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of Applied Sciences

# Effective Lead Management
## Challenges and Solutions for Marketing and Sales Departments

Master Thesis

Submitted in Fulfillment of the Degree

**Master of Arts**

University of Applied Sciences Vorarlberg

Submitted to

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Handed in by

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Dornbirn, 28.07.2023

## Abstract

Effective Lead Management: Challenges and Solutions for Marketing and Sales Departments

In the last few years the global interest on lead management has increased. This classic topic for marketing and sales departments is aimed at converting potential customers into sales. The following thesis identifies the challenges and solutions for marketing and sales departments in order to process effective lead management. Using data from a literature review and qualitative empirical research, conducted with representatives of marketing and sales departments, the results showed overall and task specific challenges and solutions. The research indicates that overall challenges and solutions regarding the gap between marketing and sales, new processes and data management including data quality, software and silos emerge. In addition task specific challenges and solutions concerning lead generation including purchased leads, lead qualification, lead nurturing and sales specific challenges and solutions conclusively the focus on existing customers, time famine and lead routing were identified. This thesis provides a framework for further studies regarding the challenges and solutions for marketing and sales departments processing lead management.

Keywords: lead management, marketing, sales, lead generation, lead qualification, lead nurturing

## Kurzreferat

Effektives Lead Management: Herausforderungen und Lösungsansätze für Marketing- und Vertriebsabteilungen

In den letzten Jahren hat das Interesse am Lead Management weltweit zugenommen. Dieses klassische Thema für Marketing- und Vertriebsabteilungen zielt darauf ab potenzielle Kunden zu einem Kauf zu leiten. Die folgende Masterarbeit eruiert die Herausforderungen und Lösungsansätze für Marketing- und Vertriebsabteilungen um ein effektives Leadmanagement durchzuführen. Anhand von Daten aus einer Literaturrecherche und einer qualitativen empirischen Untersuchung mit Vertretern von Marketing- und Vertriebsabteilungen, wurden allgemeine und aufgabenspezifische Herausforderungen und Lösungen aufgezeigt. Die Recherche zeigt, dass allgemeine Herausforderungen und Lösungsansätze in Bezug auf die Kluft zwischen Marketing und Vertrieb, neue Prozesse und Datenmanagement einschließlich der Datenqualität, Software und Silos vorliegen. Darüber hinaus wurden aufgabenspezifische Herausforderungen und Lösungsansätze mit Hinblick auf die Lead-Generierung einschließlich gekaufter Leads, die Lead-Qualifizierung und das Lead-Nurturing identifiziert. Des Weiteren konnten vertriebsspezifische Herausforderungen und Lösungen im Bereich des Fokus auf bestehende Kunden, Zeitmangel und Lead-Routing erkannt werden. Diese Arbeit bietet einen Rahmen für weitere Forschungsansätze über die Herausforderungen und Lösungen von Marketing- und Vertriebsabteilungen bei der Durchführung von Leadmanagement.



Keywords: Lead Management, Marketing, Vertrieb, Lead Generierung, Lead Qualifikation, Lead Nurturing

## Preface

Several people were involved in the implementation of this master thesis by motivating and guiding me. First of all I would like to thank all the experts involved for taking their time to support me in analyzing lead management. Furthermore I would like to thank my fellow students Eva-Maria Hagen and Barbara Kaiser who motivated me in choosing this topic. Moreover special thanks go to Fabian Heinzle a true friend for many years who supported me with helpful suggestions during the writing process. In addition I want to thank DDr. Birgit Hagen for guiding and supporting me when writing this thesis. Finally I would like to thank my parents who have motivated and supported me all these years and without them I probably would never have advanced to this point.

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# List of Abbreviations and Symbols

MQL – marketing qualified Lead

SAL – sales accepted lead

SQL – sales qualified lead

ABM – account-based marketing

B2B – business to business

B2C – business to customer

DACH – Germany Austria Switzerland

# 1 Theory

## 1.1 Introduction

A large proportion of the leads which are generated on events and trade fairs are subsequently not adequately processed by the sales department. (Ter Weiler u.a. 2016, p. 118) When it comes to online businesses even 90% of the companies do not respond quick enough on leads.(Cancel; Gerhardt 2019, p. 4) Consequently this can cause customers to distance themselves permanently from the company as they are disappointed about their ignored personal interest and in general the opportunity to gain additional turnover is missed. The reason for this situation can be that the marketing department does not cooperate effectively with the sales department. (Ter Weiler u.a. 2016, p. 118) Another reason for the poor processing of leads is the fact that the lead process is not defined in many companies. As a result the marketing or sales department defines the process on its own.(Biesel; Hame 2018, p. 198) This situation usually emerges due to the fact that a professional lead management has not been implemented which leads to the outcome that companies fail to generate potential profits by not capturing interested customers.(Ter Weiler u.a. 2016, p. 118) A study conducted by the University of Ottawa has shown that the implementation of lead management system has a positive impact on adaptive selling, technical skills and sales skills. These variables together account for about 55% of the variance of the inside sales performance, which underlines the importance of the usage of lead management system.(Ohiomah u.a. 2019, p. 175)

Therefore it is not surprising that the global interest on lead management is increasing. This trend can be seen in the rising number of search queries for the term *lead management* .The highest level of interest in lead management based on search queries on google was recorded in March 2022, followed by March 2023.('Google Trends' 2023)


Figure 1: Google Trends – Lead Management (Google Trends 2023)

The following master thesis deals with the topic effective lead management and provides insights about the challenges for marketing and sales departments. Furthermore, solutions to overcome these challenges are presented to the reader. In general this master thesis is split into a theoretical and an empirical part. In addition the major findings of these two parts are compared and the results of this master thesis are derivate out of them.

## 1.2 Research Question

In order to evaluate the actual situation for corporates regarding lead management the following research question was designed:

**Which challenges do marketing and sales departments face in processing efficient lead management and which solutions are applied?**

## 1.3 Literature Research

To ensure a high standard of quality in this master thesis only published articles and literature were taken into account. In general the literature research was conducted by using the online query directory Olav of the University of Applied Sciences Vorarlberg and by Google Scholar as resources for research. Furthermore Statista was used in order to identify market specific data. In terms of specific topics like the legal regulatory or market shares alternative sources were used by doing research via google. This action was necessary in order to guarantee a that the current situation could be covered. In addition google trends was used in order to show the relevance of lead management.

While conducting the literature research at first the primary keywords were used. During the research the secondary key words and additional keywords were taken into account especially when looking for specific information regarding the topics of this master thesis.

When it comes to articles their relevance was evaluated by ensuring that that at least one of the primary keywords is contained in the abstract or in the title. In addition, the keywords specified in each topic were taken into account. All articles which did not contain at least one of the additional keywords in the abstract or title were also excluded. Moreover all articles which were not published in multiply published journals or which did not had a popper DOI or ISBN were also excluded. When it comes to the procedure to evaluate relevance of the content at first the abstract followed by the conclusion was read. If the content was assessed as appropriate then the main chapters such as the empirical analysis, discussion and summary were read.

<u>Primary keywords:</u> lead management, marketing automation, CRM

<u>Secondary keywords:</u> online marketing, lead generation, lead nurturing, lead scoring, lead qualification, lead process, sales, marketing,

<u>Additional keywords:</u> inbound marketing, account-based marketing, GDPR, challenges lead management, effective lead management, customer journey, lead funnel, sales funnel, customer purchasing process

## 1.4 Definition of Key Elements in Lead Management

### 1.4.1 Definition of Lead Management

When it comes to the definition of the term *lead management* the literature provides various interpretations:

Lead management is a classic topic of marketing and sales and focuses on how companies lead their customers from initial interests and actions to a purchase.(Belz 2016, p. 8) More specifically lead management is about what makes a customer contact to a qualified lead for sales.(Hannig u.a. 2021, p. 72) A further definition is states that lead management is the strategic orientation, the activities and the processes for generating and qualifying prospects and convert potential customers into buyers.(Biesel; Hame 2018, p. 197–198) Finally lead management includes all activities to convert potential customers into actual buyers and is primarily relevant to B2B companies or companies with complex services and products.(Gasser; Mäder 2022, p. 26)

### 1.4.2 Definition of a Lead

A lead is a potential customer who is interested in a company's products or services.(Altenhofen 2023, p. 100) The term *lead* is generally understood as a tip, an indication or a track in order to make business. A lead is a person who signals that the contact is worth pursuing. These signals could be a click on a website or a download of a whitepaper.(Hannig u.a. 2021, p. 229)

Leads are not exclusively including new customers but also existing customers can be referred to as leads. For example if they are interested in additional products or solutions which they have not yet purchased.(Altenhofen 2023, p. 106–107) In addition, lost customers can also be referred to as leads if the company tries to convert them back into customers by taking measures.(Schüller; Schuster 2017, p. 51)

Based on the purchase probability a lead can be classified into a cold lead, a warm lead and a hot lead.(Altenhofen 2023, p. 105) Cold leads are customers who have no interest in a purchase yet but fit into the company's buyer persona. This means that they have a need that could be met by the company and thus a future business relationship is possible. In order for a potential customer to become a cold lead contact details must be exchanged for instance online by a visit on the website or offline in order to capture the potential customer in the selling organization.(Brock 2019, p. 8)  A warm lead on the other hand is already one step further and has a clear interest which can be identified for instance if he shows interest in the competitor's products and compares them.(Altenhofen 2023, p. 105) Hot leads are leads who have intensively engaged with the company's product or solution and are already close to making a purchase. They are often prioritized within the lead management process and therefore passed on directly to the sales department for further action.(Schüller; Schuster 2017, p. 153) Hot leads are also considered as marketing qualified leads.(Seebacher u.a. 2021, p. 298) Another classification of leads can be done by using the term *pseudo leads*. These are leads without any serious buying interest but nevertheless get in contact with the touchpoints of a company. Possible examples are employees of competitors, students who inform themselves about a topic, people who want to apply for a job at the company, analysts, consultants and journalists.(Schüller; Schuster 2017, p. 153)

## 1.5 Lead Management

### 1.5.1 Historic Lead Management

In the past corporates conducted lead management in an unstructured way and the marketing and sales departments were not involved in a joint sales process. The task of marketing in these times was primarily to take care of advertising and the overall image or the company's brand. Other traditional tasks of the marketing department were to organize events and trade fairs or to send advertising mails. When leads were generated out of these marketing activities they were usually passed on directly to the sales department. Delays in processing the leads were common since the transfer and subsequent preparation was not sufficiently carried out by both departments.(Schüller; Schuster 2017, p. 172)

The sales department had to identify the relevant information about the customer's company and the right contact person in the buying center. On the basis of this knowledge the sales strategy was built up. The resulting leads were processed by a predefined or customized sales process designed by the sales department. Therefore the generation of leads was usually the responsibility of the sales department which sometimes conducted the process by cold calls or personal contacts. As a result the sales force was often rejected and therefore had to be persistent.(Schüller; Schuster 2017, p. 172) The figure on the next page shows a classic sales process for businesses operating in B2B markets:

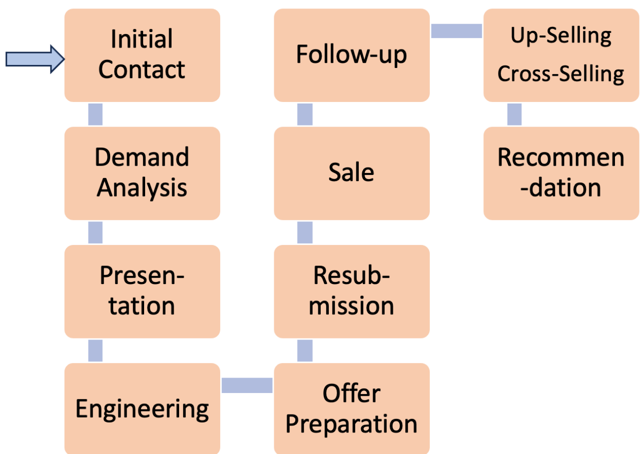


Figure 2: Classic Sales Process in B2B (Schüller; Schuster 2017, p. 172)

However if a sale was closed many follow-up transactions could not be realized since the customer might have a new decision-maker or due to the fact the customer simply did not consider to contact the salesperson. As a result a lot of time had to be invested by the sales department and a high degree of motivation was necessary but still in most cases the sales department was either too early or too late in reaching the customer. With the implementation of modern lead management these issues are improving and the customer is being approached more often at the right point in time.(Schüller; Schuster 2017, p. 172–173)

### 1.5.2 Modern Lead Management

In some companies the sales department still considers lead generation to be one of its core tasks. But generating leads requires important resources which should be spent on the actual sales task instead. Therefore joint approaches are essential to ensure a proper division of tasks and to enable close collaboration between marketing and sales.(Seebacher u.a. 2021, p. 308) Furthermore marketing departments should no longer focus exclusively on their traditional responsibilities such as branding the company because they have to collaborate with sales across the entire sales process and gain expertise in data processing, digitization, and new technologies. Sales departments on the other hand need to increase their use of digital systems and include new approaches such as virtual selling and social media networking in their activities.(Steuernagel 2021, p. 3)

The reason for the change from old approaches to modern lead management is the emergence of automation platforms. The are used to automate for instance the nurturing processes in order to develop leads into customers, to improve lead profiles and to qualify leads. In this context, the term *marketing automation* is often used. Marketing automation is not just about marketing but much also about sales because it is used as a pre-sales activity to provide sales with more time for preparing qualified leads.(Schuster 2022, p. 27)

In modern lead management marketing and sales jointly define a continuous lead funnel which starts with the generation of leads and ends with the closing of the sale.(Schüller; Schuster 2017, p. 138)

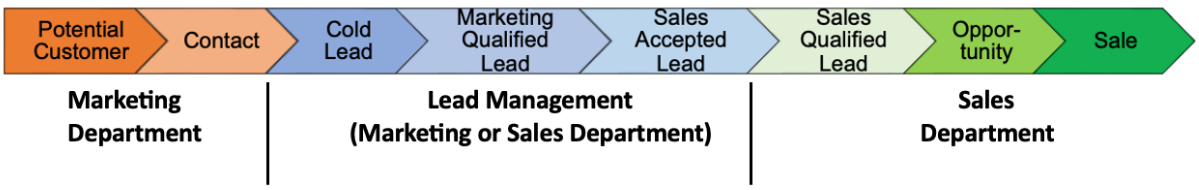


Figure 3: Lead Management Process (Owm illustreation adapted from Seebacher u.a. 2021, p. 296)

The figure above shows the stages of a purchasing process starting from a potential customer to a resulting sale and it indicates which department is typically responsible.

With regard to the typical tasks and responsibilities the marketing department deals with the first two stages which are identified as potential customer and contact.(Seebacher u.a. 2021, p. 297) In the further procedure the stage of cold lead, marketing qualified lead and sales accepted lead are unusually tasks of the lead management.(Seebacher u.a. 2021, p. 297-298) When it comes to the responsibility in processing lead management there are different views in the literature. This issue is based on the fact that there is no common definition of lead management and therefore the areas of responsibility are assigned differently depending on the author's view. Consequently depending on whether a marketing or a sales-centered definition is considered different areas of responsibility are assigned to marketing and sales. As a result the responsibility for lead management is assigned in the literature neither to the marketing department nor to the sales department.(Seebacher u.a. 2021, p. 301) The last three stages are  the sales qualified lead, opportunity and sales which are subsequently handled by the sales department.(Seebacher u.a. 2021, p. 299-300)

### 1.5.3 The Sales Funnel

In order to illustrate the qualification process the sales funnel is used. In this context it must be mentioned that the individual steps of the funnel differ among companies. Nevertheless the principle is always the same since stage by stage leads with a lower probability are sorted out in order to focus on those leads with a higher chance to close a deal. This selection is necessary to ensure that sales can target the resources on promising leads in order to gain revenue.(Hannig u.a. 2017, p. 8)

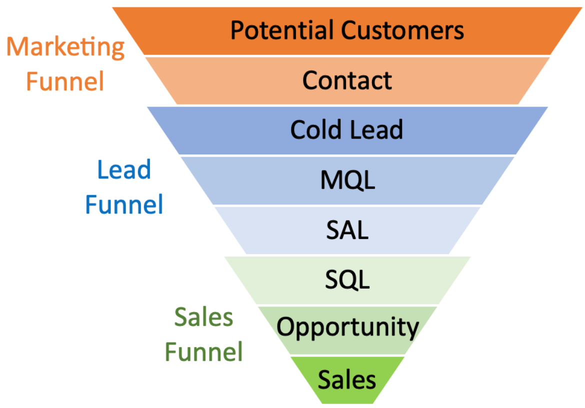


Figure 4: Marketing-Lead-Sales Funnel (Own illustration adapted from (Seebacher u.a. 2021, p. 301))

When it comes to the process starting with the initial stage of **potential customers** they include all potential buyers who fit into the company's target group. As a result they are usually the defined by the buyer persona. In the case of a B2B company this involves several personas which are represented in the buying center. In this stage the company does not know any contact data or any other information. Consequently these are completely unknown potential customers who did not appeared yet.(Seebacher u.a. 2021, p. 296–297)

When a potential customer has an initial contact with the company the next stage is introduced which is called **contact**. During this stage the company knows just a few unique personal details about the contact such as for instance an email address. These few but unique data allow the contact to be clearly assigned. Basically the contact has not yet expressed any purchase intentions or interests. Therefore the company cannot yet address the contact specifically. As a result the marketing department has to obtain further information in this stage by a defined customer journey and the respective touchpoints.(Seebacher u.a. 2021, p. 297)

The next stage is the conversion of a contact to a lead or more precisely to a **cold lead**. In general a cold lead has left just a few contact details and therefore is almost unknown to the company but still he has some kind of interest in the companies offer. The criteria which defines the difference between a contact and a cold lead vary and depend on how a company's process is defined. In terms of responsibility for handling the lead a handover from the marketing department to lead management is carried out at this stage.(Seebacher u.a. 2021, p. 297)

In the further process some cold leads turn into **marketing qualified leads (MQL).** These are leads which are qualified by defined internal company criteria. Therefore a qualification is carried out in which a score is assigned according to internal company criteria. This activity is referred to as lead scoring and if a cold lead has a sufficiently high score it is converted into a marketing qualified lead. In general the marketing qualified lead is the most important status for the marketing and the lead management department since it is the result of their effort. The stage of a MQL is the intersection of the marketing and sales department.(Seebacher u.a. 2021, p. 298)

In the next stage some MQL become so-called **sales accepted leads (SAL).** If the lead corresponds to the criteria defined by marketing and sales in a collaborative way and the sales department accepts the lead the status of sales accepted lead is reached. Nevertheless leads can also be rejected by the sales department for instance if the lead does not have a serious intention to make a purchase. For example if the sales department already knowns that the customer just wants a settlement offer or if the products are not able to solve the customer's problem.(Schüller; Schuster 2017, p. 139) In general the status of a sales accepted lead is a critical moment because the transition of the lead from the marketing department (MQL) to the sales department (SAL) is carried out.(Seebacher u.a. 2021, p. 298) By definition this transaction is called lead routing.(Hannig u.a. 2021, p. 255) Lead routing determines which lead is transferred to which sales representative. In some companies the lead is first contacted and reviewed by the internal sales team to determine this. After an evaluation the lead is passed on to the appropriate sales representative. Customers who are already known to the company should be handed over to those sales employees who have already taken care of them in previous times because changes of the contact person lead to a loss in loyalty. In general lead routing can be automated via email or via an interface between the marketing automation platform and the CRM-system.(Schüller; Schuster 2017, p. 164–165) Since the SAL marks the end of the lead funnel the performance of the lead funnel can be evaluated at this point. This validation is carried out by using the lead funnel conversion rate. With this KPI it is possible to identify the success of the sales supporting activities which have been conducted.(Seebacher u.a. 2021, p. 299) Consequently by converting more cold leads into SAL, the lead funnel conversion rate increases:

$$\text{Lead Funnel Conversion Rate } = \frac{\text{Number of Sales Accepted Leads}}{\text{Number of Cold Leads}}$$

Lead Funnel Conversion Rate (Seebacher u.a. 2021, p. 299)

The next stage of the lead is the so-called **sales qualified lead (SQL)**.(Seebacher u.a. 2021, p. 299) SQLs have usually signaled that they are going to buy soon and they meet the criteria fitting to the target customers.(Cancel; Gerhardt 2019, p. 59–60) The status is reached due to the acceptance of the SAL by the sales department. The lead is managed by a sales representative who contacts the lead and discusses the key topics. One of the reasons why the lead is managed exclusively by a sales representative is the fact that in this stage the prices are discussed and especially in B2B prices are usually defined within the sales departments. By establishing contact with the buying center it is possible to determine who the responsible decision-makers are. If the criteria is still met after the SAL has been followed up by the sales department then it becomes an SQL.(Seebacher u.a. 2021, p. 299)

If the lead is qualified as SQL he is exclusively prepared by the sales department with the aim of developing it into a so-called **opportunity.** In doing so the sales department establishes close contact with the customer in order to acquire as much information as needed. In general leads and opportunities are assessed in a different way since leads are assigned with a score while opportunities are rated with the probability of a purchase by the customer in percent.(Seebacher u.a. 2021, p. 299–300) In general an opportunity can be understood as a chance or occasion to make a sale. For a lead to become an opportunity the customer must have expressed his need in advance in a clear way. This means that his purchase is expected soon and he already has allocated his budget.(Hannig u.a. 2021, p. 229) Some opportunities eventually turn into a **sale**. In order to measure the effectiveness of the sales funnel the sales funnel conversion rate is used as a KPI. The sales funnel conversion rate is an important benchmark for the entire company.(Seebacher u.a. 2021, p. 300) An increase in the number of sales resulting from the SAL increases the conversion rate of the sales funnel:

$$\text{Sales Funnel Conversion Rate} = \frac{\text{Number of Sales}}{\text{Number of Sales Accepted Leads}}$$

Sales Funnel Conversion Rate (Seebacher u.a.2021, p. 300)

### 1.5.4 The Purchasing Path

In order to illustrate the qualification process along the customer journey it is common practice to use the concept of the funnel. (Hannig u.a. 2017, p. 8) The concept of the funnel is based on the historical AIDA model.(Seebacher u.a. 2021, p. 292) The AIDA is a well-known marketing model and actually the acronym for the four stages of awareness, interest, desire, and action.(Liu 2015, p. 78) The first three stages from potential customer to cold lead refer to the attention phase.(Seebacher u.a. 2021, p. 297) The stage marketing qualified lead refers to the interest phase followed by the stage of sales accepted lead which is related to the phase of desire. Finally the stages of sales qualified lead, opportunity and sale are located in the action phase of the AIDA Model.(Seebacher u.a.2021, p. 301) However there is little evidence that the funnel actual reflects purchasing behavior in reality today. The reason for this is that the sales funnel originates from a time when direct sales was daily business. With the emergence of a new media environment due to innovations and new technologies this model is no longer up to date.(Gasser; Mäder 2022, p. 20)

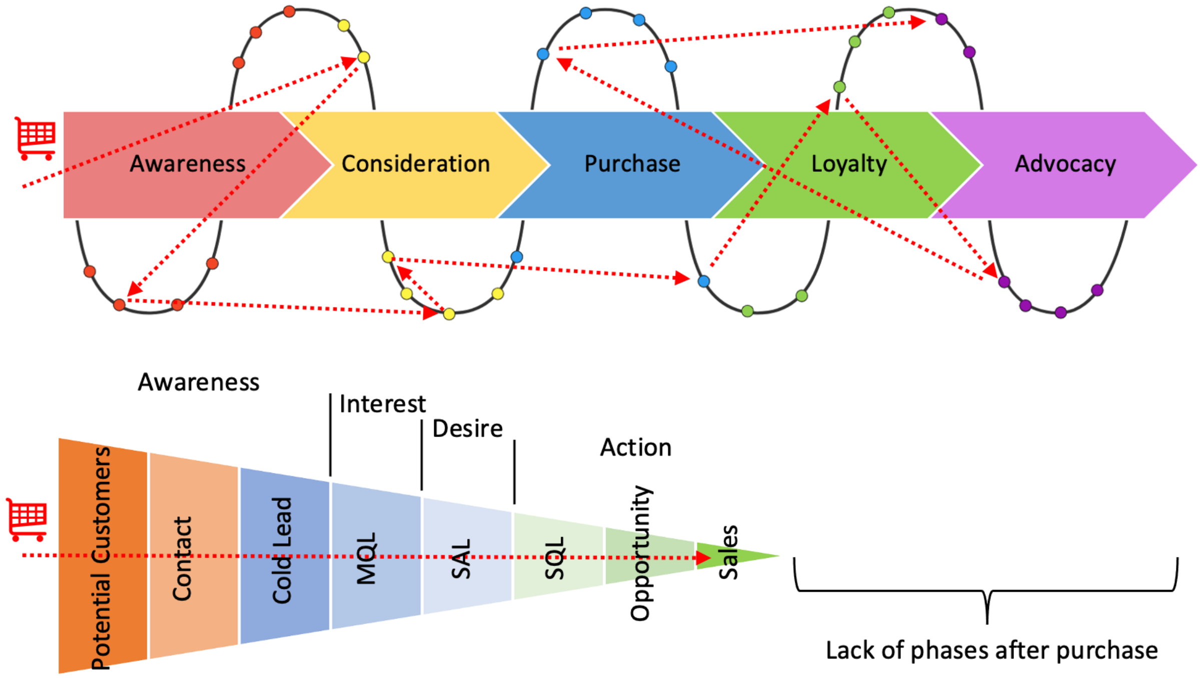


Figure 5: Customer Journey (Kreutzer 2021, p. 57) vs. Sales Funnel (Seebacher u.a.2021, p. 301) (Own Illustration)

A traditional sales funnel where leads start their purchasing path at the top funnel and a part of them subsequently become buyers is too inflexible and linear structured. In a realistic purchasing process B2B customers get in contact with the touchpoints of a company's customer journey in different ways. Only some interactions with the touchpoints can be predicted while others simply occur by chance. In addition leads follow an individual path in their buying process depending on their level of knowledge about what the company has to offer. Consequently leads enter the buying process at different stages not necessarily at the top of the sales funnel.(Gasser; Mäder 2022, p. 21) Furthermore it is possible for leads to take a step back in terms of the purchasing phases because the time frame in which they intent to make the purchase is shifted or because they don't communicate with the company for some reason.(Altenhofen 2023, p. 105) Another reason could be that leads are influenced by other parties such as friends, influencers, other customers, or competitors during the buying process. As a result the customer journey is usually not linear as the simplified model indicates.(Hopf 2021, p. 6)

A further weakness of the traditional sales funnel is the lack of customer focus.(Gasser; Mäder 2022, p. 21) While the customer journey as a big picture is focused on customers funnels on the other hand are product centered.(Kruse Brandão; Wolfram 2018, p. 95–96) The funnel is aimed at developing leads into customers while the customer journey shows the whole customer path. Therefore traditional funnels are designed to commercialize the customer in order to increase sales. Nowadays this approach is outdated because the focus on a purchase does not build any trust or any loyalty among customers.(Gasser; Mäder 2022, p. 21) When it comes to planning the customer journey is not a unique process since adaptions need to be made on an ongoing basis. The behavior of the target customers should be tested and further steps should be derived based on the findings. This adaption is particularly feasible in the case of online activities.(Heinrich 2020, p. 57)

In this context it has to be mentioned that Belz and Rutschmann reveald that marketing and sales have one single task to fulfill which is leading a customer to a purchase. As a result the purchasing process of a customer has to be the center of attention for marketing and sales. Models like the customer journey or the sales funnel are not detailed enough and usually designed from a marketeer's perspective.(Belz; Rutschmann 2014, p. 20) Furthermore Belz mentions the sales funnel is designed on the basis of the supplier's point of view. In order to improve the customer relationship it is necessary to include the customer's activities as well as the activities of the own company.(Belz u.a. 2016, p. 69–70) When it comes to lead management Belz mentions in order to conduct effective lead management the reality of the customers purchasing processes need to be the center of attention instead of purchasing phases.(Belz 2016, p. 11) However Rutschmann and Belz admit that the purchasing process of customers in B2B is usually much longer and more complex. Therefore companies in B2B have to deal more intensively with the purchasing processes in order to be able to analyze it in contrast to corporations operating in B2C.(Belz; Rutschmann 2014, p. 20)

### 1.5.5 Purchasing Behavior in B2C

Nevertheless almost all B2B purchasing processes can be can be segmented into several stages according to the sales funnel. But when it comes to B2C an exception has to be made since some customers buy spontaneously.(Schuster 2022, p. 89) The majority of customers in B2C markets tends to make quick and spontaneous purchases decisions. These decisions are sometimes based on a trigger which is activated due to advertisement or by personal recommendations. Usually just a short considering phase follows after a trigger and sometimes the purchase decision is made directly in front if the smartphone or the computer.(Stadelmann; Pufahl; Laux u.a. 2020, p. 161)

According to Belz and Rutschmann the tendency occurred that customers spend less time gathering information before making a purchase since confidence in the reliability of products is common. Some customers think that products are interchangeable anyway and therefore the risk of buying a poor product is hardly noticed.(Rutschmann; Belz 2014, p. 42–43) These assumptions are based on the patterns that people are influenced by stimuli which control their behavior in the present. As a result the behavior is driven subconsciously and not based on the evaluation of a long-term effect. But in the end the consequences of this behavior affects the behavior which follows after it.(Rutschmann; Belz 2014, p. 44) These insights originated on the experiments on classical conditioning by Ivan Pavlov at the beginning of the 20th century. His findings were advanced by John B. Watson with the aim of predicting the behavior of organisms influenced by stimuli.(Myers 2014, p. 292) Finally B.F. Skinner developed Watson's model by taking into account that stimuli lead to a direct action. In addition he implemented the consequences of actions into the model. As a result the Stimuli-Reaction-Consequence model was born.(Rutschmann 2018, p. 36–37) When it comes to purchasing Belz and Rutschmann explain that the patterns mentioned lead to a vacillation between the two poles of buying out of habit and buying out of opportunism.(Rutschmann; Belz 2014, p. 44–45)

In detail if reward is expected people learned to behave in a certain way in order to get reward while if punishment or situations when they don’t get reward is anticipated in contrary people avoid to behave in a certain way in order to evade punishment. Therefore when certain triggers are perceived an automated behavior is initialized in order to get reward in contrast when inhibitors are detected no action follows.(Rutschmann 2018, p. 38) According to the findings of Benjamin Libert the brain starts to get active 550 milliseconds before an action is conducted. In this phase the cerebral potential emerges and increases till an action is performed.(Rutschmann 2018, p. 79) Within the first 350 milliseconds automated programs which have evolved are responsible. Obviously these programs have been important to humans since time immemorial because they ensured survival and promoted reproduction. Due to the evolutionary development of humans we trust these programs without questioning them.(Rutschmann; Belz 2014, p. 82–83) In the last 200 milliseconds consciousness begins to react but since the cerebral potential has already grown the conscious mind is barely able to stop the process that is driven by a stimulus and followed by an action.(Rutschmann 2018, p. 79)

As a result a process emerges out of several individual steps which include a trigger followed by a behavior and depending on the consequences a new trigger influences the next behavior. This leads to a chain of behavior in which every step is independent with an individual goal.(Rutschmann 2018, p. 38) For instance in case of purchasing a car customers pass about 55 individual steps until the final purchase.(Belz u.a. 2016, p. 70) Rutschmann and Belz examined the reasons which led to purchasing a car. In some cases customers simply saw round balloons in front of the car dealers showroom which signaled them the opportunity to buy a car there. Consequently they made the decision for a visit although the brands offered by the car dealer were often not known in advance.(Rutschmann; Belz 2014, p. 55–56) As a result the brand is not the initial reason why a customer decides to make a purchase.(Rutschmann 2017, p. 9–10) Therefore it is not necessary for a brand to spend large investments in order to be at the top of the evoked set since imply being in the awareness set is sufficient.(Rutschmann 2017, p. 17)

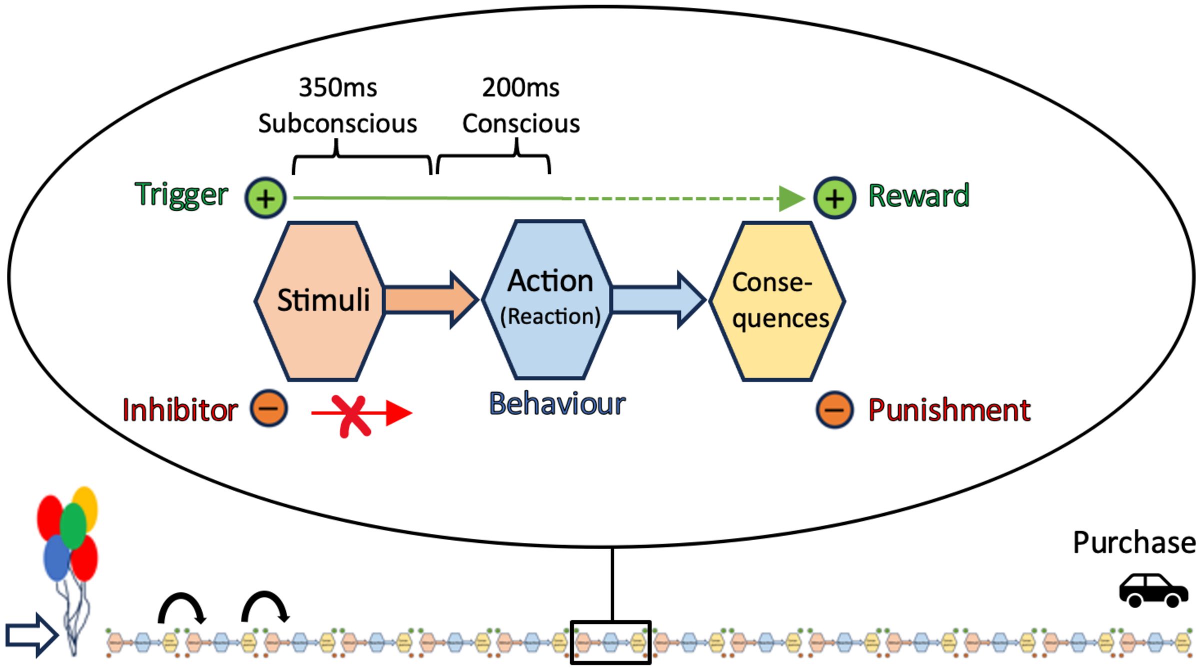


Figure 6: Purchasing Behavior (Own Illustration addapted by Rutschmann; Belz 2014, p. 69) driven by Subconscious(Rutschmann; Belz 2014, p. 82) and Conscious Mind(Rutschmann 2018, p. 79)

In order to trigger behavior in an effective way the subconscious programs have to be elicited since they are automatisms capable to increase the cerebral potential and therefore influence the action.(Rutschmann; Belz 2014, p. 94) Most of the automatisms are inherited by humans and therefore they are of genetic origin. As a result they trigger almost exactly the same behavior in all people.(Rutschmann 2017, p. 18) An example for the mentioned automatisms is that humans respond automatically and quickly to signals of scarcity as subconscious programs tell us to grab it as long as possible. Subsequently slogans like “Only available for some days!” or “The offer is valid until end of month!” are used in order to trigger behavior.(Rutschmann 2013, p. 174) Furthermore shapes and colors trigger innate and archaic reactions in humans which cannot be avoided. In terms of shapes round price tags are perceived more likely than all squared ones. Presumably the reason for this is an evolutionary adaptation of humans due to reproduction since the secondary sex organs of human are round as well. In this context horizontally running elongated squared bars attract even less attention than vertically running elongated squared bars. This automatism is explained by behavioral biologists as a vertical bar could fall down and therefore creates an unsettling feeling while a horizontal bar less likely leads to an uncomfortable feeling.(Rutschmann 2013, p. 155–156) A further popular example is based on the *Kindchenschema* by Konrad Lorenz. People react on faces with big round googly eyes, a big and jutting forehead and a small and round chin with more attention, affection and an emotional arousal.(Rutschmann 2017, p. 18)

In addition to triggers it is necessary to provide customers multiple steps rather than confronting them to early to complete their purchase.(Rutschmann 2017, p. 14) Therefore it is essential to respect the sequence of steps. For instance when it comes to tourism neutral information about the destination need to be provided at first in order to lead the customer to an action instead of individual advantages of the supplier.(Rutschmann 2017, p. 15) Moreover it is important to offer customers an immediate reward when they take a step toward a purchase.(Rutschmann 2017, p. 12) Reward which will be received in the present has a stronger influence on the action than reward which will be received in the distant future. In this context it is important to mention that the immediate dopamine release due to a short-term reward is much higher than the dopamine release for expected rewards in the distant future.(Rutschmann 2018, p. 145) In terms of reward B. F. Skinner revealed that human action which is rewarded is repeated more likely if a stimuli is perceived again.(Rutschmann 2018, p. 37) Since the customer's path to purchase takes place in stages the customer must be motivated in each stage. It is therefore important to identify the stage goals in order to motivate the customer to buy. In this way an immediate reward can be offered and the customer is motivated to take the next step.(Rutschmann; Belz 2014, p. 48)

The consequences of the regarding steps on the one hand have an immediate effect since they initiate the next step of action and therefore push a purchasing process. On the other hand they have a long-term effect as well since they are imprinting and therefore have a lasting impact.(Rutschmann; Belz 2014, p. 50) The reason why the consequences are imprinting is because they originated out of real-life experiences and therefore are perceived as authentic. As a result these consequences have an impact on our future behavior.(Rutschmann; Belz 2014, p. 52) In terms of a purchase real life experiences regarding the product and the purchase itself result. These impressions last since they are to 100% credible in contrast to advertisement and therefore this consequences can lead to repeated purchases.(Rutschmann 2018, p. 20) Even slightly positively experienced consequences or simply the absence of negative consequences leads to repetition and as a result a habit is born. The only thing that can break the customer's habit is a new stimulus. Since customers are no longer impressed by the long-term effect the interruption of a habit by stimuli often happens.(Rutschmann; Belz 2014, p. 52) As a result customers are pulled back and forth between the two poles of buying out of habit and buying out of opportunism.(Rutschmann; Belz 2014, p. 53)

## 1.6 Tasks of Lead Management

The following chapter deals with the main tasks of lead management. First of all reference is made to the legal framework of the Regulation (EU) 2016/679 (General Data Protection Regulation) regarding the processing and usage of data. Then the tasks when conducting lead management are explained starting with lead generation, lead qualification and lead nurturing.

### 1.6.1 Legal Regulatory according to the GDPR

With regard to the legal situation when processing personal data a change has taken place since 25.05.2018 when the Regulation (EU) 2016/679 (General Data Protection Regulation) became effective. The GDPR is a regulation of the European Union which unifies the previous data protection rights. (Kollmann 2019, p. 54) According to Article 1 GDPR the purpose of the regulation is on the one hand to better protect personal data with regard to the privacy of individuals and on the other hand to ensure the free flow of personal data in the EU with regard to the digital domestic market.

Therfore it is highly recommendable for a company conducting lead management and consequently likely processing personal data to work in conformity to the GDPR because otherwise huge penalties can result. The reason for this fact is stated in Article 83(5) of the GDPR which mentions that if the basic principles for processing including conditions for consent are violated a company can be fined up to 4% of its total annual worldwide turnover or € 20 million depending on which is the greater penalty to the company. Nevertheless the accumulated amount of the penalties for companies which have violated the GDPR already reached about 4 billion € in June 2023.(GDPR Enforcement Tracker 2023)

The requirements of the GDPR result in companies only being allowed to store and process information that is really necessary for a contract or the use of a service. Furthermore it is permitted that information is stored longer than it has an effective use for the company.(Stadelmann; Pufahl; Laux u.a. 2020, p. 12) One reason for these facts is stated in Article 5 (1)(c) GDPR which reveals that personal data has to be adequate, relevant and limited to the extent for what is necessary in relation to the purpose the data is actually collected.

According to Article 6(1)(a) GDPR processing personal data is lawful the subject has given consent to use the data for one or more specific purposes. According to Article (4)(11) GDPR consent is given when the subject is informed and voluntarily provides an explicit consent to the processing of the respective personal data. Nevertheless proof for this consent is required according to Article (7)(1) GDPR which implies that the controller of the personal data has to be able to demonstrate the consent of the subject. As a result the company processing lead management with personal data needs to have the consent of the lead and must be able to verify the respective consent.

In order to verify consent the double opt-in procedure can be applied. At first the email addresses of the leads are collected which can be done online via a website or offline via a personal contact or on a paper form. In a second step an email with a confirmation link is sent to the email address of the lead. Then the lead has to click the link on the confirmation email and completes his consent. By clicking on the confirmation link it is possible to clearly identify the owner of the email address and as result to have proof about his given consent.(Strzyzewski; Karpa-Tovar 2019, p. 54) In this context it is highly important to send the confirmation email rapidly because any delay will result in the loss of confirmation clicks due to the fact that some leads simply forget to confirm the email while to others the confirmation is no more relevant.(Strzyzewski; Karpa-Tovar 2019, p. 282)

Moreover Article 13 and Article 14 of the GDPR are relevant regarding the duty of providing information. For instance according Article 13(2)(a) GDPR the subject has to be informed about the period of time how long the data will be stored.

When it comes to profiling the GDPR specifically Art 4(4) GDPR describes profiling as a form of automated processing of personal data intended to evaluate certain personal aspects relating to a natural person for instance behavior, personal preferences and interests. As a result profiling in general has to be processed according to the GDPR. Consequently according to Article 6(1)(a) consent has to be given by the subject which forces a company processing profiling to proof of this consent as stated in Article 7(1) GDPR. Moreover Article 13(2)(f) GDPR mentions especially regarding profiling the subject has the right to be informed about the exitance of automated decision making about the logic involved and the consequences of such processing to the subject. In addition Article 22 of the GDPR is relevant which contains automated individual decision-making including profiling. When it comes to Article 22(1) GDPR a person must have the right not to be subject to a decision based exclusively on automated processing including profiling which produces legal effects or does similarly affect the subject. In this context is has to be mentioned that there is an exception according to Article 22(2) GDPR for instance if the subject gives his explicit consent which is stated in Article 22(2)(c). GDPR. Finally according to Article 21(1) GDPR the subject has the right to object processing his or her personal data at any time.

### 1.6.2 Lead Generation

When acquiring new customers a central task is the targeted generation of valuable leads with the aim to create an base of potential new customers.(Heinrich 2020, p. 58–59) Lead generation can be conducted by applying the inbound or the outbound strategy.(Gasser; Mäder 2022, p. 79) Outbound marketing is a one-way communication approach to the customer and is focused on attention by communication pressure. In contrast inbound marketing is a bidirectional communication approach to attract attention by relevance.(Hirschfeld; Josche

2018, p. 4) A further approach to generate target customers is account-based marketing.(Schuster 2022, p. 202)

In general account-based marketing and inbound marketing are the two main approaches when it comes to lead generation in B2B. (Altenhofen 2023, p. 98) While inbound marketing is focused on individuals of the target customer group account-based marketing targets the entire company respectively all employees of an account.(Hannig u.a. 2021, p. 380) In addition inbound marketing is focused on the quantity of generating leads.(Gasser; Mäder 2022, p. 74) Account-based marketing on the other hand is focused on generating high quality leads.(Golec; Isaacson; Fewless 2019, p. 12–13)

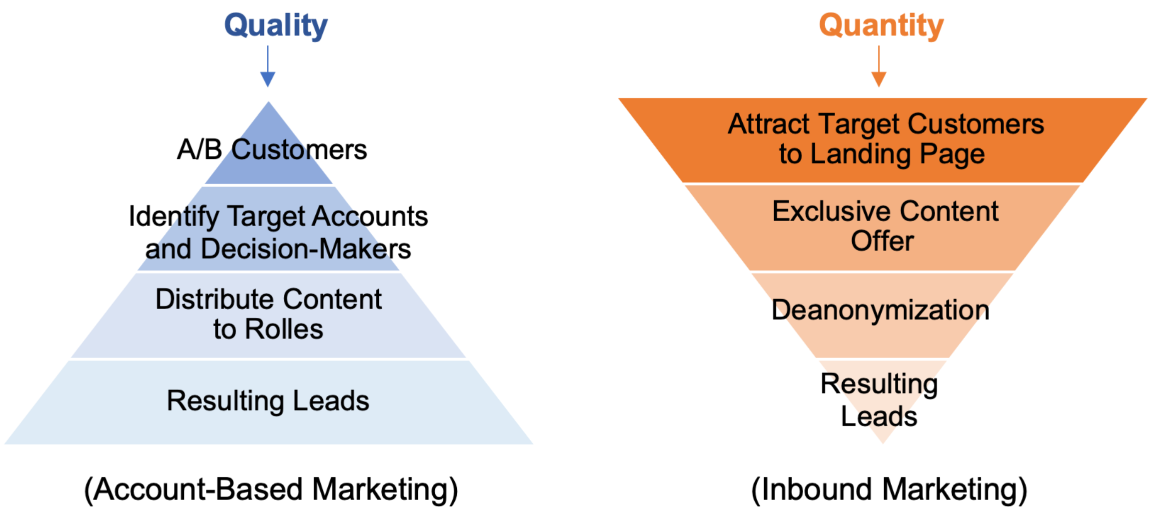


Figure 7: Account-Based Marketing vs. Inbound Marketing (own illustration adapted by (Stadelmann; Pufahl; Laux u.a. 2020, p. 162)

#### 1.6.2.1 Inbound Marketing

The challenge when conducting inbound marketing is to attract as many visitors as possible to a landing page plus to deanonymize the visitors.(Gasser; Mäder 2022, p. 74).

When it comes to the procedure of conducting content marketing following aspects should be taken into account. First of all when it comes to conduct content marketing it makes sense to build buyer personas in order to reach the target group. The advantage of using personas is that they allow identifying the relevant information as well as the solutions and contents which attract the customer's attention.(Kirchem; Waack 2021, p. 17) In order to create as realistic personas as possible several sources should be considered. These sources can consist out of the data of already existing customers, Interviews with employees which are in contact with the customers frequently like the sales staff and surveys.(Kirchem; Waack 2021, p. 23–24)

In the further process a landing page is created which presents the company's USP well and clearly. Furthermore visual elements must ensure a good first impression to visitors and it is important that social proof is shown for example by testimonials or interviews with existing customers in order to build trust. In addition, a clear call-to-action element such as a button or a contact sheet is required.(Gasser; Mäder 2022, p. 76–78) In order to get visitors to share their contact details, an offer in the form of gated content or lead magnets must be made in return. Therefore, potential customers are provided with free content that is valuable to them. However, they will only receive this content if they provide their contact details in return. Typical forms of gated content or lead magnets are reports, white papers, e-books, webinars and results of studies. The advantage of this approach is that the resulting leads are all seriously interested in a company's topics or products and are therefore of high quality.(Gasser; Mäder 2022, p. 75–76)

In this context newsletters are a frequently used way of generating leads by website visitors. The lead's journey to subscribe to the newsletter often starts after a previous search for a solution or product through a search engine. As a result they often have a specific interest and are therefore likely to sign up for the newsletter if they expect to benefit from it. Consequently leads can be generated through the website by capturing their email address.(Schwarz 2017, p. 63) Unfortunately not all subscribers to the newsletter become leads since they don't finish the double opt-in procedure. Up to 50% of all leads leave their email address but afterwards do not execute the confirmation link of the double opt-in mail. This percentage can be reduced to a minimum of 5% by measures such as clear instructions on the confirmation page for the opt-in in, the system-based exclusion of invalid email addresses and a precise description of the steps to be taken.(Schwarz 2017, p. 162–164) With regard to the legal basis when subscribing to a newsletter leads must give their consent in a separate, voluntary and explicit declaration of consent. This declaration must explain how often a newsletter is to be sent and what content is to be expected. Furthermore unsubscribing must be as simple as possible. In addition no excessive free services such as gifts or high discounts are allowed in return for the declaration of consent. As a result of the mentioned criteria a double opt-in is necessary.(Gradow; Greiner 2021, p. 51–52)

#### 1.6.2.2 Account-Based Marketing

In principle account-based marketing is appropriate when a company offers high-value solutions relevant to a precisely defined number of target customers.(Altenhofen 2023, p. 99) This method has the advantage of allowing to address the small number of target companies and their representatives much more precisely and individually.(Altenhofen 2023, p. 101) However it must be mentioned that account-based marketing results in a lot of effort especially when it comes to the creation and distribution of content. In addition the sales, key account management and marketing department needs to be organized in an integrated way. Furthermore centralized data and knowledge management needs to be implemented and communication towards the customer has to be controlled which results in the usage of advanced software solutions.(Stadelmann; Pufahl; Laux u.a. 2020, p. 166–167)

When it comes to the execution at first the relevant target companies are identified and evaluated on the basis of their potential. The base for the identification can be the existing customer base, especially the A or B customers in the sense of a previously made ABS analysis. It is of particular importance to focus on the actual potential of these existing customers instead the annually generated revenue by them in order to draw conclusions for future target customers. Alternatively other well-known relevant companies which fit to the target accounts in terms of budged, company size and operating industry can be a basis for conclusions.(Hannig u.a. 2021, p. 391)

The next step is to prioritize the target customer which can be done by predictive lead scoring a method based on the technology of machine learning which uses a mix of algorithms and the previously identified data in order to detect new target customers.(Hannig u.a. 2021, p. 394) In general predictive lead scoring is an AI-based approach to predicting the purchase intent of leads. To be more precise it allows to determine whether a lead is actively looking for a solution or a specific product. This in turn enables sales to prioritize these leads resulting in a more effective sales process. The functionality of predictive lead scoring is based on existing customer data mixed with other external sources and signals in order to predict the purchase intent of the lead. Predictive lead scoring models are offered for example by the vendors Salesforce and Insidesales.(Rainsberger 2021, p. 36–37)

In the further process, the target persons of the buying center are identified. Especially in the case of investments with a high volume, several persons are usually involved in the decision-making process. These individuals have different roles, such as purchasing, managers responsible for production and R&D, the company management, expert promoters, gatekeepers, influencers and the end user. These different roles have different needs for information and different ways of influencing the purchase. In the context of account-based marketing, it is therefore of particular relevance that the right people are provided with the individually appropriate information in order to convince the relevant decision-makers.(Hannig u.a. 2021, p. 395–396)

Consequently individual content is created which fits to the expectations the respective roles. This content is distributed via different communication channels which should as well fit to the individual roles. These channels can for example be whitepaper, trade journals, factsheets, product comparisons, landing pages, social media platforms, expert forums, trade fairs, congresses, or scientific studies. It has to be noted that the content has to be spread in a sequenced way considering the interplay of all roles involved. Therefore account-based marketing needs to be a centrally organized in order to ensure coordinated action towards the target accounts.(Stadelmann; Pufahl; Laux u.a. 2020, p. 165)

### 1.6.2.3 Outbound Marketing

Until the 1980's marketing was focused on selling product in order to gain financial profits. Therefore products and information were pushed towards the customer which in refers to the method of outbound marketing.(Pförtsch; Sponholz 2019, p. 111) In general outbound marketing has a destructive effect on the customer relationship because companies constantly increase the pressure while customers react defensively with the result that they distance themselves from the company.(Belz u.a. 2011, p. 110) Therfore with the emergence of digitalization a shift from outbound to inbound approaches occurred.(Pietzcker; Vaih-Baur u.a. 2020, p. 413). Nevertheless if successful results are achieved by outbound marketing it is acceptable to continue applying this method.(Schuster 2022, p. 153)

When a company decides to participate in trade fairs it actively approaches the customer and therefore this activity is considered outbound.(Schuster 2022, p. 153) When doing so it is important to ensure that the information about the resulting leads is documented in a systematic way. This can be done by using a standardized template which has been agreed on by all the relevant departments of the selling company. The reason why this procedure is so important is the fact that systematic documentation is the only way to ensure a targeted follow-up meeting with the customer. Nevertheless care must be taken to ensure that the collected information is processed quickly entered into a CRM system.(Ter Weiler u.a. 2016, p. 119–120)

If leads are contacted by e-mail although there has been no previous contact with the company this activity is referred to as cold mailing and is therefore assigned to the outbound activities.(Gasser; Mäder 2022, p. 79) In this context a common approach in some branches regarding lead generation is to buy the data of al lead including the double opt-in consent or to rent email addresses.(Altenhofen 2023, p. 102) In terms of renting a standalone email is prepared at first and in the next step sent to the owner of the addresses. This external partner subsequently sends the corresponding email to the potential customers.(Schwarz 2017, p. 62) The reason why it doesn't make sense to simply buy email addresses is based on the fact that owning an email database doesn't give a corporate the permission to send emails. Therefore email addresses are rented since only the owner of the email address database has the consent of the leads. Consequently leads can only be generated with this method if the recipients react to the email sent and additionally give their legal consent.(Schwarz 2017, p. 40)

When it comes to get in contact by addressing a customer via LinkedIn this can be seen as an outbound marketing approach.(Schuster 2022, p. 199) In general social media platforms became more and more important in the past years when it comes to establish an initial communication with potential customers and as a result to generate leads. Especially the networking platform LinkedIn became quite relevant to B2B Businesses since it provides beside the arrangement of an initial contact also possibility of an exchange of data and processing communication between potential target customers and vendors. Since the communication is carried out exclusively on the platform a double opt-in is not necessary in order to generate leads.

Due to the visibility of personal interest and preferences of the potential customers a targeted communication can be establish. Furthermore the initial contact is made via a message instead of a classic cold call which results in the fact that potential customer might be less disturbed.(Stadelmann; Pufahl; Laux u.a. 2020, p. 156–157)

#### 1.6.2.4 Lead Generation in B2B and B2C

Many purchase processes in B2B as well as in B2C start with research by digital media. In this research phase many customers do not even know the solution in order to fix their problem. Therefore it is necessary for a corporate to enable customers to detect them when they are looking for a specific problem. Otherwise the regarding organization is not even taken into account when it comes to a purchases. (Schuster 2022, p. 51) Due to the fact that purchasing decisions are increasingly influenced by the use of digital media the behavior in the search for information has changed. As a result of these changes it is advisable for B2B and B2C business to handle lead generation with inbound marketing.(Hannig u.a. 2017, p. 224) Nevetheless there are differences between B2B and B2C for instance regarding the landing page since in B2B the focus is more on facts.(Steuernagel 2021, p. 15)

In general markets with a huge number of potential customers are often prepared by the so called approach of “fishing with nets”. Characteristic of this approach is the decreasing number of leads that eventually become customers. In many B2B markets the approach does not work due to the limited number of potential customers. Therefore targeted activities by marketing and sales departments need to be conducted. Consequently the "fishing with spears" approach is used to target a small number of potential customers by the method of account-based marketing.(Stadelmann; Pufahl; Laux u.a. 2020, p. 162–163)

### 1.6.3 Lead Qualification

When it comes to the task of lead qualification it can be defined as a process of determining whether or not a lead is qualified enough to pass the customer journey and ultimately end in a purchase. In this context a fundamental distinction is made between qualified and unqualified leads. Unqualified leads do not have any serious buying interests. A typical characteristic of unqualified leads is the low understanding about the companies offer. Furthermore unqualified leads often do not know what kind of product they actually need for their solution. Therefore they are often not informed enough and consequently do not commit to a purchase.(Gasser; Mäder 2022, p. 117–118) The general idea with unqualified leads is to continue working on them by nurturing them until they are mature for purchase.(Halligan; Shah 2014, p. 128) Qualified leads on the other hand are usually more decisive and consequently tend to be more likely to be persuaded by nurturing to make a purchase.(Gasser; Mäder 2022, p.118)

#### 1.6.3.1 Qualification of Marketing Qualified Leads

Lead scoring is a way to determine whether a lead is ready or not to be transferred to the sales department in a precise way. By classifying leads according to their degree of readiness efficient collaboration between marketing and sales may result as well as a transparent organization of the sales process can be achieved.(Hannig u.a. 2021, p. 219) Lead scoring is basically a company's method of prioritizing those potential customers who are most likely to make a purchase. Therefore each individual interaction option for a lead is assigned with an importance value. Subsequently the leads are evaluated by a ranking on the basis of the total score. Those leads with the highest score are classified as the most promising and as a result they are prioritized.(Nygård; Mezei 2020, p. 1439)

The advantages of lead scoring are the prioritization of customer contacts and time savings which result in cost savings because the resources of the marketing and sales department are bundled on the right leads. In addition a higher conversion rate can be realized and therefore a company is able to increase its turnover in the long run.(Gasser; Mäder 2022, p. 121) When it comes to the lead scoring strategy a collaborative approach by the marketing and sales departments is necessary in order to create a high quality and productive sales process.(Seebacher u.a. 2021, p. 278)

With respect to the execution of lead scoring a basic distinction is made between a manual and an automated approach. Manual lead scoring is only appropriate if the customer data sets are manageable. Usually this is the case for companies with a small customer base. Since the collection of data in today's digital world can quickly lead to large amounts of accumulated information an automated approach is recommended when processing bigger amounts of data. In this context software providers like HubSpot or Salesforce which are among the most popular in the DACH region can be mentioned.(Gasser; Mäder 2022, p. 127)

Explicit and implicit lead scoring is a two-dimensional lead scoring model since on the one hand the explicit dimension and on the other hand the implicit dimension are considered. Basically explicit lead scoring is about evaluating the lead profile while implicit lead scoring is about assessing the behavioral data of a lead.(Schüller; Schuster 2017, p. 154) In other words explicit lead scoring deals with the contact information of a lead and therefore maps the lead profile. The evaluation of the explicit dimension can be done by a qualitative approach for example when the role of an interested party is evaluated. In this way a different score can be assigned to a CEO or a casual purchaser depending on the criteria which role is more important in order to conduct business on the one hand. On the other hand a quantitative assessment can be made by hard facts such as the number of employees. The evaluation of the implicit criteria is based on the evaluation of the behavior of the lead. Thereby the commitment and the interest in the products or solutions are evaluated.(Gasser; Mäder 2022, p. 123) To be more precise the intensity how a lead shows interested in a particular product is measured. This evaluation is based on criteria such as surfing behavior on websites or participation in webinars. In principle implicit criteria can be measured well at the touchpoints of the customer journey.(Hannig u.a. 2021, p. 219)

| Explicit Characteristics (Profile) | | Implicit Characteristics (Behavior) | |
|---|---|---|---|
| -B2B: Company | -Name | -Email Opening | -Blog Visit |
| -B2B: Website | -Email Address | -Email Click | -FAQ Page viewed |
| -B2B: Branch | -Phone Number | -Download | -Use Chat |
| -B2B: Department | -Address | -Registration Event | -Unsubscribe |
| -B2B: Role / Position | -Email (opt-in) | -Event Participation | -Blog Comment |
| -B2B: Number of Employees | -Current Contract/ Competitor | -Visit of Website or Specific Page | -Product Detail Pages viewed |
| -B2B: Company Headquarters | -Date and Time of Purchase | -Campaign Response | -Page with Prices viewed |
| -B2B: Current Situation/Manufacturer | -Interests of the lead | -Test / Demo / Trial requested | -How-to Video viewed |
| -B2B: Turnover | -Preferences | -Request Sent | |
| -B2B: Company Size | -Phone (opt-in) | | |

Table 1: Explicit and Implicit Characteristics(addapted from Altenhofen 2023, p. 104)

When it comes to the evaluation of the leads a scoring system which assigns a score to each criterion is applied. As a result all the explicit and implicit criteria are automatically weighted. For example the download of an e-book can be awarded with +5 points while the download of a product catalog including prices can be rated with +10 points since the product catalog shows a higher level of purchasing interest.(Gasser; Mäder 2022, p. 124) However negative points can also be assigned due to negative actions such as unsubscribing from the newsletter for instance with -15 points.(Hannig u.a. 2021, p. 219)

In order to clarify the procedure of lead scoring the following example is used. When a lead start his or her customer journey by subscribing for the newsletter on the website the email address will be captured. For receiving the email address a score is awarded in the dimension of explicit lead scoring since an email address is allocated in the explicit dimension. After some time a download of a product catalog is made. Consequently the lead receives points in the dimension of implicit lead scoring. In order to capture the sales maturity of the lead each score of the explicit and implicit dimension is transferred on the X and Y axis of the lead scoring matrix. As a result the lead can be assigned to the respective cluster of the lead scoring matrix. In the event a lead is allocated in the D1 section explicit profile characteristics are fulfilled perfectly but on the other hand the implicit profile shows weak interest in his behavior. As a result these leads are perfectly suited for a successful sale but they still have less interest in the company's products or solutions. Therefore it is advisable to provide these leads with additional content which is done by lead nurturing. When a lead is allocated in the A3 section this in turn shows he is very interested in the products but the explicit classification does not fit to the target group. Examples of interested leads who do not meet the explicit criteria are pseudo-leads such as students or employees of competitors. On the other hand if a lead is assigned in the section of D3 then all the parameters for sales maturity have been fulfilled resulting in the lead being classified as a marketing qualified lead. Consequently this lead can be passed on to the sales department for further evaluation.(Schüller; Schuster 2017, p. 157–158)

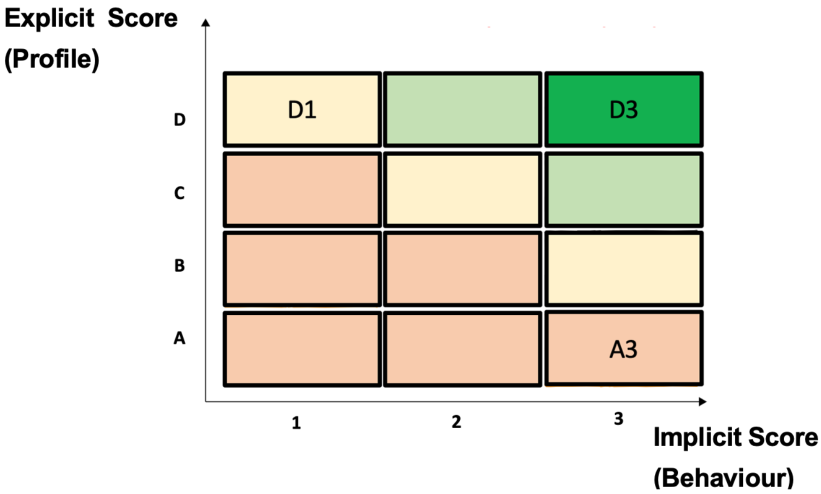


Figure 8: Lead Scoring Matrix (own illustration adapted from (Schüller; Schuster 2017, p. 157))

#### 1.6.3.2 Qualification of Sales Qualified Leads

In order to make sure that the SQL fits to the company as well as to clarify the lead qualification methods are used for this purpose and their names are acronyms. The first letter describes the most important criteria of the respective method.(Gasser; Mäder 2022, p. 135)

In order to evaluate the potential of the lead during the initial contact by the sales department the BANT model is often used.(Schuster 2022, p. 196) BANT is the oldest lead qualification method and it was invented by IMB in the 1950s. The idea back then was to identify the potential of a potential customer in a quick way. In this context it has to be mentioned that the BANT model is sales centered since the budget of the potential customer is asked at first. Nevertheless BANT is still popular nowadays.(Gasser; Mäder 2022, p. 138) In general the BANT model is often used in B2B in order to evaluate the lead by the criteria Budget, Authority, Need and Time. Consequently information about the amount of the financial budget is questioned as well as he level of authority the representative of the lead has in order to make the purchase decision. Furthermore the degree of need for the products or solutions and the time cope in which the purchase is planned is asked by the sales. Besides a personal conversation between the lead and the sales the BANT can also be evaluated by call centers or in written forms.(Altenhofen 2023, p. 105) In order to evaluate the customers situation in more detail the BANT model can be extended if necessary by questioning the customer about the involvement of the competitor and if there is already a business relationship to the competitor. Furthermore the external influence for instance regarding legal regulation can be taken into account. In addition the benefit of technical criteria is worth to be evaluated.(Schuster 2022, p. 196)

A further lead qualification methodology is NOTE which was invented by Sean Burke the former CEO of Kite-Desk. NOTE is a purchaser centered approach with the aim to build a customer relationship and to present the value of the offer. Consequently the NOTE results in efficient B2B Communication as well as in detailed lead qualification. The first criterion when applying NOTE is the analysis of the Need. The second aspect is about the analysis of the Opportunity the offer is providing to the customer followed by the criterion of Team in order to inquire the individuals who are influenced by a sale. Finally the Effect is evaluated by questioning what the effect of a cooperation would be in the future.(Gasser; Mäder 2022, p. 139)

Another purchaser centered method is CHAMP in order to clarify the Challenge the offered solution has to handle at first. The next criterion is about identifying the Authority followed by the analysis of money. The criterion Money basically defines if the lead is capable of the financial budget. Finally the aspect of Prisonization is questioned in order to clarify if the offer is prioritized by the lead. (Gasser; Mäder 2022, p. 135)

In addition the methodology named GPCTBA/C&1 assist when it comes to lead qualification. At first the Goals are asked followed by the future Plans of the lead. Then the Challenges the respective solution provides are resolved followed by the Timeline in order to understand the urgency. The next criterion is the Budget followed by the Authority. Afterwards the negative Consequences questioned in case there is no action concerning a purchase. Finally the positive Implications are concerned to evaluate the results a purchase would lead to.(Gasser; Mäder 2022, p. 137)

#### 1.6.3.3 Lead Qualification in B2B and B2C

When it comes to lead qualification in B2C it has to be noticed that a lead might skip the qualification process since a direct purchase might be conducted without prior research. Therefore the investment in a well working scoring and lead qualification system must be considered in relation to the customer behavior of the respective company. For branches with a usually a long buying process it makes sense to have a multi-stage lead qualification process. These businesses are for example insurance providers, travel agencies or companies which sell financial services.(Altenhofen 2023, p. 107)

By contrast lead qualification is particularly important for companies with a B2B focus and for those business which need intensive consulting before a purchase since efficiency of the sales process increases.(Altenhofen 2023, p. 103)

### 1.6.4 Lead Nurturing

#### 1.6.4.1 General Procedure in Lead Nurturing

In general the term *lead nurturing* can be understood as supplying potential customers with content which is relevant to them. This involves content that is considered as useful information for the customer in his search or buying process.(Hannig u.a. 2021, p. 248) The principle of nurturing is to establish a permanent communication with the lead. Therefore nurturing is conducted to ensure that when a lead is ready to make a purchase he already has the company or product in mind. It is important to provide the lead with information that is relevant to him. Furthermore the content should be easy to convey to the lead and should always include an inviting call-to-action component. Moreover it must be ensured that the content which is provided creates value for the lead in each interaction.(Halligan; Shah 2014, p. 128–129) In this context it has to be mentioned that lead nurturing can be done after a purchase as well in order to support after sales services like trainings, cross-selling activities and repurchasing.(Hannig u.a. 2021, p. 111)

In addition it is important to create a great customer experience since nowadays B2B customers expect a similar customer experience as in B2C.(Gasser; Mäder 2022, p. 105) A great customer experience arises on the one hand by the quality of the product or the service a company is offering and on the other hand by the way in which the company communicates with the customer. This communication takes place via the respective touchpoints of the customer journey and it is therefore important that the customer feels well served in this process because he is guided step by step closer to a purchase and can also be bound to the company after a purchase.(Schmitt 2019, p. 7–8) As a consequence it is necessary to provide personalized content tailored to the needs and interests of the lead.(Gasser; Mäder 2022, p. 106)

In order to implement lead nurturing successfully it is crucial to understand the customer journey precisely to ensure that the right conclusions are drawn and to recognize how the customer interacts with the company. Therefore it must be recognized how a lead enters the customer journey and when he leaves. It is also important to understand the customer's questions and his perception of the customer experience.(Gasser; Mäder 2022, p. 100) Therefore the customer has to be addressed with the right content at the right time in the right purchasing phase. In order to design a successful lead nurturing process all measures must be coordinated between the marketing and sales departments. Consequently it is of great importance to ensure close and consistent cooperation between marketing and sales in order to successfully perform lead nurturing.(Schmitt 2019, p. 13)

Furthermore timing and speed are especially important since leads wont spent time for waiting on responses.(Gasser; Mäder 2022, p. 103) As a result lead nurturing requires an enormous amount of time for marketing departments. To respond to this gap between the supplier resources and the pressure on time by the customers the use of marketing automation software is recommended. In general, the use of marketing automation software is a current trend to optimize sales and marketing processes and make lead nurturing more effective, which in turn leads to a saving of resources. (Gasser; Mäder 2022, p. 102)

In practice the content in order to do nurturing can be spread for instance by e-mails, newsletters or e-books. In addition events specifically aimed to inform new customers can be organized. In this way products can be advertised directly or indirectly and new customers can be attracted by an event. (Schmitt 2019, p. 12–13) A further way to proceed nurturing is sending trigger mails to the leads. Trigger mails are automated and individually designed notifications which are used for order confirmations, delivery status information, individual news alerts or birthdays. These mails are individually created when it comes to the content and the design. A successful execution of birthday emails requires a change of the design after each year in order to have a positive effect on the lead.(Schwarz 2017, p. 62)

#### 1.6.4.2 Lead Nurturing in B2B and B2C

When it comes to lead nurturing in B2C less action and content is necessary than in B2B.(Schüller; Schuster 2017, p. 152) The products leads are interested in are usually less complex. For example clothes do not need any further explanations since only a small number of potential buyers will lock for product details like how the shirt button was made and by which machine. In this type of action it is more effective to trigger an impulse in order to keep the lead engaged with the product. Therfore after an initial contact via a touchpoint the potential customer in B2C simply receives impulses that lead him to pay attention on the offer and impulses which lead him to a purchase.(Schuster 2022, p. 186–187) Therefore low priced B2C products need less nurturing stages and less content compared to products in the industry environment since there it can take years until a purchase is finally realized.(Schüller; Schuster 2017, p. 152) When it comes to the style of marketing communications in B2C can be focused more on emotional factors than on rational factors. Furthermore communication must not necessarily be personal since it is often not considered as suited.(Rėklaitis; Pilelienė 2019, p. 83–84)

Usually in B2B a customer acquisition process takes several months or even years. As a result it takes several actions in order to develop a lead into a customer.(Schüller; Schuster 2017, p. 152) Consequently lead nurturing is highly important in B2B since a generated lead is usually not immediately a sales qualified lead or even immediately close before a purchase. In fact the lead is usually searching for a product or a service at first. As a result a lead should think about the company or product when the purchase is about to be made. In order to ensure that the lead considers the company when making a purchase decision a connection as well as trust has to be established in advance which is accomplished by lead nurturing.(Gasser; Mäder 2022, p. 98) In general the message of marketing communication in B2B must be rational for example by offering content that contains general product characteristics. Furthermore personalized communication is absolutely necessary.(Rėklaitis; Pilelienė 2019, p. 83–84)

## 1.7 Supporting Software

### 1.7.1 Marketing Automation

When it comes to the term marketing automation the interpretation can lead to confusion. Marketing automation is actually the automation of lead management and consequently also enables a more efficient design of sales processes.(Schüller; Schuster 2017, p. 175). However marketing automation supports the core tasks of lead management which is making customers out of leads.(Hannig u.a. 2021, p. 244) In B2B marketing automation usually includes lead generation, lead nurturing and customer lifetime management. When it comes to B2C the focus is on the most effective budget allocation along the customer journey, cross-selling and customer engagement.(Lammenett 2021, p. 622) Nowadays marketing automation software is the most popular tool in order to assist lead management.(Hannig u.a. 2021, p. 244)

In general content creation, blogging, public relations, social media marketing, SEO, landing page and conversion optimization, email marketing and web analytics are supported.(Terstiege; Cinar; Hehemann u.a. 2022, p. 80) In this context marketing automation is the technological platform of lead management with the benefit of enabling the automation of traditional manual processes, making results measurable and subsequently documenting them. Furthermore workflows can be defined and communication campaigns can be managed. Therefore marketing automation supports both marketing and sales and due to automation lead management becomes more efficient. (Schüller; Schuster 2017, p. 63)

A 2021 study conducted by the Institute of Marketing Management published by the ZHAW School of Management and Law of Winterthur has surveyed 464 Swiss companies about automating marketing and sales processes. The study revealed that 57% of the companies participating have a high to very high level of willingness to invest in marketing automation in the future or to expand their marketing automation systems which are already implemented. (Zumstein et al. 2022, p. 34) Furthermore small businesses often tend to use the less complex and less costly marketing automation vendors. These include Mailchimp, Active Campaign and Mautic while medium-sized companies usually rely on HubSpot to pursue their own strategy. On the other hand large companies tend to use enterprise platforms since they have a larger financial scope and different requirements such as open interfaces. This includes the vendors Salesforce, SAS, Microsoft, Adobe, Oracle and SAP.(Zumstein et al. 2022, p. 26)


Figure 9: Marketing Automation Vendors in Switzerland (Adapted from Zumstein u.a. 2022, S. 26)

On a global perspective however HubSpot is the undisputed leader with a market share of 37.38%. The second place is taken by Adobe Expertice Cloud with a global market share of 7.58%, followed by Active Campaign with 7.44%, Oracle Marketing Cloud with 7.22%, Welcome with 6.5% and Salesforce Pardot + Salesforce Marketing Cloud with a total of 5.4% market share.(Datanyze 2023)

The technology of marketing automation is developing fast and therefore its trends should be constantly monitored in order to become more efficient. These trends in general aim to make marketing and sales more efficient by saving resources in terms of time, workload, and budget.(Terstiege; Cinar; Hehemann u.a. 2022, p. 80) Future development with respect to marketing automation vendors will focus on platform deployment. Therefore, marketing automation platform providers such as Adobe, Amazon web services, google or Salesforce can be expected to show steady growth in the future. These large and powerful providers will expand their own platforms and make them even more efficient for instance with the help of artificial intelligence. As a result it will become increasingly difficult for smaller providers to exist independently in the market. On the other hand the advantage for vendors connected to big platform providers is that it will be easier for them.(Stone; Woodcock 2021, p. 218–219)

### 1.7.2 CRM Systems

CRM systems are one of the most important tools for sales departments in order to gather customer data and manage appointments. The data in the CRM system includes contact information such as the company or the customer's contact person as well as the management of communication details and associated reminders or follow-ups. Furthermore expected sales revenues are documented and evaluated with a probability. However the focus in general is on the documentation of activities.(Neeb 2022, p. 91) In general customer loyalty is the primary goal of CRM since the success of the company depends on it.(Weber 2021, p. 174) A further goal is to increase customer lifetime value which increases as customer loyalty increases. Since customer data is the core element of CRM, it provides valuable knowledge about customers for a company. By centralizing customer data, interactions with customers can be personalized for instance by providing recommendations or service offers tailored to the individual customer.(Altenhofen 2023, p. 12–13)

Basically CRM is based on three elements which are the operational CRM, the analytical CRM and the collaboration CRM. The operational CRM is about the features for marketing, sales and service. In terms of the analytical CRM the data entered in the system by the operational CRM is analyzed in order to offer KPI's for dashboards or other analytical tools. When it comes to the collaboration CRM it is about establishing a connection with channels or frontends to the core CRM.(Fatouretchi 2019, p. 11) With regard to the system structure the operative CRM is the central element since the customer data is acquired in this there. This data can be evaluated by the data warehouse system which is a part of the analytical CRM. Furthermore the CRM is usually connected to the ERP system which is responsible for the processing of orders. In case of a complex inventory availability check is necessary for a corporation the CRM system is sometimes additionally connected to a supply chain management system.(Weber 2021, p. 174)

When it comes to the to the global financial figures CRM systems vendors allocated 66,3 billion € total revenue in 2022. Due to the massive growth figues of about 10% per year the total volume is expected to be doubled in 2028. Today Salesforce is the market leader with about 25% of the market share followed by Adobe and SAP with about 6% each and Oracle with 4% while Microsoft is able to gain 3% of the total market share. (Statista Market Insights 2023)

## 1.8 Challenges and Solutions for Efficient Lead Management

The following chapter reveals the challenges of processing lead management and offers solutions to overcome them. Therefore three overall challenges have been identified which are the gap between the marketing and sales departments, the general profitability of lead management and the data management which includes poor customer data quality and incompatible systems and data silos. Moreover several challenges regarding the task of lead management and sales specific issues have been identifies. The figure below provides an outline:

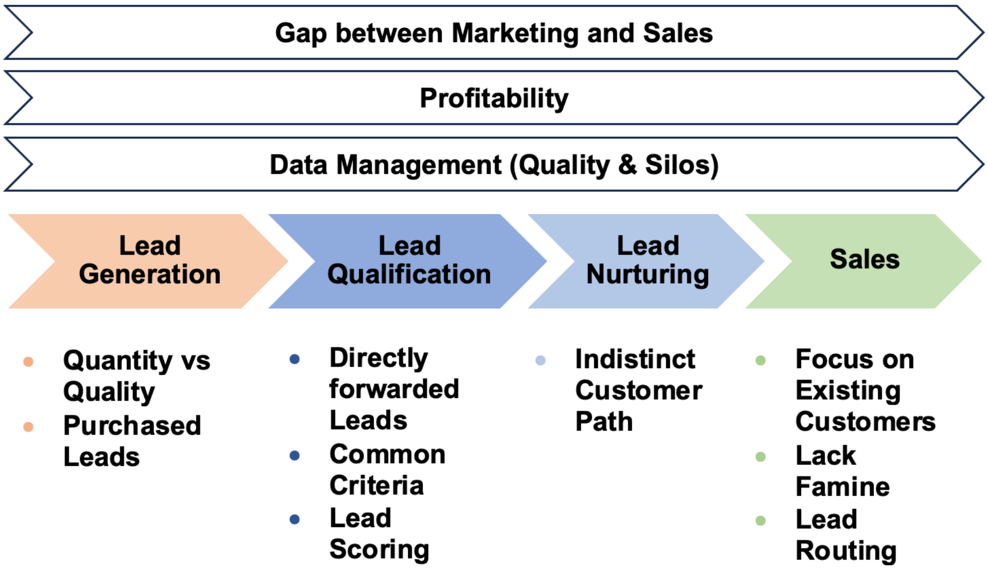


Figure 10: Challenges and Solutions of Lead Management (Own Illustration)

### 1.8.1 Gap between Marketing and Sales

In many companies there is still a mindset of silos when it comes to the marketing and sales departments.(Hannig u.a. 2017, p. 327) This negative mindset can be based on a lack of communication, incentive models for employees or a lack of cooperation when it comes to areas of competence. Spoken from a customer perspective it is not important whether the solution was provided by the sales or the marketing department but it is important if the problem is solved or not. Therefore the customer wants an united organization without any internal borders or lack of coordination. Nevertheless the center of conflicts between marketing and sales are often based on leads. For instance when less deals are closed sales sometimes blames marketing for providing poor quality leads and marketing on the other hand blames sales for being incapable.(Schüller; Schuster 2017, p. 73–74)

Moreover the lead management process is often not defined and marketing and sales optimize themselves separately according to their own standards.(Biesel; Hame 2018, p. 198) Furthermore marketing and sales departments often have different priorities in fulfilling their task. Different processes which are not coordinated result in customers being unable to experience a continuous customer journey.(Gasser; Mäder 2022, p. 131) These circumstances lead to a gap between Sales and Marketing.

Solution:
For marketing and sales the customer purchasing processes is a common base for leading the company to success. Therefore marketing and sales departments should jointly lead the customer a purchase and in doing so a common task is created which helps to avoid conflicts.(Belz u.a. 2018, p. 138) It is important to define common goals and priorities in order to encourage collaboration between the marketing and sales departments. The only way to win customers sustainably and increase sales revenues is when marketing and the sales

department act as a unified organization and define goals, communication and strategy together as a team.(Gasser; Mäder 2022, p. 132) In order to foster cooperation it is recommendable to the sales department to communicate to the marketing department by giving telling them their suggestions, providing feedback and to share market insights and customer knowledge. This actions in turn will lead to an increase of support by the marketing department.(Schuster 2022, p. 196)

Furthermore clear tasks have to be defined in order to effectively guide leads through the sales process. At the same time the workforce must be organized in a way which fosters collaboration and supports the achievement of common goals across functions. The assignment of tasks to individual employees should be clearly recorded in job descriptions making sure that they are truly cross-functional. The assignment of tasks to individual employees should be clearly recorded in job descriptions to foster an appropriate cross-functional approach.(Hannig u.a. 2017, p. 339–340)

Regarding marketing the functions of demand generation, product marketing, customer marketing and content marketing should have to be defined. The core task of the demand generation department or employees is the generation of leads in addition to development of marketing programs for the entire sales process and lead nurturing. The product marketing has to focus on the positioning of a company's products or services within the industry and supports sales for example by developing content or product data sheets. Customer marketing supports sales by providing positive customer testimonials and recommendations and the responsible authorities for content marketing create content which serves to create touchpoints regarding the customer journey and thus supports lead generation and lead nurturing.(Hannig u.a. 2017, p. 340)

When it comes to the sales department it makes sense to define the positions of business development and sales representative. The business development department is a link between marketing and sales and has the task of reviewing leads transferred between the respective departments. As a result companies with business development representatives convert up to 80% more leads into sales compared to companies which not clearly defined the business development function. With regard to sales staff and their core task of closing deals care should be taken to ensure that the best sales representatives receive the most promising leads for processing. In this way the organization can sell more cost-effectively in the long term because the top performing sales representatives do not have to spend their time on unpromising leads.(Hannig u.a. 2017, p. 340–341)

### 1.8.2 Profitability

Since a specific amount of effort results when processing lead management the overall profitability has to be questioned. When it comes to the execution there is a connection with a considerable amount of effort which is often underestimated by many organizations especially in B2B. A company has to be aware that intensive lead management requires a huge amount of time. This effort has to be in proportion to the desired success.(Belz 2016, p. 8)

Solution:

Due to the fact that the processing of leads in time is necessary to work efficiently the number of leads is crucial. In case just a few leads have to be processed a manual procedure by the sales department can be appropriate. On the other if an organization deals with a huge amount of leads which are complex to evaluate then it is recommendable to introduce an professional lead management process.(Janning 2012, p. 45)

Considering the complexity of the sales process the introduction of lead management makes less sense if a company offers products which are usually bought spontaneously and only once because the sales process won't be simplified in this case. Lead management is profitable if the purchasing process takes months or several weeks. Furthermore products with a high potential for cross-selling are suited. Basically if the products of the company need a lot of explanation and therefore the sales process is more complex the introduction of lead management is highly appropriate. In this way it is possible to prevent sales from investing too much time in leads with a low chance of buying or even processing all leads without prior evaluation.(Janning 2012, p. 45–46)

### 1.8.3 Data Management

#### 1.8.3.1 Poor Customer Data Quality

A 2021 study conducted by the Institute of Marketing Management published by the ZHAW School of Management and Law in Winterthur indicates that roughly a third of companies participating revealed they have a rather poor or very poor data quality regarding lead management.(Zumstein et al. 2022, p. 38) However in order to manage leads successfully it is crucial that the quality of the data is clean. A lead can only be evaluated and developed in a sophisticated manner if reliable information regarding the lead is available.(Janning 2012, p. 40) Therefore the quality of the customer database must be adequate since the performance of lead management system is based on it. Potential sources of error are the data transmission, the data collection and generally missing standards which can result in an incorrect database. With regard to data transmission a possible source of error is an acoustic interrogator during a customer telephone call or while a conversation. With regard to data collection the classic typos and missing standards are sources for errors.(Schüller; Schuster 2017, p. 53) In general all mentioned sources of error potentially have a bad influence on the customer relationship. A poor database can result in fatal impression on the customer. In this context specially data regarding existing customers have has to be adequate in order to address them correctly. An inconsistent database leads to ineffective marketing and sales activities which in turn reduces efficiency. Furthermore it has the potential to damage the reputation of an organization and future sales cannot be generated. (Schüller; Schuster 2017, p. 55)

Solution:
The basis of each and every organization is to have high quality data. In order to improve a data strategy can be implemented which supports to actually gain knowledge out of the data. In principle attention must be paid to the three criteria starting with the definition of responsibility, the awareness that quality is more important than quantity and the actuality of the data. When it comes to defining responsibility it must be clearly determined which employees are responsible for the data and the exact scope. Care must be taken to ensure that the right data is collected, that data protection is complied with in accordance of the law and it has to be ensured that data is managed properly. With regard to the focus on quality of the data instead of a high quantity a focus on the fact that data can be used effectively only if it is also applicable. Therefore it makes sense to take a lock on the customer journey in order to detect the mandatory data which should be collected in each phase. When it comes to actuality it is important to realize that each interaction with the customer has the potential to change the respective customer data. It is essential to ensure that customer data is consistently adjusted in order to use it as a basis for decision-making. Since complex and voluminous data requires a certain level of knowledge and competence within the company in some case the involvement of an external expert can be advantageous. (Gasser; Mäder 2022, p. 44–45) A further positive side effect for marketing and sales departments when improving the database is that common goals can be achieved by collaboration.(Seebacher u.a. 2021, p. 692)

### 1.8.3.2 Incompatible Systems and Data Silos

Another potential source of error when processing data is the storage in different pools which are not linked to each other. As a result departments and employees do not have access to the entire base of a company. (Schüller; Schuster 2017, p. 55). One of the reasons for this is the fact that companies growing by time and consequently tend to implement specialized departments due to their organizational structure. As a result the flow of information between departments is often slowed down and they do not harmonize their data collection and processing efforts. In principle isolated data pools often result when raw data is not processed, inconsistent or when different systems are used among the departments. If different systems are used in the departments this can result in the procedure to convert the data in a complicated way. Consequently this inconvenient procedure leads to an increase in the number of possible errors.(Gasser; Mäder 2022, p. 45–46) An effect of isolated data pools or silos is a poor data quality because isolated data quickly becomes outdated and consequently inaccurate. This can result in incorrect conclusions being drawn from the poor data which can result in misinvestment. A further issue is based on the fact that internal processes and the decision making of the management suffers due to a lack of access to the data. Since decision making sometimes needs to be done quickly the isolated data cannot be analyzed in time and taken in account. As a result this data is basically useless in a scenario when quick decision have to be made. Finally isolated data pools also hinder internal collaboration between departments and communication with customers. If employees just have a partial view on the data they might be unable to see the big picture and miss the opportunity to work together on the common goals of the company. Furthermore the sales process can get ineffective since a prompt and proper communication with the customer cannot be ensured due to the fact that the right information is not available.(Gasser; Mäder 2022, p. 46)

Solution:
By implementing a software interface between the marketing and sales department data silos can be eliminated. (Hannig u.a. 2017, p. 327) Usually these systems are the marketing automation software for the marketing department and the CRM system for the sales department. In order to connect the departments both marketing and sales departments are required to agree on a common understanding and responsibility for the sales process. The connection of the marketing automation software and the CRM system ideally provides not simply just a technical interface but enables the joint design of an integrated sales process.(Hannig u.a. 2017, p. 330–331) The urgency of integrating marketing automation software with CRM systems has been recognized by vendors and as a result the trend towards creating technical interfaces continues to progress.(Hannig u.a. 2017, p. 328) An example for the integration of a marketing automation software with a CRM system are the manufacturers Hubspot and Salesforce.(Kober 2022, p. 10)

### 1.8.4 Lead Generation

#### 1.8.4.1 Quantity vs Quality

When it comes to the task of lead generation a further challenge corporations face is to put too much emphasis on quantity instead of quality. This approach can lead to a loss of efficiency due to the amount of workload in the processing departments since a high number of leads have to be nurtured. As a result on the one hand huge effort is spent but on the other hand little profit is made since just a small number of leads actually turn into a sale.(Golec; Isaacson; Fewless 2019, p. 12) Especially companies operating in B2B often have just a limited pool of target customers. Therefore it might happen to a business that all target customers are already known and have been informed about the product portfolio several times. As a consequence a focus on quantity simply does not work for some companies.(Stadelmann; Pufahl; Laux u.a. 2020, p. 162)

Solution:
In order to generate more quality leads an adequate approach is to adopt the strategy of account based marketing.(Golec; Isaacson; Fewless 2019, p. 13) The focus of account base marketing is not on the quantity of leads generated but on the quality of the contacts to the

individual decision-makers of the target company. Thereby the representatives of the buying center are addressed by simultaneous actions which are coordinated in terms of content and timing in order to target the account or company.(Stadelmann; Pufahl; Laux u.a. 2020, p. 163)

### 1.8.4.2 Purchased Leads

In terms of purchased leads there is a huge number of vendors which rent or even sell leads including the respective double opt-in consent of the lead. In many cases the regarding vendors generate leads via online platforms which are focused on specific topics like insurance, financial investments, the financing of loans for construction or to leasing cars. Users of the respective platforms have to give their consent to share the data with third parties by double opt-in and as a consequence their personal data is ready to be sold to a subcontractor. In some branches it is common for corporates to purchase leads in order to increase their volume although there are huge differences regarding the quality of those leads.(Altenhofen 2023, p. 102)

Solution:

In case a corporate is deciding to increase the volume of leads by a purchase it is recommendable to start with small sizes in order to validate the quality first. An evaluation can be conducted by calculating the conversion rate of the respective leads. Moreover the behavior of the purchased leads should be analyzed. In addition it is necessary to review the legal terms as well as the conditions the vendor is generating the leads.(Altenhofen 2023, p. 102)

In this context the KPI of cost per lead defines the average costs which are required for the acquisition of a lead. As lower the amount of the costs per lead is than more cost-effective is the acquisition.(Kreutzer 2021, p. 253)

$$\text{Cost per Lead (CPL)} = \frac{\text{Total Costs of Lead Acquisition}}{\text{Number of Acquired Leads}}$$

Cost per Lead (Kreutzer 2021, p. 253)

## 1.8.5 Lead Qualification

### 1.8.5.1 Directly forwarded Unqualified Leads

In some companies the marketing transfers unqualified leads directly to the sales department resulting in unsuccessful sales efforts. In order to be able to contact the lead in an appropriate manner it is crucial for sales that a leads has been qualified and reliable amount of information is available.(Gasser; Mäder 2022, p. 131) Directly forwarded leads due to no qualification at all result in potential customers being contacted to early. This in turn leads to the situation of leads becoming annoyed by the sales department because they are willing to lock for information by their own at the beginning of the purchasing process. This situation can be compared with eating a green banana which is simply not ready to be eaten. In this context it has to be mentioned that processing leads too late because they are not dealt with is as well not beneficial for successful sales.(Schuster 2022, p. 84–85) Consequently a lack of buying interest by respective leads causes disagreement between both departments.(Gasser; Mäder 2022, p. 131)

If leads are contacted to early by sales this in turn leads to frustrated marketing managers, demotivated sales staff and potential customers feeling annoyed because they are getting contacted to early.(Schuster 2022, p. 84) In a situation where unqualified leads are forwarded directly it is common that sales complains about the weak quality of the leads transferred by the marketing. The marketing department on the other hand is frustrated because their hard work to generate the leads is not appreciated and respected by the sales department. Consequently marketing tends to suspect sales to care to less about the leads. As a result discussions between the two departments emerge about the quality of the respective work with the result that time which could be invested to process leads flies by. After all the sales department is frustrated by the poor quality of the leads which sometimes results in a complete refusal to process the leads transferred by the marketing at all.(Schüller; Schuster 2017, p. 137)

A further issue with the handover of unqualified leads to the sales is based on the fact that some sales employees work on commission. As a result they have the tendency to focus rather on promising leads than on unqualified leads. Consequently less care is taken on the unqualified leads which could potentially develop into future sales by nurturing. As a result these leads may choose to buy from a competitor.(Halligan; Shah 2014, p. 128)

<u>Solution:</u>
The solution to this problem is simply to introduce a clear qualification process. In this way the qualification and the timing regarding the transfer from marketing to sales is precisely defined. When a lead has already dealt with a product and shows interest he or she is much more open to be addressed by the sales department compared to the situation when the research has just started.(Schüller; Schuster 2017, p. 137) Therefore the quality of the lead determines when the handover to sales will be carried out. In addition it is beneficial if the sales department regularly provides feedback to the marketing department on the quality of the leads transferred.(Gasser; Mäder 2022, p. 132) A study conducted in 2015 by the University of Jyväskylä in Finland investigated the processing of content by the use of marketing automation software. One of the findings indicates that if the sales funnel is transparent for marketing and sales a collaborative definition of lead qualification and follow up criteria is possible.(Järvinen; Taiminen 2016, p. 173)

#### 1.8.5.2 Common Criteria

The transfer of leads from marketing to sales often fails because there is no common understanding of both departments about the definition of a qualified lead.(Gasser; Mäder 2022, p. 118) The lack of criteria is often a subject of conflict between marketing and sales departments since both have different interests by nature. Marketing on the one hand often tends to pass on as many leads as possible to sales. Sales on the other hand is not willing to invest resources like time on unattractive leads. The basis of this conflict of interests is that criteria for lead qualification is not jointly defined by marketing and sales.(Steuernagel 2021, p. 24)

In this context another common mistake companies make when qualifying leads is conducting qualification by weak parameters. An example for weak parameters is using exclusively the name of the interested company to evaluate the potential. It must be taken into account that a lead is not in general a good lead just because he is a representant of a well-known company. Furthermore the exclusion of anonymous email addresses is a mistake because they are used by many decision-makers in the B2B. The reason why the respective buying center representatives sometimes use anonymous email addresses is because they don't want to be immediately annoyed and disturbed by the sales departments as they were just looking for information.(Schüller; Schuster 2017, p. 153)

<u>Solution:</u>
It is therefore important that both departments agree on the criteria to define the difference between a marketing qualified lead and a sales qualified lead.(Gasser; Mäder 2022, p. 118) Furthermore this criteria in turn can be used as the basis for lead scoring which supports the evaluation of the maturity of the leads. If the leads are in addition processed with a marketing automation system an automated decision can be made whether a lead should remain in the nurturing process or is ready to be transferred to the sales department.(Steuernagel 2021, p. 24)

#### 1.8.5.3 Lead Scoring

One of the goals of lead management is to provide the sales department with more qualified sales opportunities. In order to achieve this the transfer point of the lead from the marketing department to the sales department must be defined. Therefore the lead scoring model is used to measure whether a lead is ready for transfer between the departments.(Schüller; Schuster 2017, p. 72) The challenge is based on the fact that only some key steps of the customer journey are taken into account. But in reality the customer journey is not a linear path for most of the leads. If the rules for lead scoring are not defined to the whole extent this can lead to an ineffective lead scoring model. The worst case scenario occurs if the lead scoring model is inflexible and the rules for scoring can’t be changed anymore. (Gasser; Mäder 2022, p. 127–128)

<u>Solution:</u>
For a better the whole customer journey needs to be considered and rules need to be predefined before implementing the lead scoring. Therefore the key steps have to be considered as well as all other small steps which are made in between. In order to do so it has to be questioned whether the way how the leads were generated has an influence on their journey.

Furthermore it should be considered that the path differs depending on the product a lead is looking for.(Gasser; Mäder 2022, p. 128) In general if lead scoring is conducted by using am marketing automation software leads can be analyzed and evaluated in real time and subsequently it is possible to identify the stage a lead is in as well as the status of its interest in buying on time.(Schüller; Schuster 2017, p. 152)

### 1.8.6 Lead Nurturing: Indistinct Customer Path

When it comes to lead nurturing processes they should be aligned with the phases of the customer journey in order to provide relevant content to the buyer persona via touchpoints. Form a technical perspective these lead nurturing processes are based on marketing automation software. After a lead is generated the resulting data is transferred into the marketing automation software and a lead profile is created immediately. Based in this information an automated nurturing process starts and the lead is provided with content which is pertinent to him. After a predefined time new content is served to the lead. Based on his reaction and the details of the lead profile additional offers are made in order finally develop the lead to the sage when the sales department is responsible.(Schuster 2022, p. 146–148)

In general it must be acknowledged that the customer's path from the awareness phase to purchase does not run straightforward and therefore cannot be assigned to theoretical purchasing stages.(Belz 2016, p. 8–9) Moreover leads switch with increasing frequency between different channels like stores, digital media or specialized dealers during the purchasing process. An example for a situation like this could be an initial exploration about a product by digital media and the actual purchase in physical store. In addition leads sometimes interrupt their purchasing process and leave the channel and after some time they proceed by a different channel.(Rutschmann; Belz 2014, p. 110–111) Sometimes it takes time for leads to move from one purchasing phase to the next. In addition there is a chance a lead is skipping the individual phases an buy spontaniously. As a result it is not possible to precisely define the phase the lead is in which results in the situation that the priorities of marketing or sales activities cannot be conducted based on a linear process.(Belz 2016, p. 9)

<u>Solution:</u>
In order to make lead management effective the real customer purchasing process needs to be at the center of attention instead purchasing phases.(Belz 2016, p. 11) Hence to identify the customer purchase process first of all the internal subject and the respective employees need to be defined. Then an analysis of already used internal processes descriptions of customer projects must be carried out. In the next step a selection of five different successful and five lost customer projects is carried out. Furthermore it makes sense to selected up to three backup projects for each customer project. In addition an internal and a representative of the customer are assigned to the regarding projects. After the selection has been made the relevant customers are asked to support the analysis and at the same time internal employees

are informed about the procedure. Then the actual recording of the projects begins by capturing the point of view of the customer's as well as internal perception regarding the projects. Basically the interview is focused on specific actions and incidents during the projects and interpretations are excluded. During the inquiry it is important to focus on how a project was conducted by the customer instead of considering why. When the inquiry is finished the results are evaluated and processes are illustrated. Finally a workshop for marketing and sales is organized in order to identify the critical steps along the customer purchasing process and to develop effective solutions to overcome them.(Belz u.a. 2016, p. 71)

Another way to identify the customers purchase process is to use analytical CRM. In this way transactions of customers can be analyzed in order to identify their buying patterns. As a result the important purchase reasons or incidents can be determined and those customers who are sensitive to specific offers can be selected.(Belz; Rutschmann 2014, p. 14)

### 1.8.7 Sales

#### 1.8.7.1 Focus on Existing Customers

Since the success of sales employees is usually measured by the company's turnover they tend to refuse to deal with unqualified or unpromising leads.(Gasser; Mäder 2022, p. 131) Moreover the success rate for conducting business with existing customers is usually significantly higher and the distance is closer compared to new customers. Nevertheless if the focus is centered to much on quick sales this can lead to a situation where the development of new customers as well as of new markets is neglected.(Belz 2016, p. 9)

<u>Solution:</u>
In order to ensure the sustainable growth of the company it is necessary to constantly acquire new customers.(Altenhofen 2023, p. 99–100) If the share of wallet among existing customers is saturated and price hikes cannot be realized a further growth can only be achieved by acquiring new customers. The conditions in order to win new customers are on the one hand realistic targets and on the other hand a strategy derived out of these targets. These two factors enable companies to systematically plan the acquisition of new customers and to monitor success.(Helmke u.a. 2017, p. 25) By prioritizing target industries the customer acquisition is developed to systematic approach instead of an acquisition by chance. In general, the challenge in applying this systematic customer acquisition approach is to identify well-fitting USP’s for the individual target industries and target customers as well as to communicate the USP’S in an appropriate manner.(Helmke u.a. 2017, p. 35)

#### 1.8.7.2 Time Famine

Another challenge for sales departments is time famine. One of the reasons is that sales is dealing to much with administrative tasks such as maintaining CRM data, switching from one sales-supporting software to another, meetings to discuss current and forecast sales figures, and researching contact data. As a result many sales people do not reach their target sales because they do not have enough time to actually sell.(Medina; Altschuler; Kosoglow 2019, p. 4) This fact is reinforced by an analysis done by Salesforce in 2018 which discovered that 57% of Canadian sales representatives did not meet their sales targets because they had to spend too much time on administrative tasks and were therefore unable to spend enough time on sales activities.(Salesforce State of Sales Report 2018.) Furthermore it is particularly challenging for sales to mobilize internal resources to support customer projects.(Belz u.a. 2018, p. 141)

Solution:
A solution to reduce the workload of the sales department is the transfer of activities such as clarification, tendering, fulfillment of orders and internal coordination to the internal sales department. Than larger the extend of determined sales tasks is than more support form a centralized department is necessary.(Belz u.a. 2018, p. 141)

An alternative approach to save time in administrative work with the CRM system is to use a chatbot with voice recognition. This approach can save time and make sales more efficient since data and contact information of a lead do not have to be entered manually. In addition the sales department is able to focus more on the actual sales activities.(Schuster 2022, p. 209)

#### 1.8.7.3 Lead Routing

A further challenge arises when it come to the transfer of leads from marketing to the right sales person.(Gasser; Mäder 2022, p. 131) In this context the term *lead routing* is used because the marketing qualified lead is transferred to the sales department.(Hannig u.a. 2021, p. 255) If it is not clearly defined which sales employee is responsible for the lead, this can cause delays in the process. In addition, it may result in the lead being processed twice at the same time or not at all in the worst case by the sales department.(Gasser; Mäder 2022, p. 131)

Solution:
The solution to overcome this challenge is to implement a well-defined routing process. This requires a precise definition of who is responsible for which leads. Moreover it is important to ensure a quick follow-up process by the sales department. In addition marketing and sales needs to work in a coordinate way while focus on the gaining revenues. Furthermore it is necessary that sales provides feedback about the quality of the leads to the marketing department.(Gasser; Mäder 2022, p. 131- 132) Furthermore criteria has to be defined like maturity level and transfer point, the scope and content of the transferred data.(Schuster 2022, p. 105)

# 2 Empirical Part

## 2.1 Methodology

### 2.1.1 Sampling

#### 2.1.1.1 Selection of the Sample Technique

When selecting a sample for qualitative research the focus must be put on the fact that the sample has to fit to the research question, the methodology and the research design.(Zapata-Barrero; Yalaz u.a. 2018, p. 156) As a result several decisions had to be made in order to select right sampling technique which is described in this chapter in more details. The figure below illustrates the path that was chosen when selecting the appropriate sample technique for the research.

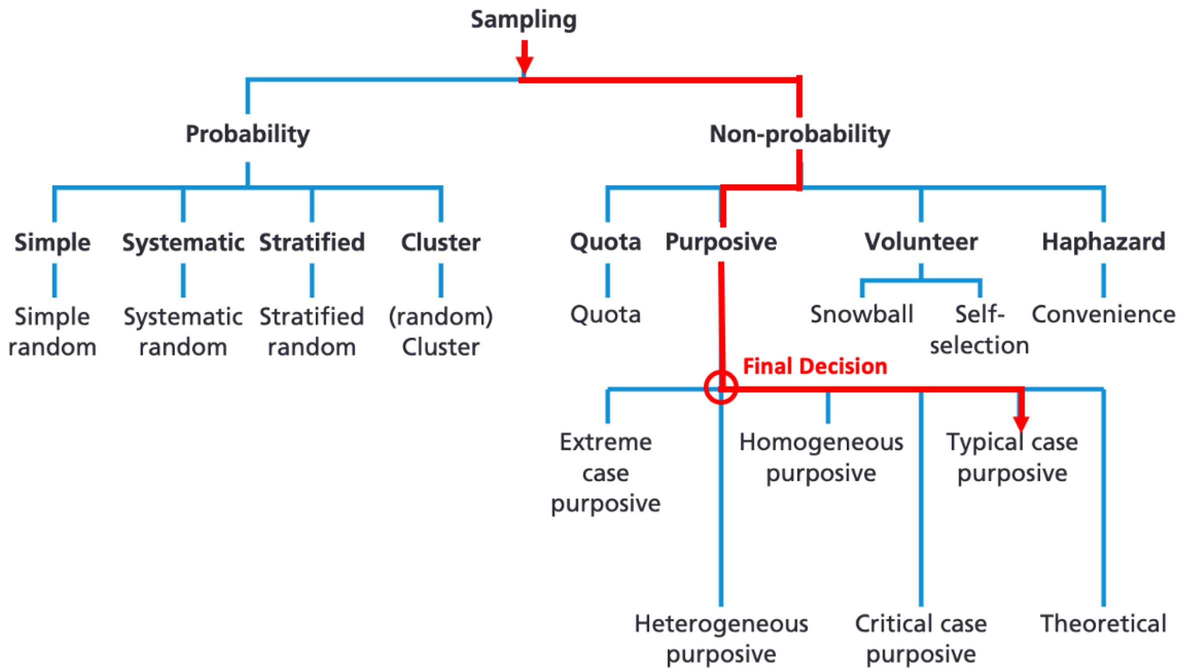


Figure 11: Decision on Sampling Technique (addapted by Saunders; Lewis; Thornhill 2015, p. 276)

When it comes to the decision which sample technique should be applied foremost a choice had to be made between two methods probability sampling and non-probability sampling.(Koch; Gebhardt; Riedmüller 2016, p. 22) Probability sampling is applied when every single individual of a population has the same chance to participate and be a part of the sample. Non-probability sampling is conducted whenever the selection is done by personal judgement of the researcher and as a result not all representatives of the population have the same chance to participate in the research.(Adams; Khan; Raeside 2014, p. 73) Since the population of the research consist out of all representatives of marketing and sales departments conducting lead management and in order to establish a setup for probability sampling, all contact persons and corporations processing lead management must be known. As a result it seemed to be way more realistic to choose non-probability sampling for the research presented herein. The reason for this decision is based in the effort involved as well as simply the fact that the capacity would have been exceeded because neither all contact persons nor all companies working in lead management are known and the time and financial resources available are not sufficient to establish a setup for non-probability sampling.

After determining that the non-probability sampling will be chosen a further selection had to be made between quota sampling, volunteer sampling haphazard sampling and purposive sampling.(Saunders; Lewis; Thornhill 2015, p. 276) Since the population must be known for quota sampling, it was excluded for the reasons already mentioned.(Saunders; Lewis; Thornhill 2015, p. 299) Volunteer sampling consists out of the two sampling techniques snowball sampling and self-selection sampling. Both techniques require cases to participate voluntarily. (Saunders; Lewis; Thornhill 2015, p. 303) Due to the assumption it would probably have taken a long time to generate an adequate sample size volunteer sampling was also excluded. For haphazard sampling cases are selected without any organizational principles and relation to the research.(Saunders; Lewis; Thornhill 2015, p. 304) Since the quality of the research depends on the quality of the cases, haphazard sampling was also excluded in order to ensure optimal results and not to take any risks. Consequently the decision was made to choose purposive sampling.

Purposive sampling which is also called judgement sampling is a frequently used approach. The researcher chooses the cases of the sample by his or her own judgment in order to ensure high quality results and order to answer the research question in the best possible way. When it comes to the selection of the cases several characteristics of the participants which have an impact on the outcome of the research can be taken into account. These characteristics can be for instance demographical features like age, socioeconomic traits or other aspects like individual attitudes.(Farrugia 2019, p. 70) Purposive sampling consists out of the sampling techniques extreme case, heterogeneous, homogeneous, critical case, typical case and theoretical. The likelihood that the sample is representative for the population is highest when using the heterogeneous and the typical case technique. Although it has to be mentioned that it is still a low likelihood for both techniques to be representative but still it depends on the researchers selection.(Saunders; Lewis; Thornhill 2015, p. 298) Consequently all other sampling techniques mentioned were excluded to ensure that the research has a high significance and is representative.

#### 2.1.1.2 The Final Decision

The heterogeneous sampling technique is based on the researcher's judgement when it comes to selecting the cases. Therefore the cases should have an as diverse a set of characteristics as possible. This in turn leads to a maximum of variation in the collected data. Consequently the key topics of the research can be described and explained. Consequently this sampling technique is also called maximum variation sampling.(Saunders; Lewis; Thornhill 2015, p. 301)

Finally it was decided to exclude the heterogeneous sampling technique as a mixed sample of cases operating in B2C and B2B would have been required in order to ensure diverse characteristics. As already explained in the theoretical part of the thesis there are a lot of differences between B2B and B2C companies regarding lead management due to the fact that the considering phase before a purchase is usually way shorter in B2C than in B2B. Consequently lead qualification in B2C is in many cases not appropriate since the effort does generally not justify the outcome. Furthermore lead nurturing in B2C needs to include triggers which should result in a direct purchase. In contrast the sales process in B2B takes much longer and the lead must always have the offered solution in mind when it comes to the final purchase decision. As a result of these differences a mixed sample of B2B and B2C representatives would have had the consequence that the results of the research would be blurred since the two areas differ greatly and different challenges and approaches to solutions arise among them.

When conducting the typical case sampling technique a typical case sample is used in the context of the research. Therefore a representative sample for a typical case should be composed. Typical case sampling enables an illustration of what is usually occurs.(Saunders; Lewis; Thornhill 2015, p. 302) Consequently the typical case technique was chosen in order to answer the research question in the best way and it was decided to exclude B2C corporates in order to ensure a typical case.

The first reason for the decision to exclude B2C was based on the fact that lead management is not profitable for companies which do not have a complex and long sales process as well as for organizations that offer products which are bought spontaneously as mentioned in the theoretical part. In B2C it is way more effective to focus on triggers which lead to an action due to subconscious programs of humans. If reward results out of these actions potential customers might make the next step towards a purchase. Therefore it is crucial to be aware of the consequences a customer experiences due to his actions since they initiate the next step of action and therefore can push the purchasing process towards a sale. In the long run these consequences are imprinting and therefore have a lasting impact since they base on real life experiences. As a result when a purchase is made customers are willing to repeat their behavior if they perceive positive or at least no negative consequences. Therefore a further reason to exclude corporations operating in B2C is based on the number of available organizations in the close DACH region which are actually executing lead management since it was estimated to be quite low. In addition it could be reasonably be assumed that just large sized companies do have a marketing and a sales department with an adequate number of employees as well as experience in processing lead management. Consequently the number of available corporates operating in B2C was estimated to be even smaller. Therefore it was presumed that it is hardly feasible to create a suitable sample of exclusively B2C companies. On the other hand there are several big and medium sized companies in the DACH area which are operating in B2B and do have marketing and sales departments. Consequently only corporations operating in B2B were taken into account.

#### 2.1.1.3 Characteristics of the sample

In order to ensure high quality results criteria for the selection was determined which consists out of four major metrics:

- First of all the criteria of selecting only corporations which have more than 1000 employees or a higher annual turnover than 300 million € per year was defined. The reason for this criteria was based on the presumption that only big sized corporations have a marketing and a sales department. During the organization of the interviews an exception was made for a single corporation. Nevertheless the regarding organization is conducting lead management and has a marketing and a sales department. Consequently the there were no reasons for an exclusion.
- The second criterion relates to the proportion of cases with a marketing and sales background. In order to ensure a representative sample, the proportion of participants from marketing and sales was evenly distributed. Consequently five cases include representatives with a marketing background while five cases have a sales background. This allocation seemed to be fair since both departments are involved in processing lead management but still they have different tasks. Furthermore it was necessary in order to evaluate the challenges and solutions for both departments in a reasonable way.
- The third criterion was to take into account only representatives of middle management. This criterion was based on the assumption that it would lead to an increase in quality, as representatives of middle management should have an overview of the processes in their departments. Consequently they should have the deepest insights about the challenges and solutions when conducting lead management. As a result the sample consist out seven cases which have the position of head of the department. Nevertheless it has to be noticed that the remaining three cases are all experts when it comes to lead management as the results of the research shows. Consequently the quality of the results was not at all influenced by them in a negative way.
- The fourth criteria was to consider exclusively cases which are employed in the same corporation. The reason for this approach was the importance of understanding the challenges that arise at the interface of the two mentioned departments. While conducting the literature research challenges and solutions that affect both departments in the same way were already found in the in advance. This criterion was created to provide a better understanding of the actual situation in the companies and to ensure that the overall picture of a lead management process was not dependent on a single case. When executing this criterion a degree of fulfillment of 80% was achieved which means that eight of the ten cases belong to the same organization.

The table below provides insights about the characteristics of the actual sample:

| Expert | Company | Department | Level | Professional Experience | Type of Business | Focus |
|---|---|---|---|---|---|---|
| **1** | A | Marketing | Marketing Manager | 4 | B2B | Product/Project |
| **2** | A | Sales | Sales Manager | 10 | B2B | Product/Project |
| **3** | B | Marketing | Head of Marketing | 10 | B2B | Product/Project |
| **4** | B | Sales | Head of Sales | 19 | B2B | Product/Project |
| **5** | C | Marketing | Head of Marketing | 25 | B2B | Project |
| **6** | C | Sales | Head of Sales | 35 | B2B | Project |
| **7** | D | Marketing | Head of Marketing | 15 | B2B | Product |
| **8** | D | Sales | Sales Manager | 35 | B2B | Product |
| **9** | E | Marketing | Head of Marketing | 21 | B2B | Solution |
| **10** | F | Sales | Head of Sales | 25 | B2B | Product |

Table 2: Characteristics of the Sample

### 2.1.2 Problem-Centered Approach

The research was conducted by applying the methodology of a problem-centered interview.(Mayring 2016, p. 67) The term *problem-centered* implies that a problem has to be available as a basis for conducting the interview and it has to be analyzed by the researcher during the preparation phase.(Mayring 2016, p. 68) When conducting a problem-centered interview, the researcher enables the experts to speak as freely as possible. However, the focus is placed on a specific problem which is repeatedly brought into focus. To achieve this, an interview guide is constructed by analyzing the problem before the interview. The elements of the interview guideline are introduced during the interview as a kind of navigation along the subject.(Mayring 2016, p. 67)

In general problem-centered interviews are a form of an open and semi-structured qualitative interview.(Mayring 2016, p. 67) The term *open* refers to the degree of freedom to which the experts were subject when answering the questions. More precisely, this means that the experts had no predefined answer options to choose from and could articulate their answers in a way that reflected their own subjective perceptions.(Mayring 2016, p. 66) The fact that the experts are able to answer their questions in an open way is an important characteristic of the problem-centered interview because it results in trust being built up in the conversation. Therefore the experts have to feel that they are being taken seriously and not interrogated in order to create a stronger relationship based on trust. If in addition a relevant problem is discussed and an equal and open relationship between the participants is established then the experts also benefit from the research process as well. As a result they tend to be more honest, reflective and accurate in their answers compared to a closed approach.(Mayring 2016, p. 68–69) The term *structured* refers to the degree of freedom the interviewer has when formulating the questions. (Mayring 2016, p. 66) Since problem-centered interviews are generally conducted by using an interview guideline they represent a semi-structured approach.(Mayring 2016, p. 67) If the interview was unstructured, the researcher would be able to freely choose the questions and topics depending on the interview situation.(Mayring 2016, p. 66)

When it comes to conducting a problem-centered interview an analysis regarding the problem has to be carried out in the first step. On the basis of the analysis an interview guideline is constructed in order to navigate the experts by introducing specific aspects of the topic. In the third step the guideline is tested in order to ensure a smooth course. Finally the interviews are conducted with the experts.(Mayring 2016, p. 71) At the beginning of the interview a general question is asked in order to identify the areas of the topic which are important for the expert. (Mayring 2016, p. 70) As the interview progressed guiding questions are asked to identify the key issues. In the course of the interview new relevant information concerning the topic might be identified. In this case the researcher can ask spontaneous questions about it.(Mayring 2016, p. 70) In order to be able to evaluate the results the interviews are recorded.(Mayring 2016, p. 71)

To sum up there are three major reasons for choosing a problem-centered interview. First of all this method does not have a purely exploratory character but is based on a previously conducted problem analysis. A problem-centered interview is therefore particularly suitable for theory-based research since there is already some information about the topic available but still there are plenty of specific questions to ask.(Mayring 2016, p. 70) On the one hand there is already some information in the literature about the challenges and solutions of companies regarding lead management. On the other hand the situations of the companies can change rapidly and might also develop. As a result this approach fits very well to the research question.

The second reason for choosing this method is that the experts are able to respond in an open way.(Mayring 2016, p. 67) The open approach was absolutely necessary due to the fact that the purpose of the qualitative analysis was to identify the problems and solutions of the companies. Since the respective corporations differ in their business model, their customer segments and their internal organization it was obvious in advance that an open approach would be more effective in order to capture the individual situation and draw a big picture out of it. Furthermore the fact that the challenges of the companies in which the experts have been working for years are a sensitive topic for sone employees and as a result this requires a certain level of trust. This trust is crucial when it comes to the quality of the answers.

The third reason for choosing the problem-centered interview is based on the fact that using an interview guideline allows a kind of standardization which enables the individual interviews to be compared more accurately. As a result the data collected can be analyzed more conveniently afterwards (Mayring 2016, p. 70) Since it could be assumed that the experts interviewed had different backgrounds in their companies regarding lead management and that this would result in different focus areas, a standardization was necessary in order to be able to derive conclusions and draw a big picture.

### 2.1.3 Implementation of Qualitative Interviews

After defining the criteria for the sample the organization of the actual participants was conducted. In order to ensure a typical case sample could be established all participants or the respective contact person in their corporations were informed about the topic and the actual procedure in order to clarify if a common base regarding lead management was given. Therefore the topic of the thesis was presented and the respective corporations were informed about some subtopics like the interface between the marketing and sales departments and challenges such as time consumption, data management, interface problems, indistinct customer buying processes and solution like supporting software systems. Furthermore the following illustration was sent by e-mail to ensure that there is a common approach of handling lead management:

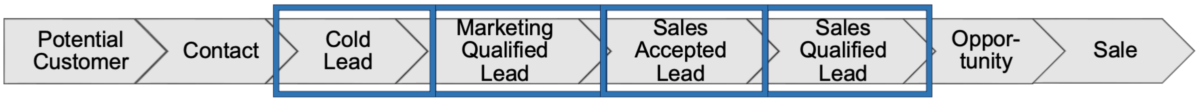


Figure 12: Information Experts Lead Management Process (Seebacher u.a.2021, p. 296)

Furthermore the participants were informed about the fact that the interviews had to be recorded and transcribed afterwards. Since the topic regarding challenges also includes cooperation problems between marketing and departments and in addition lead management is a confidential part of the internal customer process all participants were told that only parts of the interviews would be published by single quotes. This approach had to be conducted in order to ensure that the participating companies and their representatives cannot be identified. It was necessary in order to create trust and to motivate the individual representatives to express their opinion freely and without having fear of consequences. Nevertheless all experts were told that the interviews and the respective audio data is reviewed by Prof. DDr. Birgit Hagen. She has full access to the data in order to make sure that the scientific standard of this thesis is respected.

The participants were informed about the legal situation regarding their personal data before the interviews were conducted. It was explained to everyone in detail that the interviews can be stopped at any point of time during the interview and that they don't have to answer questions they do not want for any reason without further explanation. Furthermore the experts were informed about their right to revoke their consent of the processing of the data until shortly before 07.07.2023. Moreover they have been informed about who is responsible for their data. In principle after the verbal information all participants had to give their written consent to the processing of their data in this thesis.

When it comes to the actual mode the participants had the chance to choose between an implementation via MS Teams a conduction in presence. If the experts did not have a preference the researcher decided to execute the interviews in person based on his own preference. The researcher preferred an on-site interview due to the presumption that interviews in presence would create a better basis of trust. In this way the quality of the statements should improve because the experts know and trust the researcher more likely when it comes to processing the data. The final result of this approach was that three experts were interviewed via MS teams while seven interviews were conducted in presence.

Since problem-centered interviews are conducted by using an interview guideline and therefore they represent a semi-structured approach an interview guideline was used in order to assist the researcher.(Mayring 2016, p. 67) All the interviews started with the same general question: "*Briefly explain the lead management process of your company*". To ensure a flow of communication the researcher tried to choose the second question as well as each subsequent question according to the expert's answer but still in relation to the interview guideline. Furthermore guiding questions were asked to ensure that the experts stayed on topic. In addition a focus was put on spontaneous questions in order to gain an accurate understanding of the situation of the experts and to keep the communication flow going.

In general the interviews with the expert were supposed to last 30 minutes. A termination was not carried out if the experts wanted to explain themselves in more detail way since more detailed results could be collected. Furthermore consideration was given to experts who were unable to participate for 30 minutes due to last-minute reasons. Nevertheless the average duration of the interviews took 31 minutes which shows that the planning was quite accurate. The resulting average wordcount of the interviews amounts to 4649 words per expert. When it comes to the effect on the transcription the average interview had 11 pages. In this context it has to be mentioned that the number of transcribed pages depend not exclusively on the wordcount but also on the number of sub questions and the individual interview style depending on the expert.

The table below provides further details about the overall results of the interviews:

| Expert | Mode | Date of Implementation | Duration of Interviews | Transcribed Pages | Number of Words |
|---|---|---|---|---|---|
| **1** | Online Meeting | 25.05.23 | 34:46 | 12 | 5346 |
| **2** | Presence | 05.06.23 | 34:06 | 8 | 3843 |
| **3** | Presence | 23.05.23 | 25:44 | 11 | 3778 |
| **4** | Presence | 23.05.23 | 30:29 | 12 | 4699 |
| **5** | Presence | 02.06.23 | 39:53 | 14 | 7249 |
| **6** | Online Meeting | 01.06.23 | 41:28 | 12 | 5775 |
| **7** | Presence | 30.05.23 | 16:30 | 5 | 2197 |
| **8** | Presence | 30.05.23 | 29:42 | 8 | 4170 |
| **9** | Online Meeting | 05.06.23 | 27:35 | 11 | 4691 |
| **10** | Presence | 26.05.23 | 30:16 | 9 | 4741 |
| **Total:** | | | 05:10:29 | 102 | 46489 |
| **Average:** | | | **31:03** | **10,2** | **4649** |

Table 3: Interview Details

### 2.1.4 Evaluation

The interviews were recorded with a smartphone more precisely with Apple's standard "Voice Memos" application. Afterwards the respective data was translated partly with MAXQDA and partly with word. To ensure that all measures are taken to keep the experts and their companies anonymous, all statements containing the company name were translated as "or corporation". In addition answers which could identify the experts or the respective corporation because they reveal their customers, competitors, the company's offering, and specific topics which indicate the industry in which the organization operates were also encrypted. In this way, terms such as "our competitor", "our customer", "our industry" or "our product" were used. Although the experts were promised in advance that only parts of the interviews would be published additionally they were told that the entire transcript would be encrypted. This approach was intended to create more trust which in turn should lead to more honest and qualitatively improved answers.

In terms of the transcription all keywords or phrases which could identify the participating experts and the associated corporations were blurred. Consequently when an expert mentioned for instance the name of his corporation the term “our company” was used. In addition customer segments, branches which are prepared by the corporations, detailed information about specific trade fairs as well as the name of trade fairs, the name of internal departments, products and names in general were blurred. Whir regards to the published results the quotations of the experts were adjusted in order to avoid repetitions. In addition unimportant phrases were excluded. If this measure had to be applied the excluded phrases were exchanged with the symbol (…). In general some sentences have been shortened to provide a brief piece of information, which can be recognized by the fact that three dots mark these sentences at the respective area. Furthermore if it was necessary to provide additional information to the reader some phrases or words were added. In this case the added phrases were bracketed.

After transcribing the interviews the evaluation of the content in order to form categories was made. Consequently deductive and inductive categories were designed. In general deductive categories are defined based on theory while inductive categories are defined based directly on the data of the results of a research.(Mayring 2016, p. 85) When it comes to the procedure first of all the deductive categories were defined. Then the interviews were read and the respective content was assigned to the categories. During this procedure inductive categories were designed. After reading all interviews the content the inductive categories were reviewed and the sense of purpose was evaluated. In the further course the interviews were read two more times in order to review the assigned content again and to verify the validity of the subcategories.

The result of the evaluation was that two overall categories were built which are the tasks when processing lead management as well as the overall challenges. Both categories are deductive since several corresponding challenges and solutions have been identified in the theoretical part. With regard to the overall category of tasks the categories lead generation, lead qualification, lead nurturing and sales were designed in a deductive way. In terms of the category of lead generation the subcategories of task specific challenges and solutions in lead generation was designed in an inductive way while the subcategory of purchased leads was created in a deductive manner. When it comes to the category of sales the subcategories of time famine, lead routing and the focus on existing customers was designed in a deductive way. In terms of the overall category of overall challenges the categories of the gap between marketing and sales as well as the category of data management were designed in a deductive way. Since many experts mentioned challenges and solutions due to new implemented processes the category of new processes was added and as a result it is an inductive category. When it comes to the category of data management the subcategories of data quality and data silos were created in a deductive manner while the subcategory of software was designed in an inductive way.

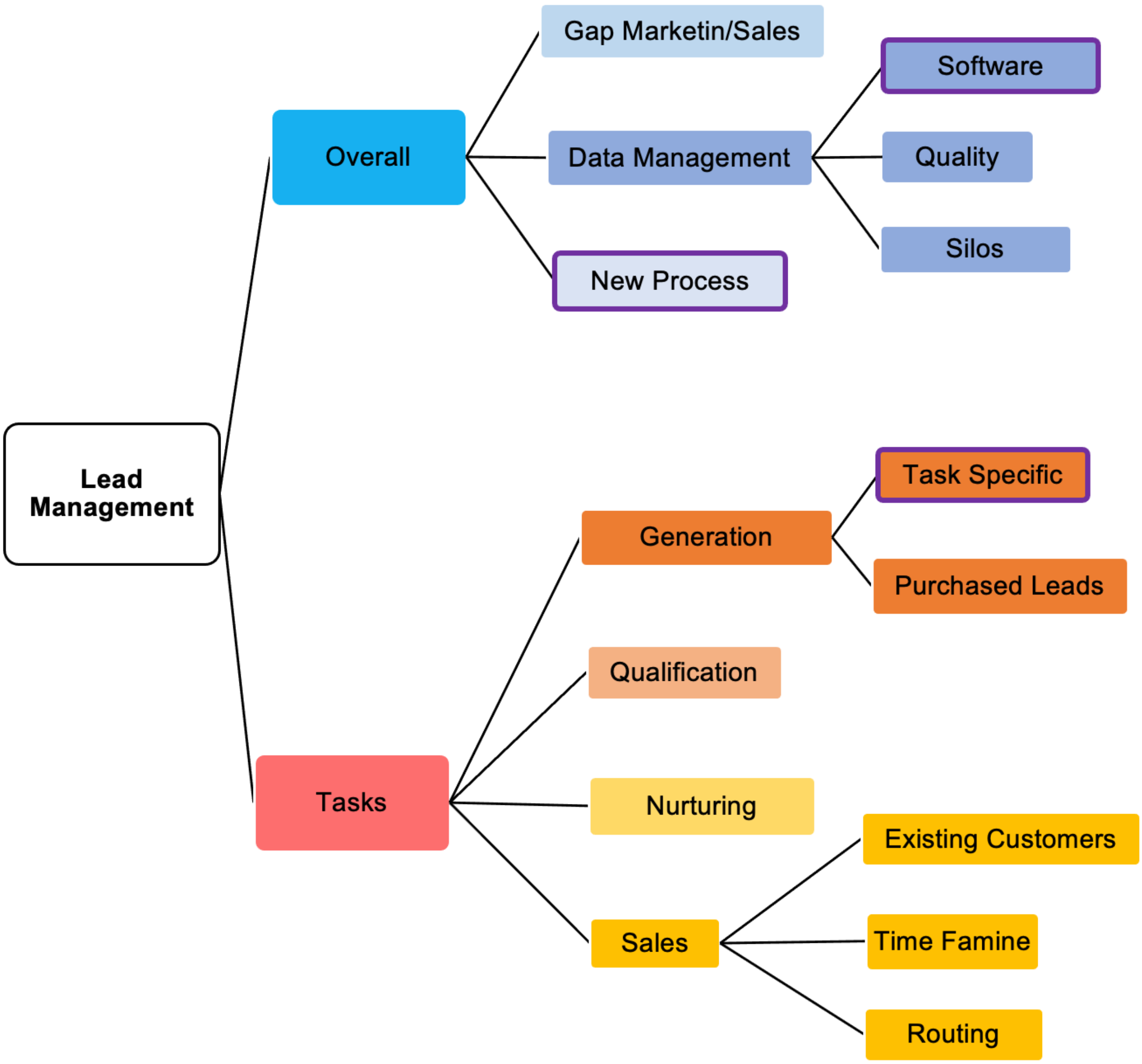


Figure 13: Categories of Qualitative Research (Own Illustration)

The figure above provides an overview about the relations of the respective overall categories with the corresponding categories and subcategories. All inductive categories and subcategories were marked with a purple frame.

When it comes to the structure of the results derived out of the categories first of all the challenges are presented starting with company A followed by the other corporations in an alphabetical sequence. In more detail at first the statement of the corresponding expert of the marketing department is published followed by the proposition of the expert representing the sales department. Subsequently the results of the solutions of each category are presented. In order to support the readability and to provide a better outline the central keywords of a statement were marked.

## 2.2 Results of Empirical Analysis

### 2.2.1 Gap between Marketing and Sales

Challenges:

When expert 1 was asked how the cooperation between marketing and sales in the area of lead management is, the result was a split opinion: "*I would say that it depends very much on the country**.** In Spain for example the departments work very closely together. However I believe that cooperation is not as close in the larger countries such as Germany, Austria, Switzerland. Nevertheless there is definitely cooperation and it has to be that way. I think in the end it depends on the person **individually**."*(Expert_1 2023, Pos. 54)

Expert 3 was asked about the challenges regarding the interface between marketing and sales and consequently this statement was made: "*To put it bluntly the **interface does not yet exist** or at least it exists far too little. (...) It is currently also a bit difficult for us to provide the sales team with the right information from the website in order for communication to take place."*(Expert_3 2023, Pos. 52) Subsequently the follow-up question whether the problem is related to the system or to cooperation was asked and expert 3 explained that it was related to both.(Expert_3 2023, Pos. 54) Consequently the follow-up question was asked whether there were any disagreements which resulted in the following answer: *"Definitively!"*(Expert_3 2023, Pos. 58) Nevertheless when expert 3 was asked about how cooperation between marketing and sales is working the following statement was made: "*It's getting better and we have to cooperate otherwise it doesn't work. But we are still too far apart from each other. But cooperation is becoming increasingly important and the added value on both sides is also becoming steadily more visible."*(Expert_3 2023, Pos. 38) A similar statement regarding the interface between marketing and sales was made by expert 4: *"In the sales process **marketing is nearly not involved**."*(Expert_4 2023, Pos. 70) Consequently a follow up question was made about those cases a lead is transferred from marketing to sales. As a result expert 4 revealed: "*...when inquiries or leads are received marketing doesn't get involved at all. Marketing is involved when it comes to conquering a certain market. (…) They help us to increase the probability of generating leads. But when the lead actually comes in marketing doesn't even notice."*(Expert_4 2023, Pos. 72)

When expert 5 was asked about the challenges regarding the interface between marketing and sales the following statement was made: *"... in the awareness phase we invite them* (customers) *to **events** and we organize everything. There is always the question and there we already have the first point who we invite there. And of course sales is always like: "Yes, he* (customer) *has to come too…"*(Expert_5 2023, Pos. 106) Consequently the follow up question was made whether the challenge is that sales still wants to have the regarding customers at the events and the expert 5 responded: "*Yes (...) every sales representative wants to do something good for his customer and they want to have them to join "special events". (...) That is a* *little bit challenging."*(Expert_5 2023, Pos. 108) Expert 6 comments the challenges regarding the cooperation with the marketing department in the following way: "*Yes there are always the challenges (...) to* ***express the USPs*** *in such a way the customer clearly understands what the added value is for him at the end of the day. What are the innovations that really make the difference?"*(Expert_6 2023, p. 60)

Expert 7 reveals regarding the question about the challenges at the interface that the sales and marketing are **physically located apart** from each other: "*..of course the sales department is in a completely different location than the marketing department and the separation of locations and communication is definitely a challenge."*(Expert_7 2023, Pos. 32) Expert 8 responds to the same question like this: "*There are definitely no disagreements. Maybe sometimes we have to clarify things from the sales or technical side but that's clear. (...) Conflicts no! It's the opposite because I'm often happy when marketing takes certain packages off our hands and says we'll take care of the design of the trade fair booth or the next newsletter. In my opinion we have a very entangled way of acting."*(Expert_8 2023, Pos. 44)

Expert 9 explains **the self-image of his marketing department** to perform as a service provider for sales is the main challenge when it comes to cooperation: *"To be honest for me the biggest challenge in marketing is to create the self-image of a service provider. In many companies marketing has kind of a sovereignty of its own but actually it's about winning new customers for the company and therefore sales and marketing have to go hand in hand. Marketing is a service provider for sales. So what does sales need to be able to win customers and then make it available and also to provide expertise to build up journeys together with sales (...) I think it's more about this service self-image and I think that's the most important challenge in our sphere at least."*(Expert_9 2023, Pos. 67)

When the expert 10 is questioned about the challenges at the interface of marketing and sales he answers that a unifying system is required: *"Yes so clearly it's the* ***systems*** *because marketing of course does surveys (...) or the website forms and the* (leads) *come in (...) mostly via lists. So any data lists (...) then they are simply passed on to the sales department in principle with the request for processing. (...) If that would have been supported by the system where the leads are simply entered into the system, forwarded, tracked, so that it is fully traceable..."*(Expert_10 2023, Pos. 54)

Solutions:

In response to the question how cooperation could be improved expert 1 made the following statement: *"I think in the end it's also a change to topic.*(regarding the new implemented lead process) *I believe that we need to work closer with the country heads and the importance of this (lead management) should also be emphasized (...) and the* ***commitment*** *from the top is important. I believe that most countries and colleagues are willing to cooperate then because they know that it is being prioritized."*(Expert_1 2023, Pos.14) When expert 2 was questioned about what he would improve in general his statement regarding cooperation he mentioned: *"...first of all the **coordination** between marketing and sales must be clearly **defined** meaning what marketing has to do and when (...) In contrast the same needs to be applied for sales. Because if we don't show them what the market currently wants and needs then marketing can't actually process and set any activities in further consequence."*(Expert_2 2023, Pos. 49)

In response to the question of what kind of improvement should be made expert 7 mentions: *"Well, I would simply **move** marketing and sales even closer together and look for a **tool** which unites these two areas even more and optimizes this process."*(Expert_7 2023, Pos. 46)

When it comes to cooperation in company E expert 9 points out the unity of the marketing and sales department: *"The relationship between sales and marketing is very close in our company. We always like to call it **"sale-keting**" meaning the two departments combined. Although we pass the lead on to the sales department we have access to the entire sales system with Gira and therefore we can see how these leads develop."*(Expert_9 2023, Pos. 32)

Expert 10 mentions that cooperation between marketing and sales is beneficial for presenting products to the customer: "*...of course we in close in contact with marketing since it is simply much more **easier to present in topics** for specific products (…). That's our thing! So basically the cooperation works great but in general it depends on the follow-up departments whether they also want it."*(Expert_10 2023, Pos. 68)

### 2.2.2 Data Management

#### 2.2.2.1 Software

Challenges:

Starting with company A the Expert 1 mentions a problem regarding the organization of leads via the software system salesforce since many leads are not recognized due to the number of leads and the **visualization** by lists: "*…shortcut leads* (prioritizes leads) *who really want something should be mapped better in the system so they can be found right away and assigned correctly in order to ensure that we don't overlook these leads. We often overlook them at the moment because a lot of things still happen outside of Salesforce and then notifications are sent out. Soon there will be a lot of leads in Salesforce and then everyone will be working with them and there won't be any duplicates just because something might have been overlooked. Things like that, that's what I would like to see. Let's see if that comes."*(Expert_1 2023, Pos. 66) Furthermore Expert1 mentions with respect to the notification tool that many **notifications are forgotten:** "*The problem we currently have is that we have a new tool in which many notifications are partially forgotten. The tool is designed to help you in every possible way. However this also means that employees is told again and again at various points that something has to be done. That is the only thing where we have not yet found a routine that* *employees regularly look at your leads in the tool if something has to be done."*(Expert_1 2023, Pos. 52)

Company B uses the system Microsoft Dynamics and in response to the question of what the challenges in lead management are to the company, Expert 3 answers: *"Well, it starts with the right **selection of the tool**…"* (Expert_3 2023, Pos 6) Moreover when Expert 3 is asked if a fully automatized process can be achieved with their current system Microsoft Dynamics the following statement is made: *"It is possible, but it is only a small link in the whole overall process. There is still a lot around it like the interface to the website and the interface to social media. Maybe we should also consider **buying** an external or an **additional software**. There is already so much software available in terms of lead generation which makes it easier for the sales department or for us in marketing. And we have been talking about it for a long time but it is still not being implemented quickly enough in my mind."*(Expert_3 2023, Pos. 92) Consequently there is a lack of software solution regarding lead generation via social media and the website for company B. On the other hand company B is currently implementing a CRM system across the entire organization. Nevertheless challenges occur as expert 4 mentions: *"...and the challenge is especially the roll out and to get that into the heads of the other **colleagues** as well in terms of how this has to work."*(Expert_4 2023, Pos. 4)

When Expert 7 of the company D was questioned about what challenges they face regarding lead management the following statement was made: "*At the moment, the challenge is that we are **lacking in a tool** that links the activities between marketing and sales so we can get a better overview and also (...) more quantity of leads and make qualification and make this interface even better and become even more professional."*(Expert_7 2023, Pos. 8) The lack of a common tool is identified by expert 8 as well: "*We don't have a dedicated tool that can only be used by marketing and sales together, and therefore (...) in principle develop each other further here. No."*(Expert_8 2023, Pos. 46)

The company F has a similar problem like the company D when it comes to a software solution in order to link the marketing and sales department. The expert 10 refers after being asked what problems occur at the interface between marketing and sales to the following: "... *there are simply the system breaks. If this would be **supported by a system** where the leads are simply entered into the system, forwarded and then tracked so that everything is fully traceable... (...) At the moment, it depends very much on the people."*(Expert_10 2023, Pos. 54)

Solutions:

A current improvement company A made is the development of a **dashboard** in order to improve the visualization of especially for prioritizes leads: "*Now we have developed a dashboard in order we can better recognize which leads we have. Because in the end you see a lot of lists in Saleforce and if you have 5 leads then it's still clear but if you have 200 leads then it's more difficult. And if you have 500 leads, that doesn't happen, but it's simply the case that* *the amount makes a difference. And we have made it more transparent now, in order to be able to make better decisions. (…) Therefore, we can prioritize them. In this way, the leads are also looked at sooner."*(Expert_1 2023, Pos. 64)

In order to make improvements company A **implemented** a new **software solution:** "*It's kind of one single system."* (for marketing automation and CRM) *"So we bought two different modules from Salesforce. One is really Salesforce for the sales part and one is Salesforce for the marketing part. They are connected with each other."*(Expert_1 2023, Pos. 22) Expert 2 reveals in this context: *"Our good fortune is that we sit right next to marketing and we actually introduced the new CRM system together. And as a result there have already been intensive discussions and adjustments between marketing and sales regarding lead generation (…) which we now have to try to manage in both channels (…) and we also have to work with each other. Basically the only way to get to new approaches and more precise data is by solving problems."*(Expert_2 2023, Pos. 18) In general when expert 2 was asked which improvements were taken by the company A regrading lead management the following statement was made: "*...one of the biggest improvements was the introduction of Salesforce. The CRM system we had was quite outdated. We collected quite a lot of junk data. And the new introduction of Salesforce in our company also gave us the opportunity to really clean up everything, to restructure, to reallocate and also partly to sort out customers(...) and to reconsider their classification and qualification."*(Expert_2 2023, Pos. 45)

Company B made improvements when it comes to **marketing campaign**: *"Of course, we have our (marketing) campaign and we create landing pages in the CRM (...) so we are definitely getting better and better. We also already do event management via the CRM."*(Expert_3 2023, Pos 14) In present improvements are achieved with regard to the **interface** between social media and the website and the CRM system: "*For social media and the website we are currently building the interface in order to make (leads) pass ultimately to the CRM."*(Expert_3 2023, Pos. 22) Furthermore Expert 4 mentions a dashboard for **the lead routing**: "*We have a specific dashboard which is reviewed by three different department heads and they tell what needs to be evaluated and who needs to make it and which team needs to be assigned to* it." (Expert_4 2023, Pos. 48)

When it comes to company C they use three different systems which are the ERP, IFS and a **customized software** for the lead process which supports their individual needs: "*... on the one hand we have the ERP and on the other hand we have a "customized" system, which is the "project system". This is more or less our Wikipedia where the leads are documented (and) where all the written notes of the discussions are made. And it (comes) from Gira (…) that's a software which is specifically aimed towards documentation and communication. And the IFS is more for the numbers and facts."*(Expert_6 2023, Pos. 26) According to Expert 6 the company C is satisfied with the customized solution: "*…when I get calls whether from Salesforce* *or from other software companies (...) who actually want to sell us something.* (I tell them) *we actually care about that with our internal tools. As I said with IFS, ERP and in our "customized system". And for us, for our product and for our customers (...) that's sufficient."*(Expert_6 2023, Pos. 90)

#### 2.2.2.2 Data Quality

Challenges:

When it comes to the quality of the data the corporation A has a problem regarding the **transfer of the old data** from the old CRM system. Expert 1 describes the challenge like this: "*Our problem is that we have transferred some leads from the old system because they are (…) newsletter subscribers. And I would say that the data quality regarding those leads is not very good because they were not managed well in the old system."*(Expert_1 2023, Pos. 60)

Data management is a major challenge for company B as revealed by Expert 1. The following statement is made in response to the question of what the general challenges are in lead management: *"Data maintenance is a big issue for us, that is the basement. It is simply a matter of entering the right data."*(Expert_3 2023, Pos. 6) The reason for this issue is identified by the following statement: *"Until half a year ago* ***anyone could enter*** *leads and create a contact. Of course, this has resulted in an extremely large amount of data garbage and that has to be said in all honesty."*(Expert_3 2023, Pos. 26) The poor data quality leads to the following problem: *"Of course we can send e-mails but the bounce rate is correspondingly high if you only enter abc@gmail in the e-mail field. I would say that this is a big challenge for us."*(Expert_3 2023, Pos. 26) A similar statement is made by Company B's Expert 4, who mentions the following incidentally: *"And in the course of this project* (introduction of the new CRM system) *we came to the conclusion that the master data quality is the absolute key. If something is wrong with that then it's incredibly difficult."*(Expert_4 2023, Pos. 6) After some time during the interview he was questioned why he thinks the customer master data is the key and this was his statement: "*In the headquarters we (...) did* ***not have a clear concept*** *right from the start of who is allowed to create which data and when. This means that someone simply creates the customer ABC with ABC. Another employee creates it under A.B.C. or with a dash in between. Then sometimes a GmbH is attached behind and consequently to the customer ABC accumulates already some at data garbage. You can imagine already where that ends. If the customer ABC buys the machine but the machine is then assigned to the customer A.B.C., then we already have an issue. If spare parts are sent, then the question is to which customer we send them. Maybe they will be sent to the wrong address (...) that is then very bad."*(Expert_4 2023, Pos. 14)

The expert 10 is irresolute when it comes to the topic of data quality: "*It varies depending on how the lead generation took place. In general, the* ***contact forms*** *work quite poorly I would say (...) The newsletters work better if they are targeted."*(Expert_10 2023, Pos. 58) Moreover he mentions: “*If a lead gets a newsletter he is already registered (...) and in this case it works at least better. (...)so the data quality is difficult. It has several aspects. There is quite a lot of* ***spam*** *coming in now, (...) unfortunately also via the contact forms or whatever (...) and the requests are very* ***unspecific****. So we always have to ask questions. It will be really difficult for us to automate things at some point.”*(Expert_10 2023, Pos. 58)

Solutions:

When expert 1 was asked which measures are taken in order to improve the customer data he mentions: “*What we are doing now is to rewind the process first. We'll take a closer look at the* ***deletion criteria****.(...) If a lead doesn't do anything with us for a year, then we have to consider whether it makes sense to qualify him further.”*(Expert_1 2023, Pos. 64) The expert 2 of the company A has a different opinion about the customer data quality and thinks the data is fine. He mentions the following reason: “*...we have been working effectively (...) with Salesforce CRM for about a year. During the transition from the old system to the new system we selected and evaluated all the customer master data and all the customer data step by step. (...)for a year now the new system has only included the customer database, which is really relevant for us. (...)In the meantime, the customer data is all properly maintained in the system.”*(Expert_2 2023, Pos. 14) Further he says that since the introduction of the new system a **standardization for the data** maintenance was introduced: *“…in our new CRM system in Salesforce system certain* ***mandatory fields*** *have been defined and have to be entered. Whether it is a telephone conversation or just mails or website based information. There are certain standardizations that have to be followed by the respective employee to ensure that we can use at least the basic data in a properly prepared form.”*(Expert_2 2023, Pos. 36)

Due to the poor data quality measures for improvement were taken in company B as Expert 3 reveals: “*Now we have formed a team which takes care to ensure that the data quality really meets the requirements.(…) Now we at least have* ***mandatory fields*** *in order to be able to contact people. Of course, this is very important for us in marketing especially for email campaigns.*(Expert_3 2023, Pos. 26) *And we are now in the process of introducing the CRM at the other main location (...) and using it worldwide. Of course, we are also in the process of migrating the data and a lot of things are coming together. And we definitely have to do a lot of work to ensure that the basement is right.”*(Expert_3 2023, Pos. 28) Expert 4 mentions the improvements in a similar way: “*To ensure that the quality of the pile of data we currently have does not worsen, we have established this* ***master data team****. This means that only a certain group of colleagues or employees can be in the world of data and create the data to ensure that the data is clean. That's number one. The second thing is to say that you have to take a close look at it and that's hard manual work. How many duplicates we have in the data? Which companies can we merge? What can we merge? Which companies no longer exist? Then every salesperson or market manager has the task to take a look at it and check if it is correct as it is written. That is hard manual work. We tried to switch to different concepts and to* *automate it. But there's so much left that you can't avoid the bone crusher."*(Expert_4 2023, Pos. 16)

Company C has a different approach to avoid poor data quality. Due to their specific product an **export control a double check** is made which leads to a review of the customer data and therefore to a better quality as expert 5 mentions: "*We have a CRM (...) out of the ERP system and due to "our products" it is (...) classic that when we have a new customer who is registered (...) he has to go through the export control procedure (...) Every week there is "an audit" and in principle (...) it is checked if names appear on any watch lists and whether they are part of our customer master data."*(Expert_5 2023, Pos 90)

A further alternative solution is provided by company E by **implementing mandatory fields in the stage gate process** of lead management as Expert 9 reveals: "*We have set it up so that the next level of a lead can only be reached if the data is good. Therefore the data is always checked when the lead level is changed and in this way we force ourselves to improve the quality of the data to the required level."*(Expert_9 2023, Pos. 36) In response to the question of whether there are any other mandatory fields the expert 9 responded: *"...yes there are mandatory fields which must be completed and depending on the level and stage there is always a new special field which must be completed. Sometimes a presentation has to be created or similar things."*(Expert_9 2023, Pos. 38)

### 2.2.2.3 Data Silos

Challenges:

The employees of Company B working in the marketing and sales department who are located in the headquarter or in the other main office have access to the same customer database as reported by Expert 3.(Expert_3 2023, Pos. 16) Nevertheless expert 4 mentions a cyber-attack which had the result that data silos were built up due to the situation occurred: "*…up to now we have been organized on the sales level in such a way that we had one market. This was managed by a salesperson in the headquarter and a salesperson (...) from "the other main location". This means that when we received a demand from a market the demand was entered once in the CRM system in Austria and once in a project management "at the other main location". Then we unfortunately were surprised by a* ***cyber-attack*** *which drove the project management" at the other main office" to the wall. That means it was no longer available there. Then they* (the other main office) *helped themselves by* ***creating some kind of storage locations*** *that were on some kind of network on which file structures were somehow mapped. And this had the consequence that one had actually hardly anymore an overview (…) What is new? How long has something been available? All of these topics which actually belong to the lead management system or to sales opportunity management could no longer be mapped.*"(Expert_4 2023, Pos. 4) Furthermore expert 4 mentions that the headquarter and the other main office have a different customer database regarding lead management than the **affiliated companies**: *"The affiliated companies are not yet included as far as the demand reports are concerned meaning the sales opportunities. The next step is to integrate them step by step*."(Expert_4 2023, Pos. 32)

When it comes to company D the marketing and the sales department do not have access to the same customer database since only sales has full access.(Expert_7 2023, Pos. 26) (Expert_8 2023, Pos. 56) Expert 7 points out that the marketing and sales department are separated in terms of location and data management which is a challenging situation: "*The sales department is located in a completely different area than marketing and the separation of locations (...) is definitely a challenge. And of course that they can't look into our data and we can't look into theirs either."*(Expert_7 2023, Pos. 32) Furthermore the expert 7 reveals that the customer data regarding the **newsletter** is stored exclusively in the marketing department and the data is not linked to the sales department: *"…we don't have access to the same data base like the sales department. We only have access to our own data and that's the newsletter tool and maybe that's also the issue I mentioned before because at the moment the problem is that we need an **interface** to actually bring these data together. Now we have a newsletter with our contacts but they are not connected to the contacts of the sales department. And the complete customer database can only be accessed by the sales department."*(Expert_7 2023, Pos. 28) In this context expert 8 reveals that only some leads are processed in the CRM while others remain on **Excel lists**: "*All the customers who show up at the trade fair(...) are captured via an Excel list and they will be followed up again afterwards. This follow-up support may then result in something being recorded in SAP again. Otherwise they remain on lists and these lists are of course also maintained in accordance with the GDPR. They remain in the sales department and are reviewed and checked from time to time.*"(Expert_8 2023, Pos. 18)

In company E marketing partially has the same access privileges to the customer database than sales as reported by expert 9: *"We have access to **the front of the funnel** up to the* (stage of) *opportunity. As soon as an opportunity is identified marketing is out (...) Then we are just support for our operative units. In the front part of the funnel where we have access to the same database as the sales department.*"(Expert_9 2023, Pos. 40)

The expert 10 of company F has identified problems due to **system breaks** and describes his perspective in the following way: *"…we currently have two different CRMs due to system breaks."*(Expert_10 2023, Pos. 8) *"Since we are a grown company with very different systems, we always have system breaks and the systems fail to communicate well with each other."*(Expert_10 2023, Pos. 48)

Solutions:

After the expert 1 of company A was asked if all departments have access to the same customer database the following statement was made: *"Yes that was the most important thing in* *this new project.*(Introduction of the **new CRM system**) *In the past we really had a separate CRM system or two depending on the country. Marketing had its own system and now with Salesforce we have really achieved what we always wanted which is complete transparency. (...) ...it is definitely important that there is* ***transparency*** *and that is also important for marketing. So marketing can also see what is happening with the leads, what is happening with the contacts and vice versa the sales department can also see what marketing is doing at the moment."*(Expert_1 2023, Pos. 20) Expert 2 confirms that both the marketing and the sales departments have access to the same customer database: *"As far as I know yes. Because for instance the invitations are not sent by the respective sales organization but are actually sent via the marketing team. So the customer base is definitely visible for both sides."*(Expert_2 2023, Pos. 20)

Currently company B is **implementing the CRM system** across the whole corporation including all subsidiaries in. Expert 3 explains the situation by the following statement: *"....the current situation is that the sales department has its own sales tools and the CRM is now being introduced across the entire group and this is the first important and correct step towards saying: "Okay we'll be working much more closely together in the future." This also makes the whole thing much more* ***transparent****. Then we can also get some information without needing to chase after the sales people (...) So from that point of view I think it's becoming more and more important and essential to work more closely together."*(Expert_3 2023, Pos. 82) Expert 4 reveals his opinion for implementing the CRM system: *"In the course of this we decided to say: "One market - one salesperson! And we want to have a comprehensive CRM system. This means that then we get the customer to be as transparent as possible for us.(…) ...you can see not only the leads we have for a customer but also what happens in aftersales. That is important for us."*(Expert_4 2023, Pos. 4)

When it comes to company C the respective departments already have access to the same customer database.(Expert_5 2023, Pos. 94)

The solution regarding the different systems that have led to system breaks in company F is already planned as reported by Expert 10: "*In a few months we will have one CRM for exactly these topics meaning* ***one CRM*** *for sales together with the remaining leads that come from marketing or customer service. Then we will have one basis. We have grown historically in this way because we are a large company with many systems but this* (CRM) *is now coming (...) and then we will both have access to all leads."* (Expert_10 2023, Pos. 12)

### 2.2.3 New Process

Last year company A implemented a new lead management process due to improve transparency as Expert 1 reveals: "*So basically the lead management process was set up last year as part of a new digital marketing rollout. And the most important thing for us was actually to* *create transparency between what marketing did (...) up to opportunities and offers(...) so we needed a tool."*(Expert_1 2023, Pos. 4) After implementing the new process and the new CRM system following challenge occurred: "*...there are countries that have been working with it for a year now but there are also countries that have been working with it for maybe two months and that's why we have different levels now. (...) In some places the lead process may be put on hold a bit. Because they say that it is important that the daily tasks are also completed and afterwards have a look at the new features. (...) In my opinion it is often a* ***change issue*** *in the end meaning how do we bring the process to the person (...) So that is where we simply have to work more."*(Expert_1 2023, Pos. 14) Expert 1 has the following reason for this challenge: "*Of course the tool itself can map the process but as I said before we also have to deal a bit with the issue of* ***resources****. And I think it's also very important that this not only impacts the countries but also the headquarters. When you introduce such new process it simply takes* ***time*** *to get used to it."*(Expert_1 2023, Pos. 14)

When it comes to company B the implementation of a new process partly already done by implementing the new CRM software and partly planed in the future. According to Expert 3 the challenge company B is facing is the **acceptance** of the new process: "*As a result of the merger we have many different systems and now we have introduced the CRM in sales at our "other main office". Acceptance is a major topic in this context."*(Expert_3 2023, Pos. 6) *"Since the CRM has just been introduced at the other main location a lot of things are still done manually or by e-mail.(…) It is not yet processed automatically."*(Expert_3 2023, Pos. 36) Furthermore company B tries to automate processes by using tools and similarly to the implementation of the CRM system acceptance is a big challenge according to expert 3: "*...we just have the issue that we are taking the step to digitalize everything. Currently it is still the case that sales provides* (the leads) *in a handwritten form and we in marketing enter them into the CRM. It's a real challenge to get people to enter it independently and to create added value so that they are happy to do so. That's a big challenge and that brings us back to the issue of acceptance."* (Expert_3 2023, Pos. 20) Moreover the process of lead generation via the website is not accepted by some sales employees as expert 3 reveals: *"...the issue with us is that we simply know our customers very well and therefore the opinion still exists that the leads should still be processed old-school (...) in the classic way. Many of our sales people are in a certain age and they simply don't accept the system. And they also don't think it makes sense when we (marketing) say we can inform them (sales) about what the customer has looked at on the website. (…) unfortunately this is a slow process and in the future there will be no way to avoid it because the new generation is coming to power also in our industry. Even if we know our customers they still google us and compare our products with those of our competitors. And it is simply enormously important to be present and to capture the lead as early as possible."*(Expert_3 2023, Pos. 60) Nevertheless not all employees don't accept the new process as expert 3 mentions: *But of course there are very different opinions within the company.*(Expert_3 2023, Pos. 62) The expert 4 mentions similar challenge when it comes to new software solutions: "*And the challenge is just (...) to get this into the heads of the other colleagues as well as how it has to work."*(Expert_4 2023, Pos. 4) Moreover expert 4 mentions the **aged generations** as a challenge: *"...so it's also often a generation issue: Ah now I have a new software in front of me and now I have to click there and it's all in the cloud. I don't know whether everything is really as tangible as I need it to be and whether everything in there is correct".*(Expert_4 2023, Pos. 6)

When expert 8 of the company D is questioned about the general changes of the lead management process he mentions the following: *"...I wouldn't change too much now but rather make the process steps that we have initialized over the last few years even **more lean** and optimize them so that some space is created to perhaps intensify personal customer contact. That would be a topic but besides that I would also simply fine-tune."*(Expert_8 2023, Pos. 60)

Expert 10 revealed after being questioned what he would improve: "*What I would improve is (…) no matter where the leads originate (...) whether from a website or elsewhere that they are simply entered in (...) a system central located or automated (...) and then routed in a targeted cluster to the right product areas. And then it is basically up to the product areas what they do with them. But we really need (...) a large system with automated e-mails about interests and so on. So that would be my wish I would say. That the process goes from being quite* manual *to **being fully automated**."*(Expert_10 2023, Pos 78)

Solutions:

When expert 1 of the company A was asked which improvements should be made regarding the lead management process the following suggestion was made: *I would request more **commitment** from the countries. For me it's ok if you say that you don't have time to spend 10 hours a day on the topic. But I think we need to have a commitment to check once a week and take a look at the leads added to the list. Then one should think about how to prioritize these leads in order to have an overall view.*(Expert_1 2023, Pos. 66) A further suggestion in order to improve process in general was made by expert 2 with the following statement: "*Actually only problems lead to new approaches (…) Short example: (...) the first event invitations were sent randomly. In the meantime we know that we have to channel the invitations and that some of them should not be sent centrally but in the name of the respective sales. And that simply requires a bit of **coordination between marketing and sales** on a daily basis(...) the ideal process of how it should run (...) in my opinion only works if you also maintain and live it together."*(Expert_2 2023, Pos. 18)

For company B some improvements regarding a new process are already made and some are planed as expert 3 reveals: *"We use the marketing extension of Microsoft Dynamics. As a result we do all the **mailing campaigns via the CRM** and with regard to the leads we are now just in the process of construction (…) now we want to generate the leads from social media or from the website and capture them and then utilize them in the CRM so that we transfer* *them to the sales with a scoring system from marketing."*(Expert_3 2023, Pos 8) In order to improve the process in the future, expert 3 has already planned solutions although the implementation will not take place immediately: *"...of course we have a big picture (...) where we have mapped this(the new process) (...) for the future. We really want to be able to generate the leases from the social media and website channels and build the funnel in such a way that you really start with marketing qualified leads and when the leads (...) become hot that they are then handed over to sales. But unfortunately we have still a long way to get there."*(Expert_3 2023, Pos. 22) A further improvement in the process is mentioned by expert 3 regarding the implementation of the **CRM system across the organization**: *"And currently this (CRM) is being rolled out to the entire group."*(Expert_4 2023, Pos. 4)

When expert 10 was asked what improvements have been made in lead management in recent times he explained that a new **process for trade fairs** had been introduced: *"In recent times, we have established a process that has worked quite well. (...) ...at the last trade fairs we have actually practiced this in the area of service (...). As I said first the training: How do I get potential leads into the system. Then the leads are automatically entered into the system and on the next day or the same day we have automatically sent an information e-mail (...) with the links to read up on in case of interest. And of course with the message that a sales person will get back to them in the next week or two. (...) plus with follow-up in CRM (...) this process worked well but it is time-consuming."*(Expert_10 2023, Pos. 70)

### 2.2.4 Lead Generation

#### 2.2.4.1 Task Specific Challenges and Solutions in Lead Generation

Challenges:

Regarding the challenges in lead generation expert 3 mentions the procedure when finally **entering the leads into the CRM** system after a trade fair and the lack of support by the sales: *"...we just had a large trade fair (...) and of course we also entered all the trade fair leads. (...) Currently it is still the case that the sales department passes us the leads in handwritten form and we in marketing then enter them into the CRM. It's really a challenge to get people to enter it on their own and to create added value in such a way that they are willing to enter it. That's a big challenge and that's where we're talking about acceptance again."*(Expert_3 2023, Pos. 20) Expert 4 reveals that **leads are not captured in the awareness phase**: "*The ideal situation would be if we could capture the leads starting from Google, or clicked ads, (...) or click rates on social media or LinkedIn (...) starting from the first klick or by the marketing department if we could capture the customer journey all the way to the order. But this doesn't happen here at the moment."*(Expert_4 2023, Pos. 74)

The expert 5 provides insights about challenges in the awareness phase in order to increase the potential of the category first instead of prompting just the company itself: *"Because first* *we don't have to make "our company" known but position "the product" as a "solution". We're not playing the sales tactics there.* (…) *We are much* ***too fast processing with the sales tactics****.* (...) *But first of all if we want the addressable potential "in our sector" to be higher (...) ...then we have to increase the awareness (...) to ensure that a "planner" thinks of "our product" when he plans something."*(Expert_5 2023, Pos. 80) When it comes to expert 6 the generation of appropriate leads according to the solution provided is challenging: "*Just because an email inquiry is received* (and the question is asked) *what does part of our product cost, that's not a lead for me."*(Expert_6 2023, Pos. 82) Furthermore he mentions that it seems to be easy to generate leads at trade fairs but lots of them are not relevant in the end: *"For example at a trade fair we had 35,000 people there. (...) probably 90% of the visitors who were at our booth are* ***not relevant.*** *Then I have to ask (...) even if I scan the business card why should I have that? Then I have a huge amount of data. This is exactly the topic where we are discussing from Big Data to Smart Data."*(Expert_6 2023, Pos. 94)

Expert 7 reveals that lead generation is usually done by trade fairs but online channels are currently still in the early stages of development: *"...I really have to say most of the new leads we generate are* via the trade fairs*. (...) lead recruitment via (...)* ***online is still in its infancy*** *for us. (...) I'm simply saying that the pool of new customers is still manageable. There are new industries where this will certainly become much more relevant but for our main industry the (...) lead generation via the website a is small share..."*(Expert_7 2023, Pos. 24) Furthermore the expert 7 explains that a part of the **customer base is known** and therefore classic lead generation is not necessary. Nevertheless expert 7 reveals that for some growing branches lead generation will become more important but the company is not ready yet: *"In some areas, it's simply the case that the customers are quantifiable (...) because there is simply only a certain amount and you don't have to search for them now. And in other areas which are still growing lead generation will become a bigger issue but we are simply not ready yet."*(Expert_7 2023, Pos. 38) When expert 7 is asked if there is a joint approach with the sales department in order to conduct lead generation the statement was made that there is a **lack of awareness about the value of online** generated leads: *"No. We know the approach of sales but I think that for the leads which are generated online (…) there is not yet an awareness of how much value could be added by them."*(Expert_7 2023, Pos. 54)

Expert 9 reveals that in the past the focus in order to generate leads was on search engine advertising but with less success: *"When I started in our company* (...) *there was a very strong emphasis on search engine advertising.* (...) *And during our work on customer personas and customer journeys, we discovered that* ***people don't actually search for us on Google****. Meaning not directly us, but the kind of company we are has not being searched for on Google."* (Expert_9 2023, Pos. 95)

When it comes to lead management challenges in general Expert 10 explained similar to Expert 3 the effort required to enter **business card data into the system** and the poor supporting systems: *"The challenges are first of all* (...) *well of course in the past there were a lot of business cards. We were at some trade fairs* (...) *and we had the issue of entering them into the systems. That is a lot of work. Of course there are now technologies which simplify this but that doesn't necessarily mean that they necessarily work so well. We already have some experience and it helps a bit but still a lot of things have to be changed manually in order to make sure that it is correct afterwards."* (Expert_10 2023, Pos. 20)

Solutions:

In general Expert 1 explains that lead generation is not challenging to company A and provides insights how leads are generated: *"I don't think lead generation is the challenge. It is more about how to deal with the leads. But basically we generate the leads classically via the web part by contact forms, white paper downloads, via social media and various campaigns and Google Ads and so on. And then of course traditionally via trade fairs."*(Expert_1 2023, Pos. 27) Expert 2 mentions besides marketing generated leads and trade fairs the importance of **personal contact with "planers"**: *"...There are various possibilities. On the one hand via marketing and (...) via trade fairs which will now probably decrease a bit in the digital age or has already decreased and a lot is generated via personal contact from projects in general. (...) We have to make sure that we have a good relationship with at least the top 15 "planners" in order to be able to follow the project situation or the flow of information from the daily business in the industry."*(Expert_2 2023, Pos. 12) In addition he mentions the employees of the company which are supporting in lead generation: "*And our leads originate not only from the marketing side but also in general from our organization from* ***every single employee***."(Expert_2 2023, Pos. 30) Nevertheless expert 2 reveals that marketing is less involved in lead generation than sales. Furthermore expert 2 makes ad distinction between national and international approaches when it comes to lead generation: *"I would say when it comes to lead generation we on the sales side are the main drivers not the marketing side. Of course, marketing supports us but the generation itself (...) actually happens primarily (...) with the customer in the project (...) Therefore, we get to know our customers* ***mainly in projects***. *On an international level it looks different than on a national level because there*(international) *we run certain campaigns."*(Expert_2 2023, Pos. 40)

After the expert 4 is asked whether sales usually contacts the customer directly the following statement he mentions external agents and dealers: *"Yes, they come in via* ***an agent or via a dealer*** *who says: "There's one back there and it looks like this and we should visit him and that we don't even know him yet". This often happens when we open up new markets (...) ...and at the beginning of course we have leads endlessly until we get up to a certain standard."*(Expert_4 2023, Pos. 64)

Expert 5 mentions events and networking in order to generate leads. Moreover he explains that it is necessary to be supportive in the preliminary phase of projects in order to get information about upcoming projects: *“We have a lot of customer activity in terms of events where we invite them to be present again and again, to show the flag again and again, to get into conversation again and again. Through this and through our expertise we are able to find out very early where in the world (...) discussions are occur about the upcoming investment. Because we are able to be supportive in the preliminary phase due to our network of relationships with representatives of the authorities.”*(Expert_5 2023, Pos. 4) Furthermore he reveals that **external speakers** are used in order to spread the message according to the solution offered since direct marketing is not really accepted by the audience: “*There is currently (...) a "trade fair" or a "trade conference" where all the major " professional planners" are on site. (...) we also have a booth there. We also have a speaker there who(...) speaks with our arguments. That's a special feature for us because we don't present ourselves as a manufacturer again, but we want (...) an opinion leader who represents a multiplier. Otherwise it is always very manufacturer-driven. That doesn't work so well in our industry. And that's where we speak. Of course we have a network of many people there, from "planners" but also from "end customers" who manage such projects "in this area".”*(Expert_5 2023, Pos. 58) Expert 6 reveals that the key for lead generation is the global sales network as well as trade fairs for those countries the company is not operating directly: *“Of course we have a narrow-meshed distribution network (...) so we are very **close to the customer** and (...) basically get the information. In new countries where we are not represented we participate on (...) the trade fairs (...) and this is how contacts are made.”* (Expert_6 2023, Pos. 22) In addition he mentions the importance of the website and LinkedIn in order to generate leads: *“Our **website** is definitely a very important tool for us to generate leads. (...) The second topic is (...) via various digital media. The social media topic (...) is partly difficult in certain countries, but is definitely an important part. On **LinkedIn** (...) I have a large account where I have already received inquiries. Really high-quality inquiries I have to say...”*(Expert_6 2023, Pos. 22)

When expert 7 was questioned about recent improvements regarding the lead management process the following comment was made: *"We have improved it by introducing request forms which did not exist before. In the past there was only one main address. Now we have really made it more differentiated, allowing users to select in the inquiry form (...) and to get to the right inquiry form (...) We have improved this and we have also differentiated the newsletter registration depending on interest and industry.”*(Expert_7 2023, Pos. 12) Expert 8 explains his solutions for led generation by mentioning trade fairs and approaching customers who are actually exhibitors. In general the major part of potential customer is known that’s why leads are generated sometimes by **business trips**: *“...by visiting trade fairs or participating in trade fairs. We have also had the opportunity to go to a "trade fair" and **approach the customers who exhibit there directly** (...) Furthermore (...) by my travel activities since I travel to "several countries". (...) the important customers in these segments are known to me.”*(Expert_8 2023, Pos. 8) Nevertheless when new courtiers and markets are entered sometimes agents are used: *“Now you expand to "a country" with the help of an **external agent** or trade* *representative."*(Expert_8 2023, Pos. 10) In addition when entering new markets leads are actively sought by a prior **research on the internet** *followed by a direct approach: "…the majority on the Internet and then perhaps reconfirmed by a visit to a trade show. If we see ok, we actually already have him on our list, then we go and see what segment he has."*(Expert_8 2023, Pos. 14) *"Most of the time, the first contact is made via e-mail nowadays. Either via our homepage with a contact form or directly via the "BU" mail address from where inquiries are made."*(Expert_8 2023, Pos. 16)

Expert 9 reveals the solution to the challenge that the customer did not look for the segment in which his company is in on Google. Due to his statement the follow-up question was asked whether a change in keywords was made and he explained: *"Completely different channels! We no longer proactively place ads on Google (...) for payment. We simply do SEO in order to still be ranked reasonably. Our most important channels are actually **LinkedIn, trade fairs** and another channel is actually to **acquire sales representatives** who may have previously worked in our segment. Because they actually have the best contacts you can buy. It's cheaper than every campaign."*(Expert_9 2023, Pos. 52)

The expert 10 provides an example of how additional leads are generated by giveaways: *"When a customer buys a piece of equipment he receives a **package for the "user"** and when the "users" receives this package (...) he has to register. And these leads obviously are transferred to marketing."*(Expert_10 2023, Pos. 8) In this context it is important to mention that according to Expert 10 these leads are usually users and not buyers and therefore in the case of Company 10 they are not usually processed by sales in the further course.(Expert_10 2023, Pos. 8) In addition Expert 10 mentions that when a lead is captured resources are needed afterwards. In order to reduce the effort the following solution is offered*: ".... so it's important for us to keep that extremely limited to our main target groups and to really only take the leads that we can spend enough time on (...) to completely follow up on those leads."*(Expert_10 2023, Pos. 28) *"...we have carried **out special training** on how we can really **distinguish** the free riders from the right customers and also challenge them. (...) sales training where you really identify the leads (...) in order to classify them."*(Expert_10 2023, Pos. 30)

#### 2.2.4.2 Purchased Lead

Challenges:

When expert 1 is questioned about the quality of purchased leads a mixed judgment is made: *"Basically the quality always **depends on the provider** and that also varies from country to country. (...) in my opinion these are very old leads. Because if we generate leads on a website, or via whitepapers, social media (...), then the customer has made the first step (...) and also wants information from us. And in this case it's the other way around because we contact the person and offer them a solution. But in general it is accepted."*(Expert_1 2023, Pos. 31)

When it comes to company B expert 3 mentions that marketing does not process with purchased leads.(Expert_3 2023, Pos. 24) Nevertheless when expert 4 was asked if the sales department works with purchased leads in the following he mentions that it was **not beneficial**: *"No. We did that once but the experience with it and the benefit was not as we would actually like to have it."*(Expert_4 2023, Pos. 12)

Similar to expert 4 the expert 5 has also made bad experiences with purchased leads. When he is questioned if purchased leads are used in company C he mentions: *That is difficult for us. Nowadays there are agencies which always try to sell us data "from our product"(meaning customer data). We did that once and then we realized that it wasn't correct and that it was fake*...(Expert_5 2023, Pos. 82) In response to the follow-up question whether the data quality was poor he reveals: "*Yes it was bad and **very general and very strongly related to "other segments"** and therefore for us too **less beneficial**. And there is no such thing as a classic cold lead because it is usually the case that someone thinks about a "product from us" when he has a problem. And then he is actually no longer a cold lead because he already appears somewhere in our network."*(Expert_5 2023, Pos. 84)

In company D leads are in general not bought as expert 7 explains but partner platforms are used to spread product awareness: "*We don't buy lists. We are also very special because our market (...) is extremely diverse. We have some industries where we also work with partners. These are partner platforms which send newsletters via their platform, for example "in a specific area of the company" it is already the case that our products are promoted via partners.*"(Expert_7 2023, Pos. 20) Expert 8 confirms that leads are not purchased.(Expert_8 2023, Pos. 8)

Similar to Company D, Expert 9 explains that leads are generally not bought in: *"No. We didn't do that on purpose either, because we operate in such a specific niche that buying leads becomes very difficult."*(Expert_9 2023, Pos. 26)

Solutions:

Expert 1 provides a solution in order to handle purchased leads **by prequalify them and exclusively use account-based data** in order to be compliant with the GDPR: *"We make sure that we don't load them into the system immediately (...) but we do a pre-qualification (...) There are also countries that say they don't know their market that well, so we have to buy in additional data. Most of the data is account-based. Which means that they are basically in accordance with data protection because there is no person involved. And what we do is that we prequalify them and only if they convert via a certain landing page then they are entered into our system and therefore they are compliant with data protection."*(Expert_1 2023, Pos. 29)

### 2.2.5 Lead Qualification

Challenges:

When the expert 1 is asked about the overall challenges in lead management the answer is directly focused on lead qualification especially at the commitment to practice it and the **effort** resulting out of lead qualification: *"First of all it's definitely a matter of **commitment to conduct** lead qualification. (...) We currently have the problem that a lot of leads are received which are not yet qualified (...) This means that they may just have a look and download something and we first have to identify who they actually are. (...) And that's the challenge because we really have to take a look on every lead..."*(Expert_1 2023, Pos. 6) Furthermore expert 1 mentions the **manual procedure** since systems can't help company A in lead qualification: "*What happens manually is this lead qualification.(...) ... and of course you also have to put the whole thing into context which also happens manually. The tool can't tell you whether a customer actually wants to buy or whether he's just very interested and might not start the project for another two years. And that is the difficult part to find out."* (Expert_1 2023, Pos. 8)When expert 1 is questioned about the interface of marketing and sales regarding the transfer of marketing qualified leads the acceptance by sales is questionable as the following statement reveals: "*Since we are still at the beginning (...) I can imagine (...) that leads are transferred which perhaps do not yet meet the sales standard. They say that the lead is **not yet properly qualified**. Or the lead doesn't really want to buy anything yet."*(Expert_1 2023, Pos. 48) When expert 2 is questioned about which the challenges occur between the interface of marketing and sales he explains that to many unqualified leads are transferred into the sales department: *"Partly also that (...) the **mutual understanding** about who are really the leads which are important for us. (...) We can't (...) follow up on every small "customer". The marketing department sometimes lacks in understanding and thus a huge flood of information is collected which is washed into our sales office and (...) we then have to evaluate it in the sales team...."*(Expert_2 2023, Pos. 32) Furthermore he mentions: "*We have a huge **mountain of data** but what do we do with it now? And I think there is still a lack of mutual understanding. We have all the data but how to use it properly is still questionable."*(Expert_2 2023, Pos. 22)

When expert 3 is asked whether there are **harmonized criteria for lead qualification** by marketing and sales the following statement is made: *"I would say project-based but apart from that still too less*."(Expert_3 2023, Pos. 40) Expert 4 mentions there is **no common definition for the term lead**: *"... it starts with the term lead and what an opportunity is. In my opinion we are not quite aligned here. For many in the marketing department a lead is the classic contact that you hear somewhere. But that almost never happens in our business."*(Expert_4 2023, Pos. 66)

The expert 5 reports that a **lot of unqualified leads are captured** which do not meet the standards are received.(Expert_5 2023, Pos. 14) In addition expert 5 mentions that it is challenging to screen the generated leads and to find the decision-makers.(Expert_5 2023, Pos. 31–35) Furthermore he described the procedure: *"Who is relevant and who is not (...) and who is just interested. And then there are also a lot of free riders. So who is really relevant?"* When asked whether the qualified leads are **accepted by the sales** department, he replies, *"...If there are 10 customers then often the following appears: I know, I know, I know, forget (note: meant forget it), not decision-maker, not decision-maker, not decision-maker. And then 2-3 remain left on which he say: Yes, I'll have a look at them once."* (Expert_5 2023, Pos. 114) In this context he adds: *"Then it becomes quite sobering..."*(Expert_5 2023, Pos. 116) In respond to the question about the general challenges in lead management expert 6 motions the task of lead qualification in his words: *"The main challenge is to* ***distinguish the important from the unimportant*** *and to ensure you are not just making empty kilometers with these requests, but to find out who is actually behind it. (..) we have a quite specific product and operate worldwide in all countries. Therefore it is important to analyzing this very precisely since we have only limited resources in sales."*(Expert_6 2023, Pos. 6)

When expert 9 is asked about previous times when sales qualified leads on their own the responds that other departments were not involved in the process and as a result the didn`t **prioritization was untransparent***: "…and the problem is that in the past the other domains such as engineering were not even involved in this process. And the corresponding prioritization was also not transparent."*(Expert_9 2023, Pos. 20)

Solutions:

Expert 1mentions an **automated lead scoring** by rating the engagement as well as the profile of the lead in order to support the local marketing departments in lead management: *"...we have the component of lead scoring installed. We also look at the engagement of the lead. So is he on our website? Has he attended a webinar? (...) so that we can also see if he is active. And via these two components of which content do we have from the person but also what kind of engagement has the person, we try to form a score in order to be able to give local marketing a chance and say: Take a look at this person."*(Expert_1 2023, Pos. 6) Furthermore expert 1 explains: *"...it runs automatically. We have specified that different actions give different points. (...) So it is separated into what the customer does and which touchpoint he visits(...) If he (...) is within this range, to us it means that he is very active."*(Expert_1 2023, Pos. 8) When expert 2 is asked about the improvements he would suggest in lead management he thinks the transition between marketing and sales needs to be reviewed as well as he questions the worth of the collected leads which he refers to as data: *"The most important thing would be to clearly* ***point out how the transition between marketing and sales*** *is. (...) There is no use (...) to collect and analyze data for sales and marketing if the data is not used mutually or if we do not work with the data. The coordination between sales and marketing must be carried out (...)We need to know if a customer XY has logged on to the website 35 times(...)*

*We in sales may have prioritized him incorrectly and must actually have the opportunity to access this data (...) perhaps it really is worth a direct visit..."*(Expert_2 2023, Pos. 49)

In order to support lead qualification company C has implemented a **business development department** as expert 5 describes: "*Now we take the direct approach with the business development which involves looking at the addresses and then qualifying them, looking at them, questioning them (...) And if a few of these are identified we pass them directly to sales."*(Expert_5 2023, Pos. 22) Expert 6 mentions specific questions in order to screen promising leads: *"We generally answer to the (lead) right away and **then specific questions are asked** and then after the first contact we find out if it really only remains a request (...) or is there really (...) an organization (...) behind it that is actually interested in dealing more deeply with the matter and then also in developing this project."*(Expert_6 2023, Pos. 8) Furthermore expert 6 reveals that its up to the feeling of the respective sales representative to qualify the lead: " "*This is primarily **based on the feeling of the sales representative**. So the salesperson (...) who gets in contact with the person (...) has to establish in the initial meetings (...) how serious and how urgent is this opportunity or lead is..."*(Expert_6 2023, Pos. 48)

Expert 10 mentions similar to expert 6 that specific questions are asked which are learned in special trainings provided by the company: "...we have conducted **special training sessions** to learn how to distinguish the free riders from the real customers and how to challenge them. (...) in order to classify them as leads."(Expert_10 2023, Pos. 30)

### 2.2.6 Lead Nurturing

Challenges:

During the interview expert 1 mentions: *"Of course the ideal way is (...) that we also send newsletters and information to the person* (lead) *in the case of an opt-in."*(Expert_1 2023, Pos. 12) Later the follow-up question was asked if exclusively customers which have given **consent by an opt-in** are nurtured. The following answer resulted: "*Yes exactly. As I said due to data protection reasons we need the opt-in consent of the person."*(Expert_1 2023, Pos. 37) When expert 1 is asked if an indistinct customer path is challenging the following statement is made: *"…we often have the case that we also have a project business depending on the customer... (...) Such a project can take one to two years especially for new projects from the scratch (…) But of course we also have customers (...) who we also supply for example via the web shop. Sometimes the lead decides relatively quickly in favor of a product. (...) So this means that it depends. And I believe that most customers are rather volatile."*(Expert_1 2023, Pos. 42) In response to the follow-up question why an indistinct customer path is challenging expert 1 replies: *"...I think keeping the **lead warm and identify the right timing** when the customer says: Now i got a new project and I want to do it with "our company" is something what makes it difficult for us. (...) Because sometimes a purchase is made at the same day or it takes to years including project planning.*"(Expert_1 2023, Pos. 44)

Expert 3 mentions the **lack of an interface** in order to send data to the sales department regarding lead nurturing: *"Due to the lack of an interface we can't really provide data from marketing and nurture leads."* (Expert_3 2023, Pos. 46) Nevertheless in response to the follow-up question about whether targeted content is sent to customers Expert 2 reveals: *"Yes of course there are different marketing lists meaning distribution lists and they receive various marketing e-mails."*(Expert_3 2023, Pos. 48)

The expert 5 mentions that in some cases it's not accepted by leads if activities regarding nurturing are processed to early: "*...it is sometimes not appreciated if we claim to be involved* ***too early****. It's always a bit critical in one of our business areas if we do too much in advance."*(Expert_5 2023, Pos. 44) *"Because there are also many opponents of "the product" in "the specific area" and then it comes just very negative: Yes, that's classic that (meant project) comes again from "our company" and that's the argumentation of "our company, they always see everything positively because they want to sell"*(Expert_5 2023, Pos. 46) Furthermore expert 5 identifies potential for improvements in the area of **targeted campaigns** with existing customers: *"I would say where we could do even more is a further development (...) with regard to targeted campaigns (...) In the awareness phase we are very broadly on the road today. (…) It is difficult to differentiate that but if we get a bit more focus in there then that would help us.* (…) *We know it's a huge network which rotates over and over again (...) so it's difficult."*(Expert_5 2023, Pos. 102) In terms of more precise targeted campaigns expert 5 mentions especially spare parts and new products: "*Where we could improve by target the customer base we already have when it comes to spare parts as well as spreading information about new Products."*(Expert_5 2023, Pos. 104)

In respond to the question about what the challenges in lead management are expert 9 mentions the long period of time needed for lead nurturing: "*One of the biggest challenges is to follow the customer for a* ***very long (...) period*** *of two years (...) in order to be able to start a business with the customer at all. (...) For us this means that within the lead process it is simply a matter of waiting and catching the moment when a customer or potential customer is not satisfied with his existing partner. The biggest challenge for us is to get in there* (start with the inintal business) *as a second source when there is the possibility. So to wait for this moment and to be patient..."*(Expert_9 2023, Pos. 10) Furthermore expert 9 mentions that potential customers are looking for MVPs in order to do pretesting. As a result the investments in the nurturing phase have to be made: "*....and then perhaps also to be able to demonstrate it* (expertise) *in this lead-nurturing process* ***without monetization at the beginning****. So the customer may needs (...) a "system" to do some testing and exploring but he's not really willing to pay for it. This means there are quite high costs which impact us in order to acquire a potential customer at that point in time."*(Expert_9 2023, Pos. 10) In response to the question of what expert 9 would improve in terms of lead management he replied the introduction of more demonstrators which have a WOW effect on the customer: "*... I would probably like to* *have two additional standard platforms of products which we can provide to the sales department in order to create a quick WOW effect at the customer. (...) So to me it's very much about* ***demonstrators and evaluation kits*** *at the customer's site."* (Expert_9 2023, Pos. 56) To make sure in which phase the demonstrators should be implemented follow-up question if they are for lead generation was made and expert 9 answered: "*Actually it's more for nurturing. You have to think of it like the test drive at the car dealership. (...) it would be nice if you could test drive 3 different cars and if they have different equipment variants too. And I think we still need to catch up a bit when it comes to this."*(Expert_9 2023, Pos. 56)

Solutions:
Expert 1 reveals that in case a lead has given his consent by an opt-in marketing is able to nurture the lead with corresponding communication activities: *"In general marketing has to qualify or nurture the leads until they become sales qualified leads. So one has to look at where the person is coming from and so on. If the person has made an* ***opt-in*** *than it's great* for us and then marketing communication as well as newsletters and also invitations *to events are sent..."*(Expert_1 2023, Pos. 35) Furthermore expert 1 mentions that nurture journeys are used to detect what a lead is interested in and to guide him to a decision: "*So basically we try to move the customer a little bit with so-called nurture journeys in order to find out what (...) the lead (...) is* ***interested in and to get the lead into making a concrete decision*** *for something. In this way we see when he looks at specific product details or when he looks at something more often. That makes definitively sense."*(Expert_1 2023, Pos. 42) Expert 2 mentions the importance of **communication** on a daily basis between marketing and sales:"*...we are in constant exchange with the marketing people, because they need our customers, so to speak, to roll out their marketing campaigns, and vice versa we also need the information from marketing. So who participated here, what do we expect from this campaign, or where will the focus be set this year in order so we are able to use it in our daily sales business."*(Expert_2 2023, Pos. 40) In response to the question if certain **target activities** are performed for target customers expert 2 replies: *"...we also conduct customer group specific events as well as we try to channel activities. So there are both there are events and marketing activities which are of interest to our entire customer base and there are also targeted activities which are aimed only at a certain customer group."*(Expert_2 2023, Pos. 41) In a follow-up question expert 2 was asked about specific targeted activities, resulting in the following response: *"This happens* ***daily in a short exchange*** *with us. From time to time we send newsletters to certain selected customer segments (...) or on specific topics. (...) And actually the certain classified customers are also informed (...).not just via the events but also via newsletters, mailings and so on."*(Expert_2 2023, Pos. 43)

Expert 3 explains that marketing leads are nurtured by special mailings as well as by digital events and events in the following statement: "*It starts with the* ***Christmas mailing*** *or thank-you* ***emails after every trade fair*** *(...) Then of course we also have announcements regarding* *product discontinuations or new products. In this case there is a distribution list which is used to filter the customers. (...) Then there are of course some events. Particularly due to the pandemic we also had some* ***digital events*** *and we can filter which customers we invite. And then there are also e-mails campaigns."*(Expert_3 2023, Pos. 48)

In order to handle the challenge of starting to early with nurturing expert 5 reveals that external **opinion-leaders are included** in the nurturing process in the early phase: *"...we tactically avoid the leading role in this early phase in the "special business field" and leave it up to the customer or to general sort leaders for "our products" who are neutral. These include university professors as well as "planers" (...) and we stay in the background and we provide them arguments."(Expert_5 2023, Pos. 46) "We try to establish contact with opinion-leaders who are not really branded with the name of "our company""*.(Expert_5 2023, Pos. 48)

Expert 8 explains that besides product details also **specific topics** like sustainability are also taken into account when doing lead nurturing: "*In addition to all the social media activities we also say: "Okay, we'll send out targeted newsletters with a focus on specific topics." We nurture these topics, whether they are product details, sustainability issues, or invitations to trade fairs and events."*(Expert_8 2023, Pos. 22)

When expert 9 is asked which solutions have been implemented regarding lead management he explains that **operational departments have been included** into the nurturing process: *"Well, the improvement we are currently working on is actually to integrate the operational units of the company into the lead-nurturing process. Therefore a development and a production* (department) *knows quite early what is actually coming in our funnel. Because we also need resources from these individual departments in order to develop this lead. (...) And this is an important improvement that we have aimed at and also implemented which has now actually already been proven. We have become significantly faster and there are fewer frictional losses due to it. It's simply because it's no longer the case that the sales department says, "We need something." Instead, we decide together with who we will take the next steps."*(Expert_9 2023, Pos. 44)

### 2.2.7 Sales

#### 2.2.7.1 Focus on Existing Customers

Situation:

When questioning the experts if there is a focus on existing customers rather than on new leads expert 2, 4, 8, 10 agree while expert 6 and 9 disagree.

When expert 2 representing the sales department is asked if leads classified as qualified by marketing are considered as an effective opportunity for sales he mentions: *"... Our daily business actually runs mainly based on the customers we already know. A real generation of new* *customers does not really happen at the moment or only marginally. (...) Of course it looks different on an international level. There marketing activities are definitely taken more seriously than here in this "area". Because here we actually already* ***know almost all*** *of them* (customers)*. But nevertheless we are always glad to receive information from the marketing side… (...) Of course, we cannot ignore any opportunities."*(Expert_2 2023, Pos. 26)

During the interview expert 4 reveals the following statement: *"If we distinguish between the term "lead" and "sales opportunity" and focus on the leads it often happens that we receive a lot of inquiries* (meaning leads) *which are not really specific and which are then often ignored by the sales department. Because we in our branch do not focus on the mentioned 10-15% but rather on those 80-85% where we really have a specific demand. Of course we are concerned that one or the other great opportunity will not be noticed when someone implements a greenfield project."*(Expert_4 2023, Pos. 34) In response to the follow up question why sales is focused rather on existing customers than on new leads expert 4 explains: *"The respective salesperson is* ***familiar with the situation of the customer****. He knows the contact persons and this whole so-called socializing does not have to be done anymore. One knows each other and one knows in which form inquiries are received. And because of these long-standing relationships you have a team which is already very hard and fixed."*(Expert_4 2023, Pos. 36)

When expert 6 representing the sales department is asked if sales is focused rather on existing customers than on new lead he says: "*You can't quite put it that way."*(Expert_6 2023, Pos. 66) Furthermore he mentions that it depends on the activity of the core market. If less business can be gained in the core market the company C focuses on other branches in which new leads are generated.(Expert_6 2023, Pos. 66) In addition expert 6 mentions in this context that it is very important for company C to focus on existing customers in order to gain revenues by **aftersales or service activities**.(Expert_6 2023, Pos. 64)

When expert 8 is asked if the focus is rather on existing customers than on new leads he reveals: "*Yes. To be honest yes."*(Expert_8 2023, Pos, 52) When being questioned why this situation is the case he explains: "*I want to say now because it is easier but currently the existing customers are generating almost the* ***maximum in terms of capacity****."* (Expert_8 2023, Pos. 54)

When expert 9 representing the marketing department is asked if company E is focused on existing customers rather than on new leads he explains that neither nor is the case and that the sales department has implemented the roles of frames and hunters: *"Not really so we have separated our sales into types such as* ***hunters and farmers****. The farmers are the ones who pay a lot of attention to existing customers and there are also some hunters. And there it is simply also about winning new customers and new projects."*(Expert_9 2023, Pos. 28)

When expert 10 representing sales of company F is asked if the focus is rather on existing customers than on new leads he explains: *"Yes of course existing customers are very* *important for us (...) And the main focus is probably on our existing customers in order to* ***keep and retain them****. Nevertheless the sales department also acquires enough new customers..."*(Expert_10 2023, Pos. 44)

### 2.2.7.2 Time Famine

Challenges:

When expert 2 representing the sales department is asked if sales is able to process leads in time he revealed: *"Sometimes better sometimes worse."*(Expert_2 2023, Pos. 28) In response to the follow-up question why the situation is like that expert 2 reveals: *"Fortunately it is due to our currently good order situation. We are actually very busy (...) and partly there is simply* ***a lack of time*** *if they* (leads) *are not processed immediately."*(Expert_2 2023, Pos. 30)

When expert 4 representing the sales department is asked if leads are processed in time he mentions: *"We definitely* ***still have potential****"*(Expert_4 2023, Pos. 76) In respond to the question of leads are partly processed in time he explains: *"Yes, partly..."*(Expert_4 2023, Pos. 78)

Expert 6 representing the sales department mentions regarding the question if leads are processed in time: *"I hope so!"*(starts laughing) (Expert_6 2023, Pos. 70)

When expert 8 representing the sales department is asked if leads are processed in time the explains: *"… Honestly, no. It's a pity but that's the way it is. We try to do the best we can. (...) It is always a* ***question of time.*** *Unfortunately this is not always possible as the sales department would like to have it or perhaps all those who are involved in this activity…"*(Expert_8 2023, Pos. 50)

When expert 10 representing the sales department is asked if leads are processed in time he denies: *"So I don't think so. In normal sales it's difficult. I mean it's often done via e-mails and so on. There are also a lot of clarifications.* ***I don't think they are processed fast enough****…"*(Expert_10 2023, Pos. 48)

Solutions:

When it comes to the solutions of processing leads in time similarities could be detected. The companies A, C, D and F try to provide feedback within 24 hours to requests as their representants of the sales department reveal:

Expert 2 reveals that leads have to be processed within 24 hours in company A. This rule is written in an internal paper regarding the sales process: "*But we try to contact customers within 24 hours whether in written form or by a phone call. (...) and this is also written down in our sales processes that we have to do that."*(Expert_2 2023, Pos. 30)

In terms of processing leads in time expert 6 mentions: "*In principle we have the instruction that customers must receive an answer within 24 hours."*(Expert_6 2023, Pos. 72)

Furthermore expert 8 explains that requests are answered within 24 hours and in more complex business cases an answer follows within three days: "*We always try to give an answer to every request within 24 hours. Even if we just say it will be processed. And then we have simply set ourselves a goal of being able to offer at least one informative statement within 48 hours or perhaps also within three days, in order to avoid the customer from saying it takes too long."*(Expert_8 2023, Pos 50)

In terms of processing leads in time expert 10 mentions that at least a system supported feedback is provided within the same day: "… *We always try to give feedback at least system-supported on the same day…"*(Expert_10 2023, Pos. 48)

#### 2.2.7.3 Lead Routing

Challenges:

In response to the question which improvements in lead management expert 1 would like to implement he explains: *"...it would be nice if the process automatically would* ***allocate leads to the right person.*** *Of course, it's always difficult when a lead just fills out the newsletter form. Then we hardly know anything about that person. And then it's hard to decide who to pass that lead to. I would like to change that and we are working on that now. (…)"*(Expert_1 2023, Pos. 66)

Expert 10 mentions that lead routing is a challenging task on a daily basis since unspecific request are received: *"...a lead is received by us via a request perhaps a general request. After that he is passed on to the sales departments and that's where it is getting difficult if it* (the request) *isn't very specific. Who processes it after that?* ***Who answers?*** *Because quite a lot of people are employed in the sales department and what is really the interest of the customer. So it is quite difficult. These are the issues we have to deal with on a daily basis."*(Expert_10 2023, Pos. 56)

Solutions:

In order to process lead routing expert 4 reveals that routing of complex leads is done by a **meeting of the department heads on a weekly basis**: *"We have the option which is also important to us of running the leads through a prioritization process. This happens every Monday when a certain level of project complexity is reached and the department heads tell which colleague is responsible for the lead. (...) This gives us an overview of who has which projects and how long they have been working on this project."*(Expert_4 2023, Pos. 26)

Expert 8 reveals that leads are assigned to the respective employee who is responsible for a specific **product segment and country:** *"So we make a classification in countries and in the countries in addition by segment. For example a "customer X" in England is managed by a different person than a "product manufacturer" in Italy. We separate this in the Customer*

*Service area, as well as in terms of sales. And then this person takes care of the filtered list and goes through it from time to time (...) and tries to establish contact..."*(Expert_8 2023, Pos. 20)

# 3 Discussion

Starting with the first overall challenge of **the gap between marketing and sales** expert 1 reveals that in countries with smaller subsidiaries cooperation is closer compared with countries with bigger subsidiaries.(Expert_1 2023, Pos. 54) When it comes to company B expert 3 mentions that marketing and sales is too far apart from each other. (Expert_3 2023, Pos. 38) Expert 7 explained that the physical distance between the marketing and sales department is a challenge for cooperation.(Expert_7 2023, Pos. 32) Furthermore expert 10 revealed that the lack of a system which connects marketing and sales activities is the biggest challenge to him.(Expert_10 2023, Pos. 54) These statements indicate a gap between the marketing and sales department. According to the theory the mindset of silos is still present in many corporations.(Hannig u.a. 2017, p. 327) A similar opinion is explained by expert 4 by mentioning that marketing is not really involved in the sales process. (Expert_4 2023, Pos. 70) This statement is connected to the theory because if the lead management process is not defined marketing and sales optimize themselves separately according to their own standards.(Biesel; Hame 2018, p. 198) Expert 5 reveals that challenges regarding the interface emerge when it comes to invitations of specific customers to events.(Expert_5 2023, Pos. 108) Furthermore expert 6 explains that cooperation is challenging when expressing the USP's in such a way that the added value is clear to the customer.(Expert_6 2023, p. 60) In addition expert 9 representing the marketing department mentions that the biggest challenge in cooperation is to create the self-image of a service provider for sales within the marketing department.(Expert_9 2023, Pos. 67) As a result almost all experts mentioned challenges in cooperation between marketing and sales although the reasons differ among the corporations. This mindset can be based on a lack of communication, incentive models or a lack of cooperation when it comes to areas of competence.(Schüller; Schuster 2017, p. 74)

In terms of the solutions expert 1 mentions the need for closer cooperation and commitment from the top.(Expert_1 2023, Pos.14) Expert 2 reveals that coordination between marketing and sales activities has to be defined as well as the tasks of both departments. (Expert_2 2023, Pos. 49) This statement is reinforced by the theory since tasks have to be defined in order to effectively guide leads through the sales process as well as the workforce must be organized in a way which fosters collaboration and supports the achievement of common goals across functions.(Hannig u.a. 2017, p. 339) Expert 7 mentions that the sales and marketing department should be physically moved closer to each other and a system which unites the two departments should be implemented. (Expert_7 2023, Pos. 46) Expert 9 reveals that marketing and sales have a very close relationship in company E since they are internally called "sale-keting". (Expert_9 2023, Pos. 32) If marketing and sales act as an united organization and define goals and the strategy together as a team this leads to a profitable situation regarding gaining revenues.(Gasser; Mäder 2022, p. 132) Expert 10 explains that the close contact between marketing and sales is useful for sales in order to present specific topics to the customers. (Expert_10 2023, Pos. 68) According to the theory the customer purchasing processes is a common base for marketing and sales in order to lead the company to success and by handling this common task conflicts can be prevented.(Belz u.a. 2018, p. 138) Therefore a united and close cooperation in order to manage customers is beneficial for both departments.

When it comes to the category of data management and its first subcategory of **software** the collected data cannot be compared to the theoretical part since this it is designed in an inductive way. However challenges like the confusing visualization of leads (Expert_1 2023, Pos. 66) and unprocessed notifications (Expert_1 2023, Pos. 52) were identified in company A. When it comes to company B the lack of software to support lead generation (Expert_3 2023, Pos. 92) and in general the struggle for some employees to handle the new CRM system were mentioned.(Expert_4 2023, Pos. 4) Similar to expert 3 the representatives of company C mentioned a lack of software in order to connect marketing and sales. (Expert_7 2023, Pos. 8)(Expert_8 2023, Pos. 46) In addition expert 10 mentioned a lack of software in order to get rid of system breaks when processing lead management as well.(Expert_10 2023, Pos. 54) As a result of these statements the lack of software solutions can be seen as the primary challenge. When it comes to the solutions the implementation of the a new software which supports marketing and sales activities was the biggest improvement to expert 2 (Expert_2 2023, Pos. 45) Furthermore the creation of dashboards in order to support a clear visualization of leads was identified as an improvement.(Expert_1 2023, Pos. 64) Moreover the implementation of an interface between social media and the CRM system was mentioned (Expert_3 2023, Pos 14) as well as the creation of a dashboard in order to support lead routing. (Expert_4 2023, Pos. 48) In addition company C uses customized software which supports lead documentation and is applicable especially for their projects.(Expert_6 2023, Pos. 26)

In terms of the **quality of data** expert 1 mentions poor data of old leads which have been transferred into the new CRM system.(Expert_1 2023, Pos. 60) When it comes to company B the quality of data is a major issue to them.(Expert_3 2023, Pos. 6) A reason for the situation is based on the fact that every employee could enter data in the past.(Expert_3 2023, Pos. 26) as well as the lack of a clear concept and internal rules how to enter data. (Expert_4 2023, Pos. 14) Although expert 10 mentions that the quality of data depends on the sources he also explains that poor customer data and spam is collected by contact forms.(Expert_10 2023, Pos. 58) Nevertheless solutions could be detected as well which are for instance the implementation of mandatory fields.(Expert_2 2023, Pos. 36) (Expert_3 2023, Pos. 26) (Expert_9 2023, Pos. 36) Mandatory fields were mentioned by representatives of the companies A,B and E and therefore can be considered as the main solution in this subcategory. The importance of this solutions is based on the fact that missing standards are one of the main sources for potential errors.(Schüller; Schuster 2017, p. 53) Furthermore the implementation of a master data team which is exclusively responsible for entering data was mentioned as a solution to improve the quality of data.(Expert_4 2023, Pos. 16) This statement is reinforced by the theory since a clear definition of responsibilities when processing data leads to an improvement in quality.(Gasser; Mäder 2022, p. 45)

With regard to **data silos** expert 4 revealed that silos were built as a consequence of a cyber-attack. As a result a lack of an overview about the data resulted.(Expert_4 2023, Pos. 4) In addition the marketing and the sales department in company D do not have access to the same customer database since only sales has full access.(Expert_7 2023, Pos. 26) (Expert_8 2023, Pos. 56) Moreover expert 10 mentions that system breaks due to different systems used in company F which has grown by time occur.(Expert_10 2023, Pos. 8) The issue of different systems which are inconsistent emerges due to specialized departments in grown corporations as mentioned in the theory. When corporations grow to a specific size they tend to introduce specialized departments. As a result these departments implement different systems which leads to silos.(Gasser; Mäder 2022, p. 45–46) When it comes to the solutions company A implemented Salesforce in order to establish a common database for marketing and sales with the effect that more transparency was created.(Expert_1 2023, Pos. 20) Furthermore company B is implementing the CRM system right now and company F will implement one soon. (Expert_3 2023, Pos. 82)(Expert_10 2023, Pos. 12) The implementation of an integrated system including marketing automation and CRM can be a solution in order to eliminate data silos in the theory.(Hannig u.a. 2017, p. 327) Furthermore such an implementation enables the mutual creation of an integrated sales process.(Hannig u.a. 2017, p. 330–331)

When it comes to **new processes** this category is created in an inductive way. In general expert 1 mentions that challenges due to the new process including the implementation of the CRM system are emerging because not all subsidiaries have the same level of experience. As a result in some countries challenges arise when conducting the new process which is identified as a change issue by expert 1.(Expert_1 2023, Pos. 14) A similar problem occurred in company B when implementing the new CRM system. Some employees do not accept the new process as expert 3 reveals.(Expert_3 2023, Pos. 20) This statement is reinforced by expert 4 mentioning that old employees are not really applying the new methods associated with the usage of the new CRM system.(Expert_4 2023, Pos. 6) When it comes to expert 10 company F is lacking of a fully automated system and to many tasks have to be carried out manually when processing lead management.(Expert_10 2023, Pos 78) In terms of the solutions expert 1 explains that more commitment to the new process is needed. (Expert_1 2023, Pos. 66) Expert 2 mentions that the new process needs to be coordinated in a mutual way between marketing and sales. (Expert_2 2023, Pos. 18) A further improvement in company B regarding new processes is the processing of email campaigns via the CRM system (Expert_3 2023, Pos 8) as well as the rollout of the new CRM system across all subsidiaries.(Expert_4 2023, Pos, 4) In terms of improvements expert 10 mentions the implementation of a new process for lead generation at trade fairs which worked out quite well for company F.(Expert_10 2023, Pos. 70)

With regards to the challenges in **lead generation** expert 3 and expert 10 reveal that it is challenging to enter the leads into the CRM system. While expert 3 mentions that marketing has to do this job for sales representatives which are not accepting to do this task by themselves (Expert_3 2023, Pos. 20), expert 10 explains that the manual amount of workload is the challenge to him.(Expert_10 2023, Pos. 20) An alternative challenge is presented by expert 5 since he revealed that company C is applying the sales tactic to early while it is more important to promote the product as a solution for the decision makers instead of promoting the name of the company in the awareness phase. (Expert_5 2023, Pos. 80) When it comes to expert 6 the generation of high-quality leads instead of a huge number of irrelevant leads is challenging especially when it comes to trade frais. In this context he compares big data with smart data.(Expert_6 2023, Pos. 94) According to the theory if corporates focus to much on quantity rather on quality the result is a loss in efficiency due to the amount of workload in the processing departments. On the one hand huge effort is spent but on the other hand just little profit is made since just a small number of leads actually turn into a sale.(Golec; Isaacson; Fewless 2019, p. 12) In this context expert 7 mentioned as well that only a certain amount of potential customer is available and many of them are already known.(Expert_7 2023, Pos. 38) According to the theory corporates operating in B2B often have just a limited pool of target customers with the result that many target customers are already known. As a consequence a focus on quantity simply does not work for some companies.(Stadelmann; Pufahl; Laux u.a. 2020, p. 162) An alternative solution for company C could be to conduct account-based marketing since ABM provides an opportunity to address a small number of corporations in a precise and individual way.(Altenhofen 2023, p. 101) Furthermore ABM is especially appropriate when a company offers high-value solutions which are relevant for a small number of targeted customers.(Altenhofen 2023, p. 99) The final challenge regarding lead generation is presented by expert 9 mentioning that the specific customer group of company E does not search for them via google. (Expert_9 2023, Pos. 95)

When it comes to the solutions expert 2 mentions the close contact to planners (Expert_2 2023, Pos. 12) similar to expert 5 who mentions the support in the preliminary phase of projects in order to get information about upcoming projects. (Expert_5 2023, Pos. 4),(Expert_6 2023, Pos. 22) Furthermore trade fairs are mentioned by all participating corporations.(Expert_2 2023, Pos. 30),(Expert_3 2023, Pos. 20),(Expert_5 2023, Pos. 58),(Expert_6 2023, Pos. 22),(Expert_8 2023, Pos. 8),(Expert_9 2023, Pos. 52),(Expert_10 2023, Pos. 70) Trade fairs can be considered as an active approach of customers and therefore they are considered as outbound activities.(Schuster 2022, p. 153) In general outbound marketing has a destructive effect on the customer relationship because companies constantly increase the pressure while customers react defensively with the result that they distance themselves from the company.(Belz u.a. 2011, p. 110) Nevertheless if the results justify the outcome a further processing is acceptable.(Schuster 2022, p. 153) In terms of trade fairs expert 8 revealed that customers can be approached directly on their own booths.(Expert_8 2023, Pos. 8) Another common approach is the usage of the social media platform LinkedIn in order to generate leads mentioned by company B,C,E.(Expert_4 2023, Pos. 74),(Expert_6 2023, Pos. 22),(Expert_9 2023, Pos. 52) In addition a common approach was identified when it comes to generate leads via an external agent by company B and D.(Expert_4 2023, Pos. 64),(Expert_8 2023, Pos. 10) In this context an alternative approach in order to generate leads is mentioned by expert 5 when revealing that external speakers who promote the solution offered by company C are used in order to avoid to approach leads to early and to direct.(Expert_5 2023, Pos. 58)

Another alternative approach for lead generation is to **purchase leads** which already has been conducted by company A,B and C.(Expert_1 2023, Pos. 31),(Expert_4 2023, Pos. 12) (Expert_5 2023, Pos. 82) According to the theory it is common for corporates to purchase leads in order to increase their volume of leads although there are huge differences regarding the quality of those leads.(Altenhofen 2023, p. 102) These differences in quality are experienced by the experts as well. Expert 1 for instance explains that the quality depends on the provider.(Expert_1 2023, Pos. 31) Nevertheless expert 4 and expert 5 made bad experiences with purchasing leads and therefore do not promote this approach since it was not beneficial to them due to the poor quality.(Expert_4 2023, Pos. 12),(Expert_5 2023, Pos. 82) However if a corporation decides to purchase leads it is advisable to start with a small amount of in order to validate the quality at first.(Altenhofen 2023, p. 102) When it comes to the solution expert 1 mentions that a prequalification of the purchased leads is done. Furthermore leads are exclusively entered in the CRM system if they convert via a landing page in order to be conform with the GDPR.(Expert_1 2023, Pos. 29) With regards to the legal regulatory as mentioned in the theory it is advisable to review the legal terms as well as the conditions the vendor is generating the leads when purchasing leads.(Altenhofen 2023, p. 102)

When it comes to the challenges emerging when processing **lead qualification** expert 1 mentions the huge effort due to the situation that the procedure has to be done in a manual way as well as the lack of commitment to actually conduct lead qualification since a lot of leads captured are not qualified.(Expert_1 2023, Pos. 6),(Expert_1 2023, Pos. 8) Company C has many captured leads which will not be qualified as well as expert 5 mentions.(Expert_5 2023, Pos. 14) Expert 6 mentions in this context that the main challenge is to distinguish the important form the unimportant leads.(Expert_6 2023, Pos. 6) Another challenge is mentioned by expert 1 when revealing that the qualified leads might not be accepted by the sales department since they do not meet their standards.(Expert_1 2023, Pos. 48) A similar statement is made by expert 5 revealing only a few marketing qualified leads are actually processed by the sales department in the end.(Expert_5 2023, Pos. 114) In context of the mentioned statements the lack of criteria for lead qualification is often a subject of conflict between marketing and sales since both have a different focus. While marketing on the one hand often tends to transfer as many leads as possible sales on the other hand doesn't not want to spent time on unattractive leads.(Steuernagel 2021, p. 24) When it comes to expert 2 a lack of mutual understanding about the definition of a qualified lead is not established. Expert_2 2023, Pos. 32) This statement is similar to the comment of expert 4 when explaining that there is no common definition of a lead between marketing and sales.(Expert_4 2023, Pos. 66) Moreover expert 3 mentions that harmonized criteria for lead qualification by marketing and sales is made project based but in general to less.(Expert_3 2023, Pos. 40) With respect to the theory the transfer of leads from marketing to sales often fails because there is no common definition about the definition of a qualified lead.(Gasser; Mäder 2022, p. 118) When it comes to company A this lack of common defined criteria to qualify leads cloud be the reason for the challenge since expert 2 describes that a huge amount of customer data is collected but it is unclear how to deal with it.(Expert_2 2023, Pos. 22) According to the theory a focus on quality instead of quantity when processing lead qualification results in saving time, financial resources as well as on conserving nerves.(Gasser; Mäder 2022, p. 121)

When it comes to the solutions for lead qualification expert 1 explains that an automated lead scoring is implemented.(Expert_1 2023, Pos. 8) In this context it has to be mentioned that lead scoring can only be seen as a solution to company A if the criteria is defined in a common way by marketing and sales, since it is the basis for lead scoring and the further processing by a marketing automation platform which is used by company A as well.(Steuernagel 2021, p. 24) Nevertheless lead scoring offers an opportunity to prioritizes customers as well as time savings due to the fact that the focus of marketing and sales is on the right leads. Furthermore a higher conversion rate can be attained resulting in an increase of turnover in the long run.(Gasser; Mäder 2022, p. 121) A further solution was mentioned by expert 6 when explaining that specific questions are asked when sales contacts the lead for the first time in order to evaluate the potential.(Expert_6 2023, Pos. 8) In addition expert 10 mentions special training sessions in order to distinguish between qualified and unqualified leads.(Expert_10 2023, Pos. 30) According to the theory the BANT model is used often in B2B in order to qualify the lead by considering the budget, the authority, the need and the time frame of the lead.(Altenhofen 2023, p. 105) Furthermore the qualification methodology of NOTE by identifying the need, opportunity, team and the effect of a cooperation can be applied.(Gasser; Mäder 2022, p. 139) Among others the CHAMP method as well as the GPCTBA/C&1 method are alternative approaches for lead qualification.(Gasser; Mäder 2022, p. 135–137)

In terms of the challenges when processing **lead nurturing** expert 1 mentions that lead nurturing can exclusively be conducted when leads have given their consent by an opt-in.(Expert_1 2023, Pos. 37) If corporations process personal data without any consent of the subject massive penalties might be imposed as written in the Article 83(5) of the GDPR. As a result financial penalties up to 4% of the total global annual turnover or 20 million € depending on which is the greater penalty to the company are imposed. Furthermore expert 1 revealed that an indistinct customer path is common for the majority of customers. (Expert_1 2023, Pos. 42) As a result the challenge to keep the lead warm as well as to apply action at the right point of time emerges.(Expert_1 2023, Pos. 44) According to the theory leads switch with increasing frequency between different channels like stores, digital media or specialized dealers during the purchasing process.(Rutschmann; Belz 2014, p. 111) Furthermore the customer path does not run straightforward or is consistent and as a result it cannot be assigned to theoretical purchasing stages. Sometimes it takes time for leads to move from one purchasing phase to the next as well as it is possible for a lead to skip the individual phases due to a spontaneous purchase. Consequently it is not possible to precisely define the phase the lead is in which results in the situation that the priorities of marketing or sales activities cannot be conducted based on a linear process.(Belz 2016, p. 8–9) In order to conduct lead nurturing successfully it has to be recognized that the customer journey is individual to each customer. Furthermore it has to be understood how and when a lead enters as well as when he leaves the customer journey and why. In addition it is important to capture the questions and behavior of the lead in order to get an overall understanding about the actual path of the leads, which actions are actually made by them as well as which leads resulted most likely in a sale.(Gasser; Mäder 2022, p. 100) Expert 3 revealed that the marketing department is not able to provide data and nurture leads due to a lack of an interface between marketing and sales. (Expert_3 2023, Pos. 46) This lack results in less success when processing lead nurturing since all measures should be coordinated between the marketing and sales departments as well as it has to be ensured that a consistent cooperation between marketing and sales is established (Schmitt 2019, p. 13) Expert 5 mentions that company C still has potential for improvement when it comes to targeted campaigns in order to nurture existing customers regarding spare parts.(Expert_5 2023, Pos. 104) In general lead nurturing can be conducted after a purchase as well in order to support after sales and cross-selling activities.(Hannig u.a. 2021, p. 111) A further challenge is explained by expert 9 since one of the biggest challenges in lead management to company E is the long period of time which has to be spent until the final sale can be achieved when doing lead nurturing. In addition financial investments in order to develop MVPs are challenging since it is not clear during the nurturing phase if revenues are gained later on.(Expert_9 2023, Pos. 10)

When it comes to the solutions expert 1 mentions that nurture journeys are used to identify what a lead is interested in and to guide him to a decision.(Expert_1 2023, Pos. 42) Furthermore expert 8 and expert 2 mentioned that specific topics are also taken into account when doing lead nurturing.(Expert_8 2023, Pos. 22) (Expert_2 2023, Pos. 43) Expert 3 explains that marketing leads are nurtured by special Christmas mailings.(Expert_3 2023, Pos. 48) According to the theory these mailings can be assigned to trigger mails which are a further way in order to process lead nurturing.(Schwarz 2017, p. 62) With regards to targeted content expert 2 reveals that targeted marketing activities for certain customer groups are conducted when doing lead nurturing. (Expert_2 2023, Pos. 41) According to the theory tailored and even personalized content is necessary in order to address the needs and to be recognized by the leads.(Gasser; Mäder 2022, p. 106) With regards to cooperation expert 2 explains the importance of communication on a daily basis between marketing and sales in order to process lead nurturing.(Expert_2 2023, Pos. 40) In this way content for tailored customer groups is created in a daily exchange between the marketing and sales department. (Expert_2 2023, Pos. 43) According to the theory a close cooperation between marketing and sales is crucial when processing lead nurturing. Because sales on the one hand knows due to the close contact to the customer which questions are often asked and why customers sometimes avoid a purchase. On the other hand marketing knows which keywords are used by customer to search for solutions as well as which content is most likely successful when doing lead nurturing.(Gasser; Mäder 2022, p. 101)

With regards to the category of sales and its first subcategory of **existing customers** of the category sales, commonalities within the statements of the experts could be identified. In principle two types of opinions emerged among the experts were identified. On the one hand expert 2, 4, 8, 10 agree that the focus is rather on existing customers than on new leads. (Expert_2 2023, Pos. 26) (Expert_4 2023, Pos. 34) (Expert_8 2023, Pos, 52) (Expert_10 2023, Pos. 44) On the other hand expert 6 as well as expert 9 objected. (Expert_9 2023, Pos. 28),(Expert_6 2023, Pos. 66) With regards to the experts focusing rather on existing customer expert 4 revealed that the reason for this approach is that the sales representative already knows the existing customer and as a result the relationship does not have to be built up anymore.(Expert_4 2023, Pos. 36) A similar statement is made by expert 8 by mentioning that it is easier to focus on existing customers although he explains as well that existing customers are responsible for the maximum of capacity.(Expert_8 2023, Pos. 55) According to the theory the success rate with existing customers is significantly higher and the distance to them is closer compared to new approaches. Nevertheless if the focus is too much on quick sales this can lead to a situation where the development of new customers as well as of new markets is neglected.(Belz 2016, p. 9) New customers are in general important due to the fact that growth of a corporation can only be ensured by them if the share of wallet among existing customers is saturated and in addition increases of prices cannot be conducted.(Helmke u.a. 2017, p. 25) In order to ensure sustainable growth of an organization new customers need to be acquired constantly.(Altenhofen 2023, p. 99–100) Therefore a solution is provided by company E since sales representatives are in general assigned to the roles of hunters and farmers. While farmers focus on existing customers hunters put their center of attention on new customers.(Expert_9 2023, Pos. 28) As a result a mixed focus is applied in general.

When it comes to the second subcategory of sales it’s all about **time famine.** In this category the experts representing the sales departments had a quite common opinion. While expert 6 responds to the question if leads are processed in time with “*I hope so*”(Expert_6 2023, Pos.

70) all the other experts denied that leads are processed always in time.(Expert_2 2023, Pos. 28),(Expert_4 2023, Pos. 76),(Expert_8 2023, Pos. 50),(Expert_10 2023, Pos. 48) On the one hand expert 2 and expert 4 explained that leads are only processed partly in time.(Expert_2 2023, Pos. 28) (Expert_4 2023, Pos. 76) On the other hand expert 8 and expert 10 denied that leads are processed fast enough.(Expert_10 2023, Pos. 48) (Expert_8 2023, Pos. 50) However the corporations A, C, D and F have set an internal goal to provide feedback within 24 hours to requests. Expert_2 2023, Pos. 30),(Expert_6 2023, Pos. 72),(Expert_8 2023, Pos 50),(Expert_10 2023, Pos. 48) According to the theory a reason for the lack of time is based in sales is dealing to much with administrative tasks.(Medina; Altschuler; Kosoglow 2019, p. 4). A solution to reduce the workload of the sales department is the transfer of activities such as clarification, tendering, fulfillment of orders and internal coordination to an internal centralized sales department.(Belz u.a. 2018, p. 141) A further approach to save time as well as to focus more on the actual sales activities is the usage of chatbots with a voice recognition. In this way the manual effort for entering information into the CRM system can be reduced.(Schuster 2022, p. 209)

In terms of the final subcategory **lead routing** it has to be mentioned that only two corporations identified this issue as challenging which are company A and company F. Expert 1 mentioned that the lead process should be improved by automation in order to allocate leads to the relevant employee. However the challenge emerges if less information is available for instance if the lead exclusively subscribes to the newsletter.(Expert_1 2023, Pos. 66) The challenge for expert 10 is based on a similar issue since requests of leads are sometimes not specific. As a result employees of the sales department can't be clearly assigned to the lead which results in the issue that it is unclear who has to process the lead. For company F this situation is challenging on a daily basis.(Expert_10 2023, Pos. 56) According to the theory it has to be well-defined which employee is responsible for which leads in order to avoid delays in processing.(Gasser; Mäder 2022, p. 131) Furthermore it is necessary to define criteria like the degree of maturity or the point of transfer when processing lead routing.(Schuster 2022, p. 105) In order to overcome this challenge expert 4 mentions that weekly meetings by the department heads are introduced and in this way complex leads are prioritized and routed to the respective employees.(Expert_4 2023, Pos. 26) When it comes to corporation D customers are segmented into countries as well as into product groups. Each segment is prepared by respective employees and as a consequence they are responsible if a lead emerges.(Expert_8 2023, Pos. 20) According to the theory a precisely defined lead routing process results in less mistakes as well as in an increase of efficiency.(Gasser; Mäder 2022, p. 131)

# 4 Conclusion

This thesis could identify several challenges for marketing and sales departments when processing lead management. Staring with the identified overall challenge of the gap between marketing and sales it has to be noticed that the only way to ensure sustainable growth for a corporation is when both departments act as an united organization by defining goals, communicating as well as the strategy as team. Furthermore a transparent and automated workflow leads to an effective process which results in harmony among the two departments.(Gasser; Mäder 2022, p. 132) Nevertheless corporations are aware of this situation as demonstrated by expert 7 mentioning that the sales and marketing department should be moved closer to each other and a system which unites the two departments should be implemented. (Expert_7 2023, Pos. 46) An example for a united marketing and sales department was provided by corporation E since both departments are internally termed as “sale-keting”.(Expert_9 2023, Pos. 32) A related challenge emerges when the two departments create silos as this disrupts collaboration as well as processes get ineffective since they are slowed down.(Gasser; Mäder 2022, p. 46) By implementing a software interface silos can be eliminated and the gap between marketing and sales can be covered.(Hannig u.a. 2017, p. 327) This solution has already been implemented by corporation A with the effect that more transparency between marketing and sales could be established.(Expert_1 2023, Pos. 20) A further overall challenge is related to the quality of data which is crucial since the leads can exclusively be evaluated and developed in an appropriate way if reliable information is available.(Janning 2012, p. 40) With regards to the solutions corporation B implemented a master data team in order to process data.(Expert_4 2023, Pos. 16) Furthermore mandatory fields have been implemented. (Expert_3 2023, Pos. 26) Based on the qualitative research challenges among new processes as well as issues associated with software could be identified. Some corporations mentioned a lack of software solution. Nevertheless corporates help themselves as demonstrated by corporation C by implementing a customized software solution in order to support lead management.(Expert_6 2023, Pos. 26) With regards to new processes some companies mentioned the lack of acceptance as well as a lack of commitment within the processing departments. However corporation F implemented a new process regarding lead generation and processing on trade fairs which turned out to work quite well for them.(Expert_10 2023, Pos. 70)

When it comes to the task specific challenges starting with lead generation for some corporations the manual processing when entering the data into the system is challenging while others struggle with identifying the high-quality leads or the fact that the majority of customers is already known. According to the theory corporates operating in B2B often have just a limited pool of target customers with the result that many potential customers are already known. Therefore account-based marketing can be a solution to them.(Stadelmann; Pufahl; Laux u.a. 2020, p. 162-163) A general solution was revealed by company C by including external opinion leaders and providing them with arguments in order to avoid approaching leads to early and to directly.(Expert_5 2023, Pos. 58) In terms of purchased leads some corporations mentioned a poor quality of the offer. In general it is important to review the legal terms and the conditions of how the vendor is generating the leads as well as to start with small amounts in order to review the quality.(Altenhofen 2023, p. 102) With regards to the challenges of lead qualification some corporations struggle with the amount of unqualified leads which are sometimes not accepted or processed by the sales department as well as there is no common definition of a qualified lead. In this context the lack of criteria which should be defined in a collaborative way between marketing and sales is often a subject of conflict for the two departments since both have a different focus. While marketing often tends to transfer as many leads as possible sales on the other hand is not willing to spent time on unattractive leads.(Steuernagel 2021, p. 24) Nevertheless corporates are improving their qualification skills as revealed by corporation F when conducting special training sessions for the employees in order to distinguish between qualified and unqualified leads.(Expert_10 2023, Pos. 30) When it comes to the challenges of lead nurturing some corporations struggle with the long duration of the nurturing process while to others with the lack of an interface between marketing and sales. In terms of the lack of an interface it has to be noted that a close cooperation between marketing and sales is crucial when processing lead nurturing since sales knows the customers questions and pains and marketing knows the keywords used by customers and which content is usually successful.(Gasser; Mäder 2022, p. 101) In this way a positive example is represented by corporation A since marketing and sales exchange their thoughts on a daily basis in order to process lead nurturing activities.(Expert_2 2023, Pos. 43) Furthermore the challenge of keeping the lead warm and to conduct action at the right point of time due to an indistinct customer path was mentioned. In order to identify the customer purchasing process specific customers should be questioned about their path followed by an analysis of the results within a workshop conducted by the marketing and sales department.(Belz u.a. 2016, p. 71) A further approach to identify the customers purchase process is to use analytical CRM in order to analyze purchasing patterns.(Belz; Rutschmann 2014, p. 14) Regarding the challenge of focusing rather on existing customers than on new leads the research has shown that the majority of the participating corporations had a focus on existing customers. Nevertheless it was not seen as a challenge by them. In this context it has to be mentioned that if the focus is too much on quick sales by existing customers this can lead to neglecting the development of new customers.(Belz 2016, p. 9) Therefore new customers need to be acquired constantly in order to ensure the sustainable growth of a corporation.(Altenhofen 2023, p. 99–100) Corporation E offers a solution since sales representatives are in general assigned to the roles of hunters focusing on new leads as well as to the roles farmers taking care of the existing customer base.(Expert_9 2023, Pos. 28) In terms of time famine a general opinion could be identified within the questioned sales departments since almost all experts revealed that leads are just partly processed in time while others mentioned that leads are in general not processed fast enough. A solution to reduce the workload of the sales department is the transfer of activities such as clarification, tendering, fulfillment of orders and internal coordination to an internal centralized sales department.(Belz u.a. 2018, p. 141) A further alternative in order to save time is to use chatbots. In this way the manual effort required to enter information into the CRM system can be reduced.(Schuster 2022, p. 209) Finally to some corporations lead routing is challenging due to the fact that less information about leads is available or vague requests are received. A general solution is provided by corporation D since customers are segmented into countries as well as into product groups and each segment is prepared by respective employees. Consequently these employees are responsible for leads emerging in their segment.(Expert_8 2023, Pos. 20)

# 5 Limitations

Lead management consists out of various areas which are very detailed in their own ways and therefore have their own pitfalls which require specific solutions. This applies in particular to the tasks of lead generation, lead qualification and lead nurturing as well as for supporting software and the challenges related to the GDPR. The challenges for corporations are very multifaceted and depend on the business model, the respective target customer base as well as on internal conditions of the organization. With regards to the sample the business model of the individual corporations differs and as a result the majority of the categories evaluated by the qualitative research have huge variety of results but less commonalities could be identified. In addition corporates have different lead management processes. For instance when it comes to lead qualification since some use a business development department (Expert_5 2023, Pos. 22) while in other corporations the marketing is responsible.(Expert_1 2023, Pos. 6) As a result the sample of the qualitative analysis is far too small in order to draw generalized conclusions or to ensure that all challenges and their respective solutions could be covered.

Moreover the impact of the GDPR on lead management was hardly included in the qualitative analysis. Due to the complex regulatory and the associated pitfalls challenges for marketing and sales departments related to this topic might also occur.

# 6 Implications

In order to identify the challenges and solutions further research should be done by exclusively using targeted samples which have a lot of commonalities regarding their business model. Therefore a separate analysis exclusively on corporations which generate many leads and with a less complex purchasing process as well as a separate research on corporations working in project business with a small number of leads but a longer and more complex purchasing process should be conducted. In this way a distinction could be made between the mentioned types of business and as a result more precise results could be gained. In addition further research should be done on the challenges associated with GDPR when conducting lead management.

Another further implication is to cover the gap of up-to-date literature on GDPR combined with lead management. In general there are many individual works on the topic of lead management which highlight a part of the legal regulatory but hardly any describe the entire procedure in detail. This was particularly evident in the research for a source covering the entire lead management process.

Furthermore some literature published after 2018 when the GDPR was already valid mentions progressive profiling in order to accumulate the lead profile.(Seebacher u.a. 2021, p. 277)(Hannig u.a. 2021, p. 72–74)(Hannig u.a. 2021, p. 110-111) However this literature lacks in mentioning the legal terms when processing personalized data and therefore is misleading. According to Article 5(1)(c) GDPR the data which is collected has to be adequate, relevant and limited to extent which is actually necessary and in relation to the purposes for which the collected personal data is used for. As a result progressive profiling and the associated accumulation of information is limited due to the legal regulatory.

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# Appendix

**<u>Interview Guideline:</u>**

| | | |
|---|---|---|
| **Themengebiet 1**<br>**Einleitung und Allgemeine Herausforderungen und Lösungsansätze im Lead Management** | | |
| Einleitung | Bitte erklären sie kurz den Lead Management Prozess ihres Unternehmens. | ❑ |
| | Was sind aus ihrer Sich die Herausforderungen im Lead Management? | ❑ |
| | Welche Lösungsansätze oder Verbesserungen hat ihr Unternehmen im Bereich des Lead Managements schon vorgenommen? | ❑ |
| | Wie steht der Aufwand (der durch das Leadmanagement entsteht) dem Profit (der durch gewonnene Leads resultiert) gegenüber? | ❑ |
| | Stehen ihrer Abteilung genügend Ressourcen für die Bearbeitung von neuen Leads zur Verfügung? (Zeit, Mitarbeiter, Systeme) | ❑ |
| | Haben alle Abteilungen unternehmensintern Zugriff auf die gleiche Kundendatenbank? | ❑ |
| | Wie schätzen sie die Datenqualität der der Leads ein?<br><br>(Standardisierung vorhanden: Wer? Was? Wann? Potential?) | ❑ |
| | | |
| **Themengebiet 2**<br>**Welche Herausforderungen und Lösungen entstehen bei der Lead Generierung?** | | |
| | Wie werden Leads generiert? (Webseite, Social Media, Email-Kampagnen, Fachmessen, ect.) Probleme? Lösungen? | ❑ |
| | Werden die gewonnen Leads durch unterstützende Systeme erfasst? (CRM, Marketing Automation Plattform, eigene Systeme bzw. betriebsinterne Workflows) Probleme? Lösungen? | ❑ |
| | Werden Leads von externen Partnern verwendet bzw. gekauft? (Kundenlisten, Ansprechpartner, Unternehmen)<br><br>Wenn ja, wie gut ist die Qualität bzw. die interne Akzeptanz? | ❑ |
| | | |
| **Themengebiet 3**<br>**Welche Herausforderungen und Lösungen entstehen bei der Lead Qualifikation?** | | |

| | | |
|---|---|---|
| | Wie werden Leads bewertet?<br>(Kriterien wie Budget, Bedürfnisse und Kaufabsicht) | ❑ |
| | Gibt es eine klare Vorgehensweise bei der Lead Qualifikation?<br>(Lead Scoring – Punktevergabe) | ❑ |
| | Werden erfolgsversprechende Leads priorisiert? | ❑ |
| | Wie eng ist die Zusammenarbeit zwischen dem Marketing und Vertriebsabteilung in dieser Phase?<br>(Abstimmung der Kriterien + Bewertung von Leads) | ❑ |
| | | |
| **Themengebiet 4**<br>**Welche Herausforderungen und Lösungen entstehen beim Lead Nurturing?** | | |
| | Wie werden die Leads gepflegt? (E-Mails, gezielte Inhalte, Webinare, Trainings, Vertriebsaktivitäten)<br><br>Probleme? Lösungen? | ❑ |
| | Stellt ein möglicherweise undurchsichtiger oder sprunghafter Kaufprozess der Kunden ein Problem für sie dar?<br><br>Wenn ja/nein, warum? | ❑ |
| | | |
| **Themengebiet 5**<br>**Welche Herausforderungen und Lösungen entstehen in der Vertriebsabteilung?** | | |
| | Welche Herausforderungen entstehen im Bereich der Schnittstelle zwischen Marketing und Vertrieb? (Übertragung, Kommunikation, Ressourcen, Meinungsverschiedenheiten)<br><br>Wie werden diese Herausforderungen gelöst? | ❑ |
| | Wie schätzen sie die Art der Zusammenarbeit zwischen Marketing und Vertrieb ein?<br><br>(Gemeinsame Vorgehensweise?) | ❑ |
| | Werden die Leads von der Vertriebsabteilung immer zeitgerecht bearbeitet?<br><br>Wenn nein, warum? | ❑ |
| | Wären sie mit der Behauptung einverstanden, dass der Vertrieb den Fokus eher auf Bestandskunden anstelle von neuen Leads legt? | ❑ |

| | | |
|---|---|---|
| | Wenn ja, warum? | |
| | Werden die vom Marketing als qualifiziert eingestuften Leads von der Vertriebsabteilung genügend gewürdigt bzw. akzeptiert?<br><br>Wenn nein, warum? | ❑ |
| Abschluss | Was würden sie persönlich, wenn sie alleine entscheiden könnten in ihrem Unternehmen am Lead Management Prozess verbessern? | ❑ |
| | | |
| **Themengebiet 6**<br>**Demographische Daten** | | |
| | Abteilung? (Marketing oder Vertrieb) | |
| | Managementebene? | |
| | Berufserfahrung in Jahren? | |

## Statement of Affirmation