdf' n. y., p. 18; cf. KG n. y.

<sup>18</sup> cf. Hannig 2017, p. 207f.

<sup>19</sup> cf. Hannig 2017, p. 3–7.

## 1.2 Research Objectives & Question

This master thesis is intended to provide a professional analysis of the digitalisation of sales processes in the B2B environment and also to show their effects on the heating industry. Thus, it should be an effective instrument for determining the position of heating manufacturers and contribute to decision-making in digitalisation projects in sales. Inspired by the article "Death of a (B2B) salesperson", this thesis aims to investigate whether salespersons in the heating industry still provide real added value for the customer or whether selling without a salesperson is the concept of the future.

The aim is to shed light on the topic from a theoretical and practical point of view so that the present paper can make a valuable contribution to the further development of the sales process in the B2B environment. The development of the contents should be well-founded and broadly supported. Extensive literature research on the contents and guideline-based interviews with experts from the scientific basis for this.

Digitisation is not an end in itself. Digitisation should improve competitiveness. In the context of the sales process, this is understood to mean, reduction of costs and improvements in productivity, but also better recognition of customer needs and changes in purchasing behaviour. The aim is to create a deep understanding of the sales process from the vendor's perspective, the purchasing process from the customer's perspective and the effects and potentials of digitisation on "both sides of the coin". This understanding will be transferred to the heating industry in Central Europe.

**This thesis aims to find out the effects of further digitalisation of the sales process on the sales force in the delimited environment of the heating industry in Central Europe.**

The following research question was derived:

**How will the digitalisation of the sales process affect the sales force in the heating industry in Central Europe?**

Sub question:

**Which steps in the sales process in the heating industry in Central Europe should be digitalised?**

### 1.3 Delimitation of the Subject

The master's thesis focuses on the digitalisation of the sales process and the purchasing process. Conclusions can be drawn for the heating industry and Central Europe<sup>20</sup>, all other regions or industries are not considered in the master thesis.

The master's thesis covers all the activities traditionally carried out by the sales department along the sales process. Activities that are usually carried out by marketing are partially mentioned but are not relevant as the thesis focuses entirely on the influence on the sales team. Due to this limitation, the object of investigation starts with the end of marketing activities such as marketing automation or with the beginning of an opportunity. It ends with the after-sales activities performed by the sales force.<sup>21</sup>



Figure 1: Scope of the Thesis<sup>22</sup>

<sup>20</sup> cf. 'Which Countries Make Up Central Europe?' n. y.

<sup>21</sup> cf. 'What is the difference between marketing and sales funnel? - Quora' n. y.

<sup>22</sup> Lins 2020g.

## 1.4 Research Status & Gap

For basic theoretical research, the author draws on relevant literature. Most of this literature could be obtained from the library stocks of the University of Applied Sciences Vorarlberg and the Vorarlberg State Library. For more recent topics and in order to obtain a broader picture, the author makes use of online scientific databases. The key terms were mostly searched for in English and German.

Database	Keywords
<b>Ebsco Journals</b>	B2B, B2B Sales, Sales Process, Role of Salesforce, Task of Sales Force, Buying Behavior, Buying Process, Buying Cycle, Buying Grid, CRM System, Sales Funnel, Marketing Funnel, Purchase Funnel, Sales of the Future, Customer Journey, Customer Purchase Journey, Trends in Sales, Digitalisation, Digital Transformation, Megatrends, Gartner Hypecycle, Driver of Digitalisation, Big Data, Internet of Things, IoT, Cloud Computing, Artificial Intelligence, Algorithmic Intelligence, AI, Automation in Sales, Digitalisation in Sales, Digitalisation of the Customer Journey, Heating Industry, HVAC Industry
<b>Elektronische Zeitschriftenbibliothek (EZB)</b>	
<b>Google Scholar</b>	
<b>Jstor Journal</b>	
<b>ResearchGate.net</b>	
<b>Manufacturer</b>	
<b>Sage Journals</b>	
<b>Springer-Link</b>	

Table 1: Keyword and Database<sup>23</sup>

After literature searches in libraries and online databases, it turned out that there are numerous sources on the topics of B2B sales, sales process, buying behaviour and digital transformation. However, hardly any source provides a complete overview of the connection between buying behaviour and the sales process. For future questions, how the sales process in the B2B sector will change with increasing digitalisation and what effects this will have on sales personnel, there are few studies, mostly published by management consultancies. However, no sources were found that refer to the craft trades or even the heating industry.

The literature search reveals a research gap in the change in the sales process caused by digitalisation and its effects on sales force in the heating industry. The lack of scientific knowledge on the above-mentioned topics underlines the scientific relevance of this master thesis.

<sup>23</sup> cf. Lins 2020g.

## 1.5 Structure of the Thesis

The present master thesis is divided into five chapters. The first chapter serves as an introduction to the topic. First, the description of the problem and the resulting objectives and questions are discussed. This is followed by the research gap and the structure of the thesis.

The second chapter summarises the theoretical foundations and serves as a basis for the entire thesis. This chapter is divided into four large subchapters with the topics Sales in B2B Markets, Buying Behaviour in B2B Markets, Digitalisation and Digitalisation in Sales in B2B.

The third chapter deals with the methodology of research design and qualitative research. In particular, with the guideline-based in-depth interview and qualitative content analysis.

The empirical investigation is conducted in chapter four. The expert interviews are used to categorise and evaluate the results. This is followed by a gain in knowledge and discussion of the results.

Chapter five summarises the results of the scientific work and gives an outlook for the future.

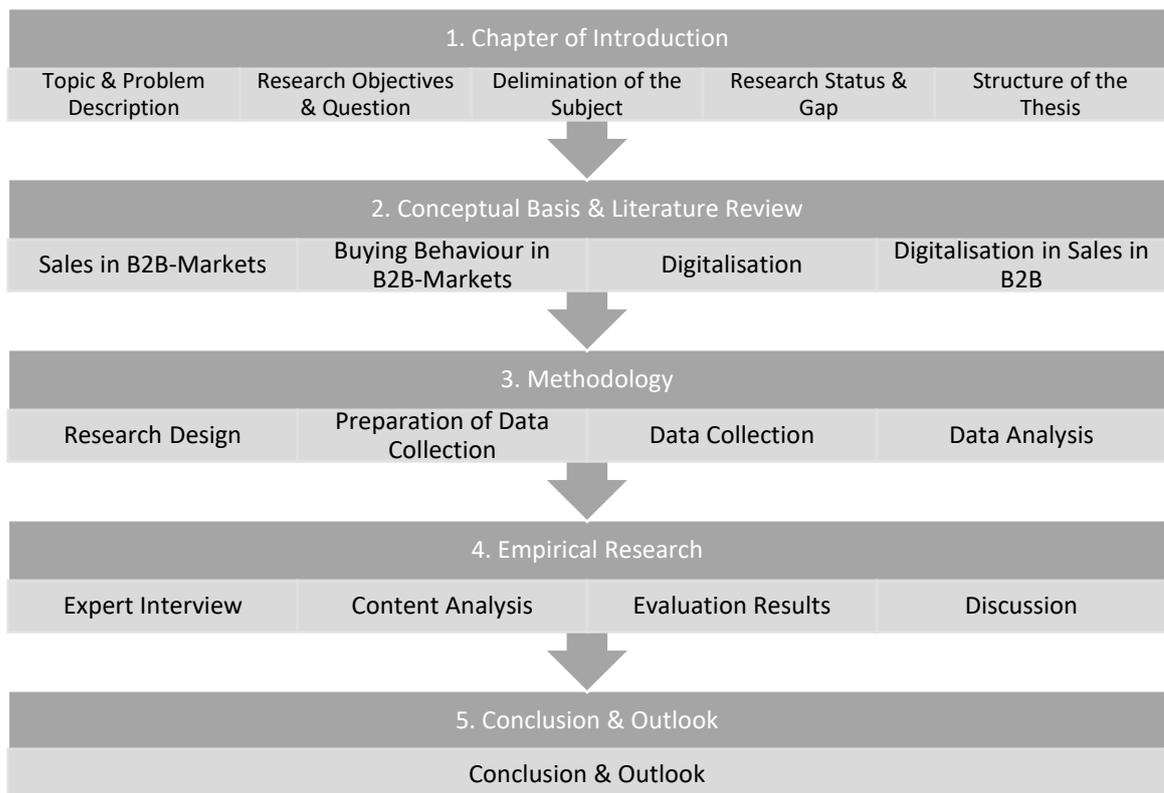


Figure 2: Structure of the Thesis<sup>24</sup>

<sup>24</sup> Lins 2020g.

## 2. Conceptual Basis & Literature Review

### 2.1 Sales in B2B-Markets

Marketing literature has shaped the terms Business-to-Business (B2B) and Business-to-Consumer (B2C) markets and the approach to this topic. Kotler, for example, in his book "Marketing Management" speaks of the business market versus the consumer market.<sup>25</sup> Up to the 90s of the last century, the term industry-good-marketing was used as a synonym for marketing to business markets. Lilien und Gerwall aptly expressed this with the sentence "What we now call business-to-business (B-to-B-Marketing) used to be called industrial marketing"<sup>26</sup> and Backhaus and Voeth immediately spoke of industrial goods marketing<sup>27</sup>. This resulted in a perspective that was firmly focused on the marketing of capital goods. However, since companies do not exclusively purchase industrial goods, the field has been expanded accordingly and is now referred to business-to-business in the literature.<sup>28</sup> That is why Lilien and Gerwall also call business-to-business marketing as the broader term of industrial goods marketing.<sup>29</sup> It is widely accepted in the literature that business-to-business is a business relationship between two or more companies, depending on the type of goods or services.<sup>30</sup>

Figure 3 referred to Godefroid provides an overview of the differentiation of business-to-business (light grey area) and business-to-consumer (dark grey area) business.

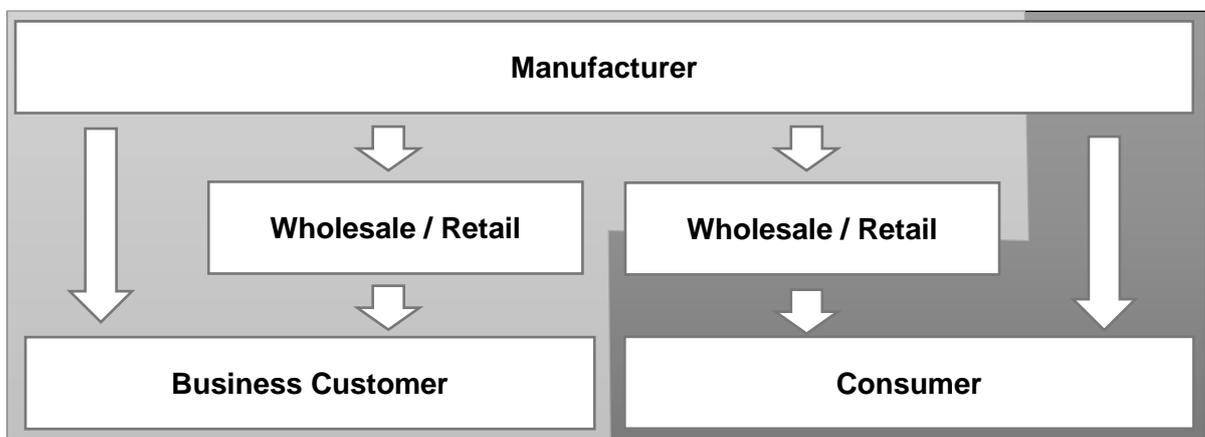


Figure 3: B2B- versus B2C Business <sup>31</sup>

<sup>25</sup> cf. Kotler; Keller 2012, p. 183f.

<sup>26</sup> cf. Lilien; Grewal 2012, p. 3.

<sup>27</sup> cf. Backhaus; Voeth 2014, p. 20f.

<sup>28</sup> cf. Lilien; Grewal 2012, p. 3; cf. Backhaus; Voeth 2015, p. 4.

<sup>29</sup> cf. Lilien; Grewal 2012, p. 3.

<sup>30</sup> cf. Kreutzer; Rumler; Wille-Baumkauff 2015, p. 13; cf. Lippold 2016, p. 3f; cf. Masciadri; Zupancic 2013, p. 3; cf. 'BUSINESS TO BUSINESS (B2B) AND BUSINESS TO CONSUMER (B2C) MANAGEMENT Dr. Vinod Kumar' n. y., p. 447–451; cf. Redaktion 2017.

<sup>31</sup> cf. Godefroid; Pförsch 2008, p. 25.

Nevertheless, there are considerable differences between B2B and B2C in terms of market structure, products and services, buyer behaviour, cause of demand, distribution channels, prices and communication.<sup>32</sup> Therefore, it is helpful for the general understanding to take a further look into these differences in this chapter.

### **2.1.1 Market Structure**

B2B markets are less present than B2C markets, although the economic importance of B2B markets far exceeds that of the consumer market.<sup>33</sup> One reason for this lack of presence is that B2B markets are usually limited to fewer buyers and therefore larger purchase volumes.<sup>34</sup> In exceptional market conditions, this can even lead to oligopolistic situations. An example of this is the automotive industry, where the number of potential customers is limited to a few.<sup>35</sup>

Due to the limited number of customers, customers have significant buyer power. Customers therefore often expect the supplier's offer to be adapted to the customer's needs. This type of adaptation often leads to very close customer-supplier relationships. In addition, B2B markets very often lack transparency concerning pricing,<sup>36</sup> the risk for buyers and sellers increases as the purchasing volume increases, and the purchasing process usually takes longer than in B2C business.<sup>37</sup>

### **2.1.2 Distribution Channels**

There is a fundamental distinction between direct and indirect sales. Direct distribution means purchasing directly from the manufacturer through sales representatives, sales offices, factory outlets or via the internet. Indirect sales work together with intermediates like agents, distributors, wholesalers and retailers.<sup>38</sup> Instead of direct and indirect distribution, the literature sometimes calls it single-level (direct) and multi-level (indirect) distribution.<sup>39</sup> In B2B markets the distribution channels are generally shorter than in B2C. In the past, direct sales even were a common standard in B2B.<sup>40</sup>

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<sup>32</sup> cf. Lilien; Grewal 2012, p. 14f.

<sup>33</sup> cf. Masciadri; Zupancic 2013, p. 2; cf. Backhaus; Voeth 2015, p. 18.

<sup>34</sup> cf. Saha 2014, p. 295; cf. Rėklaitis; Pilelienė 2019, p. 77; cf. Kuß; Kleinaltenkamp 2016, p. 34; cf. Gerth 2015, p. 68.

<sup>35</sup> cf. Godefroid; Pförtsch 2008, p. 20; cf. Robinson 1967, p. 4.

<sup>36</sup> cf. Godefroid; Pförtsch 2008, p. 15.

<sup>37</sup> cf. Masciadri; Zupancic 2013, p. 2; cf. Backhaus; Voeth 2015, p. 18.

<sup>38</sup> cf. Saha 2014, p. 296–297; cf. Pufahl 2019, p. 89–91.

<sup>39</sup> cf. Kuß; Kleinaltenkamp 2016, p. 235–236.

<sup>40</sup> cf. Saha 2014, p. 296–297; cf. Godefroid; Pförtsch 2008, p. 15.

In practice, some companies use several distribution channels in parallel. This is especially the case when one sales channel does not cover the entire market potential.<sup>41</sup> For example, the Weishaupt company from Germany sells its products to installers via sales staff, wholesalers and also via e-commerce. According to Homburg, a multi-channel system also brings the threat with it that the channels will compete with each other. This is particularly the case if customers or customer groups cannot be assigned to a specific channel.<sup>42</sup>

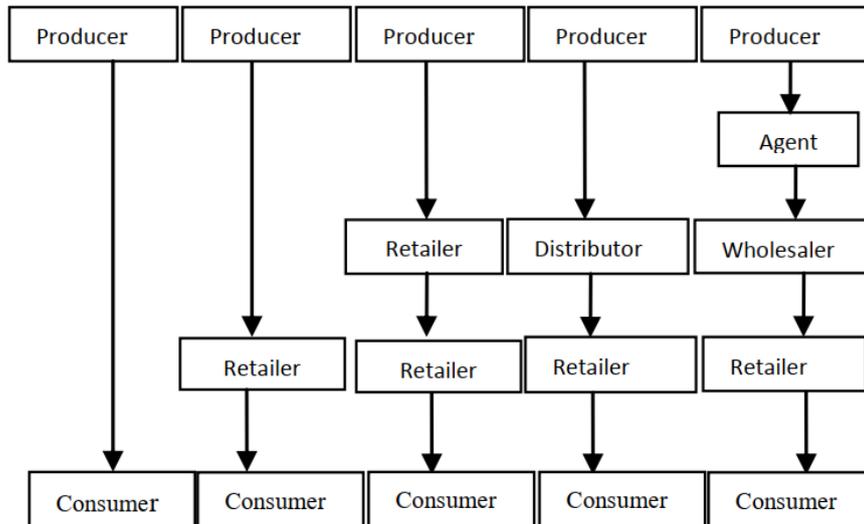


Figure 4: Distribution Channel of B2B <sup>43</sup>

### 2.1.3 Business Types

There are different ways to describe the characteristics of the B2B Business itself, but one of the most common is the business type definition regarding Backhaus et. al.<sup>44</sup> A business type describes the interaction between supplier and customer concerning the current situation and market environment.<sup>45</sup> This ended up in four major business types in B2B business.

<sup>41</sup> cf. Kuß; Kleinaltenkamp 2016, p. 244.

<sup>42</sup> cf. Homburg; Schäfer; Schneider 2016, p. 49–54.

<sup>43</sup> cf. Saha 2014, p. 297.

<sup>44</sup> cf. Scheed; Scherer 2019, p. 10f.

<sup>45</sup> cf. Backhaus; Voeth 2014, p. 210–218.



Figure 5: Business types in B2B <sup>46</sup>

The **integration business** is characterised by a high degree of individuality and integration into the customer's products and services. Typically for this type of business are industrial pre-products developed individually for the customer. The automotive industry is often named as an example of this business type. Because their suppliers are very often tightly integrated into production and development processes, this strong integration also creates a powerful mutual dependency, which is also known as the "lock-in effect".<sup>47</sup>

The characteristics of the **system business** are that products or services are not designed primarily for one customer, they are created for a whole market or market segment and whereby the focus is on a sequence of purchase transactions. The goal is, therefore, to win over a customer with a standardised product or service and to generate additional purchase transactions through system integration. In the system business, the customer enters a relationship of dependence with the supplier. Examples of this are software systems or production facilities in conjunction with maintenance or service contracts.<sup>48</sup>

Non-reproducible customer-specific products and services characterise the **project business**. The individual products and services are tailor-made for the customer. This means that the product or service can only be provided after the purchasing process. Typical project businesses are infrastructure projects and plant construction.<sup>49</sup>

<sup>46</sup> cf. Backhaus; Voeth 2014, p. 217; cf. Kreutzer; Rumler; Wille-Baumkauff 2015.

<sup>47</sup> cf. Backhaus; Voeth 2014, p. 218; cf. Scheed; Scherer 2019, p. 10.

<sup>48</sup> cf. Backhaus; Voeth 2014, p. 217–218; cf. Scheed; Scherer 2019, p. 11.

<sup>49</sup> cf. Backhaus; Voeth 2014, p. 217; cf. Scheed; Scherer 2019, p. 11–12.

The **product business** is characterised by the sale of standardised products or services in an entire market or market segment. This way of business results in a low level of customisation and a high level of replacement through similar products from other suppliers. Therefore, the main criteria for a buying decision are product quality and services related to the product. The price may also become a decisive criterion, especially for simple and qualitatively uncritical products. Typical applications for the product business are the wholesale of all kinds of products to retailers or selling C-parts for production companies.<sup>50</sup>

In practice, a company does not have to follow one type of business strictly. Especially when different business areas are involved, different types of business are often used.<sup>51</sup>

#### 2.1.4 Role of the Sales Force

Based on the approach of the business types of Backhaus, Belz and Weibel conducted a study on sales differentiation in the B2B business. They developed the basic role understanding of the sales force.<sup>52</sup>

Due to the close interlocking and usually long-standing partnership between provider and customer, it is essential in the **integration business** to focus on individual customer needs. The central tasks of the sales force are to understand the customer needs and to act as a kind of **hub** between the customer and the internal departments.<sup>53</sup>

Follow-up purchases are the foundation of the **system business**. That is the reason why the sales force should primarily take on the task of **relationship maintenance**. The sales staff thereby overcomes the barriers between individuals and organisations and is the most important communication channel to the customer.<sup>54</sup>

The **project business** is characterised by the unique and individual adaptation of products and services to customer needs. As a result, the selling process has a high degree of advance performance by the provider and the customer has a high degree of uncertainty. It is therefore essential to use the sales department as an **ambassador of trust** to win the customer and the project.<sup>55</sup>

Since products are relatively easy to replace in the **product business**, sales performance is a crucial differentiating factor alongside price, quality and service. For this reason, the

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<sup>50</sup> cf. Backhaus; Voeth 2014, p. 217; cf. Scheed; Scherer 2019, p. 12.

<sup>51</sup> cf. Scheed; Scherer 2019, p. 12.

<sup>52</sup> cf. Backhaus; Voeth 2015, p. 437–457.

<sup>53</sup> cf. Backhaus; Voeth 2015, p. 454–455.

<sup>54</sup> cf. Backhaus; Voeth 2015, p. 452–453.

<sup>55</sup> cf. Lilien; Grewal 2012, p. 450–451.

sales department primarily takes on the tasks of **representing the company and maintaining relations** with customers.<sup>56</sup>

### 2.1.5 Tasks of the Sales Force

With customer acquisition, customer retention and non-sales activities have the sales force three major tasks, according to Churchill, Ford und Walker.<sup>57</sup>

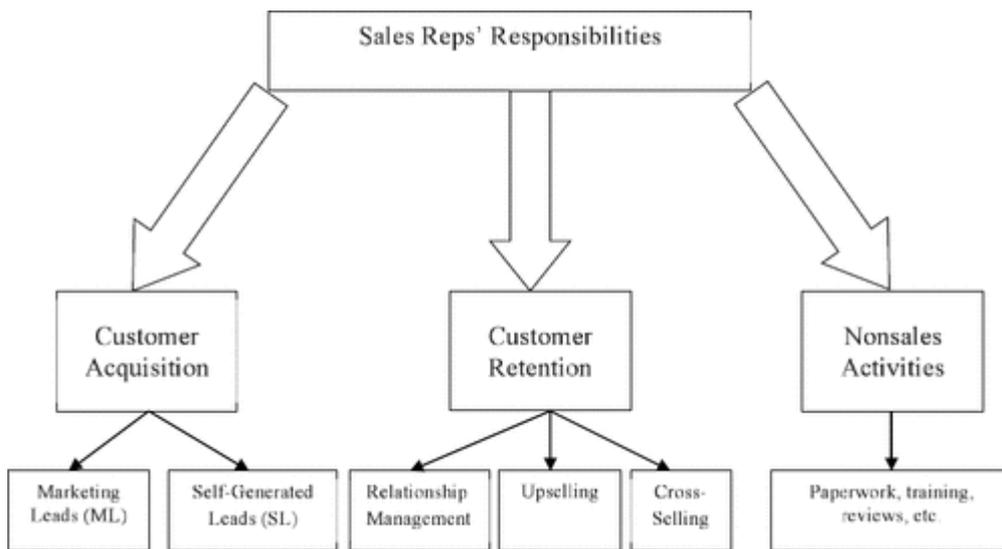


Figure 6: Tasks of the sales force<sup>58</sup>

The task of customer acquisition is divided into the acquisition of marketing-generated leads and self-generated leads. Customer retention is divided into relationship management, upselling and cross-selling, and non-sales activities are usually all other operational activities.<sup>59</sup>

### 2.1.6 Sales Process in B2B

Sals is one of the primary activities according to Porter's value chain model - in addition to logistics, production, marketing and service. Porter defines primary activities as those that contribute directly to the creation of value and thus to direct customer benefit.<sup>60</sup> Concerning Winkelmann, sales activities are carried out based on established processes to ensure customer acquisition and customer care.<sup>61</sup>

<sup>56</sup> cf. Backhaus; Voeth 2015, p. 448–449.

<sup>57</sup> cf. Sabnis et al. 2013.

<sup>58</sup> cf. Sabnis et al. 2013.

<sup>59</sup> cf. Sabnis et al. 2013.

<sup>60</sup> cf. Porter 2014, p. 66f.

<sup>61</sup> cf. Winkelmann 2012, p. 221.

### 2.1.6.1 Personal selling according to Armstrong & Kotler

According to Moncrief and Marshall, most sales models are based on a seven-step linear process which was first mentioned in the 1920s.<sup>62</sup> One of the best-known examples of this is the "Personal Selling Process" by Armstrong and Kotler. According to Armstrong and Kotler, the process begins with the prospecting and qualifying of potential new customers and ends with the follow-up of orders.<sup>63</sup>

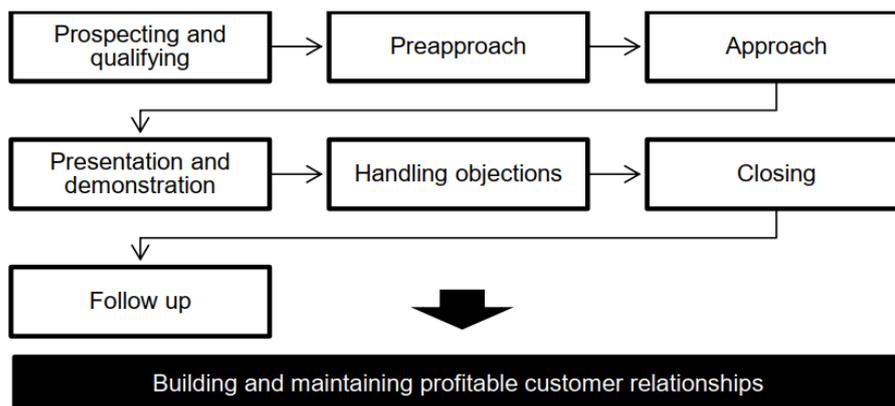


Figure 7: Personal Selling Process<sup>64</sup>

#### Step 1: Prospecting and Qualifying

The first step in the personal sales process is to identify and qualify potential new customers. This involves searching for potential customers who are interested in the products and services offered and who have the financial means to pay for them.<sup>65</sup>

#### Step 2: Pre-approach

In the pre-approach phase the supplier tries to find out as much as possible about the potential new customer. Typical information is the organisational structure, purchasing processes, the composition of the buying center, competitors, etc. In this phase also the decision is made about how which person will be contacted at the next step.<sup>66</sup>

#### Step 3: Approach

In step 3, the sales will contact the previously selected person via the already selected communication channel. This can be done by telephone, e-mail, post or via social media. It

<sup>62</sup> cf. Åge 2011, p. 1557.

<sup>63</sup> cf. Kotler; Armstrong 2018, p. 434.

<sup>64</sup> cf. Kotler; Armstrong 2018, p. 434.

<sup>65</sup> cf. Kotler; Armstrong 2018, p. 496–499.

<sup>66</sup> cf. Kotler; Armstrong 2018, p. 496–499; cf. Kotler; Keller 2012, p. 561.

is crucial in this phase to quickly establish a good relationship and identify the added value for the customer. <sup>67</sup>

#### **Step 4: Presentation and Demonstration**

In this stage of the personal selling process, the sales try to present the product or service to the potential new customer. It is crucial to dedicate oneself to customer orientation in addition to the product orientation. The focus should be on the benefits and value for the customer, in addition to characteristics and advantages. <sup>68</sup>

#### **Step 5: Handling Objections**

After a presentation, the customer may raise objections. Objections are often due to individual preferences, antipathy, personal dislike of changes in use. Hence, a complaint is very often an inner resistance. According to Kotler, there is also logical resistance when there are differences in price, delivery times and product characteristics. The salesperson should try to take the objections positively and use question techniques to turn them into a reason to buy. <sup>69</sup>

#### **Step 6: Closing**

Closing is primarily about getting an order. It is essential for the sale to be in contact with the decision-maker and to interpret the corresponding signs. Signs for a sales transaction can be physical impulses, remarks, but also detailed questions and negotiations. <sup>70</sup>

#### **Step 7: Follow Up**

Immediately after closing the sale, the sales should take some follow-up action. These involve clarifying delivery, installation and other aspects relevant to the customer. Likewise, the salesperson should contact the customer again after the delivery of the product or the service to check the smooth delivery process. This ensures customer satisfaction and prepares repeat purchases. <sup>71</sup>

### **2.1.6.2 Sales Process according to Pufahl**

Pufahl distinguishes between different levels when building his model of sales processes. Level 0 represents the process map in which all departments of a company are represented

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<sup>67</sup> cf. Kotler; Armstrong 2018, p. 496–499.

<sup>68</sup> cf. Kotler; Armstrong 2018, p. 496–499; cf. Kotler; Keller 2012, p. 561.

<sup>69</sup> cf. Kotler; Armstrong 2018, p. 496–499; cf. Kotler; Keller 2012, p. 561.

<sup>70</sup> cf. Kotler; Armstrong 2018, p. 496–499; cf. Kotler; Keller 2012, p. 561.

<sup>71</sup> cf. Kotler; Armstrong 2018, p. 496–499; cf. Kotler; Keller 2012, p. 561.

similar to the value model of Porter. Levels 1 to 5 contain the actual process, process phases, sub-processes, sub-process modules and activities.<sup>72</sup>

The sales process is according to Pufahl divided into the following phases: sales planning, lead management, contact management, offer management, order management and after-sales, which are additional divided into sub-process, modules and activities.<sup>73</sup>

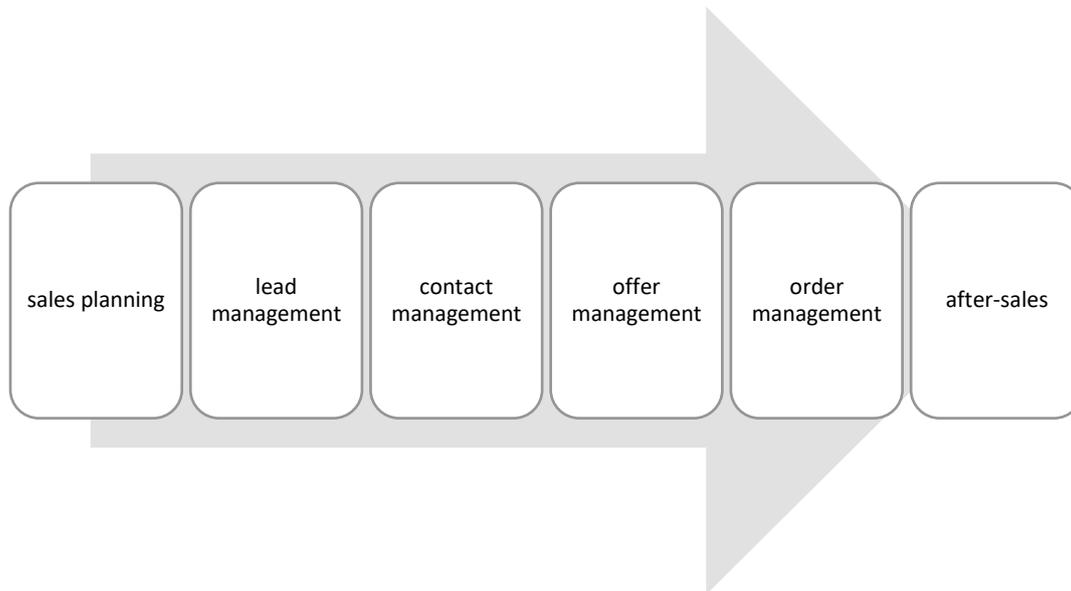


Figure 8: Sales process according to Pufahl<sup>74</sup>

### **Phase 1: Sales Planning**

In the sales planning phase, the markets and customers will be defined. The sales are analysing the market potential, market volume, the competitive situation and evaluate the customers and their potential. This preparatory phase leads to a targeted sales process.<sup>75</sup>

### **Phase 2: Lead Management**

The "real" sales process starts with lead management. This phase is according to Pufahl divided into the sub-processes "lead generation", "analyse buyer situation", "work out unique customer benefit", "analyse buying-center", "obtain missing information" and "Contact and qualify the lead".

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<sup>72</sup> cf. Pufahl 2019, p. 127–129.

<sup>73</sup> cf. Pufahl 2019, p. 137–157.

<sup>74</sup> cf. Pufahl 2019, p. 139.

<sup>75</sup> cf. Pufahl 2019, p. 139–141.

Pufahl defines a lead as a potential new customer with possible interest in products or services. The generating of leads can be done by the sales force, by marketing, by customer service or by external service providers.

Based on the assessment of the buyer situation, follows an analysis of how "strong" the customer need is. A distinction is made between "latent need present", "current need present" and "customer has an exact idea of the solution".

A "Unique Customer Benefit" should be found to address the customer as a basis for the first customer contact. The goal of the buying center analysis in this early phase is to identify the contact persons and their roles. Critical missing or uncertain information is called red flags by Pufahl. These red flags must be identified and removed during the sales process.

The aim is to leave a first positive impression often the first contact with a lead. For this reason, such an action should be well prepared as it can take place in a variety of ways. After the initial contact, the lead has to be qualified based on the information received, the potential and the interest to buy.<sup>76</sup>

### **Phase 3: Contact Management**

Once the lead from phase two has been classified and assigned, the contact management phase begins. In this phase, it is advisable to contact the potential customer as often as possible, provide all necessary information and develop a relationship with the customer. This phase aims to build up and maintain contacts. Also crucial in this phase is the exact identification of the individual persons in the buying center.<sup>77</sup>

### **Phase 4: Offer Management**

As soon as a potential customer makes a particular inquiry, the offer phase begins. In this phase, offers are prepared, followed up and negotiated. To generate an offer, the feasibility and sometimes also customer-specific data such as grade must first be checked. The customer should be approached proactively via follow-up interaction. In the course of the follow-up, it can also come to corresponding offer negotiations and the offer has to be improved. The goal of the offer phase is to receive an order. The success rate should be measured to present the performance level transparently.<sup>78</sup>

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<sup>76</sup> cf. Pufahl 2019, p. 142–146.

<sup>77</sup> cf. Pufahl 2019, p. 147–150.

<sup>78</sup> cf. Pufahl 2019, p. 150–156.

### **Phase 5: Order Management**

Order management starts with acceptance of the offer by the customer and ends by invoicing to the customer. All steps in between are also part of this phase, from approval of the order by the supplier to control of progress up to the delivery.<sup>79</sup>

### **Phase 6: After-Sales**

The After-Sales phase begins with the completion of the order and the actual purchasing process. According to Pufahl, the company's success needs to provide the best possible After-Sales service, because it is much easier to persuade an existing customer to buy again than to win a new customer. The aim is to motivate the customer to buy back or to make additional purchases. Customer satisfaction plays a decisive role in this. To increase customer satisfaction every interaction between supplier and customer is crucial. Typical interactions are service, maintenance, repair and handling of complaints.<sup>80</sup>

#### **2.1.6.3 CRM Sales Cycle according to Winkelmann**

In his CRM sales cycle, Winkelmann differentiates between a sales cycle in the narrow sense and a sales cycle in the broader sense. The sales cycle in the narrower sense reflects the view of the salesperson. In contrast, the sales cycle in the broader sense focuses on the opinions of strategic sales management.<sup>81</sup>

The CRM Sales Cycle in the narrower sense consists of the following eight stages

1. Identify leads
2. Qualify leads, evaluate opportunities
3. Define requirements for an offer
4. Acquisition, offer
5. Achieve positive customer response
6. Final negotiation, the conclusion of the contract
7. Processing, delivery
8. Aftercare, clarify follow-up needs<sup>82</sup>

The sales cycle begins with the identification of potential customers. In the second step, the potential customers are qualified and the sales opportunities assessed. After qualifying the lead, the sales staff collect the requirements for a possible offer. In step 5, it is necessary to convince the potential customer of the offer, which Winkelmann calls positive customer

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<sup>79</sup> cf. Pufahl 2019, p. 155–156.

<sup>80</sup> cf. Pufahl 2019, p. 156–157.

<sup>81</sup> cf. Winkelmann 2012, p. 224.

<sup>82</sup> cf. Winkelmann 2012, p. 224.

response. If the sales achieve a positive customer response, the order should be negotiated and the purchase finalised. After a definite conclusion, the order is processed and the goods or services are delivered to the customer. After successful delivery, follow-up support and clarification of the following requirements are the last steps of a sales cycle.<sup>83</sup>

#### **2.1.6.4 Sales Process according to Jost, Kieliszek, Neubarth**

Jost calculates the sales process as a customer management process and divides it into six steps: strategic planning, action planning, contact preparation, contact execution, contact follow-up and success monitoring.<sup>84</sup> Kieliszek subdivided the process in personal sales into customer search, clarification of buying interest, advising the customer, the actual sale, gathering information and maintaining the customer relationship.<sup>85</sup> According to Neubarth, the sales process has seven steps. The first step is preparation, followed by contact, demand analysis, argumentation, handling of objections, discharge and follow-up.<sup>86</sup>

There are several other sources and approaches in the literature for the description of the sales process, but they do not find further consideration in this paper.

#### **2.1.7 Summary**

This chapter gives an overview of how a B2B market works from the point of view of the sales staff. To begin with, it is essential to define and characterise the differences between B2B and B2C markets. As the heating industry (the research object) is a B2B market, this chapter therefore focuses on this type of market. Then, for example, the market structure (Chapter 2.1.1) or the distribution channels (Chapter 2.1.2) are considered. With the further course, the master thesis deals more specifically with the role of the sales force (Chapter 2.1.4) and the sales force's tasks (Chapter 2.1.5). It is worth mentioning the reference to the division of tasks according to Churchill, Ford and Walker. These researchers identified the three main tasks: Customer Acquisition, Customer Retention and Non-Sales Activities as paperwork or trainings.

The sales process was deliberately viewed from many angles. Chapter 2.1.6 contains six models of sales process definitions. Due to the high importance of this topic for this master thesis, this multi-faceted approach is essential for successful research. The different approaches and sales process models have a strong linear course in common and are generally quite similar. Usually only the names of the (mostly six) intermediate steps differ

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<sup>83</sup> cf. Winkelmann 2012, p. 224f.

<sup>84</sup> cf. Bliemel 2000, p. 338.

<sup>85</sup> cf. Kieliszek 1994, p. 11.

<sup>86</sup> cf. Neubarth; Neubarth 1992, p. 61ff.

or there are additional steps (such as in the 8-step model from Winkelmann). The model by Mario Pufahl (Chapter 2.6.1.2) is particularly preferred for further processing because it is clearly structured and reflects reality very well. He arranges the six phases from sales planning to aftersales according to the chronological order. The source from 2019 is also very current. Therefore, the creator knows the advancing digitalisation and may have already adapted his model in this regard.

After the market has been viewed from a sales perspective in this chapter, one of the next chapters will turn the point of view: The focus is then on the buying behaviour in B2B markets and in particular on the buying process.

## 2.2 Heating Industry

The market players in the heating industry are necessarily manufacturers, wholesalers, installers and consumers.<sup>87</sup>

The two-stage distribution channel (manufacturer->installer->consumer) and the three-stage distribution channel (manufacturer->wholesaler->installer->consumer) are common (Chapter 2.1.2). A direct sale from manufacturer to consumer is more than unusual.<sup>88</sup>

The speciality of the multi-stage distribution channel is that the heating system manufacturer still supports the installer directly, even in the case of three-stage distribution via the wholesale trade. The wholesaler essentially assumes the role of logistics partner.<sup>89</sup>

The business model is the classic product business (Chapter 2.1.3) and the sales department is primarily representing the company and maintaining the relations (Chapter 2.1.4).<sup>90</sup>

Installer	Austria	Germany	Czech Republik	Hungary	Liechtenstein	Poland	Slovakia	Switzerland
<b>Inhabitants in tsd</b>	8.877	83.132	10.699	9.769	38	37.970	5.454	8.574
<b>Heating Installers</b>	4.829	47.839	5.820	5.314	21	20.655	2.967	4.664
<b>Employees</b>	35.832	374.065	45.530	41.572	162	161.582	23.210	36.487
<b>Turnover in Mio €</b>	5.000	46.500	3.530	3.223	30	12.526	2.159	6.788
<b>Turnover per Employee in €</b>	139.540	124.310	77.522	77.522	186.053	77.522	93.027	186.053

Table 2: Market Data per Country<sup>91</sup>

Based on the defined market figures of Austria and Germany, taking into account the adjustment of purchasing power and the homogeneity of the market, the market figures of Central Europe were collected. According to this calculation, there are around 92,100

<sup>87</sup> cf. Andres 2020.

<sup>88</sup> cf. Andres 2020.

<sup>89</sup> cf. Andres 2020.

<sup>90</sup> cf. Andres 2020.

<sup>91</sup> cf. 'Population, total - Austria, Germany, Czech Republic, Hungary, Liechtenstein, Poland, Slovak Republic, Switzerland | Data' n. y.; cf. 'WKO\_Heizungsmarkt\_Österreich.pdf' n. y., p. 13–19; cf. 'Statista\_Heizungsmarkt\_Deutschland.pdf' n. y., p. 1–10.

installers or customers of heating manufacturers in Central Europe, who generate a turnover of around 80 billion euros.<sup>92</sup>

The market is characterised by 82% small companies with less than ten employees, but which generate only 25% of sales. About 50% of the turnover is generated by companies with 10 to 50 employees, which in relation to this only account for 17% of the companies. The remaining 25% of turnover is generated by large installers with more than 50 employees.<sup>93</sup>

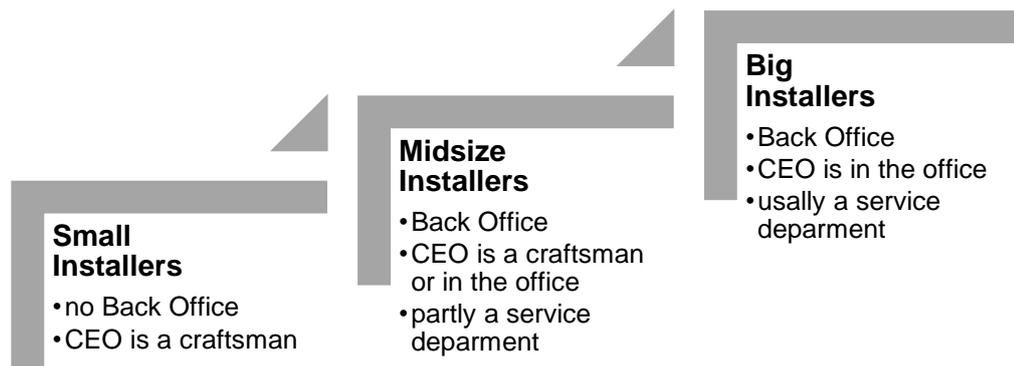


Figure 9: Structure of the Heating Industry<sup>94</sup>

From the heating manufacturer's point of view, the market has a unique character depending on the size of the company.

In small companies, the CEO or owner is still working on the construction site himself and has neither a back-office nor a service department. Medium-sized companies, on the other hand, usually have a back office, the CEO is sometimes involved but is usually in the office, and sometimes they have their service department. Large companies always have a back-office and usually a service department, and the managing director can be met at the office.<sup>95</sup>

<sup>92</sup> cf. 'Population, total - Austria, Germany, Czech Republic, Hungary, Liechtenstein, Poland, Slovak Republic, Switzerland | Data' n. y.; cf. 'WKO\_Heizungsmarkt\_Österreich.pdf' n. y., p. 13–19; cf. 'Statista\_Heizungsmarkt\_Deutschland.pdf' n. y., p. 1–10.

<sup>93</sup> cf. 'Population, total - Austria, Germany, Czech Republic, Hungary, Liechtenstein, Poland, Slovak Republic, Switzerland | Data' n. y.; cf. 'WKO\_Heizungsmarkt\_Österreich.pdf' n. y., p. 13–19; cf. 'Statista\_Heizungsmarkt\_Deutschland.pdf' n. y., p. 1–10.

<sup>94</sup> cf. Andres 2020.

<sup>95</sup> cf. Andres 2020.

## 2.3 Buying Behavior in B2B-Market

B2C markets focus on satisfying the personal needs of consumers. In contrast, in B2B markets the business needs are satisfied and usually several people decide on the purchase, which means that B2B markets operate more rationally than B2C markets. The involvement of several experts from different areas of the company means that the cost-benefit arguments are the most crucial factor in a purchase decision.<sup>96</sup> The difference between the perceived costs and the perceived benefits is concerning Kotler, the trigger for purchase in the B2B environment.<sup>97</sup> According to Kuß and Kleinaltenkamp, companies procure products to become more successful in their markets. The trigger for the purchase is a market problem that starts from a quality perspective or economic aspects are in the foreground. However, the core issue is to maintain or increase competitiveness. Based on this task, the buying process typically brings three types of problems with it.<sup>98</sup>

- Financial resources must be made available for the procurement of products or services
- The products or services to be procured must be integrated into the operational process.
- The involved persons have to choose between different offers and suppliers. The decision between offers and/or suppliers can be complex and the economic consequences may be high, which can make a decision very difficult.<sup>99</sup>

### 2.3.1 Buying-Center

The term "buying center" was coined by Webster and Wind back in 1972. They also concluded that each person involved in the buying process has a specific role. The typical roles are decision-maker, influencer, gatekeeper, buyer and user. Bonoma adds a sixth role to the role concept according to Webster/Wind with the initiator and Kotler with the approver a seventh.<sup>100</sup> However, the size of the buying center is different in each purchasing process, merely a mental entity and often anchored in the company. Thus, one person can take on several roles, but several people can also have a role.<sup>101</sup>

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<sup>96</sup> cf. Grewal et al. 2015, p. 193; cf. Gerth 2015, p. 69.

<sup>97</sup> cf. Kotler; Keller 2012, p. 193–194.

<sup>98</sup> cf. Kuß; Kleinaltenkamp 2016, p. 78–79.

<sup>99</sup> cf. Kuß; Kleinaltenkamp 2016, p. 78–79.

<sup>100</sup> cf. 'Who really does the buying?' n. y.; Kotler; Keller 2012, p. 188.

<sup>101</sup> cf. Kotler; Keller 2012, p. 188–190; cf. Lippold 2016, p. 9–11; cf. Foscht; Swoboda; Schramm-Klein 2015, p. 297–300; cf. 'A General Model for Understanding Organizational Buying Behavior' n. y., p. 17–19.

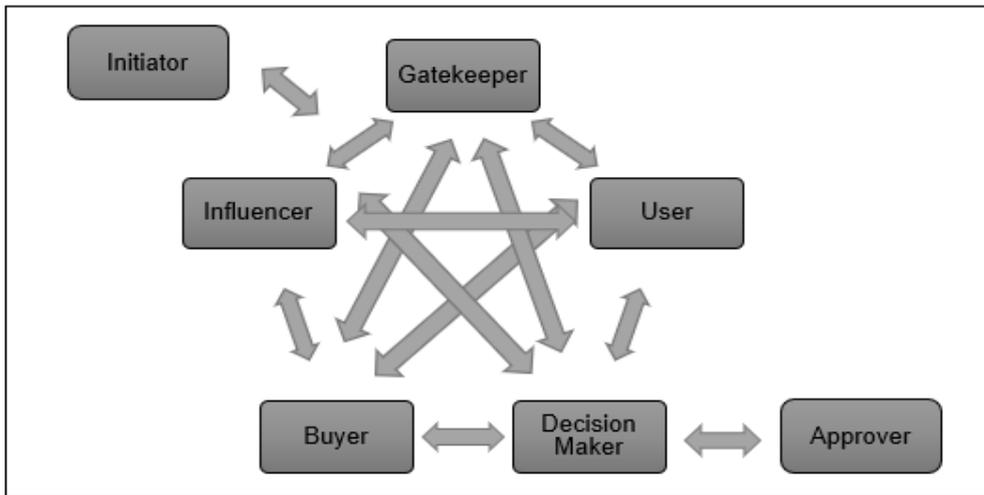


Figure 10: Buying Center<sup>102</sup>

The **initiator** recognises that a current situation can be improved and sets the purchase process in progress.<sup>103</sup>

Although the **decision-maker** is often not involved in the search process down to the last detail, he decides on the purchase. He usually owes this right to his position in the company and is often a member of the management level.<sup>104</sup>

An **approver** is a person who enables the decision-maker to make the decision - these approvers are usually higher ranking persons like the decision-maker himself.<sup>105</sup>

Particular expertise enables **influencers** to influence the procurement process even though they are not formally involved. Influencers are often found in quality management because they set the standards. According to Kreuzer et al., people with an above-average of influence on the company such as "grey eminence", retired manager, etc., can also be an influencer concerning procurement decisions.<sup>106</sup>

The **gatekeeper** is involved in the purchasing process and prepares all information for the other persons in the buying center in a structured way. These people are often located in the area where the product or service is to be used - for example, an IT employee for the selection of new server hardware.<sup>107</sup>

<sup>102</sup> cf. Kotler; Keller 2012, p. 188–190; cf. Lippold 2016, p. 9–11; cf. Foscht; Swoboda; Schramm-Klein 2015, p. 297–300; cf. 'A General Model for Understanding Organizational Buying Behavior' n. y., p. 17–19.

<sup>103</sup> cf. Kotler; Keller 2012, p. 188.

<sup>104</sup> cf. Kotler; Keller 2012, p. 188; Kreuzer; Rumler; Wille-Baumkauff 2015, p. 19–20.

<sup>105</sup> cf. Kotler; Keller 2012, p. 188; Kreuzer; Rumler; Wille-Baumkauff 2015, p. 19–20.

<sup>106</sup> cf. Kreuzer; Rumler; Wille-Baumkauff 2015, p. 19; cf. Kotler; Keller 2012, p. 188; cf. 'Who really does the buying?' n. y.

<sup>107</sup> cf. Kreuzer; Rumler; Wille-Baumkauff 2015, p. 19; cf. Kotler; Keller 2012, p. 188; cf. 'Who really does the buying?' n. y.

The **purchaser** takes care of the contractual and commercial aspects. These are the people who select and introduce the suppliers formally. <sup>108</sup>

The **user** is the representative for all persons who will use the product or service in the future. The user plays an essential role in the purchasing process and is ideally involved in the process at an early stage. In many cases, the user is also the initiator, as he or she will recognise the potential for improvement based on daily use. <sup>109</sup>

### 2.3.2 Buying Situations

According to Katona, there is a fundamental distinction between "genuine" and "habitual" buying decisions. Applied in relatively unknown purchasing situations, "real" buying decisions are made, whereas in familiar situations habits play a significant role. <sup>110</sup> This basic concept of Kontona has been adapted over the years by different authors, with the adaptation of Kroeber-Riel and Gröppel-Klein being the most extensive. They assume that the purchase decision is two-dimensional and depends on cognitive and emotional involvement. <sup>111</sup>

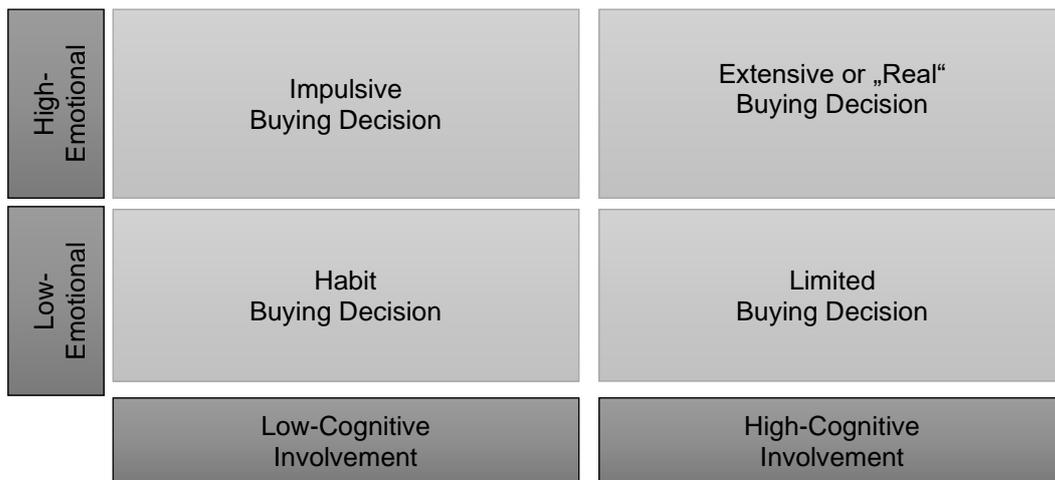


Figure 11: Buying Decision <sup>112113</sup>

A buying situation with high emotional and high cognitive participation is called **extensive or a "real" buying situation**. The economic theory describes mostly this kind of situation. The buyer is in both ways highly involved because the decision has relevance for the

<sup>108</sup> cf. Kreutzer; Rumler; Wille-Baumkauff 2015, p. 19; cf. Kotler; Keller 2012, p. 188; cf. 'Who really does the buying?' n. y.

<sup>109</sup> cf. Kreutzer; Rumler; Wille-Baumkauff 2015, p. 19; cf. Kotler; Keller 2012, p. 188; cf. 'Who really does the buying?' n. y.

<sup>110</sup> cf. Foscht; Swoboda; Schramm-Klein 2015, p. 167.

<sup>111</sup> cf. Kroeber-Riel; Gröppel-Klein 2013, p. 458ff.

<sup>112</sup> cf. Backhaus; Voeth 2014, p. 217; cf. Kreutzer; Rumler; Wille-Baumkauff 2015.

<sup>113</sup> cf. Kroeber-Riel; Gröppel-Klein 2013, p. 463.

company, and there is a little or no previous experience in this field. This type of situation is characterised by a high lack of information, a lengthy decision-making process and the development of an evaluation-matrix. The buyer or buying-center carries out a cost-benefit analysis and compares product features in detail.<sup>114</sup>

A **limited buying situation** is characterised by some buying experience in this area but no clear preference for one supplier. It is typical for this buying situation that customers from the outset only consider a particular and known group of suppliers and already know their evaluation criteria.<sup>115</sup>

In **habitual buying situation** cognitive and emotional involvement is rather low. The reason for this low involvement is that prefabricated purchasing decisions are only implemented. This situation is characterised by a short decision-making time and is particularly relevant for goods for daily use.<sup>116</sup>

Buying situations with high emotional involvement and low cognitive control are called **impulsive buying situations**. Those purchase decisions are unplanned and often uncontrolled.<sup>117</sup> The buyer does not act but only reacts to the stimuli offered.<sup>118</sup>

### 2.3.3 Buying Process

In the literature, there are various descriptions to analyse the purchase process. One of the first approaches was the AIDA model by Elmo Lewis in 1898.<sup>119</sup> In the 1960s the topic became attractive to a wide field of scientist and researchers. Many new approaches emerged like the Buygrid according to Robinson,<sup>120</sup> the customer decision process according to Howard & Seth, the advertising effect model of Lavidge & Steiner and others.<sup>121</sup> More recent developments are the Buying Cycle by Masciadri & Zupancic,<sup>122</sup> the six buying jobs by Gartner,<sup>123</sup> the Consumer Decision Journey by McKinsey<sup>124</sup> and the Customer Journey Model by Procter & Gamble. The essential approaches are presented in the following chapter.<sup>125</sup>

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<sup>114</sup> cf. Solomon 2015, p. 69ff.

<sup>115</sup> cf. Foscht; Swoboda; Schramm-Klein 2015, p. 172.

<sup>116</sup> cf. Foscht; Swoboda; Schramm-Klein 2015, p. 175f; cf. Kroeber-Riel; Gröppel-Klein 2013, p. 485.

<sup>117</sup> cf. Foscht; Swoboda; Schramm-Klein 2015, p. 177–178.

<sup>118</sup> cf. Weinberg 1981, p. 164.

<sup>119</sup> cf. Hiemeyer; Stumpp 2020, p. 69.

<sup>120</sup> cf. Grewal et al. 2015, p. 196; Kotler; Keller 2012, p. 195.

<sup>121</sup> cf. Hiemeyer; Stumpp 2020, p. 69.

<sup>122</sup> cf. Masciadri; Zupancic 2013, p. 186.

<sup>123</sup> 'The New B2B Buying Process' n. y.

<sup>124</sup> cf. 'The consumer decision journey | McKinsey' n. y.

<sup>125</sup> cf. Cundari 2015, p. 48f.

### 2.3.3.1 Purchase Funnel

Elmo Lewis developed the AIDA model as a communication strategy in advertising. AIDA is an acronym for Attention, Interest, Desire and Action. The concept bases on a linear process in the brain concerning advertising. First, a brand has to be made known, so it needs attention in the first step. Then the consumer's interest has to be aroused. The consumer must then develop a desire concerning the intention to buy. Last but not least, the consumer has to set the purchase action.<sup>126</sup> William W. Townsend first mentioned the connection between the AIDA model and a funnel model in 1924 in his book "Bond Salesmanship". He assumed that one could lead a prospective customer to the customer in a kind of funnel of attention over interest etc.<sup>127</sup> Today the AIDA model and the purchasing funnel serve as the basis to many sources.<sup>128</sup>

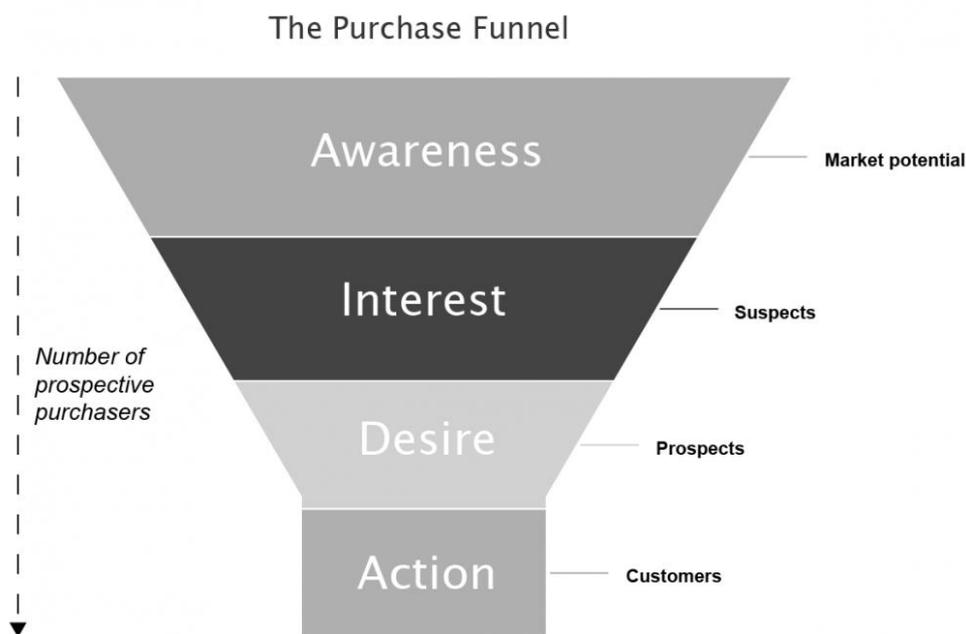


Figure 12: Purchase Funnel<sup>129</sup>

Thus, recommendations for action for advertising design were transformed into phases in the buying process. The number of potential customers is reduced in each of the four stages so that it resembles a funnel system. Phase 1 "Attention" is usually translated as **awareness**. The first step is to generate awareness of potential buyers. The potential customer informs himself about the characteristics of the product, the service or the solution

<sup>126</sup> cf. Hassan; Nadzim; Shiratuddin 2015, p. 265.

<sup>127</sup> cf. Townsend 1924, p. 109.

<sup>128</sup>

cf. Hassan; Nadzim; Shiratuddin 2015, p. 265; cf. 'Marketing Funnel vs Customer Journey Map' n. y.; cf. 'Marketing Funnel EXPLAINED with EXAMPLES | B2U | Business-to-you' 2017; cf. 'AIDA: Attractive websites drive digital marketing' 2017.

<sup>129</sup> 'AIDA: Attractive websites drive digital marketing' 2017.

in the interest-phase. When the customer develops the intention to buy, he is in the **desire-phase**, also called decision-phase. Within the **action-phase**, the buying process is set in motion. <sup>130</sup>

### 2.3.3.2 Buygrid according to Robinson

As early as 1967, Patrick J. Robinson differentiated the buying process in buying classes and buy phases and called it "Buygrid". <sup>131</sup>

		Buyclasses		
		New Task	Modified Rebuy	Straight Rebuy
Buyphases	1. Problem recognition	Yes	Maybe	No
	2. General need description	Yes	Maybe	No
	3. Product specification	Yes	Yes	Yes
	4. Supplier search	Yes	Maybe	No
	5. Proposal solicitation	Yes	Maybe	No
	6. Supplier selection	Yes	Maybe	No
	7. Order-routine specification	Yes	Maybe	No
	8. Performance review	Yes	Yes	Yes

Figure 13: Buygrid<sup>132</sup>

In buying classes, a distinction is made between direct repurchase, modified repurchase and a completely new task. <sup>133</sup>

A **direct repurchase** is a standard procedure in the purchasing department. No new or other suppliers will be considered and the buyer will restock an already known product or service. The supplier aims are to increase sales through a high repurchase rate. <sup>134</sup>

In the case of a **modified repurchase**, the aim is to adjust the supplier's performance accordingly before a buyback. This may involve changes in specifications, but also in prices and conditions. In opposite to the direct repurchase, the purchase from the existing supplier is not fixed and new suppliers could also be taken into account. <sup>135</sup>

When a customer buys an entirely new product or service for the first time, it is called a **new task**, according to Robinson. In this case, neither the particular job nor the supplier is

<sup>130</sup> cf. 'Marketing Funnel vs Customer Journey Map' n. y.

<sup>131</sup> cf. Kotler; Keller 2012, p. 193–194; cf. Grewal et al. 2015, p. 195–196.

<sup>132</sup> cf. Grewal et al. 2015, p. 196; Kotler; Keller 2012, p. 195.

<sup>133</sup> cf. Kotler; Keller 2012, p. 193–194; cf. Grewal et al. 2015, p. 195–196.

<sup>134</sup> cf. Kotler; Keller 2012, p. 193–194; cf. Grewal et al. 2015, p. 195–196.

<sup>135</sup> cf. Kotler; Keller 2012, p. 193–194; cf. Grewal et al. 2015, p. 195–196.

known at the beginning of the process. This is the most significant challenge for the buyer, as the decision can be associated with high risks.<sup>136</sup>

In each of the three buying situations, a buyer will go through eight buy phases.

1. Problem recognition
2. General need description
3. Product specification
4. Supplier search
5. Proposal solicitation
6. Supplier selection
7. Order-routine specification
8. Performance Review<sup>137</sup>

The buying process starts at the moment the **customer realises** that **his problem** needs to be solved. There can be internal or external stimuli to identify the problem. Internal stimuli are often the apparent problems such as poor delivery performance, quality defects and others. The traditional marketing aims at external incentives by suggesting that the customer has a problem.<sup>138</sup> In B2B, this could be a promise like delivery within 24 hours or a unique product feature.

In the phase of the **general need description**, the problem is roughly worked out and specified. Internal and external resources are often used to do this. Existing suppliers can already exert considerable influence on the customer in this phase and guide him towards a solution.<sup>139</sup>

The **product specification** phase differs from the general description of requirements to the extent that the customer puts together a group of experts to generate a specification sheet. Often a value analysis takes place in this step to evaluate the possible solutions on a subjective basis.<sup>140</sup>

To **find suitable suppliers**, customers make use of trade fairs, catalogues, trade directories, etc. Internet shopping has also changed the way information is obtained and suppliers are selected. More than 90% of buyers in the B2B sector are searching on the

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<sup>136</sup> cf. Kotler; Keller 2012, p. 193–194; cf. Grewal et al. 2015, p. 195–196.

<sup>137</sup> Kotler; Keller 2012, p. 195; cf. Grewal et al. 2015, p. 195–196; cf. Robinson 1967, p. 13.

<sup>138</sup> cf. Homburg; Schäfer; Schneider 2016, p. 150; cf. Kotler; Keller 2012, p. 196.

<sup>139</sup> cf. Kotler; Keller 2012, p. 196.

<sup>140</sup> cf. Kotler; Keller 2012, p. 196; cf. Robinson 1967, p. 58.

internet to get more information about potential suppliers. The possibilities via the internet are far-reaching, ranging from industry websites to web searches and video blogs.<sup>141</sup>

The next step is the **solicitation of offers** where proposals for solutions are sought and evaluated from potential suppliers. After the evaluation of the various offers, a few suppliers are usually invited to present their solution.<sup>142</sup>

In the **supplier selection** phase, the eligible suppliers are compared with one another and a supplier will be selected. This decision is often made in a team and based on evaluation criteria. The evaluation criteria are different for each purchasing process and are also weighted differently.<sup>143</sup> According to a study, quality, price, technical competence, service, delivery capacity, experience and advice are the most important criteria for selecting a supplier.<sup>144</sup>

Before the contract is awarded, the **order-routine specifications** have to be determined. These include financing, guarantees, delivery arrangements, etc. If the purchase is the beginning of a planned long-term partnership, often appropriate framework agreements are drawn up.<sup>145</sup>

The **performance assessment** takes place either once after the purchase or continuously in the case of long-term partnerships. The supplier is evaluated according to various criteria and compared with other suppliers. Typical measures are complaints, delivery capability, delivery reliability, flexibility, price development, etc.<sup>146</sup>

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<sup>141</sup> cf. KG n. y.; cf. Kotler; Keller 2012, p. 195–198.

<sup>142</sup> cf. Kotler; Keller 2012, p. 198.

<sup>143</sup> cf. Kotler; Keller 2012, p. 198–201.

<sup>144</sup> cf. Dempsey 1978, p. 257.

<sup>145</sup> cf. Kotler; Keller 2012, p. 201.

<sup>146</sup> cf. Kotler; Keller 2012, p. 201.

### 2.3.3.3 Buying jobs according to Gartner

In contrast to Robinson, Gartner Research identified six buying jobs to the purchasing decision in 2019.<sup>147</sup>

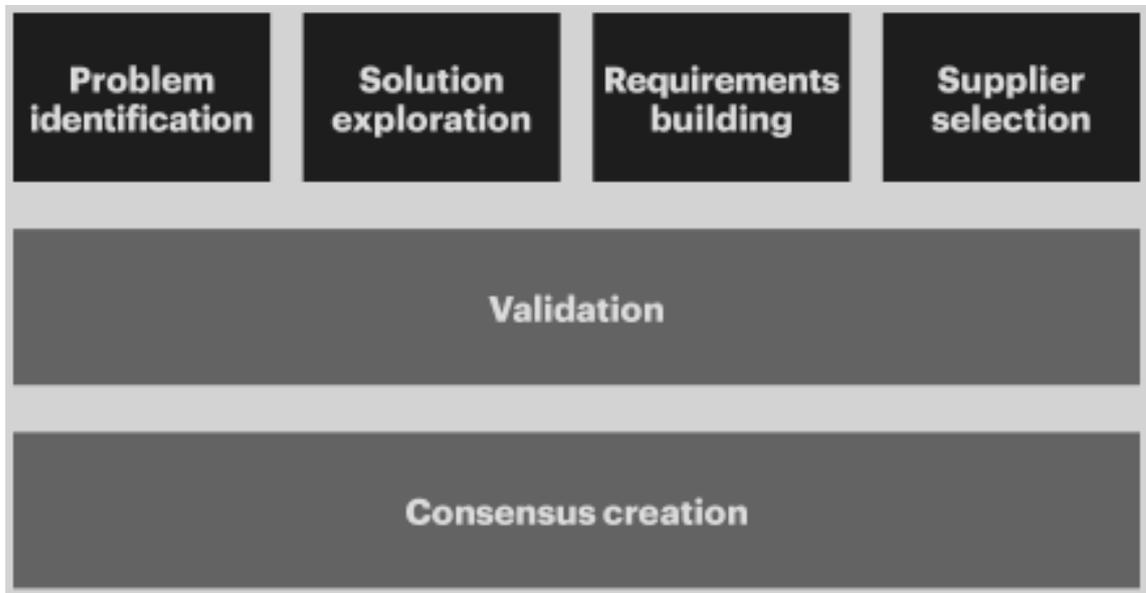


Figure 14: B2B buying jobs concerning Gartner<sup>148</sup>

Just like Robinson in 1967, Gartner, some 50 years later, assumes that the problem must first be recognised. Further tasks in the course of the purchasing process are to scan the market concerning solutions (solution exploration), to build up the requirements, to select the supplier, to validate the supplier and create a consensus at the buying center. However, unlike Robinson, Gartner concludes that buying is not a linear process, but a potential buyer jumps back and forth from step to step. For example, an input from the market in the course of validation can have an impact and also change the requirements.<sup>149</sup>

<sup>147</sup> cf 'Gartner - B2B Sales Customer Journey.pdf' n. y.; cf. 'The New B2B Buying Process' n. y.

<sup>148</sup> 'The New B2B Buying Process' n. y.

<sup>149</sup> cf 'Gartner - B2B Sales Customer Journey.pdf' n. y.; cf. 'The New B2B Buying Process' n. y.

### 2.3.3.4 Consumer Decision Journey according to McKinsey

The management consultancy McKinsey has carried out a study of around 20,000 purchase decisions in five sectors on three continents and developed the Consumer Decision Journey in 2007. In contrast to the funnel concepts, they found that the decision-making process is circular.<sup>150</sup>

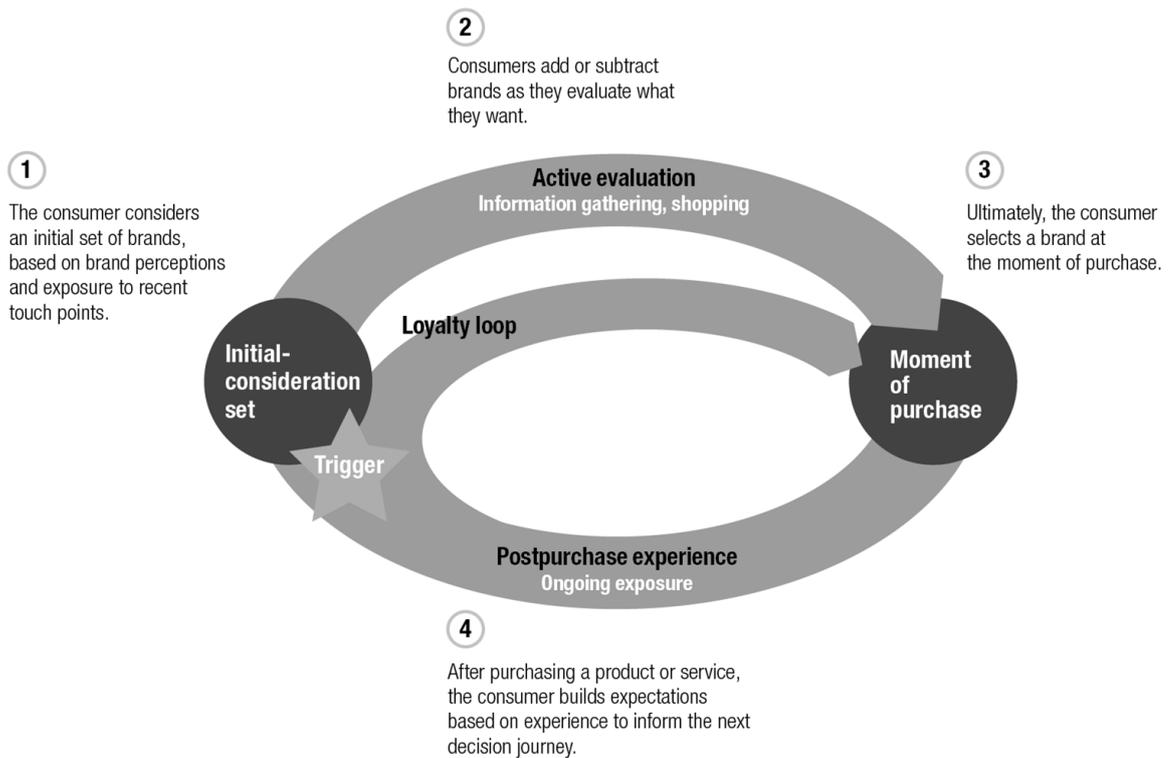


Figure 15: Consumer Decision Journey<sup>151</sup>

There is still a trigger that sets the buying process in motion. In the first phase, the customer considers certain products, services or companies. An evaluation phase will follow this. In contrast to Townsend, new suppliers can also be added, because during research new solutions can come up. The decision happens in phase 3, and usage and experience are made in step 4. After the usage, McKinsey sees the Loyalty Loop as a shortcut in the purchase process as customers tend to buy again out of genuine loyalty or convenience.<sup>152</sup>

### 2.3.3.5 Buying Cycle according to Masciadri and Zupancic

The buying cycle, according to Masciadri and Zupancic is also a four-phase model with an origin in the field of marketing. The purchase cycle aims to influence the customer in every

<sup>150</sup> cf. 'The consumer decision journey | McKinsey' n. y.; cf. 'Ten years on the consumer decision journey: Where are we today? | McKinsey & Company' n. y.

<sup>151</sup> 'The consumer decision journey | McKinsey' n. y.

<sup>152</sup> cf. 'The consumer decision journey | McKinsey' n. y.

phase of the purchase with the right information and communication channels.<sup>153</sup> The buying cycle is a prevalent one; for example, UBS Bank and Microsoft used this method.<sup>154</sup>



Figure 16: Buying Cycle<sup>155</sup>

In the **contact phase**, the customer's need for information is the main focus. It is crucial to satisfy interest by addressing the customer. In the **evaluation phase**, the customer need is to decide on a supplier or a solution. The provider tries to motivate the customer to buy. In the **purchase phase**, the aim is to make the purchase as easy as possible for the customer. The provider has a supporting function here. Furthermore, in the **usage phase**, the customer wants to have his decision confirmed. So the provider has the task to maximise the customer experience and to take care of the customer in the best possible way.<sup>156</sup>

### 2.3.3.6 Moments of Truth according to Procter & Gamble

In 2005, Procter and Gamble (P&G) developed the "Moment of Truth", a straightforward model for representing a customer journey. Moments of truth are interactions between the customer and the goods.

According to Procter and Gamble, there is first a stimulation of the customer and then a first and second moment of truth.<sup>157</sup>

<sup>153</sup> cf. Masciadri; Zupancic 2013, p. 185.

<sup>154</sup> cf. Masciadri; Zupancic 2013, p. 187–192.

<sup>155</sup> cf. Masciadri; Zupancic 2013, p. 186.

<sup>156</sup> cf. Masciadri; Zupancic 2013, p. 186–188.

<sup>157</sup> cf. Köksal 2017, p. 465f; cf. 'Moments of Truth - Definition' 2016; cf. Dräger 2020; cf. Cundari 2015, p. 48.



Figure 17: Moments of Truth<sup>158</sup>

The stimulation can be done via traditional advertising or other marketing measures. If the stimulus was big enough, the customer in the store perceives the brand and decides for it at the first moment of truth (FMOT). The second moment of truth (SMOT) is revealed when using the product by checking the quality promise. In summary, P&G believed that these two moments of truth determine the likelihood of repurchase.<sup>159</sup>

### 2.3.3.7 Zero of Truth according to IRI Group

The Procter & Gamble model was extended by another moment of truth by the IRI Group in 2009.<sup>160</sup> They called this moment the Zero Moment of Truth (ZMOT) because it was in the buying process before the First Moment of Truth (FMOT). The Zero Moment of Truth (ZMOT) assumes that the customer is informed about the product between the stimulus and the visit to a store.<sup>161</sup>



Figure 18: Zero Moment of Truth<sup>162</sup>

<sup>158</sup> '2011 - The Zero Moment of Truth Macro Study, GoogleShopp.pdf' n. y., p. 5.

<sup>159</sup> cf. Köksal 2017, p. 465f; cf. 'Moments of Truth - Definition' 2016; cf. Dräger 2020; cf. Cundari 2015, p. 48.

<sup>160</sup> cf. Köksal 2017, p. 466.

<sup>161</sup> cf. Köksal 2017, p. 466; cf. Cundari 2015, p. 48–50.

<sup>162</sup> '2011 - The Zero Moment of Truth Macro Study, GoogleShopp.pdf' n. y., p. 6.

The Zero Moment of Truth (ZMOT) became well known in 2011 thanks to Google's market study, which analysed the behaviour of 5,000 purchases in 12 product groups and concluded that the Zero Moment of Truth (ZMOT) had a significant impact on the decision of 84% of shoppers.<sup>163</sup>

### 2.3.3.8 Customer Purchase Journey according to Cundari

In its Customer Purchase Journey Cundari has combined the concepts of McKinsey's Consumer Decision Journey, P&G's Moments of Truth and the IRI Group's Zero Moment of Truth into one model.<sup>164</sup>



Figure 19: Customer Purchase Journey<sup>165</sup>

The model starts with a trigger that generates attention and therefore a specific selection of products, solutions or brands are considered. Then a research phase follows with the Zero Moment of Truth (ZMOT) and in a next step the evaluation of the supplier, which ends with the purchase of the First Moment of Truth (FMOT). After the purchase, the customer gains experience with the product and becomes a repeat buyer via the Loyalty Loop or leave the purchasing journey. Optimally, the customer becomes an advocate and influences potential and new customers in the research phase (ZMOT) via internet recommendations or word of mouth. Cundari calls this effect the Advocate Accelerator Loop.<sup>166</sup>

<sup>163</sup> cf. 'The Zero Moment of Truth Macro Study, Google/Shopper Sciences, U.S., Apr 2011' 2011, p. 3–13.

<sup>164</sup> cf. Cundari 2015, p. 50–52.

<sup>165</sup> Cundari 2015, p. 51.

<sup>166</sup> cf. Cundari 2015, p. 50–52.

### **2.3.4 Summary**

Buying decisions in B2B markets are often more rational than buying decisions in B2C markets. The reason for this is that the needs of an organisation must be met instead of human or personal needs. The buying process becomes more complex due to the peculiarity of the buying centres. According to Webster and Wind (2.3.1), several people with different roles often contribute to a purchase decision: users, gatekeepers, approvers, and others. Purchase decisions are also made in different emotional and cognitive involvement (2.3.2). The subject-specific literature mostly focuses on "real" buying situations with high emotional and high cognitive involvement.

Various models have been developed for the buying process in recent decades. A quite simple but impressive one dates to the 1920s: William W. Townsend developed the purchase funnel (2.3.3.1). This model is an exciting starting point for this chapter, since it comes from a time when the balance between supply and demand began to flip. This general change is also reflected in the following models by Robinson and Gartner, who assumed a rather rational approach by the buyer.

Today, however, research has moved away from linear models and replaced these models with circular ones (2.3.3.4 ff.). Worth mentioning is the Cundari Customer Purchase Journey model, which is a combination of different concepts (2.3.3.8). The Customer Purchase Journey is particularly convincing in the fact that it is not limited to a single purchase moment, but really reflects a recurring purchase relationship. In the research field of this master thesis, the heating industry, repeat purchases and long-term business relationships are standard, individual purchases are extremely rare. That is why the choice as a reference model for further processing very much considered on the concept of Cundari. Elements from this model will also be found in chapter 4 of this thesis.

## 2.4 Digitalisation

In the literature, the term digitalisation is often replaced with the synonym digital transformation. However, there is no clear definition of the term.<sup>167</sup>

Gartner understands digitisation as the use of digital technologies to adapt business models and sees this only as a preliminary stage to digital business.<sup>168</sup> Parviainen refers to the conversion of analogue data into digital form as digitalisation.<sup>169</sup> Bowersox et al. understand digital transformation as a process of adapting a business model into digital operations. Tihinen et al. speak of the ability to convert existing offers into digital varieties and thus to gain advantages in the course of digitisation<sup>170</sup>. The Capgemini Consulting Group understands digitalisation as the use of technology to improve the companies performance or reach radically.<sup>171</sup>

In the literature, one finds numerous other definitions. The digitalisation consulting company "etventure" has chosen a practical approach to the topic and, in the course of a study, interviewed about 2000 German companies with a minimum annual turnover of 250 million €. The study clearly showed that the majority of companies understand digitisation as the transformation of existing business models and processes. Only 28% of the companies saw it similar to Gartner and focused on the development of new business models.<sup>172</sup>

All the above statements actually suggest that digital transformation is a replacement for manual and plant activities. However, Iansiti and Lakhani make it clear that this is not a disruptive process per se. According to Iansiti and Lakhani, digital transformation is about networking, redesigning and digitising processes.<sup>173</sup>

### 2.4.1 Digital Transformation

There are different approaches in the literature to describe the digital transformation of an existing business model based on Esser, PricewaterhouseCoopers and Bouèe and Schaible. Schallmo et al. have developed their roadmap for digital transformation.<sup>174</sup>

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<sup>167</sup> cf. 'Schallmo - 2016 - Jetzt digital transformieren.pdf' n. y., p. 3.

<sup>168</sup> cf. Gray; Rumpe 2015.

<sup>169</sup> cf. Parviainen; Tihinen 2017, p. 64.

<sup>170</sup> cf. Tihinen et al. 2016.

<sup>171</sup> cf. 'Digital\_Transformation\_\_A\_Road-Map\_for\_Billion-Dollar\_Organizations.pdf' n. y., p. 5.

<sup>172</sup> cf. 'etventure\_Studie\_2018-Trendreport.pdf' n. y., p. 8.

<sup>173</sup> cf. Iansiti; Lakhani 2014.

<sup>174</sup> cf. Schallmo 2016, p. 7–11.

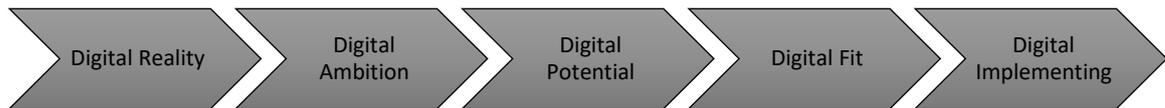


Figure 20: Digital Transformation Roadmap<sup>175</sup>

The "**Digital Reality**" phase aims to carry out an analysis of the current situation. For this purpose, on the one hand, the existing processes and, on the other hand, the customer requirements are outlined and the necessary conclusions are derived. When sketching the customer's requirements, the benefit must be analysed and categorised. These can be functional, economic, process-related, emotional or social benefits.<sup>176</sup>

The definition of the goals to be achieved with the digital transformation is called "**Digital Ambition**", according to Schallmo et al.<sup>177</sup>

After the target definition, the actual **digital potentials** are determined. These are done by benchmarking best-price solutions from other industries and by identifying enablers.<sup>178</sup> The term enablers originate from Bouèe and Schaible and are digital technologies and drivers that support digital transformation. Bouèe and Schaible divide these technologies and drivers into the categories of networking technologies, digital data analysis, digital customer access and automation.<sup>179</sup>

The next step is to evaluate the different options and correlate them to the requirements and business opportunities. Schallmo et al. call this phase "**Digital Fit**".<sup>180</sup>

The final step is to finalise and **implement** a business model adapted through digital transformation.<sup>181</sup>

## 2.4.2 Digitisation as a Megatrend

The term megatrend was coined by John Naisbitt and described a trend of long duration and enormous potential for change.<sup>182</sup> According to Horx, the emergence of megatrends

<sup>175</sup> cf. Schallmo 2016, p. 11–28.

<sup>176</sup> cf. Schallmo et al. 2017, p. 13–17.

<sup>177</sup> cf. Schallmo et al. 2017, p. 17–18.

<sup>178</sup> cf. Schallmo et al. 2017, p. 18–20.

<sup>179</sup> cf. Bloching et al. n. y., p. 17–21.

<sup>180</sup> cf. Schallmo 2016, p. 22–23.

<sup>181</sup> cf. Schallmo et al. 2017, p. 24–27.

<sup>182</sup> 'John Naisbitt's Trend Letter: Reimagining Business Civilization in the 1980s - ProQuest' n. y.

can take decades. The decisive factors for a megatrend are its influence on all areas of life, its global character and a sustained dynamic despite setbacks.<sup>183</sup>

Streibich already wrote down in 2015 that digitisation is a global megatrend that affects all areas of people's lives. He concludes that no other change in our time influences us as powerfully as digitalisation. The different future research institute named up to 15 megatrends. Mostly digitisation is in the one or other way a part of it. For example, PricewaterhouseCoopers names the rise of technology, McKinsey the technological breakthroughs and the Future Institute the connectivity.<sup>184</sup>

### 2.4.3 Drivers of Digitalisation

Depending on the source, there are different statements about what the actual drivers of digitisation are. According to Tiersky, it is mainly customer expectations in terms of speed and customer experience coupled with artificial intelligence and transformation of business models that are the drivers behind digitisation.<sup>185</sup> According to Faber, the drivers behind digitisation are the speed of data processing, the rate of data transport, the Internet of Things, cloud computing, big data, artificial intelligence and blockchain technology.<sup>186</sup> With more focus on the production process, Kettunen and Salmela call the Internet of Things, the driver for digital transformation.<sup>187</sup> According to Disler, globalisation, the new economy, the Internet of Things, Big Data, changes in consumer behaviour and the urge to reduce transaction costs are the main drivers of digitalisation.<sup>188</sup> All these sources have in common that digitisation is driving human needs on the one hand and technological progress on the other. To categorise and evaluate emerging technological advances, Gartner developed the Gartner Hype Cycle in 1995.<sup>189</sup>

The Hype Cycle represents the typical progress of innovation. It shows, when innovation becomes relevant at all and when the first steps become business models.<sup>190</sup>

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<sup>183</sup> cf. Horx 2011, p. 72ff.

<sup>184</sup> cf. 'Megatrends In Action' n. y.; cf. 'Die Megatrend-Map' 2020; cf. 'five-megatrends-implications.pdf' n. y., p. 15–18; cf. 'Megatrends 2020-2030 ... what they mean for you and your business, and how to seize the new opportunities for innovation and growth' 2019.

<sup>185</sup> cf. 'The 5 key drivers of digital transformation today - ProQuest' n. y.

<sup>186</sup> cf. Erner 2019, p. 4.

<sup>187</sup> cf. 'Internet of Things as a Digital Transformation Driver in the Finnish Manufacturing Technology Industry' n. y.

<sup>188</sup> cf. Alexander Disler n. y.

<sup>189</sup> cf. 'Understanding Gartner's Hype Cycles' n. y.

<sup>190</sup> cf. 'Understanding Gartner's Hype Cycles' n. y.

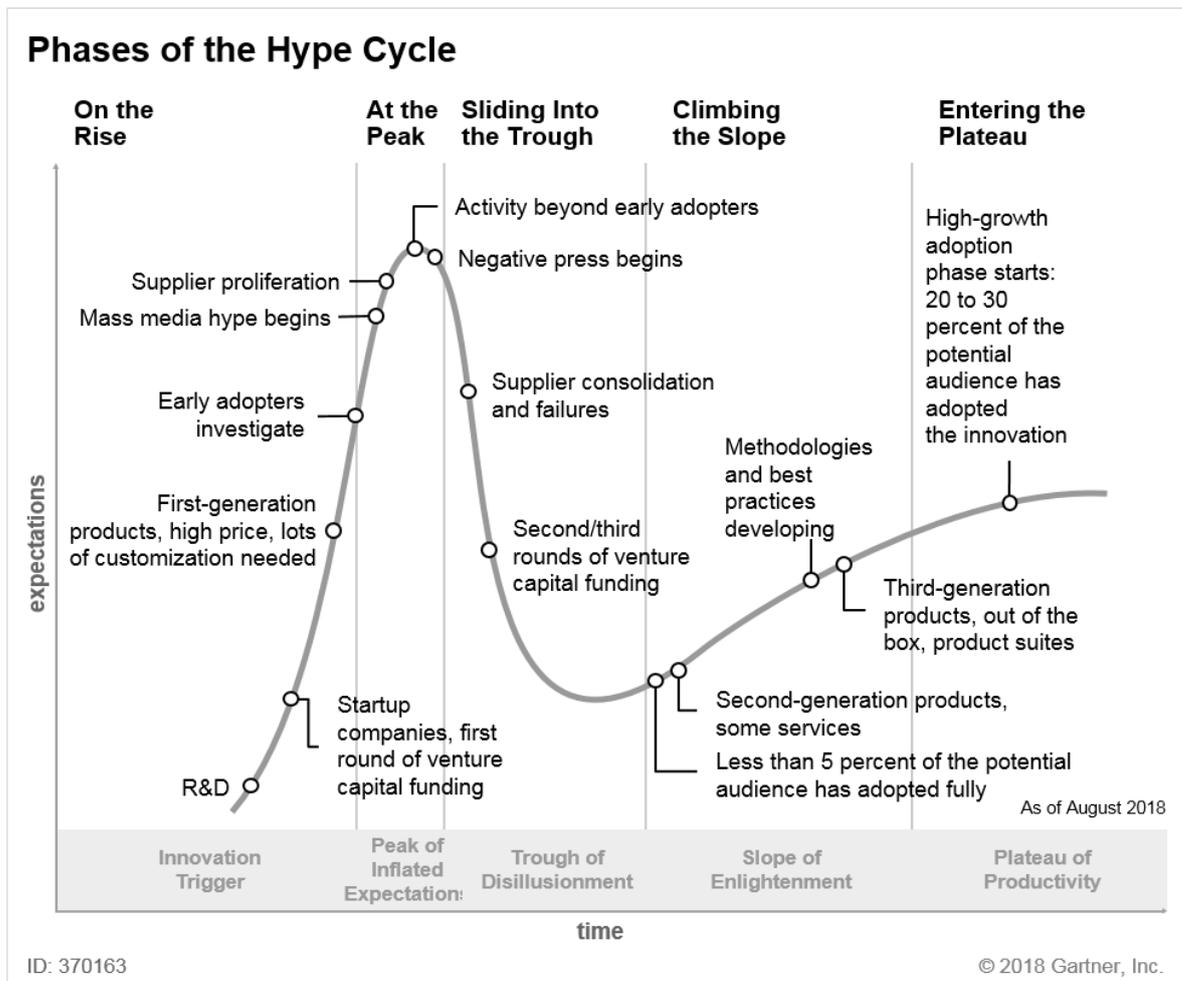


Figure 21: Gartner Hype Cycle<sup>191</sup>

According to Gartner, an innovation technology goes through a total of five phases with "Innovation Trigger", "Peak of Inflated Expectation", "Trough of Disillusionment", "Slope of Enlightenment" and "Plateau of Productivity".<sup>192</sup>

#### Phase 1: Innovation Trigger

The first phase of the Hype Cycle is called "Innovation Trigger". At this phase the first projects are launched, and the broad masses become aware of the technology.<sup>193</sup>

<sup>191</sup> 'Understanding Gartner's Hype Cycles' n. y.

<sup>192</sup> cf. 'Understanding Gartner's Hype Cycles' n. y.

<sup>193</sup> cf. 'Understanding Gartner's Hype Cycles' n. y.

## **Phase 2: Peak of Inflated Expectations**

At the peak of inflated expectations, the innovative technology has maximum media attention and unrealistic and exaggerated expectations are stirred up.<sup>194</sup>

## **Phase 3: Trough of Disillusionment**

In this phase, it is determined that the innovation cannot fulfil the exaggerated expectations and disillusionment occurs. Problems with the performance usually happen, and the media interest decreases.<sup>195</sup>

## **Phase 4: Slope of Enlightenment**

The new technology is viewed realistically with its strengths and weaknesses. First innovative companies overcome the initial hurdles and start to use the technology effectively.<sup>196</sup>

## **Phase 5: Plateau of Productivity**

More and more companies are recognising the advantages of this new technology. This leads to an increase in acceptance and an expansion of the fields of application. Business models are developed and productively implemented.<sup>197</sup>

Gartner, in his Hype Cycle for emerging technologies, also names the megatrends of the future in the field of digitisation. According to Gartner, sensors will permanently change mobility and improve autonomous driving and flying. The second megatrend will be the connection between man and machine. Besides, computing and communication solutions will open up the entire globe through new technology. Customers, suppliers, competitors and things will create digital ecosystems and network with each other. Machine learning and artificial intelligence will increasingly push back subjective decision-making.<sup>198</sup>

Of the more than 200 unique technologies that have ever appeared in a Gartner hype cycle for emerging technologies,<sup>199</sup> the following four have been identified as leading the way in sales and marketing: Internet of Things, Big Data, Cloud Computing and Artificial Intelligence.

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<sup>194</sup> cf. 'Understanding Gartner's Hype Cycles' n. y.

<sup>195</sup> cf. 'Understanding Gartner's Hype Cycles' n. y.

<sup>196</sup> cf. 'Understanding Gartner's Hype Cycles' n. y.

<sup>197</sup> cf. 'Understanding Gartner's Hype Cycles' n. y.

<sup>198</sup> cf. '5 Trends Appear on the Gartner Hype Cycle for Emerging Technologies, 2019' n. y.

<sup>199</sup> cf. '(2) 8 Lessons from 20 Years of Hype Cycles | LinkedIn' n. y.

### 2.4.3.1 Internet of Things

The Internet of Things (IoT) originated in 1999 when Kevin Ashton of the Massachusetts Institute of Technology (MIT) spoke of a network of connected devices and had the vision that computers could capture and understand the real world without human intervention. The starting point at that time was RFID technology for locating objects.<sup>200</sup> The starting point at that time was RFID technology for locating objects. The basic idea of 1999 with communication between things without human influence remained the same. Only the technology has changed so that today networked objects interact with each other directly via the internet. The range of application is far-reaching here. The enormous potentials are seen, apart from the first application area of logistics, above all in the energy industry, mobility, industrial production, health care and not to forget in everyday life. In the energy industry, the buzzword "Smart Grid" is an often mentioned term concerning IoT. This allows electricity production and consumption to be optimally coordinated. In the field of mobility, autonomous driving is a technology which, according to Gartner, will reach the next stage of development in the next few years. Industrial production is working to ensure that things will control and monitor production processes themselves in future. In the future, sensors that monitor body functions will support preventive health care and disease treatment. Moreover, the topic of smart home (intelligent home concerning Gartner) will directly influence the everyday life of many people.<sup>201</sup>

### 2.4.3.2 Big Data

According to Marr, the hype around Big Data will disappear and be seen as usual, as Big Data will change almost all areas of business and life. There are countless definitions per se.<sup>202</sup> DeRoos defines Big Data as extracting information from enormous volumes of data that would have been impossible before.<sup>203</sup> Dumbill defines it more technically and understands Big Data as a processing capacity that standard database systems cannot provide.<sup>204</sup> Marr defines Big Data as the fact that data can now be collected and analysed in a quantity that was not possible a few years ago. The most common of these definitions nevertheless refer to the same characteristics of Big Data with volume, variety, velocity and veracity.<sup>205</sup>

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<sup>200</sup> cf. Abashidze; Dąbrowski 2016, p. 217; cf. 'IoT-A Internet of things Architecture' n. y.; cf. Borgmeier; Grohmann; Gross 2017, p. 5.

<sup>201</sup> 'Good Bye Connected Home - Hello Intelligent Home - Jessica Ekholm' n. y.; cf. 'Emer - 2019 - Management 4.0 – Unternehmensführung im digitalen .pdf' n. y., p. 12–14.

<sup>202</sup> cf. Marr 2016.

<sup>203</sup> cf. Zikopoulos n. y., p. 3–4.

<sup>204</sup> cf. Dumbill n. y.

<sup>205</sup> cf. King 2014, p. 34–35.

**Volume** is mostly defined as the pure amount of data. Whereby the volume increases steadily and is even underestimated. In 2013, Jüngling also assumed that the amount of data would continue to double every two years according to Moore's Law so that in 2020 it will be about 40 zettabytes.<sup>206</sup> The International Data Corporation (IDC) today assumes that the data volume in 2020 will already be 59 zettabytes.<sup>207</sup> Stockinger and Stadelmann see the reason for this unpredictable growth in data volume in certain phases in the fact that technological waves influence data volumes. Stockinger and Stadelmann see major research institutes such as CERN as the first wave, which produce an enormous amount of data. Internet companies such as Google, Amazon and Co, which index and store data, are seen as drivers of the second wave. Social networks are the third wave, and the fourth wave is the Internet of Things, which also produces an enormous amount of data through sensor data.<sup>208</sup>

The term **variety** describes the heterogeneity of the data. Big Data obtains information from a wide variety of data sources in a wide variety of formats and sometimes even unstructured. Typical examples are photos or audio files. Big Data must generate enough intelligence to interpret the data by using processes.<sup>209</sup>

**Velocity** is not clearly defined in the literature. Some sources understand it as the speed of data generation, and others assume it as the processing speed. Ultimately, however, both types of definition interact, since more data in a shorter time also requires more processing speed.<sup>210</sup> Marr sees distributed computing technology as a driver of more processing speed, in which the computing power of several computers can be made available as a whole. Google, for example, uses the computing power of around 1000 computers for each search query.<sup>211</sup>

According to Bender et al., veracity describes the accuracy and reliability of the data. Social media are the most prominent example, as subjective and objective content mix together: In this respect, it is Big Data's task to verify the data and to separate the objective content from the subjective content.<sup>212</sup>

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<sup>206</sup> cf. Jüngling 2013.

<sup>207</sup> cf. 'Data created worldwide 2010-2024' n. y.

<sup>208</sup> cf. Stockinger; Stadelmann 2014.

<sup>209</sup> cf. Dorschel 2015, p. 8; cf. Hashem et al. 2015.

<sup>210</sup> cf. Dorschel 2015, p. 8-9; cf. Hashem et al. 2015.

<sup>211</sup> cf. Marr 2016, p. 3.

<sup>212</sup> cf. 'Taming Uncertainty in Big Data' n. y.

### 2.4.3.3 Cloud Computing

The ongoing digitalisation needs cloud computing as a technology to process the amount of data at the appropriate speed.<sup>213</sup>

The term "cloud computing" was coined by Chellappa back in 1997, but there is no uniform definition of cloud computing. According to the National Institute of Standards and Technology, cloud computing is about providing easily configurable computing resources with a minimum of effort.<sup>214</sup> In some definitions, only the characteristics of cloud computing are described. Rittinghouse and Ransome characterised cloud computing by a flexible and scalable infrastructure. Furthermore, Armbrust et al. speak of infinite computing resources that are available on demand.<sup>215</sup> In summary, cloud computing describes a technology that provides computing power in a simple, flexible, scalable and unlimited way.

However, all these definitions of cloud computing do not describe by whom and where the cloud should be operated. The most common form is the Public Cloud, which is owned and managed by an external provider.<sup>216</sup> The leading providers for B2B usage are Amazon, Microsoft and Google.<sup>217</sup> The using company can also own and operate the cloud; this kind of cloud computing is called Private Cloud. A Community Cloud is a cloud which is shared by several companies. It is also possible to distribute the load flexibly between the three different cloud variants; then it is called a Hybrid Cloud.<sup>218</sup>

### 2.4.3.4 Artificial Intelligence

Artificial intelligence, big data and cloud computing are inevitably linked. Since the large and unstructured data sets with computing power must be given a "meaning",<sup>219</sup> the automatic face recognition "DeepFace" from Facebook can be mentioned as an example.<sup>220</sup> There is currently no official definition of artificial intelligence, but the literature refers to an explanation from Amazon. Concerning Amazon, artificial intelligence is defined: "A field of computer science that deals with the acquisition of cognitive abilities, which are usually attributed to human intelligence. For this purpose counts learning, problem-solving and pattern recognition".<sup>221</sup>

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<sup>213</sup> cf. Abolhassan 2016, p. 7.

<sup>214</sup> cf. Mishra 2014, p. 204–205.

<sup>215</sup> cf. Reinheimer 2018, p. 4–5.

<sup>216</sup> cf. Mishra 2014, p. 204–205.

<sup>217</sup> cf. 'Enterprise public cloud service usage worldwide 2017-2020' n. y.

<sup>218</sup> cf. Mishra 2014, p. 204–205.

<sup>219</sup> cf. Erner 2019, p. 26.

<sup>220</sup> cf. Lu et al. 2018, p. 1.

<sup>221</sup> cf. 'What is Artificial Intelligence (AI)? — Amazon Web Services' n. y.

According to Berendt, there are four groups of artificial intelligence.

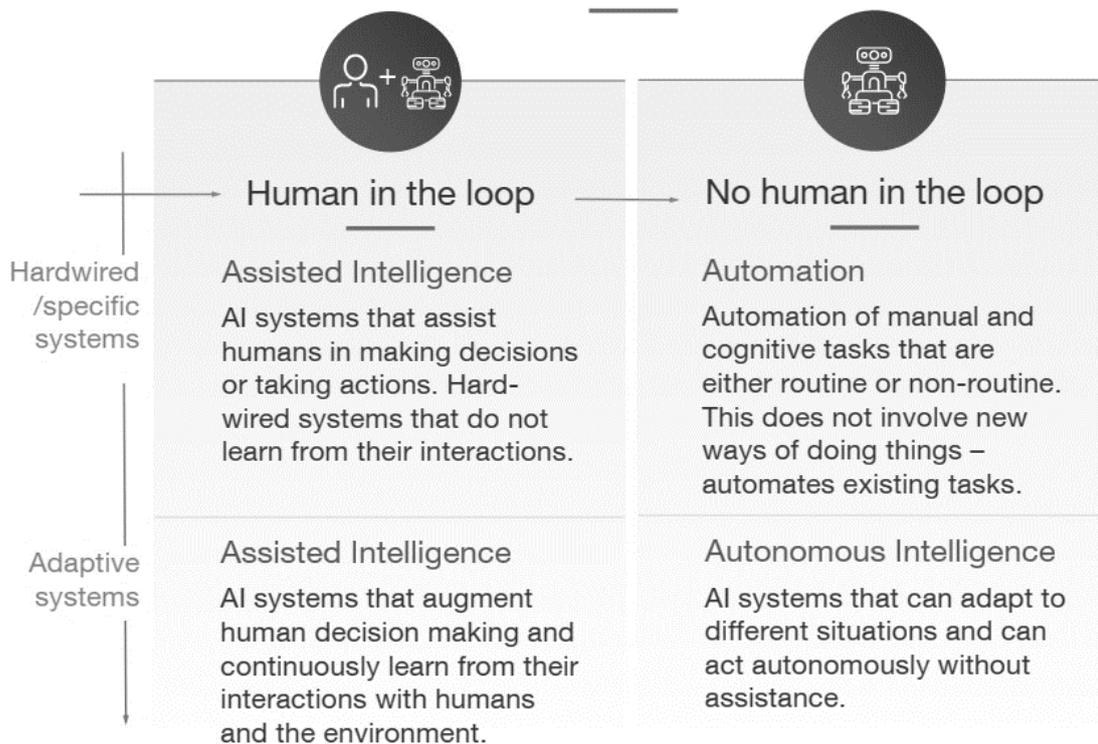


Figure 22: Four groups of artificial intelligence<sup>222</sup>

The main distinction is made between learning and non-learning systems and systems with and without human interaction. Non-learning systems that support people in making decisions or in their work belong to the first group. The next step in the evolution will be if a non-learning system carries out actions without human interaction.<sup>223</sup>

Next group are systems which learn from human interaction. For example, this is still in use in cancer research.<sup>224</sup> Millions of photos of healthy and diseased cells are compared, and the system learns by human interaction with each additional photo. If the system could decide on its own if the cells are healthy or sick, this would be the last step of artificial intelligence development.<sup>225</sup>

The fields of application of artificial intelligence are already wide-ranging from automatic pricing and image recognition to self-propelled cars and automated decision making.<sup>226</sup>

<sup>222</sup> LinkedIn Talent Solutions 18:31:34 UTC, p. 6.

<sup>223</sup> cf. LinkedIn Talent Solutions 18:31:34 UTC, p. 6; cf. Bünthe 2018, p. 5–6.

<sup>224</sup> cf. LinkedIn Talent Solutions 18:31:34 UTC, p. 6; cf. Bünthe 2018, p. 5–6.

<sup>225</sup> cf. Erner 2019, p. 28.

<sup>226</sup> cf. Erner 2019, p. 27–29.

#### **2.4.4 Summary**

Digitalisation is a buzzword of our time. But do we all understand the same thing when we talk about digitalisation? This chapter starts with the search for the definition of the term digitalisation and presents different interpretations. The picture quickly emerges that digitalisation (or the frequently used synonym “digital transformation”) is a replacement for manual and plant activities. However, the nature of digitalisation is more likely to find in the areas of networking, redesigning and digitising processes.

This so-called megatrend (2.4.2) is further accelerated by various drivers. Examples for these drivers include the speed of data processing, the rate of data transport, artificial intelligence, blockchain technology and others. Four of the many drivers are dealt with in more detail in chapter 2.4.3 because they are believed to have the greatest importance for the further digitalisation process. This should allow a better understanding of the upcoming changes and provide a good basis for further consolidation in the following chapter 2.5 and for the empirical tasks of this master thesis.

## 2.5 Digitalisation in Sales in B2B

Technological progress has always had an impact on sales. To illustrate this, Binckebach and Elste go back to the year 1998 and report on a typical working day of a sales employee. According to them, they prepare customer files in folders, plan sales tours by using city maps, pick up orders via notepad and communicate with the head office via fax, landline and letters. Approximately 20 years later, digital technologies support the sales force in all these activities. CRM systems and digital customer files help to prepare visits quickly, navigation-systems recognise the fastest route in real-time, orders are placed via e-commerce and communication takes place via e-mail, mobile phone or messenger services.<sup>227</sup> Digitalisation in sales is equal to the digital support of every sales employee or sales organisation, according to Elste. This support can happen in all phases of the sales process and is driven by technological improvement.<sup>228</sup>

According to Katzengruber and Pförtner, technological innovations always lead to market changes that alter or entirely question existing business models. Such serious technological changes still had a direct impact on the development of sales and their processes.<sup>229</sup>

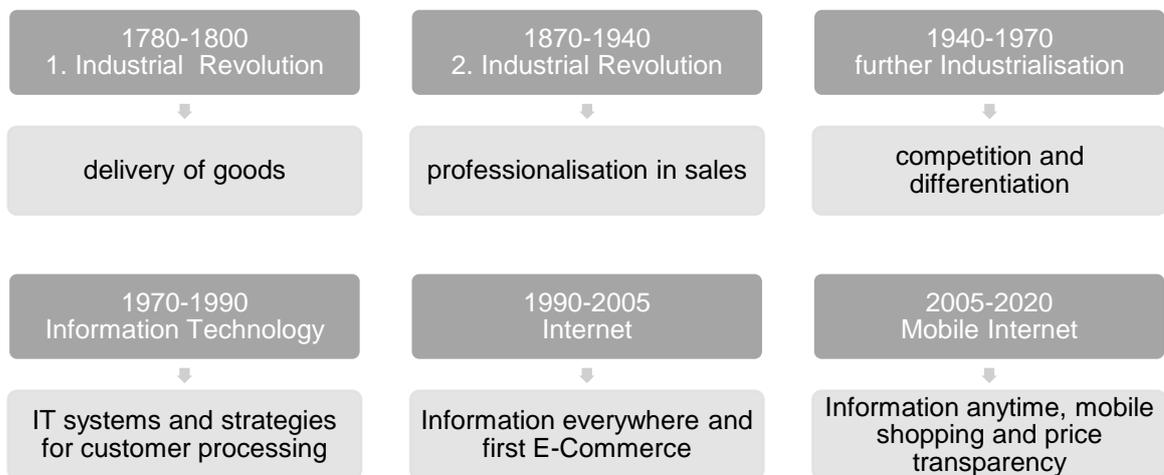


Figure 23: History of Sales<sup>230</sup>

At the invention of the steam engine, distribution in the real sense did not exist. The focus was on the delivery of goods. With the second industrial revolution and the beginning of mass production, the first wave of professionalisation in sales took place intending to meet the demand. With further industrialisation from the middle of the last century, the supply could cover the request. The first competition in sales began, and products try to differ from

<sup>227</sup> cf. Binckebanck; Elste 2016, p. 4.

<sup>228</sup> cf. Hildebrandt; Landhäußer 2017, p. 909.

<sup>229</sup> cf. Katzengruber; Pförtner 2017, p. 16.

<sup>230</sup> cf. Katzengruber; Pförtner 2017, p. 16–18.

others. With the advent of information technology in the 1970s, the new strategies for customer processing were developed, and first IT-systems were implemented. With the expansion of the internet in the 1990s, the information was reachable from everywhere, and the first e-commerce solutions emerged. In 2005, the smartphone began to gain widespread acceptance, leading to an always-online-mentality. This was followed by mobile shopping platforms, permanent availability and higher price transparency.<sup>231</sup>

### 2.5.1 Impact of Digitalisation on the Sales Process

In the book "digital sales" of Biesel and Hame, also known as Sales 4.0, the sales processes are always geared to the respective customer group. For this reason it is crucial to bring together the buying behaviour (outside-in perspective) and the sales process (inside-out perspective). Lingqvist/Plotkin/Stanley also conclude that it is now crucial for B2B suppliers to get involved in their customers' purchase decision process as early as possible and to align the sales process with the customer journey of the customer groups.<sup>232</sup> The author used the concepts of Cundari and Pfuahl as representative examples.<sup>233</sup>

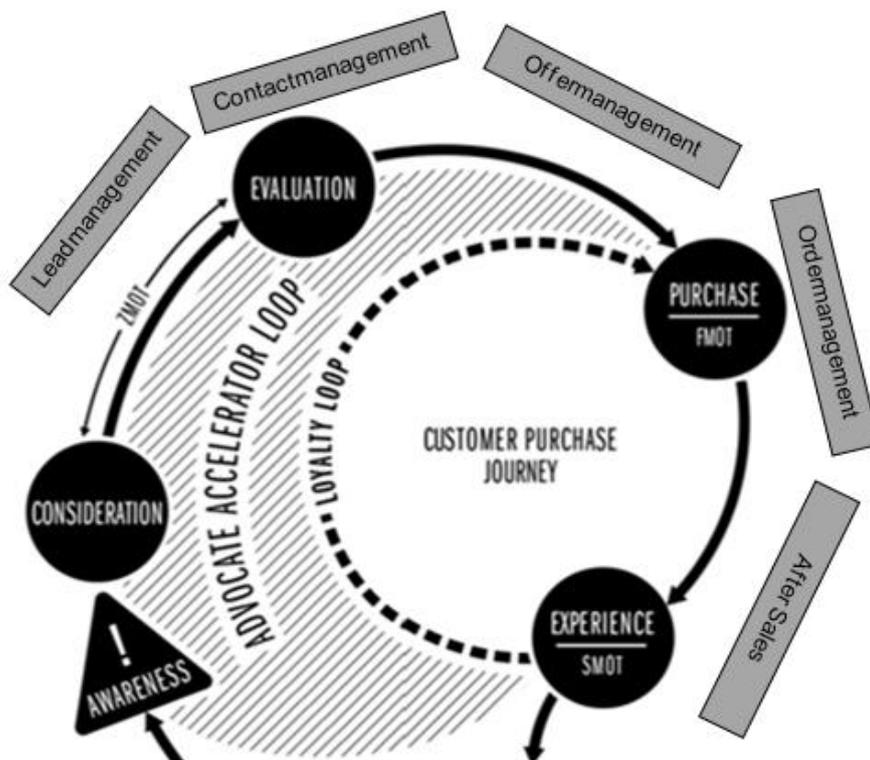


Figure 24: Customer Purchase Journey & Sales Process<sup>234</sup>

<sup>231</sup> cf. Katzengruber; Pfortner 2017, p. 16–18.

<sup>232</sup> cf. Lingqvist/Plotkin/Stanley n. y.

<sup>233</sup> cf. Biesel; Hame 2018, p. 49.

<sup>234</sup> Cundari 2015, p. 51; cf. Pfuahl 2019, p. 139.

Figure 23 shows in the middle the customer purchase journey according to Cundari (Awareness, Consideration, ZMOT, Evaluation, Purchase, Experience, Loyalty Loop, Advocate Accelerator Loop) and on the outside the sales process according to Pfuahl (Lead Management, Contact Management, Offer Management, Order Management, After Sales).

According to Pfuahl and Cundari, there is no overlap in the areas of awareness-raising, Loyalty Loop, Advocate Accelerator Loop. Also, according to Hiemeyer and Stumpp, attention generation, customer retention and customer loyalty are primarily marketing tasks today, not classic sales tasks.<sup>235</sup> Due to this fact and the broad nature of the topic "Marketing Automation", any digitalisation influences in this area will not be pursued further.

### 2.5.1.1 Zero Moment of Truth vs Lead Management

The Zero Moment of Truth and the Lead Management are both information gathering actions about the respective counterpart. The internet, in particular, has a massive influence on the behaviour of the customer. In the past, buyers used to obtain information about the sales agent, **B2B buyers today use the internet to search for information**. This is driven due to the steady growth of "millennial" buyers. A study by Merit concludes that 73% of 20- to 35-year-olds are already involved in purchasing decisions in their company.<sup>236</sup> For example, 90% of B2B buyers now google for suitable offers as part of their procurement activities, and 70% of these decision-makers even watch videos to obtain information. It is therefore not surprising that almost 60% of the decision-making process is completed before the first contact is made with the respective supplier.<sup>237</sup> Despite these results, Biesel and Hame conclude that content management, own website and social media marketing are not used consistently.<sup>238</sup> As already described in the chapter "Zero Moment of Truth", the B2B customer obtains most of his information via the internet. Professor Neil Rackham even concludes that a B2B customer today has about 20 times more information available to him for a supplier decision than years ago. That means that the **customer is looking for suppliers, and not the sales department is looking for customers**. So there is a power shift between customer and supplier.<sup>239</sup> Krapf also assumes that the push strategy in the

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<sup>235</sup> cf. Hiemeyer; Stumpp 2020, p. 42–43.

<sup>236</sup> cf. Almquist 2018.

<sup>237</sup> cf. Berger 2015, p. 6.

<sup>238</sup> cf. Biesel; Hame 2018, p. 40.

<sup>239</sup> cf. Hildebrandt; Landhäußer 2017, p. 914–915; cf. 'Bought Not Sold: Marketing and Selling to Digitally Empowered Business Customers' 2015.

sales department is not state of the art anymore, so the "aggressive salesmen" will not be in demand anymore.<sup>240</sup>

### 2.5.1.2 Evaluation vs Offer & Contact Management

According to Pfuahl, the contact and quotation phase is all about establishing a relationship with the customer and providing him with all the necessary information.<sup>241</sup>

Johnston and Marshall express this as follows: "Today, sales organisations are concerned with building long-term customer relationships."<sup>242</sup>

In connection with customer relationships and digitalisation, the term Customer Relationship Management (CRM) is often used in practice.<sup>243</sup>

According to Homburg et al., this is just an empty phrase, as it refers more to an IT system than to building a customer relationship. Nevertheless, these systems have changed the contact and offer phase in a lasting way.<sup>244</sup> The management consultancy McKinsey, for example, assumed that as early as 2012, **productivity could be increased by 10-12% through digital assistants on-site**, thus increasing the frequency of visits.<sup>245</sup> CRM Next came to a similar conclusion when it spoke of a productivity increase of 15% in 2014.<sup>246</sup> With increasing digitalisation, the acceptance and market penetration of the CRM system also increased. The sales of CRM providers have almost quadrupled since 2010, from USD 13.9 billion to USD 55.3 billion in 2019. This trend can also be observed in Central Europe.<sup>247</sup> The Federal Statistical Office found that 43% of all companies in Germany already use a CRM system.<sup>248</sup> According to Biesel and Hame, a CRM system should not only plan, organise and document activities but also actively manage business opportunities in the form of quotes and ensure follow-up.<sup>249</sup>

Despite the vast selection of software-based communication channels, according to a study by BuyerSpehre, e-mail is the most popular means of communication, followed by the website and personal contact.<sup>250</sup> In addition to the "traditional" forms of communication, social media also support relationship building. **This allows the distributor to convey current information in a targeted manner via newsletters, blog posts, tweets,**

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<sup>240</sup> cf. Karpf n. y.

<sup>241</sup> cf. Pufahl 2019, p. 147–150.

<sup>242</sup> cf. Johnston; Marshall 2013, p. 89.

<sup>243</sup> cf. Binckebanck; Elste 2016, p. 287.

<sup>244</sup> cf. Homburg; Schäfer; Schneider 2016, p. 249.

<sup>245</sup> cf. Hiemeyer; Stumpp 2020, p. 40.

<sup>246</sup> cf. CRM Next n. y.

<sup>247</sup> cf. Statista n. y.; cf. SuperOffice n. y.

<sup>248</sup> cf. Statistisches Bundesamt n. y.

<sup>249</sup> cf. Biesel; Hame 2018, p. 64–65.

<sup>250</sup> cf. Hiemeyer; Stumpp 2020, p. 41.

**Facebook entries and other social media.** This is a very efficient use of the communication channels, as current events can be communicated bi-directionally in real-time.<sup>251</sup>

However, the main objective is to prepare for winning orders in this phase. **It is essential to adapt communication to the customer's preferences.** In order to obtain more comprehensive information about the customer, for example, preferences are queried using web forms. A more subtle digital method of finding out the preferences is the analysis of surfing behaviour in a registered area or via cookies.<sup>252</sup>

### **2.5.1.3 Purchase (FMOT) vs Order Management**

The digital transformation aims to ensure long-term competitiveness through changes, expansions or inventions. Customers have already made purchase decisions in consideration or evaluation phase, but they want to be convinced once again by the sales force. So, the digital transformation shifts the point of sale (POS) to the point of decision (POD).<sup>253</sup>

Driven by new developments and changing market conditions, companies are increasingly questioning their sales strategy and looking for new forms of distribution. Analogue distribution channels are increasingly being compared with digital ones, sometimes supplementing them and sometimes replacing them.<sup>254</sup> This is also shown by the figures of the IFH study "B2B e-commerce 2019", which show growth to 1,300 billion EURO in Germany in 2018.<sup>255</sup> This corresponds to an annual growth rate of more than 15% since 2012, which is also reflected in purchasing behaviour. About 40% of buyers in the B2B sector purchase via the provider's webshop and 24% are connected to the provider's order system via an electronic interface.<sup>256</sup> The market research company Forrester, for example, concluded as early as 2015 that **75 % of B2B shoppers consider shopping in a webshop to be more convenient than buying from a sales representative.** In the case of traditional order processing, the rate was even higher at 93% following a decision.<sup>257</sup> One other example is mobile shopping, which tripled in the retail sector between 2016 and 2020.<sup>258</sup> Nevertheless, Elste and Blinckebanck conclude that although buying behaviour is

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<sup>251</sup> cf. Binckebanck; Elste 2016, p. 13.

<sup>252</sup> cf. Binckebanck; Elste 2016.

<sup>253</sup> cf. Biesel; Hame 2018, p. 51.

<sup>254</sup> cf. Niehaus; Emrich 2016, p. 48.

<sup>255</sup> cf. 'B2B-E-Commerce wächst auf 1.300 Milliarden Euro Umsatz' n. y.

<sup>256</sup> cf. 'B2B-Handel - Kaufverhalten in Deutschland 2019' n. y.

<sup>257</sup> cf. Forrester n. y.

<sup>258</sup> cf. 'Global mobile retail commerce revenue 2021' n. y.

changing in a revolutionary way, it is not entirely replacing the original pattern of behaviour.<sup>259</sup>

Looking at the development of the individual companies, up to four successive evolutionary stages of digital sales can be identified, depending on the digital maturity of the company.<sup>260</sup>

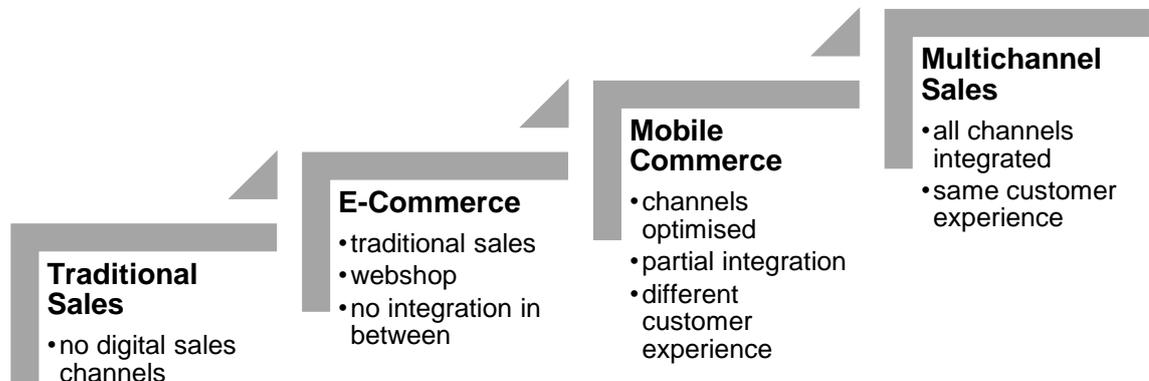


Figure 25: Evolution of Digital Selling<sup>261</sup>

The first evolutionary stage is traditional and analogue distribution via the field sales force, branches, telephone sales and the like. Digital channels are not used.

If an online shop is added, the company climbs the second evolutionary stage of digital distribution. However, traditional and online sales are not networked and continue to develop independently of each other.

In the third evolutionary stage, e-commerce becomes mobile commerce, as the digital distribution channel is optimised for mobile devices. In this evolutionary stage, however, the customer has an entirely different customer experience when buying online than when buying offline. It is difficult to change the sales channel during the purchasing process because the systems are only rudimentarily integrated into each other.

The highest development level is a fully integrated multi-channel sales system. This allows an easy change of the distribution channel during the purchasing process. The integration has progressed so far that a cross-channel customer view is created and thus, the sales channels are complementing each other instead of cannibalising.<sup>262</sup>

With the growth of e-commerce, there is also a trend towards shorter distribution channels. Sales intermediaries are increasingly being excluded, which leads to an increase in direct

<sup>259</sup> cf. Hildebrandt; Landhäußer 2017, p. 911f.

<sup>260</sup> cf. Niehaus; Emrich 2016, p. 48.

<sup>261</sup> cf. Niehaus; Emrich 2016, p. 48.

<sup>262</sup> cf. Niehaus; Emrich 2016, p. 48–50.

sales via e-commerce to the end customer. For example, sapi research has found that 48% of **B2B manufacturers now could serve end customers directly via e-commerce**. Including distributors and wholesalers, 61% of market participants even reported activities via e-commerce in end-customer sales.<sup>263</sup>

#### **2.5.1.4 Experience (SMOT) vs After-Sales**

In the usage phase or in after-sales, the customer makes his first experiences with the product or service. The positive customer experience is the driving force for repurchase, which is why high-quality after-sales is seen as very important for success.<sup>264</sup> However, after-sales service is not only an opportunity for resale from the supplier's point of view; after-sales service can also become a decisive criterion for the customer. Because through service, the supplier also takes responsibility for the product or service just sold. This gives the customer a feeling of security and responsibility.<sup>265</sup> In order to ensure the **best possible customer service, companies are increasingly using digital possibilities with FAQs, customer forums and product videos**.<sup>266</sup> Increasing automation also offers further potential for digitalisation, with 31% of German companies, for example, considering the use of **chatbots in the after-sales area to be useful**.

#### **2.5.2 Status Quo - Future of B2B Sales**

A certain kind of Darwinism can be seen in the sale because technological progress in the past was not always evolutionary, but partly also disruptive. A much-quoted example is the Kodak company, which after more than 100 years of successful analogue photography did not make enough use of the new technology of digital photography and thus lost its supremacy completely. Through digitalisation, the technological change took place so quickly that an entire branch of business was more or less wiped out. This list could go on and on, with examples of how the smartphone cost Nokia its supremacy in mobile telephony or how streaming services made video libraries superfluous. The adage "too big to fail" no longer applies in the digital world; what is crucial is the ability to adapt quickly to changing market situations.<sup>267</sup>

In the course of the research, four significant fields crystallised which will significantly change the sales of the future.

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<sup>263</sup> cf. Sapi 2018, p. 16.

<sup>264</sup> cf. Binckebanck; Elste 2016, p. 296.

<sup>265</sup> cf. Scheuer 2015, p. 145.

<sup>266</sup> cf. Binckebanck; Elste 2016, p. 296.

<sup>267</sup> cf. Hildebrandt; Landhäußer 2017, p. 910.

### 2.5.2.1 Value Creation

In its study "Future of B2B" sales, the consulting agency KEARNEY asked around 1600 sales managers and experts about the challenges of the future and then created a benchmark. One of the main topics is the maximisation of customer benefit. They came to the conclusion that suppliers must make their products configurable and expandable. Products thus become complete customer solutions. In addition, the offerings must be collaborative and networkable. After Gervet and Oder, the days of company-specific proprietary ecosystems are over. One example is the Apple App Store, which enables thousands of companies to develop applications. The third point of value is post-sale sales. It is about taking care of the customer even after the actual purchase and educate them on how to realise the added value of the product.<sup>268</sup>

McKinsey and Deloitte independently concluded that customer experience is the key to tomorrow's success.<sup>269</sup> Digitalisation and globalisation are making products more and more similar and prices more transparent. In times when products and prices hardly differ any more, the customer experience becomes a unique selling point.<sup>270</sup> According to a Gartner survey from 2019, more than **50% of B2B shoppers place the buying experience at the forefront of their decision making**. This is followed by brand/company and product/shipping/service with 19% each and the price-performance ratio with 9%.<sup>271</sup>

### 2.5.2.2 Purchasing Behaviour

First and foremost, the customer must be able to shop quickly and easily. If the supplier succeeds in eliminating the friction points, he will inspire his customers. Digitalisation plays a significant role because purchasing processes must be designed to be lean, scalable and automated.<sup>272</sup>

Accessibility and reachability are also part of an "easy" purchasing process. In the future, the B2B sector will also require the possibility to buy from anywhere and at any time. Digital sales channels are ideally suited to this requirement.<sup>273</sup> For Zupancic, **multi-channel management will be a must in the future in order to be successful in sales. All channels must be integrated and coordinated**. The customer expects to be known, no matter whether he is in the store, in the webshop or with a sales representative.<sup>274</sup> The best practice is the wholesaler Würth, which has 32,000 sales employees, shops and a webshop.

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<sup>268</sup> cf. Gervet; Oder n. y.

<sup>269</sup> cf. Baldauf; MBA 2020; cf. Harting; Mayer n. y.

<sup>270</sup> cf. Harting; Mayer n. y.

<sup>271</sup> cf. Baldauf; MBA 2020.

<sup>272</sup> cf. Gervet; Oder n. y.

<sup>273</sup> cf. Gervet; Oder n. y.

<sup>274</sup> cf. Zupancic 2019.

Regardless of whether the customer orders in the webshop or from a sales representative, it is the same customer experience. He orders via an app on the particular mobile device and picks up the goods from the nearest location in 60 minutes.<sup>275</sup>

In the future, **purchasing will also be forward-looking and personalised**. It is expected that as the variety of information increases, the sales channel will recognise the preferences of the customer and make appropriate suggestions.<sup>276</sup> Krah calls this expectation "Netflix factor in sales". In her opinion, this shopping experience will become the new benchmark in sales. With the help of artificial intelligence and algorithms, it is necessary to recognise patterns for the future from orders from the past.<sup>277</sup>

### 2.5.2.3 Data & Automation

"Data is King" is one of Zupancic's theories. He assumes that every **customer leaves traces behind through his behaviour and that only those providers who collect, evaluate and use this information in the best possible way will be successful in the future.**<sup>278</sup>

Data will thus become something like a second currency, and customer behaviour will change sustainably. The customers of the future will only be prepared to pay with this new currency if they get something in return. Well-known examples are customer cards with discount campaigns, subscribing to newsletters with discounts, downloading a white paper, etc.<sup>279</sup> The consultancy Selligent Marketing Cloud puts it even more drastically: "**The era in which unsuspecting customers transmitted their data unrestricted and free of charge is over forever**". According to their study, 79% of respondents expect special conditions in return for information. A British study by Catapult Digital also concludes that 29.4% expect added value for their data and 20% expect direct monetary compensation.<sup>280</sup> Sellers are now faced with the challenge of selling the added value to customers and in return, taking away their fears.<sup>281</sup>

The newly acquired data quality has the advantage that certain parts of the sales process can be automated. The potential for automating the sales process is almost enormous. A study by You Gov concludes that a **sales employee generates an average of €19,500 per year in costs through uncoordinated sales activities.**<sup>282</sup> Above all, the acquisition will

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<sup>275</sup> cf. Gervet; Oder n. y.

<sup>276</sup> cf. Gervet; Oder n. y.

<sup>277</sup> cf. 'Die Top-Vertriebstrends 2020' 2019.

<sup>278</sup> cf. Zupancic 2019.

<sup>279</sup> cf. Hildebrandt; Landhäußer 2017, p. 915.

<sup>280</sup> cf. Selligent Marketing Cloud 2020, p. 2–4.

<sup>281</sup> cf. Hildebrandt; Landhäußer 2017, p. 915.

<sup>282</sup> cf. 'Die Top-Vertriebstrends 2020' 2019.

change after Krah substantially, because chatbots steer this process in future.<sup>283</sup> According to Klinghöfer, automation in sales is not only reserved for the acquisition process. It is based on the assumption that in the future, artificially intelligent systems will be able to handle almost all repetitive tasks in sales; from communication to sales planning and controlling.<sup>284</sup>

#### 2.5.2.4 Tasks of the Sales Force

Only a few years ago, "High Touch, Low Tech" was still considered a recipe for success in sales. The aim was to persuade the customer to buy with the highest possible number of contacts and with the biggest possible impact. This view is increasingly being challenged by new technologies such as chatbots. Digital customer interaction is gaining more and more quality and acceptance on the customer side. Today, "High Touch by High Tech" challenges the conventional sales logic and, according to Giebelhausen, brings effectiveness and efficiency into a harmony even without personal sales.

In order to be able to assess the future tasks of sales staff, the question must first be asked how digitisation per se will change the world of work. The bitkom study from 2016 concluded that by 2026 a large number of office activities will be replaced by IT systems and intelligent machines will take over the majority of the necessary physical work.<sup>285</sup>

Similarly, Gentsch sees algorithms and artificial intelligence as a massive disruption to existing business practices in the area of marketing & sales. In his opinion, artificial intelligence will also take over administration, planning and scheduling processes in the sales area.<sup>286</sup> Gervet and Oder put it even more drastically: **To avoid unnecessary costs in the future, companies should automate back-office activities as much as possible and reduce the number of sales staff if necessary.**<sup>287</sup>

According to Zupancic, personal selling is the most expensive distribution channel and should only be used if it creates added value. This added value can be created through consulting, conception, organisation, relationship, trust or other things.<sup>288</sup> Satke also focuses on the added value of sales and concludes that customers are only willing to pay for it when they see the value. "The customers now have almost the same knowledge as the salespeople. Against the background of differentiation and individualisation of the

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<sup>283</sup> cf. 'Die Top-Vertriebstrends 2020' 2019.

<sup>284</sup> cf. 'Vertrieb der Zukunft: So läuft Ihr B2B-Vertrieb in 50 Jahren | Qymatix Sales AI' n. y.

<sup>285</sup> cf. Dirks n. y., p. 2–5.

<sup>286</sup> cf. Gentsch 2019, p. 2–5.

<sup>287</sup> cf. Gervet; Oder n. y.

<sup>288</sup> cf. Zupancic 2019.

product range, companies are more than ever challenged to question the added value of their sales staff".<sup>289</sup>

According to Krah, the digitalisation of distribution processes makes **personal sales a premium skill**.<sup>290</sup> According to Biesel and Hame come to a similar conclusion. According to them, it is becoming apparent that personal sales resources will increasingly be used only for "**high quality**" tasks and top customers in the future. Simple or "**fast and easy**" tasks will be taken over by IT solutions in the future, and smaller customers will be served remotely.<sup>291</sup>

Despite or precisely because of increasing competition, the **high importance of personal sales does not change**. This will continue to be an integral part of companies in the future but will be used in other cases and for new activities.<sup>292</sup>

### 2.5.3 Summary

One effect of digitalisation is the higher level of information about options among customers. For this reason, the contact between customers and sales takes place later in the classic buying process. Most of the time, the customer has already developed his needs into a specific, product-related demand - and all of this through self-research on the Internet. Professor Neil Rackham propagates the idea that customers today are looking specifically for suppliers and not sellers for customers (2.5.1.1). An aggressive sales strategy is therefore no longer appropriate. The trend is that customer relationship management (CRM) systems support salespeople in their daily work and even go beyond planning and organising appointments (2.5.1.2). The channels on which sales are made must also be coordinated. Sales take place on many channels and all of them - figuratively - should speak the same language (2.5.1.3).

Digitalisation has the character of a revolution and revolutions are disruptive. This disruptive force does not stop at anyone who does not recognise the signs of the times. There are enough examples of big players who have already experienced such a fate (e.g. Nokia or Kodak).

Subchapter 2.5.2 shows an overview of the status quo and an outlook on developments in B2B sales regarding digitalisation. Companies try to create a good customer experience, to make webshops more user-friendly and to be able to offer the customer a value for their

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<sup>289</sup> cf. 'Vertrieb 4.0 stellt Ihre Vertriebsorganisation auf den Prüfstand.' 2019.

<sup>290</sup> cf. 'Wie digital muss Vertrieb eigentlich sein?' 2020.

<sup>291</sup> cf. Biesel; Hame 2018, p. 38.

<sup>292</sup> cf. Biesel; Hame 2018, p. 43.

data. A core message of this chapter is that the tasks of sales will change: some things will be replaced by IT; some things will become obsolete and new things will be added. It is therefore highly likely that fewer sales personnel will be required in the medium term, but that these personnel will need to master significantly more specific sales skills.

### 3. Methodology

The case study was chosen as research method because case studies can generate new research questions from the observation of complex and real contexts. Case studies have an analytical depth that allows to identify, understand and describe the links between context and process.<sup>293</sup>

Cosmos Corporation also publishes in "Case Study Research and Applications" the conclusion that the case study is a suitable research method for research questions "how" or "why" in contemporary contexts.<sup>294</sup>

There is no consensus in the literature on the course of case research. The author has chosen the Yin approach because it deals specifically with investigations using qualitative data. Besides, Yin gives precise instructions for action, which is seen as very valuable.

The case research on Yin comprises the following five phases:<sup>295</sup>

- Design of the case study
- Preparation of data collection
- Collection of data
- Data analysis and
- Writing the case study

#### 3.1 Research Design

There are two fundamental questions to be answered when designing research, according to Yin:

- Which method can be used to answer the research question?
- Which data are needed for this?

To meet this requirement, the research question, a proposition (if any), the case(s), the relationship between propositions and results, and the interpretation of the data are of particular importance.<sup>296</sup>

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<sup>293</sup> cf. Denzin; Lincoln 2011, p. 314.

<sup>294</sup> cf. Yin 2018, p. 9.

<sup>295</sup> cf. Yin 2018, p. 25ff.

<sup>296</sup> cf. Yin 2018, p. 27–34.

In the course of the research design, the author has added an additional phase to the five phases according to Yin with the literature research. In the area of data analysis, Yin mentioned pattern matching or Explanation Building. The author decided on qualitative data analysis according to Mayring based on data collection via in-depth interviews.

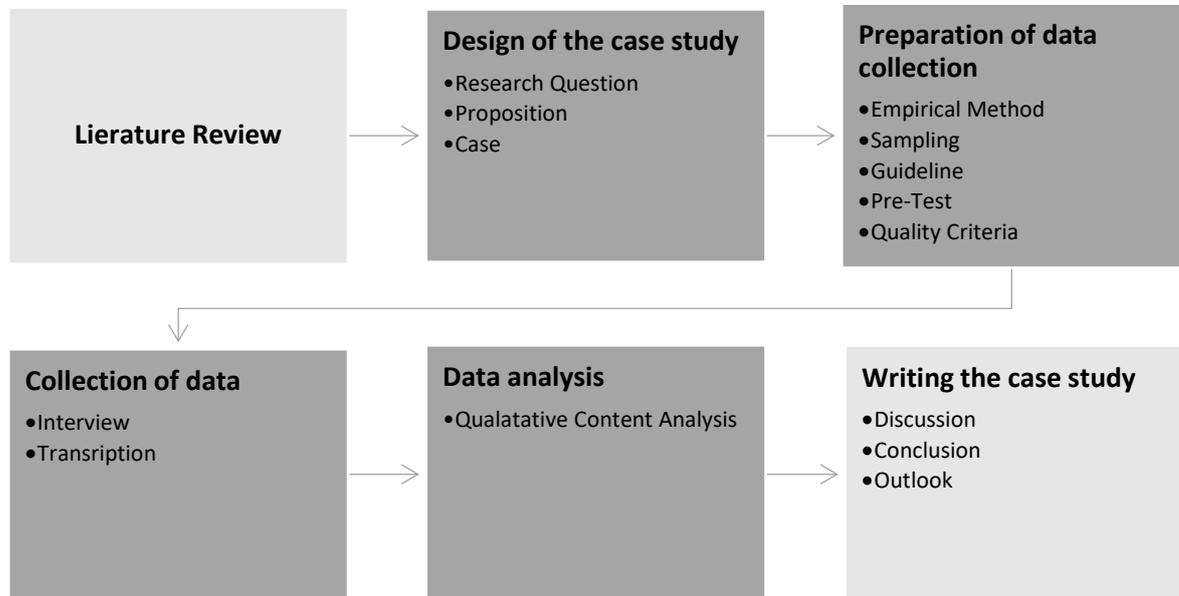


Figure 26: Research Process

## 3.2 Preparation of Data Collection

According to Yin, in the phase of preparing data collection, special attention should be paid to the skills of the researchers, the selection of subjects, documentation or guidelines and the conduct of a field study.<sup>297</sup> The author himself has added to this phase the basics of empirical research and the definition of quality criteria.

### 3.2.1 Empirical Method

Hug and Poscheschnik understand empirical research as the systematic collection, evaluation and interpretation of data and findings with the help of scientific methods. The goal of empirical research is to derive statements about reality, which differentiates it from other scientific methods.<sup>298</sup>

In order to answer the research question, it is necessary to weigh up the different research methods among each other and to find the most suitable method for achieving the goal.<sup>299</sup>

<sup>297</sup> cf. Yin 2018, p. 81–110.

<sup>298</sup> cf. Hug; Poscheschnik 2015, p. 2ff.

<sup>299</sup> cf. Kuß; Wildner; Kreis 2014, p. 13.

Primary research, secondary research or a combination of both can be used. Secondary research is based on already gained knowledge and can be based on studies, books and other data sources. Primary research, on the other hand, focuses on gaining new insights, which is why the social sciences also refer to this as field research.<sup>300</sup> Since the research question is a new area for discussion, primary research must be used in addition to secondary research.

In primary research, a distinction is made between qualitative and quantitative research. Quantitative research follows the principle of deduction, in which general principles are reviewed. Both observation and questioning can be counted among the methods of quantitative research.<sup>301</sup> However, in order to keep the influence of researchers as low as possible, standardised surveys and environmental conditions are essential. In order to achieve representative results, a large number of line samples is necessary.<sup>302</sup>

Qualitative research is to be preferred if the research is aimed at exploring connections, behavioural patterns or at gaining ideas and hypotheses. The focus is not on quantifying and representative statements. The sample size is correspondingly smaller in qualitative research, and the survey is not conducted in a standard way, which offers more room for interpretation.<sup>303</sup> Qualitative methods follow the principle of induction by looking at the "individual case" and thus try to establish general principles.<sup>304</sup> The actual goal of qualitative research is to gain a better understanding of reality, its patterns of processes and structural features and its interpretation. However, it does not sufficiently meet this goal since qualitative research cannot faithfully reflect reality despite the accurate description.<sup>305</sup> Qualitative research is characterised by a small number of samples, the non-standardised collection of data and the more interpretive than statistical analysis of the data.<sup>306</sup>

Qualitative survey methods include interviews, group discussions, observations, ethnography, thinking aloud, introspection, dialogue-consensus methods, grid methodology and role-plays.<sup>307</sup> The author excluded all observational survey methods. After examining the feasibility of all other methods, the group discussion and the interview were considered by the author as the best survey methods.

A focus group interview is a simultaneous questioning of 6-10 persons in interaction. Advantages of this method are the stimulation of the individual participants through

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<sup>300</sup> cf. Kuß; Wildner; Kreis 2014, p. 36–37.

<sup>301</sup> cf. Ebster; Stalzer 2017, p. 203.

<sup>302</sup> cf. Berekoven; Eckert; Ellenrieder 2009, p. 90f.

<sup>303</sup> cf. Kuß; Wildner; Kreis 2014, p. 40ff.

<sup>304</sup> cf. Reinders et al. 2015, p. 51–55.

<sup>305</sup> cf. Flick; Kardorff; Steinke 2017, p. 14.

<sup>306</sup> cf. Kuß; Wildner; Kreis 2014, p. 40ff.

<sup>307</sup> cf. Flick; Kardorff; Steinke 2017, p. 423–550.

interaction with each other. The natural discussion situation creates a comfortable atmosphere for the participants, the low costs and the possibility to record the content. The disadvantage compared to the interview, on the other hand, is that less information can be collected per subject, as not every person can contribute to every aspect. There must be ensured that there is a balance in information delivery between more dominant and weaker persons.<sup>308</sup>

Interview variations were abundant. Criteria for the author's selection were an open question and a clearly defined process. Therefore the semi-structured interview and the in-depth interview were considered. In the first part of the semi-structured interview, available assumptions and components are asked about open questions. In the second part, the statements are structured and validated.<sup>309</sup> In the in-depth interview, the procedure is roughly defined by a guideline. It is an intense conversation about given topics. The interviewer controls the conversation and tries to find out all aspects of the topic. Additional questions ensure the deepening of the topic, and the conversation is brought to other aspects in order to avoid "getting out of hand".<sup>310</sup>

Advantages of in-depth interviews:<sup>311</sup>

- Complete chains of thought and argumentation
- Statements can be clearly assigned
- New aspects are introduced by the person interviewed
- Interviewer carries out a change of perspective

With reference to the problem and the research question, the author chooses qualitative research and the method of an in-depth interview. The author has been motivated to conduct qualitative research because the chosen topic has few theories or models due to its topicality.<sup>312</sup> Qualitative research makes it possible to deepen individual topics. The in-depth interviews offer the best access to existing information in the research area. In-depth observations and opinions can be included that build on current knowledge and bring on new insights.<sup>313</sup>

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<sup>308</sup> cf. Kuß; Wildner; Kreis 2014, p. 54.

<sup>309</sup> cf. Mey; Mruck 2010, p. 424–427.

<sup>310</sup> cf. Kuß; Wildner; Kreis 2014, p. 57.

<sup>311</sup> cf. Kuß; Wildner; Kreis 2014, p. 58.

<sup>312</sup> cf. Buber; Holzmüller 2009, p. 33.

<sup>313</sup> cf. Kuß; Wildner; Kreis 2014, p. 57f.

### 3.2.2 Sampling

According to Bogner et al., sampling means the targeted selection of persons to be interviewed. Which persons are selected depends primarily on the choice of research questions, since the persons to be interviewed are supposed to provide relevant information about the research area and answer the research questions.<sup>314</sup>

Bogner et al. refer to the concept of expert interviews to gain knowledge. In the literature, the concept of the expert is defined rather vaguely due to the few clear criteria. Gläser and Grit, for example, define experts as "experts of themselves and their life-world".<sup>315</sup> According to Sprudel, expert knowledge is about complex knowledge levels in a professional context.<sup>316</sup> According to Meuser and Nagel, an expert is a construct of the researcher and not a personal characteristic or ability. However, a person's position in his or her field of activity also plays a decisive role.<sup>317</sup> Bogner et al. conclude that not only the specific knowledge but also the extent to which the person is sufficient in practice plays a decisive role. Freely translated, they define experts as follows: "Experts can be understood as persons who - based on specific practical or experiential knowledge relating to a delimitable problem field - have created the possibility of meaningfully interpreting the particular field of action and structuring it in such a way that it guides the actions of others."<sup>318</sup>

The selection of experts was based on their activities and experience in the researched area in order to be able to guarantee a practical reference to the research questions. Triangulation was used in the selection of experts to increase the validity of the research results. They were thus illuminating the topic from three sides: from the perspective of the sales manager, the sales representative and the installer.

The author contacted sales managers of various heating manufacturers and asked them for an interview. In addition, each heating manufacturer was also asked to name two representative salespersons and two representative installers for further questioning. The author then selected the sales staff and the installers according to the size of the company.

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<sup>314</sup> cf. Bogner; Littig; Menz 2014, p. 34f.

<sup>315</sup> cf. Mey; Mruck 2010, p. 427.

<sup>316</sup> cf. Bogner; Littig; Menz 2014, p. 12.

<sup>317</sup> cf. Bogner; Littig; Menz 2014, p. 11f.

<sup>318</sup> cf. Bogner; Littig; Menz 2014, p. 13.

### 3.2.3 Interview Guideline

In the course of qualitative research, the in-depth interview was chosen as the method in Chapter 3.1.1. In-depth interviews or expert interviews are partly structured and based on guidelines. The guidelines serve not only to structure the interview but also to help with data collection.<sup>319</sup>

The research questions form the basis for the preparation of the guidelines. Care should be taken to ensure that the questions are as open, simple, understandable and short as possible. Suggestive questions should be avoided. In order to involve the interviewee in the flow of speech and to create an atmosphere of trust, simple introductory questions should be asked at the beginning of the interview, which can be quickly answered by anyone.<sup>320</sup> According to Bogner et al. is the central challenge of an interview the different contexts of the two interview partners. Thus the interviewer has the scientific context in mind, and the interviewee passes on his or her knowledge based on his or her experience. The interviewer thus has the task of bringing the scientific context into the context of the interviewee by asking questions. Since every interview is different and spontaneous questions are necessary, the interviewer is expected to have a high degree of competence. Therefore, in qualitative interviews not all questions need to be identical in all interviews in order to establish comparability between the interviews. To entice the different interviewees to come up with useful answers in the most diverse situations is the main issue.<sup>321</sup>

In order to be able to respond flexibly to situations and ask questions in the context of the interviewee, a modified questionnaire was developed for sales managers as well as for sales staff and installers. Each of these questionnaires comprised a set of 40-50 questions based on the same pattern but from a different perspective. The set of questions was intended to serve as a guide, but not to be used explicitly and entirely in every interview. The guidelines all followed the pattern of the sales process or customer purchase journey.

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<sup>319</sup> cf. Bogner; Littig; Menz 2014, p. 27.

<sup>320</sup> cf. Mayer 2009, p. 95.

<sup>321</sup> cf. Bogner; Littig; Menz 2014, p. 28.

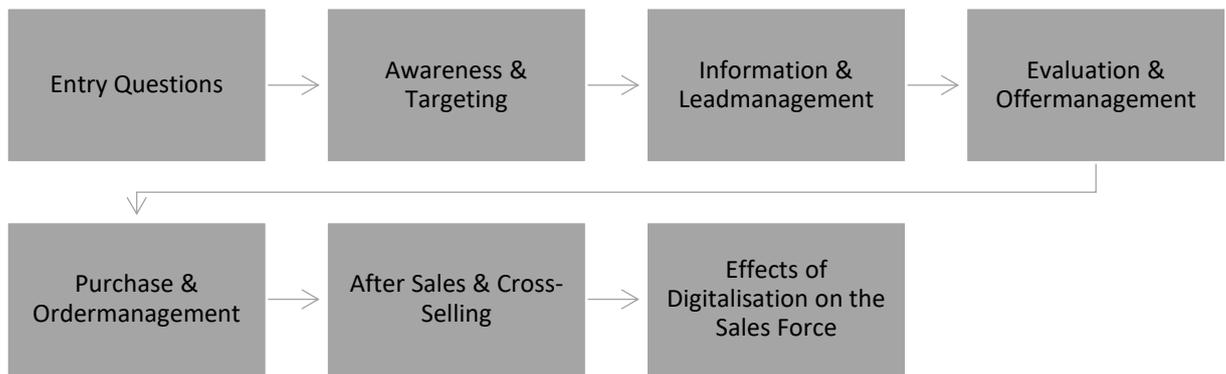


Figure 27: Structure of the Interview Guideline

### 3.2.4 Pre-Test & Interview

A pre-test checks the practicability of the interview guide for feasibility, comprehensibility and the expected time expenditure for interviewer and interviewee.<sup>322</sup>

Within the framework of empirical research, each of the three sets of guidelines was tested in advance with one interviewee and then with one person from the expert group. After each of these two test runs, the corresponding questionnaire set was adjusted in terms of comprehensibility and time expenditure. For example, the entry questions were reduced, as sales staff and sales managers tend to digress too much.

The pre-test had consequences not only in terms of content but also technically. Originally it was planned to record all discussions about Microsoft Teams. During the test, however, it turned out that on the one hand connection interruptions made the interviews more painful and on the other hand some test subjects had problems with the operation of the technology. Therefore each expert was explicitly contacted before the interview and could choose between Microsoft Teams or telephone.

Due to the Covid19 crisis, the original schedule for the interviews could not be kept. While all interviews were originally scheduled for April 2020, Covid19 shifted the schedule towards May and June 2020, simply because of the accessibility of the experts. Some of them were forced to work short time and seemed to be generally overwhelmed by the situation, while others thought intensively about the future of their company and simply deprioritised the interview.

<sup>322</sup> cf. Bogner; Littig; Menz 2014, p. 34.

### **3.2.5 Quality Criteria**

Quality criteria ensure the quality of the research work. In quantitative research, the criteria validity, reliability and objectivity are applied. In contrast to quantitative research, the results of qualitative interviews are context-dependent and by no means identical. According to Mayring, qualitative research requires its quality criteria.<sup>323</sup>

#### **Procedure Documentation**

Mayring concludes that a lack of process documentation makes qualitative research appear worthless. In contrast to quantitative research, qualitative research is more case-specific. This must be documented in order to make it comprehensible for others.<sup>324</sup>

#### **Argumentative Interpretation**

Interpretations are not provable; therefore, they have to be substantiated with arguments. It is essential that the prior understanding of the existing interpretation must be appropriate. Furthermore, the interpretation must be conclusive and plausible. Breaks in the argumentation must be explained. Furthermore, the search for alternative interpretations and their verification is considered essential.<sup>325</sup>

#### **Rule Guided**

Qualitative research is admittedly more flexible in adhering to the planned analysis steps than quantitative research. Nevertheless, it is crucial to adhere to defined procedural rules and to divide the material into meaningful units in order to guarantee a systematic procedure and thus the corresponding result.<sup>326</sup>

#### **Proximity to the Object**

Qualitative research tries to be as close as possible to the "happenings" of the object of investigation. Therefore, research is conducted as close as possible to the phenomenon that occurs. Furthermore, it is crucial to approach the interests of the object of investigation in order to create the highest possible understanding.<sup>327</sup>

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<sup>323</sup> cf. Mayring 2016, p. 140.

<sup>324</sup> cf. Mayring 2016, p. 144–145.

<sup>325</sup> cf. Mayring 2016, p. 145.

<sup>326</sup> cf. Mayring 2016, p. 145–146.

<sup>327</sup> cf. Mayring 2016, p. 146.

## **Communicative Confirmation**

To validate qualitative research results, they can be presented to and discussed with the research subjects. If the research subject can confirm the results, this is an essential argument for the validity of the results.<sup>328</sup>

## **Triangulation**

Triangulation refers to the attempt to find different solutions to the problem. The goal of triangulation is never to achieve complete agreement. It is essential to compare the different perspectives, to recognise the strengths and weaknesses of each and to combine the different approaches to a complete picture.<sup>329</sup>

## **3.3 Data Collection**

Complete and traceable data acquisition is of utmost importance for data evaluation and interpretation.<sup>330</sup> To ensure this, all fifteen interviews were recorded via telephone or Microsoft Teams and transcribed.

### **3.3.1 Transcription**

The recorded audio formats are transcribed and are a central part of the scientific analysis. The transcriptions can either be done by the author himself or by third parties. Kuckartz estimates that the transcriptions take up five to ten times the length of the interview.<sup>331</sup> Because of approximately 16 hours of audio material and an estimated transcription time of 100 hours, the author decided to commission a transcription service. Since there are no generally applicable rules for transcriptions, they had to be prepared and communicated in advance. The author corrected any ambiguities due to low audio quality or the too strong dialect. A further error correction took place parallel to the later coding phase.

### **3.3.2 Transcription Rules**

The detail of the transcription depends on the research objective to be investigated. If an emphasis of the interviewee is essential to answer the research objective, all para verbal utterances, laughs, pauses or stutters should be recorded.<sup>332</sup> This is not relevant to the

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<sup>328</sup> cf. Mayring 2016, p. 147.

<sup>329</sup> cf. Mayring 2016, p. 147–148.

<sup>330</sup> cf. Bogner; Littig; Menz 2014, p. 39.

<sup>331</sup> cf. Kühn 2016, p. 163.

<sup>332</sup> cf. Gläser; Laudel 2010, p. 193.

research objective given here. The following rules have been established by the author and according to Fuß.<sup>333</sup>

- The transcription is done verbatim
- However, dialect expressions are adapted to the colloquial language to increase readability
- Utterances and sounds such as coughing, stuttering, etc. are only transcribed if the meaning of the statement is changed
- If there are interruptions in the flow of speech, this will be noted
- Incomprehensible sections need to be marked

Since the transcripts were not made by the author personally, it was necessary to check and correct the collected material. Based on an agreement with the respondent, the interviews conducted were anonymised immediately after transcription, so that no conclusions can be drawn about the respondents.

### **3.4 Data Analysis**

For this study, fifteen experts were interviewed, the interviews were transcribed according to the given rules of transcription, in order to be evaluated with the method of qualitative content analysis according to Mayring. In addition to the theory-based approach, the primary decision criterion for the qualitative content analysis according to Mayring was the large amount of data, which made structuring with the aid of evaluation software (MAXQDA) appear sensible.

The substance of the qualitative content analysis is a methodical and controlled procedure to examine the texts (material) to be evaluated step by step. For this purpose, the material is broken down into small pieces, processed one after the other and categorised. The focus is on the developed category system since this system determines the aspects to be extracted. The principle of qualitative content analysis is the systematic analysis of texts by editing text passages with category systems.<sup>334</sup>

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<sup>333</sup> cf. Fuß; Karbach 2014, p. 38–44.

<sup>334</sup> cf. Mayring 2016, p. 114.

In order to structure the process, Mayring has developed a process model, which comprises between nine and 11 steps depending on the source. However, there are essentially three main areas:<sup>335</sup>

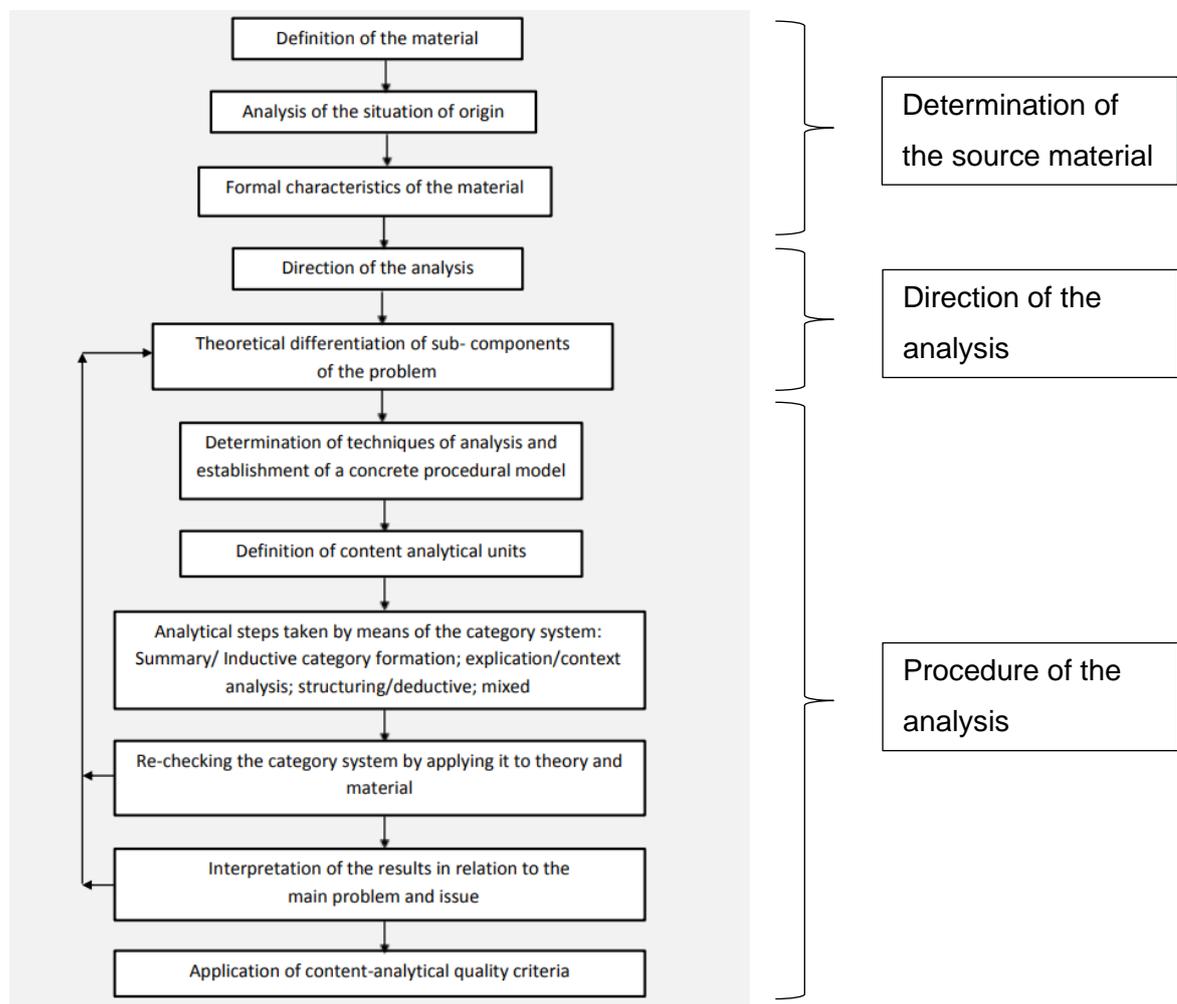


Figure 28: Content-analytical procedural model<sup>336</sup>

The determination of the source material and the direction of the analysis have already been explained in the previous chapters, which is why the further procedure focuses on the actual analysis process.

The first step is to determine the form of interpretation. Mayring knows three forms of interpretation with summary, explication and structuring. The **summary** reduces the material to such an extent that only the relevant content remains. The **explication** works with additional material to extend the understanding of questionable text passages. The **structuring** filters out certain aspects of the material according to defined order criteria.<sup>337</sup>

<sup>335</sup> cf. Mayring 2000, p. 54; 62 2016; cf. 2010, p. 61.

<sup>336</sup> cf. Mayring 2000, p. 54; cf. 2010, p. 52–62.

<sup>337</sup> cf. Mayring 2010, p. 65.

Since the form of interpretation is directly related to the way categories are formed, this became the decisive criterion for choosing a form of interpretation.<sup>338</sup>

Categories can be formed either inductively or deductively. In deductive categorisation, categories are formed on the basis of the literature and are re-examined after some of the interviews.<sup>339</sup> Concerning the research question, the author found this too impractical, too restrictive and somewhat too far removed from the actual empirical findings. For this reason, the author opted for inductive category formation and the summarising form of interpretation.

The basic principle of summarising content analysis is that the respective level of abstraction is generalized step by step using omission, generalisation, construction, integration, selection and bundling. The summary thus becomes more and more abstract.<sup>340</sup>

The summarising content analysis follows a seven-step process, which is reduced to four steps for large amounts of data.<sup>341</sup>

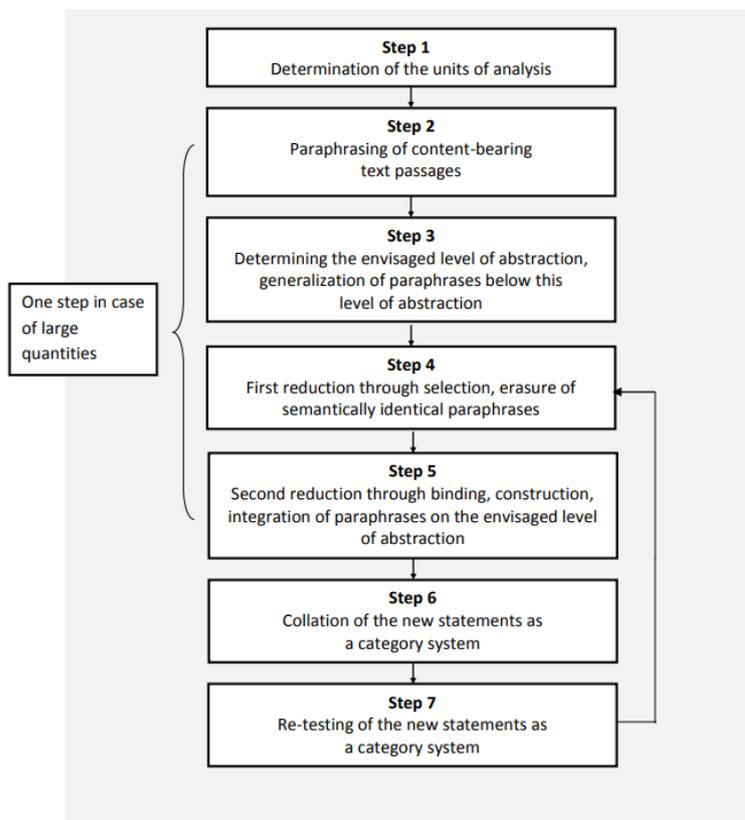


Figure 29: Step-by-step model of summarising content analysis<sup>342</sup>

<sup>338</sup> cf. Mayring 2010, p. 66.

<sup>339</sup> cf. Mayring 2010, p. 83.

<sup>340</sup> cf. Mayring 2010, p. 67.

<sup>341</sup> cf. Mayring 2010, p. 66.

<sup>342</sup> cf. Mayring 2010, p. 66.

### **Step 1: Determination of the analysis units**

In the first step, the analysis and evaluation units are determined in advance.<sup>343</sup>

### **Step 2: Paraphrasing**

In a second step, all parts that deliver relevant content relevant are summarised in short form and in a uniform language.<sup>344</sup>

#### Paraphrasing rules (Z1)

- Z1.1. Delete all parts of the text that have no (or only minor) content, such as decorative, repetitive, clarifying phrases
- Z1.2. Translate the text passages that carry content to a uniform language level
- Z1.3. Transform them into a short grammatical form<sup>345</sup>

### **Step 3: Determining the level of abstraction**

In the third step, the first level of abstraction is determined, and all statements below this level are unified. Paraphrases with similar content and paraphrases without content are removed.<sup>346</sup>

#### Generalisation to the level of abstraction (Z2)

- Z3.1. Generalise the objects of the paraphrases to the defined level of abstraction
- Z3.2. Generalise the sentence statements in the same way
- Z3.3. Leave the paraphrases that are above the desired level of abstraction
- Z3.4. Use theoretical assumptions in case of doubt<sup>347</sup>

### **Step 4: First reduction by selection**

In this phase, meaningless paraphrases are deleted<sup>348</sup>

#### First reduction (Z3)

- Z3.1. Delete meaningless paraphrases within the evaluation units
- Z3.2. Strikeout paraphrases which are not content-containing
- Z3.3. Adoption of paraphrases, which are still central to the content
- Z3.4. Use theoretical assumptions in case of doubt<sup>349</sup>

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<sup>343</sup> cf. Mayring 2010, p. 69.

<sup>344</sup> cf. Mayring 2010, p. 69.

<sup>345</sup> cf. Mayring 2010, p. 70.

<sup>346</sup> cf. Mayring 2010, p. 69.

<sup>347</sup> cf. Mayring 2010, p. 70.

<sup>348</sup> cf. Mayring 2010, p. 69.

<sup>349</sup> cf. Mayring 2010, p. 70.

### **Step 5: Second reduction**

In the second reduction, the categories are to be further reduced by a combination of related paraphrases<sup>350</sup>

#### Second reduction (Z4)

- Z3.1. Summarise paraphrases with similar statements
- Z3.2. Combining paraphrases with several statements about one object
- Z3.3. Making paraphrases with the same object and different statements
- Z3.4. Use theoretical assumptions in case of doubt<sup>351</sup>

### **Step 6: Collation of the new statements as a category system**

It is essential to check whether all the initially relevant paraphrases are found in the new system. It must be possible to rule out any loss of content carrying information.<sup>352</sup>

### **Step 7: Re-Test**

Finally, the summary category system is rechecked on the source material.<sup>353</sup>

The reduction of the collected material of this thesis was achieved by applying three rules of interpretation. Due to the unambiguousness of the results obtained in this thesis, a second reduction of the material could be omitted.

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<sup>350</sup> cf. Mayring 2010, p. 69.

<sup>351</sup> cf. Mayring 2010, p. 70.

<sup>352</sup> cf. Mayring 2010, p. 69.

<sup>353</sup> cf. Mayring 2010, p. 69.

## 4. Empirical Research

### 4.1 Expert interview

In the period from 15. May to 20. June 2020, 18 experts were interviewed by telephone or via Microsoft teams. Six sales managers from different heating manufacturers, six salespeople from different regions and six installers of different company sizes, were selected.

<b>Nr.</b>	<b>Company Type</b>	<b>Position</b>	<b>Date</b>
<b>SM1</b>	Manufacturer	Sales Manager	15. May 2020
<b>SM2</b>	Manufacturer	Head of Sales	19. May 2020
<b>SM3</b>	Manufacturer	Head of Sales South Germany	19. May 2020
<b>SM4</b>	Manufacturer	Sales Manager Austria	22. May 2020
<b>SM5</b>	Manufacturer	Sales Manager Europe	22. May 2020
<b>SM6</b>	Manufacturer	Sales Manager	04. June 2020
<b>SR1</b>	Manufacturer	Sales Representative	25. May 2020
<b>SR2</b>	Manufacturer	Sales Representative	26. May 2020
<b>SR3</b>	Manufacturer	Sales Representative	26. May 2020
<b>SR4</b>	Manufacturer	Sales Representative	04. June 2020
<b>SR5</b>	Manufacturer	Sales Representative	10. June 2020
<b>SR6</b>	Manufacturer	Sales Representative	10. June 2020
<b>IN1</b>	Installer	CEO	09. June 2020
<b>IN2</b>	Installer	Owner	09. June 2020
<b>IN3</b>	Installer	Technical Manager	12. June 2020
<b>IN4</b>	Installer	CEO	12. June 2020
<b>IN5</b>	Installer	Technical Manager	16. June 2020
<b>IN6</b>	Installer	CEO	20. June 2020

Table 3: Participants Interview

The participating companies were; A. Dolschek GmbH, ATAG Heating B.V., DB Installation e.U., Dolinschek Gesellschaft m.b.H., Fröling Heizkessel- und Behälterbau Gesellschaft m.b.H., Gebrüder Amann GmbH, Glen Dimplex AG, Josef Stockhammer & Sohn Installationsgesellschaft mbH, Kermi GmbH, Köhler Gesellschaft m.b.H., , Max Weishaupt GmbH, Walter Bösch GmbH & Co KG.

## 4.2 Content Analysis

Based on the insights gained through the Mayring content analysis process, the following category system was developed.

Nr.	Category
K1	Structure of the Participants
K2	Tasks & Skills of the Sales Staff
K3	Digital Transformation
K4	Awareness & Lead Generation
K5	Information Gathering
K6	Offer Management
K7	Purchase Decision
K8	Order Management
K9	After-Sales
K10	Consumer
K11	Impact of Digitalisation on the Sales Force

Table 4: Category System

## 4.3 Evaluation results

In the following chapter, the content of the 18 interviews conducted is evaluated and presented using the categories from chapter 4.2.

### 4.3.1 Structure of the Participants

Three different groups took part in the empirical study: sales managers and sales staff of heating manufacturers and purchasing managers of heating installers.

The sales managers of heating manufacturers are all male, between 47 and 62 years old, lead between 12 and 250 sales staff and have between 20 and 33 years of experience in the industry.

The salesmen of the heating manufacturers are all male, between 33 and 57 years old, come from different regions of the German-speaking countries and have between 10 and 28 years of experience in the industry.

The purchasing managers of the heating installers are all male, between 30 and 61 years old and have between eight and 35 years of experience in the industry. The companies

employ between five and 55 people. All heating installation companies are active in the heating and plumbing industry, with three of the six participants carrying out heating maintenance themselves and three leaving this task to the heating manufacturer.<sup>354</sup>

#### 4.3.2 Tasks & Skills of the Sales Staff

In order to get a rough overview, the field staff, sales managers and installers were interviewed about the most important tasks of the field staff and the office staff from their point of view.

All the salespeople felt that their most important tasks were presenting new products, clarifying new projects, preparing solution concepts and offers and coordinating delivery or commissioning problems.<sup>355</sup> The sales managers share this opinion and extend the range of tasks. The main task of the salesman is sales and sales includes acquisition, advice and support. The area sales department has the task of looking after all heating installers in its region.<sup>356</sup> The sales force is the mouthpiece for the customers and towards the customer. Everything the customer wants and has suggestions for improvement should be communicated to the organisation, and everything the organisation does for the customer should be communicated to the outside world.<sup>357</sup> According to the purchasers, **the most important tasks of a salesperson are technical advice and the calculation of quotations.**<sup>358</sup>

The most important characteristic for a "good" sales representative is **sympathy** with seven nominations, followed by **availability** and **technical understanding** with five nominations each. In addition, the representatives should be **reliable, communicative and committed.**<sup>359</sup>

The **internal sales support** the salesperson and also the customer, especially in administrative matters. For example, the sales office maintains the necessary systems, prepares quotations and procures sub-stocks. However, one of the most important tasks is **to carry incoming orders into the organization and to initiate order processing.**<sup>360</sup> From the installer's point of view, the internal sales service is particularly useful when it

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<sup>354</sup> cf. Lins 2020h, p. 1; cf. 2020i, p. 1; cf. 2020j, p. 1; cf. 2020k, p. 1; cf. 2020l, p. 1; cf. 2020m, p. 1; cf. 2020n, p. 1; cf. 2020o, p. 1; cf. 2020p, p. 1; cf. 2020q, p. 1; cf. 2020r, p. 1; cf. 2020s, p. 1; cf. 2020a, p. 1; cf. 2020b, p. 1; cf. 2020c, p. 1; cf. 2020d, p. 1; cf. 2020e, p. 1; cf. 2020f, p. 1.

<sup>355</sup> cf. Lins 2020n, p. 1; cf. 2020o, p. 1; cf. 2020p, p. 1; cf. 2020q, p. 1; cf. 2020r, p. 1; cf. 2020s, p. 1.

<sup>356</sup> cf. Lins 2020m, p. 1; cf. 2020k, p. 1; cf. 2020h, p. 2; cf. 2020i, p. 2; cf. 2020l, p. 2; cf. 2020j, p. 3.

<sup>357</sup> cf. Lins 2020h, p. 2; cf. 2020k, p. 1; cf. 2020m, p. 1.

<sup>358</sup> cf. Lins 2020a, p. 1; cf. 2020b, p. 1; cf. 2020c, p. 1; cf. 2020d, p. 1; cf. 2020e, p. 1; cf. 2020f, p. 1.

<sup>359</sup> cf. Lins 2020a, p. 1,14; cf. 2020b, p. 1,13; cf. 2020c, p. 13; cf. 2020d, p. 1; 2020f; 2020l; 2020m; cf. 2020k, p. 13; cf. 2020j, p. 11.

<sup>360</sup> cf. Lins 2020n, p. 1; cf. 2020o, p. 1; cf. 2020p, p. 1; cf. 2020q, p. 1.

comes to questions about quotations. If there are no questions about quotations, then the internal sales force hardly ever makes an appearance to the customer.<sup>361</sup>

### 4.3.3 Digital Transformation

The experts were asked to explain the benefits of digitalisation and which areas will be affected by digitalisation in the future.

According to the experts, digitalisation has already changed sales and will continue to have a strong influence on it. They see **automation and digital communication** as the most important developments in sales. Advantages are time savings, cost reduction, higher process speed, better accessibility and scalability of the business.<sup>362</sup> The disadvantage will be that personal contact will decrease due to increasing digital communication.<sup>363</sup> An often mentioned objection was that digital communication is **a generation or age problem**.<sup>364</sup>

### 4.3.4 Awareness & Lead Generation

The majority of experts concluded that there was no added value in attracting the attention of installers in general, as the brands were already well known. The heating manufacturers have been on the market for 35 to 90 years. Thus 50% of the heating installers also stated that they knew the market of potential suppliers ultimately.<sup>365</sup> Only one installer and one sales manager stated that there are historically under-represented regions and that this broad market understanding on the part of the installer about the potential supplier does not exist and therefore there is no brand awareness.<sup>366</sup>

More than 90% of the people surveyed stated that the **field sales force is the most crucial acquisition instrument** and for generating attention.<sup>367</sup>

With regard to digital marketing, the experts widely agreed that this is useless or irrelevant for attracting the attention of heating installers. At this point, the objection was usually raised that the heating installer currently still works with analogue technology and that this could change with the generational change.<sup>368</sup> A sales manager of a heating manufacturer stated that he would use online marketing to generate leads, and a purchasing responsible of a

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<sup>361</sup> cf. Lins 2020b, p. 1; cf. 2020c, p. 1; cf. 2020d, p. 1; cf. 2020f, p. 1.

<sup>362</sup> cf. Lins 2020n, p. 2; cf. 2020o, p. 2,5,15; 2020p, p. 4; cf. 2020k, p. 4,15; cf. 2020h, p. 2.

<sup>363</sup> cf. Lins 2020h, p. 1; cf. 2020l, p. 1; cf. 2020f, p. 6.

<sup>364</sup> cf. Lins 2020o, p. 5; cf. 2020p, p. 4; cf. 2020f, p. 3; cf. 2020k, p. 4.

<sup>365</sup> cf. Lins 2020b, p. 3; 2020p; cf. 2020q, p. 2; cf. 2020f, p. 4; cf. 2020d, p. 2.

<sup>366</sup> cf. Lins 2020k, p. 4; cf. 2020b, p. 17.

<sup>367</sup> cf. Lins 2020m, p. 1; cf. 2020o, p. 2; cf. 2020r, p. 2; cf. 2020c, p. 2; cf. 2020d, p. 2.

<sup>368</sup> cf. Lins 2020r, p. 1; cf. 2020n, p. 3; cf. 2020k, p. 3; cf. 2020h, p. 3; cf. 2020f, p. 3.

heating installer stated that he follows the market in his spare time via various social media.<sup>369</sup>

Experts did not attach any importance to generating attention via trade journals or trade fairs concerning the heating installer.<sup>370</sup>

#### 4.3.5 Information Gathering

The information-gathering by the heating installers is obtained using the **push method**. Thus, 100% of salespersons, 75% of sales managers and 50% of installers conclude that the information is mainly transmitted from the manufacturer to the installer. From the manufacturer's point of view, both the salesmen and the sales managers think that the installer is too "lazy" to obtain the information himself.<sup>371</sup> The purchasing responsible of the heating sellers observed the same phenomenon. However, the reason given for this is that it is **quicker and more convenient to obtain specific information** via the manufacturer.<sup>372</sup>

The transfer of information takes place in four main ways. The analogue product catalogue, also called price list, the manufacturers' website in the public area, the manufacturers' customer portals in the closed area and the information transfer by e-mail.

The experts disagree on the relevance of individual media. While the sales managers have the opinion that information gathering is predominantly analogue and that the catalogue is the most important instrument for this<sup>373</sup>, the sales force and installers have a more differentiated view. The salesperson considers the **catalogue to be essential for presenting** the products to the customer. In their opinion, further information such as **technical details** and accessories are obtained mainly **online or sent by e-mail**.<sup>374</sup> There is a considerable difference between heating installers with and without their own office staff. Heating installers with their own office staff rely mainly on online information-gathering and those without their office staff prefer catalogues and e-mail.<sup>375</sup>

Prices, technical details, innovations and sales arguments were named as the most important contents. Datasheets are the preferred communication medium.<sup>376</sup> 40% of experts named the **explanatory product video as the communication medium of the**

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<sup>369</sup> cf. Lins 2020j, p. 3; cf. 2020b, p. 3.

<sup>370</sup> cf. Lins 2020m, p. 1; cf. 2020o, p. 2; cf. 2020r, p. 2; cf. 2020c, p. 2; cf. 2020d, p. 2.

<sup>371</sup> cf. Lins 2020o, p. 4; cf. 2020p, p. 4; cf. 2020q, p. 4; cf. 2020r, p. 4; cf. 2020s, p. 4; cf. 2020k, p. 4; cf. 2020m, p. 4; cf. 2020h, p. 5.

<sup>372</sup> cf. Lins 2020a, p. 3; cf. 2020d, p. 3; cf. 2020e, p. 3.

<sup>373</sup> cf. Lins 2020h, p. 5; cf. 2020j, p. 4; cf. 2020k, p. 15; cf. 2020m, p. 14.

<sup>374</sup> cf. Lins 2020s, p. 3; cf. 2020o, p. 4; 2020k; cf. 2020n, p. 5.

<sup>375</sup> cf. Lins 2020a, p. 2; cf. 2020b, p. 3; cf. 2020c, p. 3; cf. 2020d, p. 3; cf. 2020e, p. 3; cf. 2020f, p. 3.

<sup>376</sup> cf. Lins 2020f, p. 2; cf. 2020b, p. 3; cf. 2020c, p. 3; cf. 2020d, p. 3; cf. 2020j, p. 4; cf. 2020o, p. 4; cf. 2020p, p. 4; cf. 2020r, p. 4.

**future.** These should give a quick overview of the products and relieve the sales department from the task of product presentations. Webinars were avoided as far as possible. This was justified by the fact that each participant of the webinar has a different level of knowledge and therefore, the webinar is not target-oriented enough.<sup>377</sup>

#### 4.3.6 Offer Management

The evaluation phase usually begins with a concrete project. The process is initiated by the consumer (user), who places an enquiry with the heating installer for a new heating system or a renovation. The installer then contacts the heating manufacturer's sales representative and communicates the consumer's concern. The sales representative develops a solution, which the heating manufacturer's internal sales support converts into a quotation and sends it to the installer. The quotation is usually sent by e-mail and usually contains prices and a system drawing, and occasionally essential datasheets.<sup>378</sup>

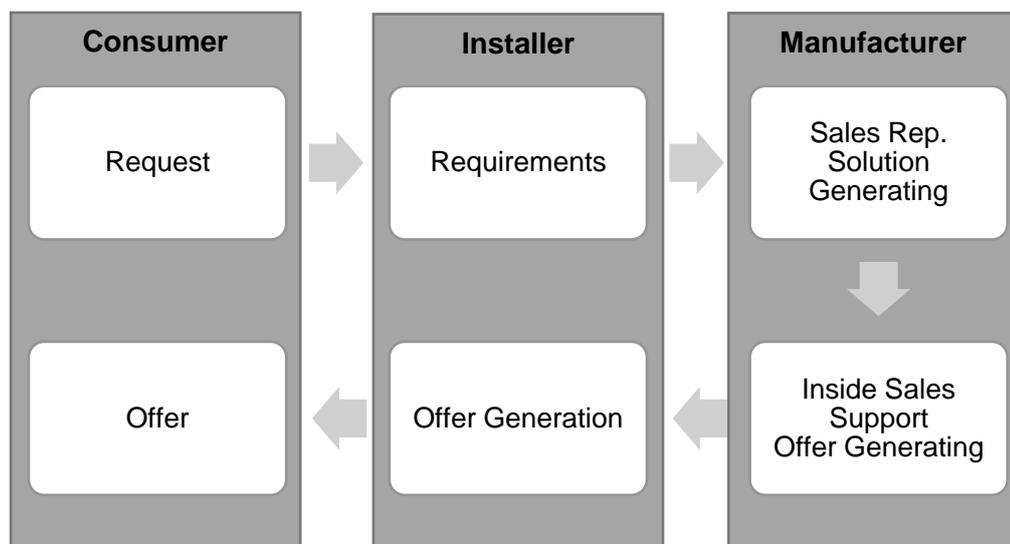


Figure 30: Offer Process in the Heating Industry<sup>379</sup>

So the process for heating manufacturer starts with the **sales representative** taking the requirements of the consumer and the installer and then manually **developing a concept based on these specifications**. These requirements are communicated to the sales representative by e-mail or telephone. In many cases, new requirements are discussed on-

<sup>377</sup> cf. Lins 2020o, p. 10; cf. 2020p, p. 4; 2020s; cf. 2020k, p. 5; cf. 2020j, p. 7; cf. 2020c, p. 2; cf. 2020f, p. 4.

<sup>378</sup> cf. Lins 2020c, p. 3; cf. 2020d, p. 3; cf. 2020f, p. 4; cf. 2020f, p. 5; cf. 2020k, p. 5; cf. 2020q, p. 6; cf. 2020m, p. 6.

<sup>379</sup> cf. Lins 2020c, p. 3; cf. 2020d, p. 3; cf. 2020f, p. 4; cf. 2020f, p. 5; cf. 2020k, p. 5; cf. 2020q, p. 6; cf. 2020m, p. 6.

site with the installer and in rare cases on-site with the consumer. The information is then forwarded to the office staff by e-mail or telephone.<sup>380</sup>

Although each request is a project, the complexity of the projects varies greatly. Most heating system manufacturers have some kind of project or **System-Finder to reduce the planning effort** of the sales representatives for simple projects or standard systems.<sup>381</sup>

This concept has been further developed by some heating system manufacturers, allowing the installer to generate simple concepts and offers directly online in the manufacturer's customer portal.<sup>382</sup>

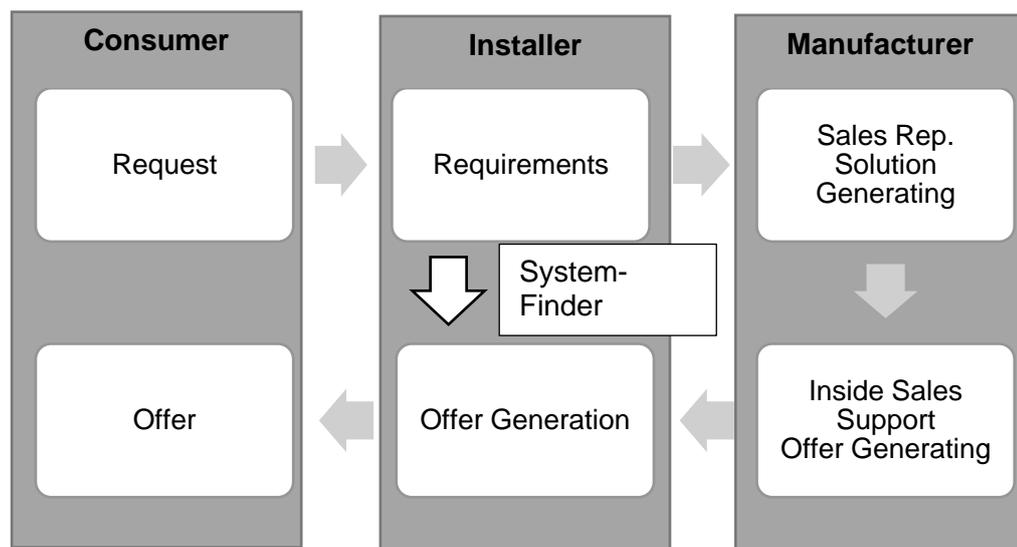


Figure 31: Offer Process including System-Finder in the Heating Industry<sup>383</sup>

The experts were in disagreement about the acceptability of such a self-service instrument on the market. The sales representative rejected the idea of self-service, stating that the complexity is too high for the heating installer and that this service is expected from the heating manufacturer.<sup>384</sup> On the customer side, those **customers with service department would use the self-service portal. In contrast, those without a service department would expect this service from the heating manufacturer's sales representative.** The main objection against the self-service portal was the fear of “errors”.<sup>385</sup>

All experts from the sales and 50% of the experts from the sales management department concluded that, in contrast to a system-finder for the installer, a **System-Configurator**

<sup>380</sup> cf. Lins 2020p, p. 5; cf. 2020q, p. 5; cf. 2020r, p. 5; cf. 2020n, p. 7; cf. 2020c, p. 7; cf. 2020d, p. 10.

<sup>381</sup> cf. Lins 2020n, p. 8; cf. 2020r, p. 6; cf. 2020k, p. 7; cf. 2020m, p. 7.

<sup>382</sup> cf. Lins 2020n, p. 6; cf. 2020p, p. 6; cf. 2020m, p. 8.

<sup>383</sup> cf. Lins 2020c, p. 3; cf. 2020d, p. 3; cf. 2020f, p. 4; cf. 2020f, p. 5; cf. 2020k, p. 5; cf. 2020q, p. 6; cf. 2020m, p. 6.

<sup>384</sup> cf. Lins 2020s, p. 6; cf. 2020p, p. 6; cf. 2020r, p. 7; cf. 2020o, p. 8.

<sup>385</sup> cf. Lins 2020f, p. 5; cf. 2020a, p. 7; cf. 2020e, p. 7.

**including a quotation preparation tool for the field service has enormous potential.** As a result, the heating solution would be digitally generated directly by the **sales representative** on-site, converted into a **quotation and sent directly to the customer**.<sup>386</sup>

The offer-tracking is software-supported in almost all companies, using CRM software or other tools. Only one company does not perform quotation tracking, assuming that it works with fixed partner installers. When a consumer places an order, the order is automatically triggered by the heating manufacturer. Tracking is done by telephone or on-site by the sales representative. The experts do not consider further digitalisation to be useful.<sup>387</sup>

According to the experts, there are hardly any objections to the offer if it has been worked out correctly. If objections do arise, discussions about the price and unclear components were named as the most frequent cause.<sup>388</sup>

#### **4.3.7 Purchase Decision**

According to the experts, the most crucial criterion for a purchase decision is the interpersonal **relationship between those responsible for purchasing at the installer** and the heating manufacturer's field service. This is followed by well-functioning **customer service and support**. The product itself or the **technical solution** is seen in third place, followed by the **speed of the offer** and the **price**. Just how significant the human factor is, some experts have tried to put it into figures, naming the influence of sales representatives on the purchase decision between 50% and 90%.<sup>389</sup>

A new factor that has become increasingly apparent in recent years is the involvement of the consumer in the purchase decision. Thus, 16 out of 18 experts stated that the **consumer must increasingly be involved in the decision**. The expert "IN4" noted that in the end, the consumer decides what he wants. Others, as the expert "SR6", see the consumer's influence on the purchase decision at 30-40%. Expert "SM2" summarised the situation in such a way that the purchase decision is a two-stage process. The consumer must be prepared for the brand and the installer does not want any trouble.<sup>390</sup>

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<sup>386</sup> cf. Lins 2020o, p. 7; cf. 2020c, p. 6; cf. 2020d, p. 7; cf. 2020e, p. 6; cf. 2020f, p. 6; cf. 2020j, p. 7; cf. 2020h, p. 8; cf. 2020m; cf. 2020i, p. 7.

<sup>387</sup> cf. Lins 2020p, p. 8; 2020j; cf. 2020r, p. 9; cf. 2020n, p. 10; 2020k; cf. 2020o, p. 12.

<sup>388</sup> cf. Lins 2020k, p. 8; cf. 2020j, p. 7; cf. 2020n, p. 10; cf. 2020r, p. 8; cf. 2020p, p. 7.

<sup>389</sup> cf. Lins 2020n, p. 11; cf. 2020p, p. 9; cf. 2020r, p. 2; cf. 2020s, p. 9; cf. 2020k, p. 3,6,10; cf. 2020j, p. 8; cf. 2020h, p. 5; cf. 2020i; cf. 2020b, p. 4; cf. 2020d, p. 5,15; cf. 2020c, p. 8.

<sup>390</sup> cf. Lins 2020n, p. 4; cf. 2020p, p. 3; cf. 2020q, p. 2; cf. 2020k, p. 3; cf. 2020i, p. 2; cf. 2020d, p. 7; cf. 2020b, p. 9; cf. 2020s, p. 9.

### 4.3.8 Order Management

The ordering process is seamlessly connected to the already elaborated offer. The order is initiated by telephone, on-site, by e-mail or online. With "offline" ordering, the order is usually placed via the sales representative or inside sales support. Depending on the complexity and characteristics of the company, the field sales representative then prepares the order for the internal sales force as an intermediate step or directly for the back office.<sup>391</sup>

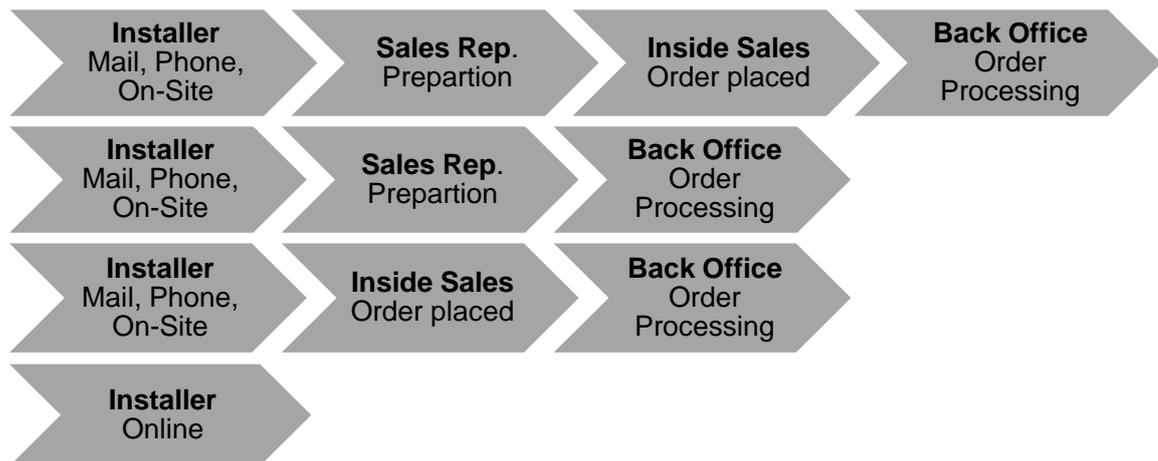


Figure 32: Order Processes in the Heating Industry<sup>392</sup>

Five of the six heating manufacturers have a webshop implemented, all six see the online ordering process as an enormous simplification of work, but according to their statements, **one manufacturer makes significant sales** with it. One of them speaks of an online share of 63% of the turnover and he mentioned that there is no difference for them if the installer order on- or offline. The sales department and the sales manager mentioned the mindset of customers, the customer's uncertainty about mistakes, problems with the function and the different possibilities between online and offline ordering as possible obstacles.<sup>393</sup>

**50% of the installer stated that they either already predominantly order online** or would like to order online if that functionality would be given. On the other hand, 33% preferred to order offline and **17% had problems with the limited possibilities of the online tool** and therefore ordered offline.<sup>394</sup>

From the point of view of the heating manufacturer, order processing mainly includes the delivery of the goods, the preparation of the planning documents and the commissioning of

<sup>391</sup> cf. Lins 2020n, p. 11; cf. 2020o, p. 11; cf. 2020p, p. 9; cf. 2020q, p. 9; cf. 2020r, p. 9; cf. 2020s, p. 9.

<sup>392</sup> cf. Lins 2020n, p. 11; cf. 2020o, p. 11; cf. 2020p, p. 9; cf. 2020q, p. 9; cf. 2020r, p. 9; cf. 2020s, p. 9.

<sup>393</sup> cf. Lins 2020o, p. 11; cf. 2020p, p. 10; cf. 2020q, p. 9; cf. 2020r, p. 10; cf. 2020s, p. 10; cf. 2020i, p. 3; cf. 2020m, p. 12.

<sup>394</sup> cf. Lins 2020a, p. 8; cf. 2020b, p. 11; cf. 2020c, p. 9; cf. 2020d, p. 6; cf. 2020e, p. 11; cf. 2020f, p. 6.

the heating system. The majority of experts found that **tracking orders** during processing and delivery are an added value. For example, 83% of **salespeople said that they spend much time clarifying the order status and tracking deliveries**. Once the heating system is completed on-site, the installer coordinates the commissioning of the heating system with the heating manufacturer. Here, 3 out of 6 salespeople stated that **digital coordination of commissioning would reduce the effort enormously**.

#### 4.3.9 After-Sales

The installers are maintained by the heating manufacturer's sales representatives either through **regular or occasional visits to customers**. In this way, the sales managers are also sure that regular appointments are also an indicator of high turnover. For the experts on the heating installers' side, this means discussing current projects, communicating innovations and maintaining the relationship. According to all the experts, this should be kept in this form.<sup>395</sup>

Because the heating manufacturer puts the heating system into operation, the installer loses contact with the consumer and all other information once his work is complete. Half of the experts stated that one **digital project file per order represents** added value for both the field service and the installer. The reason for this is that the installer can track all consumer-related activities with digital capabilities.<sup>396</sup>

The topic of **cross-selling** was queried concerning the after-sales area. Five out of six heating system manufacturers entirely rely on the field sales force and their knowledge of the customer's portfolio. Only one company relies on **automatic potential analyses at the product group level**, controls the share of wallet and defines actions. Experts disagree on whether digitally supported cross-selling offers added value. For example, "SR2" explains: "With cross-selling, there would be potential for digitalisation, since the sales department does not always focus on the gaps with the customer," to which "SR3" replies: "Due to the limited number of customers and the limited territory, every sales employee knows his customers. He does not need digital support".<sup>397</sup>

In principle, the experts agree that discounts and promotions are not a sustainable strategy and that **customer loyalty** programs are the better alternative here. Keywords such as

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<sup>395</sup> cf. Lins 2020c, p. 11; cf. 2020d, p. 12; cf. 2020e, p. 11; cf. 2020k, p. 12; cf. 2020j, p. 8; cf. 2020b, p. 13; cf. 2020c, p. 12.

<sup>396</sup> cf. Lins 2020o, p. 12; cf. 2020p, p. 1; cf. 2020c, p. 11; cf. 2020f, p. 12.

<sup>397</sup> cf. Lins 2020a, p. 13; cf. 2020b, p. 14; cf. 2020c, p. 12; cf. 2020d, p. 14; cf. 2020j, p. 11.

customer club, travel, advisory board and annual bonus were mentioned in the interviews. A trend and/or idea in the digital context could not be deduced.<sup>398</sup>

#### 4.3.10 Consumer

As already mentioned in chapter "4.3.7 Purchasing decisions", the consumer is increasingly becoming a decision-maker who must be taken into account in the future. The experts agree on the fact that **consumer marketing will become even more important in the future.**<sup>399</sup>

The consumer already comes to the installer with specific ideas, so the consumer automatically becomes the lead generator for the heating manufacturer. For this reason, the experts agree that emphasis should be placed on increasing brand awareness. Word-of-mouth and the **"digital word-of-mouth propaganda" of social media in combination with the publication of success stories** are cited as the most effective means here.<sup>400</sup>

The experts agree that consumers are increasingly using the Internet to obtain information about products. Test reports, the heating manufacturer's website and the installer's website were mentioned as common sources. According to the experts, **customers are well informed, but they also have "dangerous" half-knowledge in the field of heating technology.**<sup>401</sup>

In order to counter the increasing pressure from consumers and the change in knowledge, the installer needs support in selling the heating manufacturer's products. According to the experts, ways should be found **to provide the installer with the appropriate arguments.** Keywords such as argumentation aid, interactive product comparisons and product videos were used in this context.<sup>402</sup>

Some experts were in favour of a digital customer satisfaction analysis after the heating system has been put into operation in order further to promote word-of-mouth propaganda in analogue and digital form.<sup>403</sup>

#### 4.3.11 Impact of Digitalisation on the Sales Force

According to the experts, digitisation will **improve the quality in sales, reduce errors and increase speed.** The increasing level of consumer information certainly presents

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<sup>398</sup> cf. Lins 2020n, p. 14; cf. 2020o, p. 13; cf. 2020q, p. 13; cf. 2020k, p. 12; cf. 2020d, p. 12.

<sup>399</sup> cf. Lins 2020n, p. 4; cf. 2020o, p. 4; cf. 2020k, p. 3; cf. 2020j, p. 4; cf. 2020d, p. 4; cf. 2020b, p. 2.

<sup>400</sup> cf. Lins 2020n, p. 5; cf. 2020o, p. 4; cf. 2020q, p. 3; cf. 2020l, p. 3; cf. 2020c, p. 7; cf. 2020d, p. 2.

<sup>401</sup> cf. Lins 2020r, p. 3,14; cf. 2020k, p. 5; cf. 2020m, p. 3–4; cf. 2020j, p. 4; cf. 2020a, p. 11; cf. 2020b, p. 8; cf. 2020c, p. 3–5.

<sup>402</sup> cf. Lins 2020q, p. 8; cf. 2020o, p. 11; cf. 2020k, p. 5,13; cf. 2020j, p. 7; cf.5-6 2020c; cf. 2020d, p. 8.

<sup>403</sup> cf. Lins 2020f, p. 11; cf.12 2020d; cf. 2020c, p. 11; cf. 2020s, p. 13; cf. 2020o, p. 13.

sales with the challenge of always being technically up-to-date. The exact role of the sales force is not yet foreseeable. It can be assumed that due to the digital possibilities, **permanent support will become less, but relationship management will become more important.** According to the experts, customer relations cannot be digitised and this, in conjunction with customer service, will make all the difference in the future.<sup>404</sup>

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<sup>404</sup> cf. Lins 2020n, p. 6; cf. 2020o, p. 14; cf. 2020p, p. 14; cf. 2020q, p. 15; cf. 2020r, p. 13; cf. 2020j, p. 13.

## **4.4 Discussion**

In the discussion part of the master thesis, the two research questions will be answered by interpreting the empirical results, relating them to the literature, discussing implications and making assessments.

### **4.4.1 Further Digitalisation of the Sales Process**

#### **Awareness & Lead Generation**

All models of buying behaviour starting with the Customer Decision Journey from McKinsey (Chapter 2.3.3.4), the Moment of Truth model from Procter & Gamble (Chapter 2.3.3.6) up to the modified Customer Purchase Journey from Cundari (Chapter 2.3.3.8) are based on the model that a trigger or stimulus starts the buying process. Due to the literature research and the scope of the field of marketing automation and social media marketing, this part was excluded from the master's thesis, but it is nevertheless astonishing that in the area of awareness and lead generation no digitisation measures can be justified and even trade fair visits and specialist magazines do not bring any added value. The experts' statements in this area were clear that lead generation in the heating industry in Central Europe takes place either via classic cold calling (Chapter 4.3.4) or via access to consumers (Chapter 4.3.10). For this reason, all actions in this area should also focus on these two themes.

#### **Information Gathering (Zero Moment of Truth)**

After identifying a new lead, Moncrief and Marshall assumed about a hundred years ago that the presentation and demonstration of products would be the next logical step, in advance of the deadline (Chapter 2.1.6.1). At the same time, Elmo Lews, in his model of the "buying funnel", contradicted this a little by assuming that, once attention had been generated, the customer would make up his mind about the characteristics of the product (Chapter 2.3.3.1). With the spread of the Internet, the idea that customers get a picture of the product for themselves has mainly become digitalised. An example of this is the "Zero Moment of Truth", which first appeared in 2009 as an Internet information phase between attention generation and purchase at the IRI Group (Chapter 2.3.3.7). Current literature and studies assume that today 90% of customers in purchasing decision positions inform themselves in advance on the Internet and 60% of them have already made their decision on the basis of digital information. This even goes so far that the thesis includes the statement that today's customers are looking for suppliers rather than suppliers for customers (Chapter 2.4.1.1).

However, if you look at the statements of the experts in the heating industry, you are reminded of Moncrief and Marshall from 1920. They are unanimous in their opinion that in the heating industry it is not the customer who is looking for the supplier, but the other way round, and that the flow of information only works in the push process via online transmission, e-mail or telephone. However, the background to this behaviour provides valuable insight. The experts agreed that this is simply faster, easier and more targeted for the installer (Chapter 4.3.5). Binckebach and Elste also spoke of the importance of adapting communication to the preferences of the customer (Chapter 2.5.1.2). Moreover, Gervet and Oder came to the conclusion that processes must become faster and easier through digitisation (Chapter 2.5.2.2).

The author concludes that it is not the industry that is unwilling to use the digital channels, but that the digital channels are simply not adapted to the needs of the industry. Innovations and sales arguments are essential information for the installer, which in the opinion of the experts should be transported via explanatory product videos (Chapter 4.3.5). Other important information is prices and datasheets; in the opinion of the author, automation would be the right solution for providing this information automatically (2.4.3.4). The interface to the installer should be as close as possible to his usual methods of communication.

### **Offer Management**

According to Pufahl, quotation management begins with the inquiry of a customer or potential customer. In this phase of the sales process, offers are prepared, followed up and negotiated (Chapter 2.1.6.2). Freely interpreted according to Churchill, Ford and Walker, this is a field of activity that can be classified as "customer acquisition" or "relationship management", depending on the case, but in any case as "non-sales activities". The interaction between sales and the installer can be interpreted as acquisition activity, but not the actual preparation of the offer (Chapter 2.1.5). Current studies see great potential for savings by replacing these "non-sales activities" with automation (Chapter 2.5.2.3).

In the heating industry, it is common practice that a customer-specific solution is generated for each inquiry from the sales force and that this solution is offered administratively by the office staff. In order to minimise these "non-sales activities" for the field service, it is common practice in the industry to provide a so-called System-Finder for standard systems (Chapter 4.3.6). However, according to the experts, this is only done with moderate success. Installers with office staff are generally willing to use such a tool if it is easy to use for them and does not require too much specific expertise. In particular, the reference to the fear of

errors shows a lack of user-friendliness (Chapter 4.3.6). A guided process using automation can be the solution to this problem (Chapter 2.4.2.4).

According to the experts, the part of the offer that cannot be outsourced to the installer should also be designed as efficiently and quickly as possible. The majority of the experts concluded that instead of a System-Finder for the installer, a System-Configurator for the field service employee offers enormous savings potential. Such a System-Configurator should facilitate the manual planning service of the sales force by digitalisation and generate a quotation for the installer directly from the planning (Chapter 4.3.6). This would reduce effort, shorten the time needed to process the quotation and eliminate interfaces. Such a tool reflects all aspects of the advantages of digitalisation (Chapter 4.3.3).

Studies have shown that CRM systems can increase sales productivity by up to 15% (Chapter 2.5.1.2). Supply tracking is an area where the majority of the heating industry relies on such tools. Therefore this task is partially automated with the help of a digital reminder function. The actual quotation tracking is usually done analogously and individually during a customer visit or telephone call. According to the experts, this activity should not be digitised (Chapter 4.3.6). Even the author himself could not find any further potential for digitisation based on the literature. According to the experts, the offer negotiation itself does not represent a chance for digitalisation.

According to Pufahl, the offer phase aims to obtain an order. However, Pufahl does not mention how this can be ensured (2.1.6.2). Personal relationships, customer service, technical solution, speed of the offer and price were cited as the most important reasons for the purchase (4.3.7). In the case of the system configurator mentioned above, two of the five reasons for purchase (technical solution, speed of supply) would be covered. All other reasons for purchase are either outside the sphere of influence of the sale or offer no further potential for digitisation.

On the part of the experts, the most important change in the purchase decision was the consumer's co-decision (Chapter 4.3.7; 4.3.10). This fact turns the familiar buying-center entirely upside down since the consumer can now take on the roles of decision-maker and at least approvers in addition to the roles of initiator and user (Chapter 2.3.1). Therefore, one of the most important tasks in the future will be to support the installer in order to convince the consumer of the heating manufacturer's product or solution.

## **Order Management**

Winkelmann calls order management "processing & delivery" and the process starts with the order and ends with the delivery (Chapter 2.1.6.3). Pufahl goes one step further here and includes all steps up to invoicing in addition to delivery (Chapter 2.1.6.2). To digitalise the ordering process, the keyword e-commerce or webshop is often used. This goes so far that digital ones are increasingly replacing analogue distribution channels. Various studies speak of an incredibly fast-growing e-commerce market. A study by Forrester from 2015 revealed that 75% of B2B buyers prefer ordering via a webshop to ordering from a sales representative. Besides, e-commerce offers manufacturers the opportunity to serve consumers directly without intermediaries. (Chapter 2.5.1.3).

Almost all manufacturers of heating systems also offer e-commerce solutions in the form of webshops. However, only a tiny proportion of suppliers can achieve a significant turnover with them. From a sales point of view, the failure of webshops is mainly due to the attitude of installers, lack of knowledge and lack of functionality. The argument of a lack of attitude on the part of the installers' motivation could be refuted in that about 67% stated that they wanted to use a webshop (Chapter 4.3.8). The manufacturers themselves were unable to explain why the difference in relative revenue was so huge from the one to the other manufacturers. In a subordinate clause, however, the "successful" manufacturer mentioned that it makes no difference to the process whether the customer orders online or offline (Chapter 4.3.8). The key to success seems to be the integration of the different sales channels. Zupancic also came to the conclusion that multi-channel management must be mastered and all channels must be coordinated with each other in order to operate successfully in the market. The best-practice example from Würth translated to the heating industry would mean that the ordering process on-site by the sales force would also have to be able to be carried out directly via the webshop (Chapter 2.5.2.2). This thesis is supported by the evolutionary model of digital selling, which states that the highest evolutionary stage is reached when the channels are fully integrated with each other. The channels complement each other in this evolution stage instead of cannibalising each other (Chapter 2.5.1.3).

After the actual ordering process, 83% of the experts still saw great potential in the digital tracking of deliveries (Chapter 4.3.8). Due to the high level of agreement among the experts, this appears to be an essential component of the customer portal of the future.

The topic of digital coordination of heating commissioning was not evaluated by the author, as only 3 of 18 experts were in favour of it (Chapter 4.3.8).

### **After-Sales**

According to Pufahl, the after-sales phase begins with the completion of the order, delivery and invoicing. It is crucial to provide the best possible service to bind the customer to the company and encourage him to buy again. It is crucial to increase customer satisfaction through interaction between supplier and customer (Chapter 2.1.6.2). Winkelmann speaks quite boldly of clarifying the follow-up needs (Chapter 2.1.6.3). Cyclical purchasing processes such as the Buying Cycle according to Mascidiari and Zupancic or the Customer Purchase Journey according to Cundari also place particular emphasis on the phase after the purchase, as it forms the basis for the repurchase (Chapters 2.3.3.5, 2.3.3.8). These statements are also supported by literature from recent years, but the previous concept has been extended to include the influence of digitalisation. Thus Blinckebach and Elste conclude that FAQ, customer forums and product videos improve after-sales services. A study from 2015 goes even further and found that 31% of German companies consider chatbots in after-sales to be useful (Chapter 2.5.1).

In the heating industry, after-sales service is provided to the installer and not to the consumer, which is why it is designed a little different. The after-sales service is the classic customer care which is carried out either regularly or on-demand by means of customer visits. The experts agree that this should continue to be the case (Chapter 4.3.9).

In the course of customer care, the sales force carries out cross-selling to increase the share of wallet. All experts were largely in agreement that this activity is important and belongs to the field of activities of the sales representative (Chapter 4.3.9). Theoretically, this statement is supported by Churchill, Ford and Walker who assigned cross-selling to customer retention measures (Chapter 2.1.5). The experts disagreed whether this measure should be carried out according to the perception of the sales representative based on good customer knowledge or software-supported by means of database analyses (Chapter 4.3.9). Nor does the literature provide any recommendations for action in this specific case. With regard to the fact that each sales employee produces an average of € 19,500 in costs due to uncoordinated sales tasks, software-supported cross-selling is preferred in this case (Chapter 2.5.2.3).

The expert cited a digital project file in the customer portal for the installer as the most effective means of customer retention. The background to this is that, on the one hand, the installer has all information about the consumer available in the manufacturer's portal. The

one hand, this creates customer loyalty and at the same time added value for the installer (Chapter 4.3.9).

#### **4.4.2 Effect of further Digitalisation of the Sales Process on the Sales Force**

The expectation is that "The death of the B2B Salesman" will not come true in the heating industry soon, but the field of activity and the resulting challenges will change permanently.

According to Backhaus and Voeth, the field sales force in the product business has above all the tasks of presenting the company and maintaining the relationship with the customer (Chapter 2.1.4). Churchill, Ford and Walker described relationship management as one of the value-adding activities of a sales representative (Chapter 2.1.5). In line with the literature, the experts also concluded that the relationship between the sales force and the installer contributes at least 50% to the decision-making process. This, together with excellent customer service and technical competence, are the decisive factors for business success (Chapter 4.3.7). Due to digitalisation, this habitual practice is beginning to change, as with increasing digital information, the consumer begins to influence the decision actively and in some cases takes over the decision completely (Chapter 4.3.7). This will permanently change sales in the heating sector, as the buying centre will move into the area of marketing or the installer and gradually lose influence on the purchase decision. One of the new tasks of the future for sales will be to support the installer to convince the consumer of his products.

Contrary to the theory of Hildebrandt and Landäüßer, in the heating industry, the supplier will still have to look for the customer (Chapter 2.5.1.1). Therefore, soon the sales force will be able to prove its strength in the acquisition of new customers (Chapter 4.3.4).

In the following steps of the information exchange, digital possibilities such as product videos and automation will relieve the sales force, provided that an information medium suitable for the installer is found (Chapter 4.4.1).

According to Biesel and Hame, it is assumed that the quick and easy activities are carried out by IT systems and only high-quality work is done by the sales department (Chapter 2.5.2.4)

According to the author's conclusions, this is exactly what will happen in the area of offer management with increasing digitalisation. With simple systems, in the future some of the customers will serve themselves through targeted automation, while the office staff will serve the other part. Complex system situations will be converted directly into solutions and offers will be created by the field service with the help of a configurator (Chapter 4.4.1).

However, with his support of the installer concerning the consumer, a new essential task will be added (Chapter 4.4.1).

Order management will hardly affect the sales force in the future because by creating the same possibilities online as offline and by integrating the channels, the readiness for online orders will increase to 67%. Through digital order tracking and proactive information directly to the installer, queries about deliveries will be a thing of the past (Chapter 4.4.1).

In after-sales, the field service will continue to provide installers with regular or on-demand visits. However, due to the increasing digitalisation of the quotation and order process, it is assumed that the frequency of visits will decrease noticeably. Cross-selling will become more targeted and efficient thanks to algorithmic intelligence(Chapter 4.4.1).

#### **Tasks of the Sales Force of the Future in the Heating Industry:**

- Customer Acquisition
- Presentation of the Products and the Company
- Generate Solutions for Complex Requests
- Support the Installer in Consumer Sales
- Maintain the Relationship
- Cross-Selling

In summary, it can be said that the findings of Krah, Biesel and Hame can also be applied to a large extent to the heating industry. Through digitalisation, personal sales do not lose importance; simple activities are automated, which makes personal sales a premium skill (Chapter 2.5.2.4).

However, the internal sales force is influenced by increasing digitalisation to a much greater extent than the external sales force. The heart of the internal sales support is the generation of offers and the processing of orders (Chapter 4.3.2). Due to increasing digitalisation, only the simple requests which are not carried out by the installer are left for the internal sales force and the number of orders is reduced by 67% due to e-commerce(Chapter 4.4.1). This fits with the theory of Gervet and Oder that companies should try to automate as much back-office work as possible (Chapter 2.5.2.4)

## 5. Conclusion

The following conclusion summarizes the theoretical and empirical findings, answers the research question, places the work in the context of the current state of research, points out limitations and gives an outlook on possible further research.

### Theoretical Findings

At the beginning of this thesis, the framework and the starting point for this master's thesis was defined in the introduction to chapter 1. The problem definition and objectives were determined and from this, both the research question and the associated limitations were derived. The following is an in-depth literature review which substantiated the conceptual basis of chapter 2. The literature research in Chapter 2 was structured like a funnel, from general to specific and from historical research to current topics.

Chapter 2.1 covered the issue of "**Sales in B2B-Markets**". It was found that B2B markets are more customer-specific and lack price transparency. The distribution channels may be multi-channel, but they are usually shorter than in B2C business. There are four basic orientations in B2B business: project business, integration business, system business and product business, which also have a direct influence on the role of sales in the company. In product business, for example, the salesperson has the main task of representing the company and cultivating the relationship with the customer. The tasks of sales were also examined and divided into the categories of customer acquisition, customer retention and non-sales activities. Due to the high importance of this topic for the present master thesis, the sales process was deliberately considered from different perspectives. The models considered all had a sequential structure and yet were very similar. Often they only differed in expression and detail. Mario Pufahl's model was used as a reference for further work because it was clearly structured and best-reflected reality. He built his model into the following six phases: sales planning, lead management, contact management, offer management, order management and after-sales.

Chapter 2.2 briefly dealt with the **Central European heating industry**. It was concluded that regardless of the distribution channel, it is almost always the heating manufacturer who provides technical support to the installer. A sale directly to the end customer is unusual. The market comprises around 92,100 installers, 82% of whom employ fewer than ten people. There are three types of installers from the heating manufacturer's point of view; small installers without their own back office, medium-sized installers who are difficult to classify and large installers with their own back office and service department.

Chapter 2.3 deals with **buying behaviour in B2B markets**. Buying in B2B-Markets is usually more rational than in hypermarkets. The reasons for this are that organisational needs are not addressed as emotionally as personal needs and that several people are involved in the purchase. According to Webster and Wind, this is also known as a buying center. Every purchase is situation-specific and depends on emotional and cognitive involvement. The technical literature usually focuses on "real" buying situations with high emotional and cognitive involvement. The opposite pole to the buying process is buying behaviour, which is the focus of this chapter. There are countless models for the buying process, eight of which have been examined by the author and structured according to temporal and logical structure. Already 100 years ago, William W. Townsend developed the purchase funnel with the phases Awareness, Interest, Desire and Action. However, this simple model is the basis for many other developments. Whereas 100 years ago, it was assumed that information had to be passed on to the potential customer, modern models today assume that the customer can obtain the information himself via the Internet. This concept is based on the Zero Moment of Truth model of the IRI Group. McKinsey was one of the first companies to present the buying process not as a funnel but as a cycle, because it has found that when a customer is satisfied with a product or brand, they tend to buy it again. Worth mentioning is the Cundari Customer Purchase Journey model, which is a combination of different concepts. This model internalizes the McKinsey phenomenon of repurchase with the findings of the IRI Group's Internet researchers and adds the influence of satisfied customers on the generation of new customers. This model also formed the basis for the following chapters.

The topic of **digitisation** is dealt with in Chapter 2.4. The first step was to define what is meant by digitisation. The term is used differently in the literature and the author agreed on the digital transformation of existing business models and processes. The actual transformation is based on Schallmo's roadmap with the steps: Digital Reality, Digital Ambition, Digital Potential, Digital Fit and Digital Implementation. In a further step, it was discussed that digitization as a megatrend has become a major influence on all aspects of life and that the drivers of digitization are Internet of Things, Big Data, Cloud Computing and Artificial Intelligence.

Chapter 2.5 brings together the introductory concepts of the sales process, buying behaviour and digitisation and combines them with the most recent findings on the **digitisation of B2B sales**. The author himself has combined the models of Pufahl and Cundarie because in the digital world, sales and buying behaviour merge into one another and are interdependent.

Significant findings from this were:

- 60% of purchasing decisions are made before the buyer has had contact with the potential customer.
- In B2B tweets, blog posts and other social media are getting common.
- The use of CRM systems in sales increases productivity by up to 15%.
- 75% of B2B buyers prefer to buy from the webshop rather than from the seller staff
- B2B manufacturers now could serve end customers directly via e-commerce
- customer service using digital possibilities with FAQs, customer forums and product videos
- chatbots in the after-sales are useful

The second part of chapter 2.5 dealt with the status quo - the future of B2B selling. It is assumed that markets and products are becoming more and more similar. Therefore, the buying experience represents the added value of the future and differentiates between companies and products. Another trend is that buying behaviour is becoming increasingly digital, which poses a challenge for suppliers. Ordering processes must become more straightforward and faster and the various sales channels must be integrated so that the customer always has the same buying experience, whether online or offline. Data automation will continue to advance and bring enormous savings potential, especially in the sales area. Due to increasing automation, sales tasks are changing in such a way that operational activities will disappear completely, leaving only the "high-quality" work.

### **Empirical Findings**

The case study, according to Yin, was chosen as a research method because case studies are very well suited to investigate real situations. As an empirical method, qualitative research based on in-depth interviews was chosen. Again, the reason for this was that, from the author's point of view, a deep insight into concrete cases was best suited to the research question. The content analysis was carried out according to Mayring because, like the interviews, it is designed to process large amounts of data. A random sample of 18 experts from the heating industry was selected. In order to look at the topic from different perspectives, six experts each from the areas of sales managers, sales personnel and installers were selected. During the quantitative data analysis, eleven categories were created that could be reassigned to the **sales process** as far as possible.

In the lead or **awareness generation phase**, it was found that the heating industry is contrary to the theoretical principles. While the theory of digital marketing, as well as social media marketing, also became the focus of attention in the B2B sector, the most effective

means of generating leads proved to be classic cold calling and through the influence of the consumer.

In the **information-gathering phase**, the installer - contrary to all theories - does not react to the pull approach of obtaining the information himself via the Internet. This aspect was examined in more detail and it was found that product videos in particular and automation in the transmission of prices and data sheets represent added value for both the installer and the heating manufacturer.

Two digital tools are to be used in the **offer management phase**: System Finder for the installer and System Configurator for the field service. Different versions of the System Finder already exist, but with moderate success. With automation, the tool is to be adapted so that the customer finds the right system based on a guided process. The System Configurator, on the other hand, is a new tool that enables the sales department to carry out its planning services digitally and to prepare a quotation for the installer. This shortens the process, the lead time and minimizes the effort. In this phase, the support of the installer towards the consumer was identified as a new task for the field sales force. The background is that the end customer is increasingly becoming a decision-maker and thus has an influence on the decision.

During the **order management phase**, it was established that the installer was ready for e-commerce. However, the key to success seems to be the integration of the different distribution channels into one unit. It should make no difference to the installer whether he orders online or offline. The customer experience must be the same to achieve acceptance. In addition, deliveries should be tracked digitally during order processing.

The **after-sales** phase is already carried out by most heating system manufacturers with software support in the form of information about the customer. This digital information is to be expanded to include the identification of cross-selling potential. The actual manual activity of the on-site visit should be retained in the interests of relationship management.

Somewhat surprisingly, in addition to the sales process, the topic of the **consumer** was also discussed in detail. It was noted that the consumer is increasingly influencing the purchase decision, which may make all efforts regarding the installer unnecessary. It was noted that in the future, it will be more decisive to play the consumer with marketing measures.

## Research Question

This thesis aimed to answer the main research question posed in chapter 1.2 and the sub-research question derived from it with the help of basic theoretical knowledge and empirical research.

For this reason, the theoretical aspects of distribution in B2B markets, the heating industry, buying behaviour in B2B markets and the impact of digitalisation on B2B sales were examined. Based on this, an interview guideline was developed and the empirical data collection was carried out by means of expert interviews and subsequently evaluated and discussed. The main research question was answered by combining the findings from theory and empiricism and the answered sub-research question.

This section answers the main research question, which is as follows:

**How will the digitalisation of the sales process affect the sales force in the heating industry in Central Europe?**

The increasing digitalisation will have a large effect on the sales force, tasks will disappear, new tasks will be added and new ones will replace conventional working methods.

In the future, the sales force will be supplemented or replaced by algorithms of intelligence (automation), especially in the information phase and order processing of the sales process. New communication methods such as explanatory videos will support it. One of its main tasks will continue to be in the area of offer management. In future, simple offers will be carried out directly by the customer or by the office staff with the help of automation. More elaborate requirements are still the job of the field service. Field staff will generate software-supported solutions from the requirements of the consumer and the installer and convert these offers. In this phase, a new task is added with the support of the installer to sell the solution to the consumer. Cross-selling will also become more targeted and efficient through software support. As a result of digitisation, the human factor has become not inconsiderable, and relationship management is still considered the most important instrument for sales success. In summary, it can be said that automation will simply make tasks superfluous, software tools will improve quality and increase efficiency, and personal selling will become a premium skill.

Disruptive will be the effects on the internal sales support. Increasing automation, especially in the offer and order management phase, will remove the basis for this position. Companies will try to automate as many back-office activities as possible and reduce the number of office staff if necessary.

### **Context of the Current State of Research**

In the introductory part of this thesis, the lack of scientific literature on the effects of further digitalisation of the sales process on sales personnel in the heating industry was identified as a research gap. This gap was closed by identifying the steps in the sales process to be digitised for the heating industry and thus deriving the effects on the sales force. This work can thus be entered as a recommendation for action for companies in the heating industry.

### **Limitations**

Despite a wide range of different characters, the selection of experts brings the limitation to light. Due to the limited possibilities, only men in the German-speaking region were interviewed. On the side of the heating manufacturers, only companies with a turnover of more than € 100 million were selected, which is why it is not necessarily possible to draw conclusions about the difference to small heating manufacturers.

### **Outlook on Possible Further Research**

The paper presents an overview of which steps in the sales process should be digitised and what the effects on the sales force are. The question of how this should be implemented and how this can be done is not covered in the thesis and offers room for further research.

The empirical data analysis revealed the influence of the consumer on the purchase decision. How consumers influence the purchase decision in a three-stage distribution and what effects this has on marketing also offers potential for further research.

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# Appendix

## Questionnaire Sales Representative:

### Start of conversation (2 Min)

- Introduction: Who am I
- Information about the duration and content of the interview
- Point out that the conversation will be recorded
- Point out that the interview will be anonymised
- Does the interviewee have any questions that should be explained beforehand?

### Entry questions (8 Min)

1. Please introduce yourself and the company
2. What are the daily tasks of a sales employee? (process)
3. What is the role of the inhouse service? (process)
4. When you think about your daily tasks, where do you see the potential for digitalisation in sales? (Why)
5. From your point of view when should a process be digitalised? (Why)

### Phase 1: Awareness & Targeting (8min)

6. Who are your costumers? What is the most important target group? (Targeting, Data)
7. From your point of view what are the most important ways to gain new customers and how do new potential customers know about you? (What)
8. Do you think due to increasing digitalisation this will be changed in the future? (What)
9. How important is it that end customers become aware of your company? (What, Data)
10. What measures do you use here? (What, Data)
11. Where do you see the benefits of digital awareness making in relation to posting, cold call or similar activities? (Why)

### Phase 2: Collection of Information(8 min)

12. What information will be given to a potential new customer and how? (What, Data)
13. How important is personal contact between employee and customer during this process? (What)
14. What is the role of the information that the customers gathers himself via website, social media, product videos, webinars, virtual showrooms? (What, Data)
15. Do you think that the relationship between digital information and personal counselling will be changed? How? (What)
16. Where do you see benefits for yourself, when the customers inform themselves mostly online? (Why)
17. Where do you see benefits for the customer? (Why)
18. Where do you see disadvantages? (Why)

### Phase 3: Offer Management: (10Min)

#### Offer Creation

19. In what way does an offer making usually take place? (What; Process, Data)
20. What is the most important for you, the product, the solution, the service or the company? (What)
21. What services in this process are necessary to actually make an offer to the customer? (What; Consulting; Data)
22. What digital aids do you use to create an offer?
23. Do you see potential for digital aids in sales for offer creation? e.g. product selector, system configurator? (Why)
24. From your point of view, what is the potential for self-service-solution for the customers so that they are able to configurate an offer without any doing of the company?

#### Presentation

25. What does the customer get with the offer? How is the offer presented?
26. What are the typical objections and how are they being dealt with?
27. How does the follow up on the offer take place? (What)
28. What digital aids do you use to present offers and to follow up on them?
29. Do you see potential for further digitalisation?

### Phase 4: Order Management (8 Min)

30. What do you think are the decisive reasons for which supplier a costumer decides for? (What)
31. What influence do you think does the personal contact have on the buying decision of the customer and with that on the sales success?
32. If the costumers has decided on an offer, how is the offer being conclude?
33. What are the requirements to make a customer use e-commerce?

34. Besides the ordering process are there further potentials for digitalisation from your point of view?
35. If you think about your customers, regarding the offer conclusion are there further potentials for digitalisation?

**Phase 5: After-Sales Support & Cross-Selling (8 Min)**

36. How are existing customers supported in your company?
37. Are there digital aids used to make the customers support easier for the sales employees? If so, which ones?
38. From your point of view are there digital ways to connect the customers more to the company?
  1. customer-connection program, calculating tools, ....
39. How are new product groups and new products presented to existing customers?
40. Are there digital possibilities such as automatised sales actions for non-buyers?
41. Do you think that digital attraction can help to increase the turnover and product variety?

**Impacts on the sales employee (4min)**

42. From your point of view, how does the work field of a sales force employee change due to increasing digitalisation?
43. Do you think that the expectations of the customers will be changed due to digitalisation?
44. What competences need to be developed in the future to meet the expectations of the customers?

**Finish: (2min)**

45. Do you have other topics to add to the interview which were probably not mentioned?

**Questionnaire Sales Manager:**

**Start of conversation (2 Min)**

- Introduction: Who am I
- Information about the duration and content of the interview
- Point out that the conversation will be recorded
- Point out that the interview will be anonymised
- Does the interviewee have any questions that should be explained beforehand?

**Entry question (8 Min)**

1. Please introduce yourself and the company?
2. How is your sales organisation constructed?
3. What is the role of the inhouse service and the sales force? (process)

**Phase 1: Awareness & Targeting (8min)**

4. Who are your costumers? What is the most important target group? (Targeting, Data)
5. From your point of view what are the most important ways to gain new customers and how do new potential customers know about you? (What?)
6. How important is it that end customers become aware of your company? (What, Data) What measures do you use here? (What, Data)
7. Do you think due to increasing digitalisation this will be changed in the future? (What?)

**Phase 2: Collection of Information (8 min)**

8. When a new customers becomes aware of your company what information in the first contact phase are important to them and how are they being explained? (What, Data)
9. What is the most important for you, the product, the solution, the service or the company? (What)
10. What is the role of the information that the customers gathers himself via website, social media, product videos, webinars, virtual showrooms? (What, Data)
11. Do you use digital tools to follow up on website visitors?
12. What is the role of the sales employee in the first the phase of information gathering?
13. Do you think that the relationship between digital information and personal counselling will be changed? How? (What)

**Phase 3: Offer Management: (10Min)**

Offer Creation

14. How does an offering process usually take place? (What; Process, Data)
15. What are the tasks of the sales force and the inhouse service?
16. What digital aids do you use to create an offer?
17. Do you see potential for digital aids in sales for offer creation? e.g. product selector, system configurator? (Why)

18. From your point of view what is the potential for self-service-solution for the customers so that they are able to configurate an offer without any doing of the company?

#### Presentation

19. What does the customer get with the offer? How is the offer presented?
20. What are the typical objections and how are they being dealt with?
21. Are there digital aids for the dealing with objections?
22. Do you see potential to support the sale?
23. How does the follow up on the offer take place? (What)
24. Do you see potential for further digitalisation and automatisisation?

#### **Phase 4: Order Management (8 Min)**

25. What do you think are the decisive reasons for which supplier a customer decides for? (What)
26. What influence do you think does the personal contact have on the buying decision of the customer?
27. If the customer has decided on an offer, how is the offer being concluded?
28. What are the requirements to make a customer use e-commerce?
29. Besides the ordering process are there further potentials for digitalisation from your point of view?
30. If you think about your customers, regarding the offer conclusion are there further potentials for digitalisation? e.g. order tracking for the customer, questionnaire for customer happiness

#### **Phase 5: After-Sales Support & Cross-Selling (8 Min)**

31. How are existing customers supported in your company?
32. Are there digital aids used to make the customer support easier for the sales employees? If so, which ones?
33. From your point of view are there digital ways to connect the customers more to the company?
34. How are new product groups and new products presented to existing customers?
35. Are there digital possibilities such as automatised sales actions for non-buyers?
36. Do you think that digital attraction can help to increase the turnover and product variety?

#### **Impacts on the sales employee (4min)**

37. From your point of view, what makes a good sales employee?
38. From your point of view, how does the work field of a sales force employee change due to increasing digitalisation?
39. Do you think that the expectation of the customers will be changed due to digitalisation?
40. What competences need to be developed in the future to meet the expectations of the customers?

#### **Finish: (2min)**

41. Do you have other topics to add to the interview which were probably not mentioned?

### **Questionnaire Customer:**

#### **Start of conversation (2 Min)**

- Introduction: Who am I
- Information about the duration and content of the interview
- Point out that the conversation will be recorded
- Point out that the interview will be anonymised
- Does the interviewee have any questions that should be explained beforehand?

#### **Entry questions (8 Min)**

1. Please introduce yourself and the company
2. What are the typical tasks of a sales employee of a heating manufacturer?
3. What makes a good sales employee?
4. What is the role of the inhouse service? (process)
5. What digital media do you use? (How)
6. What devices do you mostly use the media with? (How)
7. Are there digital means of communication that you use? (What)
8. From your point of view, when should a process be digitalised? (Why)

#### **Phase 1: Awareness & Targeting (8min)**

9. How did you become aware of the company Bösch?
10. If you were looking for a new partner in this area, how would you do so?
11. Do you use social or digital media such as Facebook, Instagram, XING or Youtube?
12. Do you think that the behaviour of the installation branches in relation to business gatherings will change with increasing digitalisation in the future? (What)

**Phase 2: Collection of Information(8 min)**

13. If you become aware of a new supplier what information is relevant to you right from the start?
14. How important is personal contact between employee and customer during this process? (What)
15. What is the role of the information that the customers gathers himself via website, social media, product videos, webinars, virtual showrooms? (What, Data)
16. Do you think that the relationship between digital information and personal counselling will be changed? How? (What)
17. Where do you see the benefits of online information for yourself? (Why)
18. Where do you see disadvantages? (Why)

**Phase 3: Offer management: (10Min)**

19. If a supplier seems interesting to you how does an inquiry usually take place?
20. What is the most important for you, the product, the solution, the service or the company? (What)
21. Regarding the offer creation of the supplier, what is important to you?
22. How is the offer usually presented to you?
23. Regarding the offering process, where do you see potential for improvement?
24. Do you see potentials for digital tools?
25. How do you see the potential for a self-service solution in which you configure the offer yourself?

**Phase 4: Offer management (8 Min)**

26. What decides if you get the order from the customer?
27. What are typical reasons to decide for a provider? (What)
28. What influence does the personal customer support have on the buying decision?
29. How are the suppliers usually being notified, if they got the surcharge?
30. Do the other suppliers get notified, that they didn't get the surcharge?
31. Do you already e-commerce solutions and if so, how?
32. What are the requirements to make you use e-commerce?
33. Besides the ordering process are there further potentials for digitalisation in the order conclusion from your point of view? e.g. tracking numbers

**Phase 5: After-Sales Support & Cross-Selling (8 Min)**

34. How do you usually get supported by your providers after your purchase?
35. In which cases do you contact the sales employee?
36. How important is regular personal contact to you?
37. If you were happy with the product, how big is the chance that you buy other products from the same provider?
38. Do you think sales actions could help buy more from a provider?

**Impacts on the sales employee (4min)**

39. From your point of view, how does the work field of a sales force employee change due to increasing digitalisation?
40. Do you think that your expectations will be changed due to digitalisation?
41. What competences need to be developed in the future to meet the expectations of the customers?

**Finish: (2min)**

42. Do you have other topics to add to the interview which were probably not mentioned?

## **Statement of Affirmation**

I hereby declare that all parts of this thesis were exclusively prepared by me, without using resources other than those stated above. The thoughts taken directly or indirectly from external sources are appropriately annotated. This thesis or parts of it were not previously submitted to any other academic institution and have not yet been published.

Dornbirn, 28.07.2020

Simon Lins