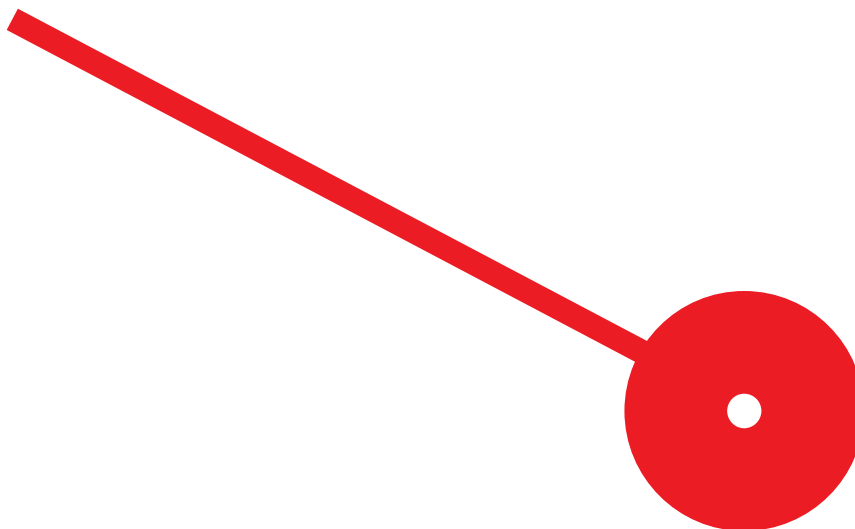


How e-commerce is shaping the sales Forces of Business-to-Business companies: A Multiple Case Study

Leticia Manuela Ferreira Azevedo

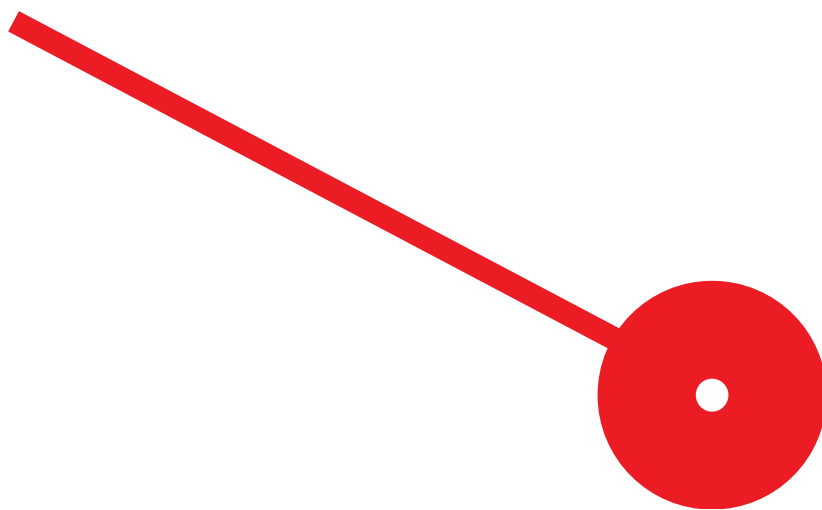
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Abstract

For a long time, B2B companies have been moving towards digital transformation, adopting new technologies to meet the needs of more demanding and empowered customers. This challenging movement is transforming the sales force and impacting the salespeople on many levels. Thus, the purpose of this study is to understand how the B2B sales force is being affected by digitalization, especially e-commerce. Using the multiple case study methodology, we conducted in-depth interviews with sales managers from four B2B companies, two traditional and two startups, and analyzed several dimensions initially found in the literature review. After analyzing the data, results demonstrated that when comparing the sales force of traditional and startup companies, there are significant organizational differences. Overall, the three companies with online sales have been dealing with the challenges of a multi-channel sales force, although the evolution has been distinct for all of them. These differences have proved that factors such as management commitment and investment, a clear e-commerce strategy, transparent communication, and proper training, are enablers for successfully selling online, as it also lessens job insecurity, one of the main consequences of digitalization within the sales force. In terms of technology, it was not surprising to find that the startups are using more recent digital tools than the traditional companies, investing in sales automation, and data analysis, which is something that the traditional companies also aim for but are still not prepared for. Finally, findings also showed the distinct impact that the Covid-19 pandemic had on the case studies, with traditional companies' businesses slowing down, and startups booming, thanks the e-commerce. Overall, we were able to understand that B2B companies are dealing with changes caused by Digital Transformation within their sales force, which can have a different impact on similar companies, and that hybrid sales forces bring benefits and challenges that affect the structure, but mainly the salespeople. Findings add new insight to the existing academic research, and B2B sales managers should find guidance on our recommendations on to deal with the challenges of a multi-channel sales force.

Keywords: Business-to-business e-commerce; business-to-business sales force; digital transformation; multichannel sales.

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ACRONYMS

B2B: Business-to-business

B2C: Business-to-Consumer

P2P: Peer-to-Peers

CRM: Customer Relationship Management

ERP: Enterprise Resource Planning

DIT: Digital Information Technologies

CHAPTER I – INTRODUCTION

Over the last decades, since Business-to-business companies first established a selling organization, very focused on products, to enhance their business, several events have been changing the sales force. The one causing the major transformation in the way that B2B companies sell was, undoubtedly, the Internet. “Since its commercialization in the mid-1990’s, the Internet has been one of the most revolutionary forces in history to hit business in general and B2B” (Mantrala & Albers, 2010).

The new digital technologies have already “disrupted traditional sales processes and profoundly changed the way salespeople operate” (Alavi & Habel, 2021). B2B customers are more demanding than ever, and companies are forced to make an effort to digitalize their selling activity, investing in new tools that can provide higher efficiency.

This transformation has been creating hybrid sales forces that try to balance traditional and online sales channels, navigating through the benefits and the challenges of digitalization. The changes in buying and selling activity between businesses, especially the adoption of e-commerce, affect the sales forces on an organizational and processual level, but also on a Human level, with salespeople facing a transformation of their roles, skills, tasks, and relationships. Marcos Cuevas (2018), analyzed B2B selling activity, and his study reported a “fundamental shift in what a salesperson does”, and an “unprecedented degree of transformation of professional selling”.

The motivation to conduct this research arose from a very strong professional and personal enthusiasm regarding B2B e-commerce and its impact on the sales forces. Having the experience of working in this area for some time, it became important for me to study this topic, learn more about it, and perform case study research, to better understand the phenomenon in real companies.

The main purpose of this research is to study and learn about the impact of e-commerce and sales digitalization on the sales forces and salespeople of B2B companies, on academic and professional levels. The goal is to theoretically study the subject and use the research findings to bring new academic insights, but also to provide managerial recommendations and advice for B2B companies that are currently going through the process of digitalizing sales.

The research question is the following:

How are the sales forces and salespeople of B2B companies being affected by Digital Transformation, especially e-commerce?

To help answer this question and guide the research, nine specific objectives were defined:

SO1: Understand how the digitalization of B2B selling activity is changing traditional sales forces, in terms of structure and organization

SO2: Compare these changes to the ones that occurred in startup companies, and learn about their sales force evolution

SO3: Learn about how tech startups' sales forces have evolved

SO4: Find which technologies, digital tools, and online channels the sales forces are currently using, and how they are affecting the selling activity

SO5: Understand the status of e-commerce in the case studies, and its impact on the sales forces' activities

SO6: Find what have been the main changes for the salespeople, when working on multi-channel and digitalized sales forces

SO7: Discover the main challenges that this changing environment is producing, and how the sales forces are dealing with them

SO8: Understand if the Covid-19 pandemic influenced the digitalization of selling activity and if yes, how

SO9: Find how sales Managers foresee the future of the sales forces within the Digital Transformation

To achieve these objectives a qualitative approach was defined, using the multiple case study methodology. After selecting four units for analysis, in-depth interviews were conducted, whose questions were based on various dimensions found in the literature review. The data from the

interviews was then analyzed according to each of those dimensions, allowing to answer the initial research questions and the specific objectives. A content thematic analysis was used.

The structure of the rest of this dissertation is organized as follows:

Chapter II – State of the Art: This chapter describes the findings of the literature review performed for this study, covering, as main topics, the evolution of the sales forces, the Digital Transformation within the sales forces, the e-commerce implementation, the role of technology in the sales force Digital Transformation and the impact of Digital Transformation in the salespeople, finishing with some recommendations for a successful sales Digital Transformation.

Chapter III – Methodology: This chapter starts by justifying the use of a Multiple Case methodology, then describes the research design of the study, and explains how the case studies were selected, as well as the protocol for the data collection, its processes, and tools.

Chapter IV – Results: This chapter describes the findings of the data analysis, based on the main themes covered in the interviews, namely the case studies and sales force characterization, the digitalization within the sales force, digital sales channels, and the Covid impact, including some new dimensions found, and finishing with the Word Cloud Analysis.

Chapter V – Discussion: This chapter is dedicated to the discussion of the data analysis findings, according to each of the main research objectives initially defined for the study.

Chapter VI – Conclusion: In the final chapter the main findings of the research are summarized, and then answer the initial problem, as well as the specific objective initially defined. Here are also presented the limitations of the study, some managerial implications, and directions for future research.

CHAPTER II – STATE OF THE ART

This chapter presents the literature review performed for the present study, providing the most relevant contributions of several authors and their books, articles, journals, conferences, and reports. This step of the research was crucial to support the theoretical background for further empirical research.

2.1 B2B sales force are changing

In today's world, as many Business-to-Business (B2B) companies embrace digitalization, most are still struggling with the changes brought by the Internet and new technologies, as it affects every department and every person in the organization, including the sales force and, ultimately, the salespeople.

It is rare to find a definition for the sales force in academic papers, so its meaning was consulted on the online Cambridge Dictionary, which defines it as “a group of employees whose job is to sell their company's products or services, especially by visiting or phoning customers and possible customers”. This is a simplistic description of the sales force, which some authors have referred to as “an internal stakeholder group contributing to market intelligence”, and an “internal customer whose adoption can critically impact new product success” (Kuester et al., 2017). Ahearne et al. (2010) stated that, in B2B markets, “the sales force is a major product- and brand-building tool, which—if trained on and leveraged properly—can create a significant competitive advantage”.

14 years ago, Mantrala & Albers (2010) stated that Internet-induced changes had deep implications for B2B companies' sales force strategy, sizing, and structure and that the need for a sales force would remain, even though the Internet was enabling buyers to be more informed and empowered. “The overall impact of these changes is not that the sales force has become unnecessary, or are necessarily smaller, but that seller organization design has to become more guided” to “how Internet-empowered customers want to do business” (Mantrala & Albers, 2010).

In 2014, Kearney's Future of B2B sales study surveyed more than 1.600 top sales managers and professionals from diverse worldwide industries and showed that many of the companies were already struggling to deal with challenges such as more complex products and services to meet

clients demands; more aggressive competition, with alternative offerings, unconventional business models, and lower prices; greater market transparency and growing customer procurement capabilities; shifting control of the buying process toward customers (Gervet et al., 2015).

The study also revealed that dealing with these challenges was not only a reality for most of the companies surveyed but also that these problems would intensify in the future.

Since the technology was and still is, the primary driver of these changes, the Covid-19 pandemic ended up accelerating some of the trends towards digitalization, especially e-commerce, not only for Business-to-Consumer (B2C) companies but also for B2B firms, who had to adjust and adapt (Weger, Wolfgang; Tielker & Nienhaus, 2021; Rangarajan et al., 2021).

According to Alavi & Habel (2021), Digital Transformation is changing not only business, but society in general, and for many companies, the sales force is at the core of this transformation. These authors, who studied the Human side of Digital Transformation in sales, also argued that, even if the new sales technologies and e-commerce hold the promise of significant productivity gains, at the same time, they may have side effects for sales employees and companies.

2.1.1 Evolution of the sales force

The rapid growth of the sales force happened after World War II when companies' focus was on products. At the time, establishing a selling organization was a popular option to enhance demand (Sheth & Sharma, 2008).

Sheth & Sharma (2008) observed the changes in the sales force and investigated the reasons for it, suggesting, in their 2008 study, that the traditional product-focus sales organizations were declining, while sales automation, selling focused on customers and Global Account Management were increasing, due to the shift from products to service and customers, sales processes changes and technology advances. Authors also predicted that these modifications would accelerate, and that the product-to-service shift evolution would also change selection, training, compensation, and sales processes.

2.1.2 The sales force evolution over time

Thaichon et al. (2018) analyzed the evolution of the sales structures, which have been enhanced mainly due to technological advances, raising a shift in the focus of the buyer-seller relationship, from providing value, to co-create it, and identified four main stages over time.

In the 1970's, Outside salespeople were the main ones responsible for the relationship with customers, mainly visiting buyers and working with different departments to address clients' needs. Consequently, most sales forces were organized geographically, and companies depended on how salespeople brought and handled new customers. Thus, Outside salespeople were the main source of information, and contact point, and long-term relationships, based on face-to-face interactions were crucial.

In the 1980's, some events, such as sales calls becoming more expensive, the introduction of computers, and economic instability, made Field / Outside salespeople required to know more about the products and provide advice on solutions, within a "product-centric selling" environment. To assist them, Inside salespeople's responsibilities expanded to processing orders, performing routine communications with buyers, handling minor issues, and follow-up with customers, "often with the help of new technologies". Customers started obtaining value from Inside salespeople, although still relying on the knowledge of the Outside salespeople, so, at this stage, cooperation between both was required, with inside sales offering new sales capabilities.

In the 1990's, with the Internet and technology growth, companies changed their definition of value, which was now more focused on designing solutions with bigger customer involvement. As a result, the selling process shifted from being merely transactional to building long-term relationships with customers. At the same time, customer segmentation became more important, leading to changes in the salespeople's roles, in the sales process and selling practices, "from product- to customer-centric".

In the 2000's, the expansion of the Internet allowed the digitalization of selling activities and the growth of e-commerce, which caused a shift in the way customers and salespeople interacted, by combining the traditional roles of Outside and Inside sales forces with the modern online channels, creating new Hybrid sales structures, where customers could choose their preferred channel and move across them. Inside sales gained a new value in these Hybrid sales

structures, leading to an expansion of the role, in size and importance, as firms tried to take advantage of new technologies, and reduce the dependency on physical interaction. The higher focus on relationship strategy allowed both sellers and buyers to cocreate value together, with customers being “actively involved in all stages of selling activities” (Thaichon et al., 2018).

2.1.3 From Product to Service focus

When sales organizations were created, they were organized geographically, and salespeople were product experts, assigned to customers from a region. Sales forces were “confined to locational, product and temporal limits” (Sheth & Sharma, 2008). The shift from exchanging tangible goods towards intangibles demanded new specialized skills, knowledge, and processes from the salespeople, that needed to provide customized offers to better fit customers' needs.

In the past, most communication was done one way, from the company to the customer. However, in a service-centered view, there is dialogue, asking and answering questions, during the communication process. According to Seth & Sharma (2008), “this is where the critical role of the sales force emerges”, with salespeople becoming education agents instead of persuasive: For this reason, their knowledge of customers and solutions will constitute a competitive advantage. These customer-oriented and relational strategies would soon be used by the companies to co-create value with the customer (Sheth & Sharma, 2008).

Marcos Cuevas (2018) also claimed that customers are demanding more value, forcing companies to change dramatically change their processes, to co-create value with the customer, and provide solutions that better suit the buyers’ needs. The author points out two factors that explain these new supplier-customer relationships: the availability of information online, which equipped buyers with more product knowledge; and stronger customers, in a powerful position that enables them to be more demanding (Marcos Cuevas, 2018).

Based on the described changes in the traditional sales environment, Sheth & Sharma (2008) explained how they expected a bipolar shift of the traditional product-focused sales force: *First*, an increase in sales automation, with some traditional sales force functions being automated; and *second*, an increase in customer-focused selling and in Global Account Management teams.

Both these events corresponded to a service-dominant logic and were expected to lead to a decrease product focus in the sales force (Sheth & Sharma, 2008).

2.2 Digital Transformation within the sales force

Since the early days of the Internet, B2B companies have been a long way, implementing solutions to facilitate buyer and seller interactions, and to make the selling process more efficient. The fast-paced evolution of technology is shaping the B2B landscape, directly affecting both buyers and sellers, and consequently, their sales forces and salespeople.

Most authors are unanimous about the complexity of Digital Transformation in sales (Alavi & Habel, 2021; Guenzi & Habel, 2020), especially in the B2B contexts, defining it as “a complex phenomenon that encompasses various technologies potentially impacting different sales processes”. Just recently Zoltners et al. (2021) admitted that has not been an easy road, because, despite the advantages brought by the Internet and digital technologies, it has become more challenging for companies to build stable partnerships (Jenke, 2018).

The growth of e-commerce and other related technologies in B2B is increasingly rapid, with customers self-educating themselves by consulting the seller's websites (Oh, 2017), another reason why the digital transformation in complex B2B contexts must “be conducted with great care and balance” (Rodríguez et al., 2020). The digitalization of the selling activity and e-commerce adoption can be extremely beneficial, but it can also reveal itself as deeply challenging. Being right in the center of this pendulum, the sales force and salespeople have been, and still are, profoundly impacted by the shifts caused by this multi-channel environment.

One of the new challenges for salespeople, is the buyers' independence from a salesperson's assistance at each step of the purchasing process (Bongers et al., 2021). Lawrence et al. (2019) referred to an Accenture study, from 2014, which states that most B2B buyers prefer to do their research online, as long as they can, at any stage of the process, contact a salesperson in case of need.

For Digital Transformation to become a source of competitiveness for sales forces, it would require a revolution from a tactical to a strategic selling organization. With the changes that

happened, at the same time, on the buyers' side and demand for superior relationships, sellers have been required to a "strategic response". (Piercy & Lane, 2005).

The findings of Marcus Cuevas's (2018) study showed that "selling is a profession in flux", which is visible in several ways: the salespeople were required to become experts on the customers' businesses, and not only in the company products and services; the nature between sellers and buyers became more complex, being harder for the sales force to fulfill their promises; the configuration of the sales organizations have changed, and consequently, so has the role of salespeople.

With the Covid-19 pandemic forcing society to close and very strict rules for coexistence, physical visits and in-person meetings were replaced by video and conference calls, and both sellers and buyers had to adapt quickly to a completely virtual environment. "The resulting increase in digital urgency and proficiency among customers, salespeople, and entire selling organizations made conditions ripe for digital sales initiatives to succeed" (Zoltners et al., 2021).

A survey conducted by McKinsey & Company (2020), revealed that the pandemic accelerated digital transformation, "including omnichannel, inside sales, tech-enabled sales, and e-commerce", suggesting also that these changes are likely to be permanent (Rangarajan et al., 2021).

2.2.1 Digitalization of the Selling activity

With several studies concluding that the Internet is the most widely used channel to communicate with customers, Rodríguez et al. (2020) claimed that digitalization, such as Internet technology, is changing the way business is being done, becoming a source of competitive advantage (Rodríguez et al., 2020; Ivanov, 2012)

Zoltners et al. (2021) defined digitalization as "the use of technology, data, and analytics for designing and supporting business processes and decisions". Based on Singh et al. (2019), and Syam & Sharma (2018) work, these authors claimed that digitalization has "the potential to deliver mutual value for customers and selling organizations", and is turning sales into a science, which enables sales forces to improve their strategy, decisions and processes (Zoltners et al., 2021).

Johnson & Bharadwaj studied the consequences of the implementation of web-based selling channels within the sales force. These authors defined digitalization of the selling activity as “a selling organization’s capacity to have customers perform buying activities in a self-directed manner using a website without the involvement of a salesperson” (Johnson & Bharadwaj, 2005).

According to their investigation, two of the main areas being digitalized are: The *provision of product and/or service information*: Throughout the Internet, customers can easily access information online, without even needing to reach a salesperson; the *purchase transaction*: Online shops allow customers to see and purchase products, and manage their account details and order history, by themselves, without the help of a salesperson.

In the face of these findings, it is fair to say that the use of the Internet has been allowing sales departments to have more interactive communication with customers, which results in product strategies that are more market and solution oriented. Thus, it can be concluded that “the Internet highly affects sales management activities”, as well as market segmentations and even customer classification (Avlonitis & Karayanni, 2000).

Johnson & Bharadwaj (2005) argued that digitalization involves two subprocesses that determine how much likely it is for a salesperson to be disintermediated from the channel:

1. Automation (discussed further ahead);
2. The increasing complexity of the work environment: “improves salespeople’s career prospects”, because the potential to generate detailed data about the customers allows them to “develop a new and perhaps more advanced set of skills that preserve their ability to create value within the firm”.

The balance between these two subprocesses explains why employees are unsure about digitalization, and why it is important to be successfully managed.

2.2.2 Changes in Buying and Selling

Mantrala & Albers (2010) made some propositions about how the Internet-based changes in the information available for B2B buyers and sellers would impact the nature of both buying and

selling processes, as well as the nature of the seller-buyer interactions, and, ultimately, affect the sales force size and structure.

Concerning the *buying process*, the Internet enables more dispersed stakeholders to be connected, better informed, and participative, hence, taking some of the power that was concentrated on the seller's side. In turn, the seller's task becomes more difficult, because instead of one decision-maker, it has to convince multiple ones, well-informed and connected. At the same time, the information available on the Internet also allows buyers to be more educated, without the need to contact a salesperson, and even postpone the first direct interaction. This makes it easier for customers to compare and evaluate suppliers on their own.

For the *selling process*, the authors expected that the technological advances would increase the digitalization of the selling activity, a service-dominant orientation, and the frequency of salespeople's contact with existing customers. Together, these effects would represent a transformation in the selling process, in which the buyer would have more control than the seller.

Finally, Mantrala & Albers (2010) also claimed that, in the seller-buyer interpersonal interaction, thanks to the Internet, sellers would lose the information advantage to buyers, reaching a stage where both are symmetrically informed. In light of these predictions, authors expected a shift from consultative to collaborative interaction, that would allow sellers to cocreate solutions with buyers, to meet their needs.

In general, digital capabilities “allow customers to buy more efficiently and effectively, whether they use online channels alone or a combination of digital, virtual, and in-person channels” (Zoltners et al., 2021). This combination of multiple sales channels created what Thauchon et al. (2018) called a Hybrid sales structure, similar to what Zoltners et al. (2021) described as a hybrid channel environment, which occurs when customers can purchase products available across multiple channels, online and offline.

2.2.3 The role of technology in the sales force Digital Transformation

Digital Transformation would not be possible without the development of new technologies, and most of the advances in sales digitalization are due to technological acceleration. According to Mattilda et al. (2021), technologies and applications can either be salesperson-oriented, when

meant to be used exclusively by the salespeople, or shared, when technologies are interactive, such as social media.

Alavi & Habel (2021) surveyed 128 sales managers from different industries and got some important insights on the adoption of sales technologies, that allowed them to rate them. The top three sales technologies mentioned were CRM systems, considered the most mature technology; tablets; and social media applications. On the opposite side, the cutting-edge technology, with less adoption were virtual or augmented reality applications; big data analytics; predictive analytics; Internet of Things (IoT); and service bots. In general, the sales managers interviewed admitted that the implementation of these technologies in their sales organizations, and their adoption by the salespeople represents a challenge.

Despite the complexity that its implementation might represent, technology developments, such as CRM, helps firms “better understand the profitability of individual customers” (Sheth & Sharma, 2008), especially due to the customer knowledge it can provide to selling firms. Besides, CRM also provides “alternative, more economical ways” of performing selling tasks (Piercy & Lane, 2005).

Lilien et al. (2015) pointed out information gathering as one of the main impacts of technological trends on B2B buying and selling. These authors claim that with the advances in Digital Information Technologies (DIT), buying and selling processes became more buyer-driven, as customers can engage with salespeople “at any stage of the buying process”. Because there is much more product-related information online, “technology-enabled buyers expect more from sales representatives”, so these must seek and provide solutions for the customer’s problems. As a consequence, some B2B selling companies started using digital tools that help them to identify leads, and analytics tools to get more data about the customer’s behavior on their websites.

During the last decade, sellers also started exploring other DIT, such as webinars and online demonstrations, to “encourage customer learning”, which helps increase customer satisfaction, “with lower investments. An increase in the ratio of inside-to-outside salespeople is indicated by the authors as a “related implication” (Lilien et al., 2015).

Rodríguez et al. (2020) were one of the first to point out that, lately, social media became a communication channel for the sales force as well, especially LinkedIn or Twitter that to an increasing development of CRM strategy, “which has changed the way a salesforce works”.

2.2.3.1 Automation in the Selling activity

The complexity of B2B sales processes can lead to increasing costs, due to the combination of physical goods with services, which makes salespeople’s effort higher, but also because it has multiple people involved, making processes longer. For this reason, managers want to increase the effectiveness of the sales force and reduce its cost. One way of doing it is through digitalization and sales force automation (Rodríguez et al., 2020), but also with e-commerce, since it enables companies with more efficiency and more reliable business data and processes, through transaction automation (Shim et al., 2000).

In the early stage of the Digital Transformation of the sales forces, few firms had “automatic selling”, for two main reasons: 1) sales costs were low; 2) available technology didn't allow sales automation savings (Sheth & Sharma, 2008). And automation in the sales force is always a sensitive topic, when it comes to salespeople, that not always positively embrace these developments.

According to Johnson & Bharadwaj (2005), one of the processes involved in the digitalization of selling activities that would determine how likely it would be for salespeople to be pushed away from the sales force, is the decomposition of activities into routines that can be automated. The authors state that the automation of routine tasks has “immediate benefits, such as transaction cost savings, and reduced tediousness of salesperson’s job tasks”. For this reason, their study states, salespeople’s routines “are usually the first targets for digitalization”, by identifying repetitive tasks and “developing technological capabilities to perform those tasks” (Johnson & Bharadwaj, 2005).

On their conceptual model - Digitalization of Selling Activity and sales force Performance Change – these authors also argued that some of the sales automation benefits include a wider product range to work with, more time to do cross-selling and target new customers, and the capacity to dedicate more time to profitable customers. Thus, the automation of the salesperson

routines increases their time “to engage in customer-centric selling” activities. Online shops, for example, allow customers to do repeated purchases, saving more time for the salesperson, which can “redirect their efforts” to new selling opportunities. Websites also allow the salesperson to spend less time providing descriptive and contextual information to customers. Therefore, these authors were able to prove right their hypothesis: The greater the digitalization of selling activities, the greater the level of salesperson effectiveness.

Sheth & Sharma (2008) also enumerated some of the benefits of automation for the sales force:

1. Allows to operate 24/7, for example with online shops;
2. CRM allowed to determine the profitability of customers when firms were trying to reduce costs through automation;
3. Allows companies to provide information about their complete range of products and solutions, and customers to access the specific information they need;
4. Allows customers to deliberate on their decisions without the support of the sales force;
5. Reduces human errors, as orders are automatically placed;
6. Technology allows customers’ and firms’ computers to communicate automatically, reducing the need for salespeople to perform these tasks and making the ordering process more efficient.

Additionally, the authors described other consequences of sales automation:

- a) *Automation of information access*: The sales areas more affected by technology are product and service specifications, and consequently, the information provided to customers. Sheth & Sharma (2008) considered this topic critical in the shift from product to service, as most B2B companies built websites that can provide complex service and product information to customers, even maybe better than a salesperson can do it. For these reasons, the authors claimed that “the role of the salesperson as an information provider is declining rapidly”.
- b) *Automation of sales processes*: Tools such as CRM allowed companies, not only to automate the sales process but also to better adjust their service offering to the customer needs, leading to “higher levels of satisfaction”.

Despite the changes caused by sales automation, authors concluded that “not all sales processes and personal selling interaction can be automated”, which “will require better skills set from salespeople, and stronger investments in the sales force” (Sheth & Sharma, 2008).

2.3 The emergence of e-commerce

It is commonly accepted that the Internet and the emergence of new digital technologies have been dramatically changing the way companies are doing business, even B2B (Kaefer & Bendoly, 2004; Chong et al., 2011). More and more traditional B2B companies have been strengthening their online presence and investing in digital technology to get more business opportunities and keep ahead of their competitors (Guenzi & Habel, 2020). These companies started to adopt practices that were, until somehow recently, typically used by B2C companies, being forced to adapt and respond to the new demands of both suppliers and customers.

In Gartner’s Magic Quadrant for Digital Commerce (Daigler et al., 2021) one of the strategic planning assumptions is that by 2024, 15% of B2B organizations will use digital commerce platforms to support both customers and salespeople in all sales activities. The report also says that the growth in B2B digital commerce continues to be higher than in B2C, as companies try to provide solutions not only for simple transactions but also for complex B2B sales (Gartner, 2021).

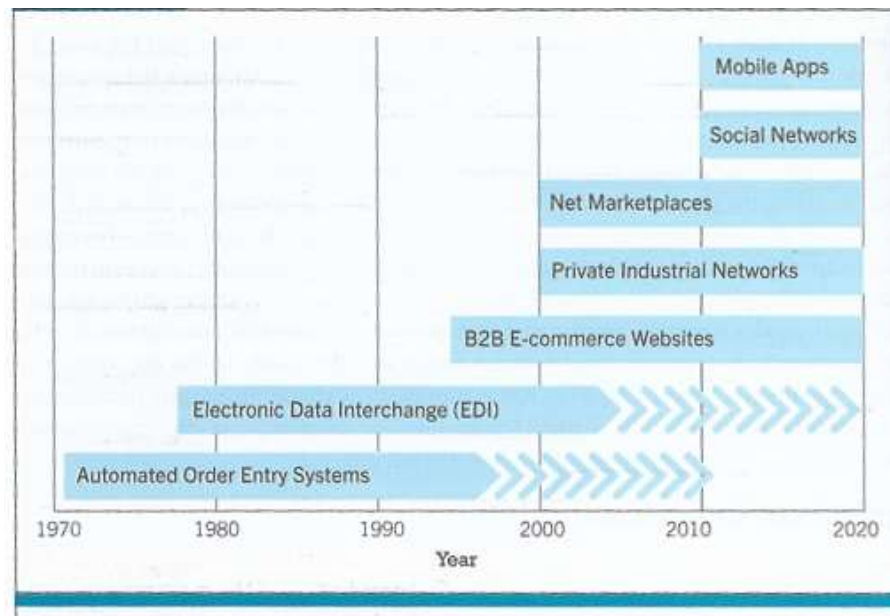
The huge potential of e-commerce growth is forcing B2B companies to adapt, so it’s already visible some firms becoming more “flexible, agile, scalable, quicker, mobile and global”, and more “digitally aware” (Zoltners et al., 2021), replacing the traditional working hours with a 24/7 coverage, and solution-focused offers, requiring more support from the sales force and constant contact with customers (Sheth & Sharma, 2008).

Nemat (2011) explained e-commerce, very simply, as “the use of the Internet and the web to transact business”. Laudon & Traver (2021) defined e-commerce as “digitally enabled commercial transactions between and among organizations and individuals”. In other words, it concerns all the transactions that occur over the Internet, implying the exchange of value across organizational or individual boundaries, in return for products and/or services. If there isn’t a value exchange, then it’s not e-commerce (Laudon & Traver, 2021).

B2B e-commerce

Evolving over 45 years through several technology-driven stages (see Figure 1), B2B e-commerce is a type of digital commerce, in which companies sell to other companies, and not directly to the end customer. This form of e-commerce includes “all types of inter-firm trade to exchange value across organizational boundaries, involving both the purchase of inputs and the distribution of products and services” (Laudon & Traver, 2021).

Figure 1: The evolution of the use of technology platforms in B2B e-commerce (Laudon & Traver, 2021, pp 818)



There are several differences between B2B and B2C e-commerce, starting with buying behavior. According to Lilien et al. (2015), in B2B, purchasing is driven by derived demand, meaning that business customers buy to “meet the needs of their buyers”; more people are involved in the purchase decision process; the purchasing process takes more time because it usually involves high money and more negotiation; buyers are usually looking for a solution for their needs, and not only a product, reason why offerings are more complex, and often include training and/or technical support.

Rodríguez et al. (2020), also explained that “B2B sales processes require stronger sales efforts by the seller in reaching out, closing deals and maintaining business relationships with customers” because it contains “more detailed stages in the sales process”, which is why, usually, “more people are involved” on the customer side when comparing to B2C sales.

Moreover, B2B relationships are often long-term, since they demand more effort from sales to create and deliver value, in order to get extended loyalty, which leads to higher sales by retaining customers through follow-up orders and rebuys.

2.4 Impact of Digital Transformation on the salespeople

Technology is “facilitating new ways of working, opening new opportunities and challenges for sales professionals” (Marcos Cuevas, 2018). The author stated that the analysis of the B2B selling activities reveals a fundamental shift in the tasks of the salespeople, adding that selling behaviors that were successful in the past, are not necessarily the correct ones for modern sales teams (Marcos Cuevas, 2018).

Most B2B companies have already websites that can impact the sales force, as more consumers start the buying process online before physically talking to a salesperson. The growth and evolution of these digital channels ended up changing the relationship between the buyer and the salesperson, who, many times, is contacted for reassurance about a decision that has been already taken. At this point, it is very difficult for the salesperson to change the customer’s mind (Lapoule & Colla, 2016).

In the same line of thought, to Oh (2017), the greatest changes in the selling environment are related to technological developments. The author reiterates Lapoule and Colla’s statement, by reminding that, “historically, the interaction between a salesperson and customer was based on information asymmetry, in that buyers depended only on salespeople’s product and service knowledge and expertise before, during, and after purchase”. Moreover, for decades, salespeople have been a crucial communication channel between sellers and customers (Lawrence et al., 2019).

However, “the role of the salesperson as an information provider is declining because the Internet provides the same, if not more, information”, and it is now buyers that lead the communication and provide insights. As B2B customers gain more product and service knowledge through the Internet, “salespeople face an intense competition”, being confronted with the need to change and modernize their role, in order to fight the potential threat of obsolescence (Oh, 2017).

Studies also show that salespeople's feelings toward the digitalization of selling activity are ambivalent, as it might be seen as competition, or as an opportunity (Johnson & Bharadwaj, 2005). Lapoule & Colla (2016) agrees equally that digital transformation became a source of anxiety for the salesperson, as multi-channel selling is seen by some salespeople as unfair competition.

On the other hand, Johnson & Bharadwaj (2005) argue that digitalization didn't make the salesperson less important, rather its role "assumes a more strategic focus" (Johnson & Bharadwaj, 2005). With routine tasks being done through digital channels, salespeople are free to focus on additional, more demanding functions, to which they need to adapt (Lapoule & Colla, 2016).

2.4.1 Main changes in salespeople roles

Selling activities can have different complexity levels, which means that salespeople need to have different sets of skills. Understanding the necessary skills that they need to be effective in their role is important to determine if they will adapt to the changes. For instance, besides facilitating transactions, salespeople are also expected to create value for their firms and clients, being product experts when providing information. (Oh, 2017). Based on this, the author proposed that the salespeople's role demand fundamental *core skills*, related to selling, and *complementary skills*, which can include communication, negotiation, and conflict resolution. Complementary skills have the same importance as core skills, which alone may not be enough to meet customers' needs and deal with changes in the selling environment. Thus, "salespeople who equip with complementary skills can be more flexible and adaptable" to changes, the author states.

The data from Marcos Cuevas's (2018) study indicated that the role of the future sales professional "will require constant improvement in specific aspects of business and organizational knowledge, as well as in customer management and techniques". Besides, the salesperson will need to "develop personal qualities to go beyond functional expertise" (Marcos Cuevas, 2018).

2.4.1.1 The shift to Consultative selling

As discussed by Sheth & Sharma (2008), the focus shifted from product to solution and service led to the increase of more customer-focused selling, or consultative, which has changed the role of the salesperson. From a “spokesperson” for the product, they became a consultant for the customer, which demands a deeper understanding of the customer’s needs.

In this context of new customer-focused sales organizations, salespeople would then need “to become experts in fulfillment also”, instead of leaving it to other company areas (Sheth & Sharma, 2008), and implement “fundamental changes in skills and their associated behaviors” (Marcos Cuevas, 2018). According to the authors, this shift would also influence the way salespeople were selected. If, before, hirings were based on the person’s ability to bring new customers and close deals, the shift to consultative selling required people with the skills to be more problems solvers and act as account managers. Besides, in strategic or consultative selling, “the wider scope in the activities of the sales organization, results in a redefined role for the sales professional” (Marcos Cuevas, 2018).

2.4.1.2 Inside versus Outside salespeople

There are two main salespeople roles mentioned when the topics is related to the transformation of the sales organizations: Inside sales (also known as Internal sales) and Outside sales (also known as Field sales). “Traditionally, Inside sales representatives typically do not leave the office and are charged with order taking over the telephone and handling customer complaints”. However, frequently, they are “also responsible for sales lead generation, acquiring new clients by ‘cold calling’ and arranging contacts or meetings for Outside sales representatives”. These “spend much of their time traveling to and visiting current clients and prospective buyers”, usually having “face-to-face with contact the customer”. (Mantrala & Albers, 2010)

Much has been written about the Inside salespeople’s role evolution, but the fact is that they are increasing in number, and several studies suggest that, especially due to the development of communication technologies and the growing costs of Outside sales, the job will become more important.

Mantrala & Albers (2010) proposed implications of Internet-induced effects for Inside and Outside sales force size and structure, predicting more Inside selling capacity, and changes in the Outside-Inside ratio. Some of their propositions claimed that the sales forces size would increase, as B2B buying processes became more Internet-dependent, and as B2B selling processes became more buyer-driven.

Considering the higher information symmetry between suppliers and buyers, these authors also expected the Outside sales ratio to increase due to complicated purchase settings and more collaborative relationships; and that the Inside sales ratio would increase because of the interactions becoming more transactions. Even though, the authors stated that Inside salespeople were more likely to increase their number than Outside, and that modern B2B sales forces would probably organize as teams of Outside and Inside specialists, managed by Account Executives. (Mantrala & Albers, 2010)

2.4.1.3 The rise of Global Account Managers

From an evolutionary perspective, the sales force started with national accounts, then transformed into key accounts, and finally into Global Accounts management. As firms started to compete in a worldwide market, their sales organizations needed to go global as well, and becoming “globally organized with a central key contact person: the Global Account Manager”. This emerging role would manage “the fulfillment of customer needs”, by organizing the company resources. (Sheth & Sharma, 2008)

Global Account Managers will then be a “single point of contact”, and need to coordinate companywide efforts to serve global customers at multiple levels, in multiple countries and contexts, and need authority at multiple vertical and horizontal levels (Sheth & Sharma, 2008).

2.4.2 Main challenges faced by salespeople

Being at the center of the Digital Transformation of selling activities, salespeople are deeply affected by the new strategies, tools, applications, and technologies adopted, not only in their daily routinized tasks but also in the way they interact with the customers, get leads, close deals, provide information and support. Basically, all their activities and their role are affected by

digitalization and e-commerce, and, therefore, they need to prepare and face tremendous challenges.

For example, the implementation of digital tools that allow automating some tasks that were, traditionally, performed by salespeople, has always been a ghost within the sales forces. Now, with the rapid spread of new technologies, and with many B2B companies implementing multi-channel structures, sales automation arises again in the discussion about whether it will have the capability to replace salespeople.

In 2005, Piercy & Lane evoked some authors who have considered sales functions “under siege” due to the development of the Internet and technologies. However, the authors claimed that, as customers got more sophisticated and demanding, and buyer-seller relationships became more important, sales and account management would remain a “source of competitive differentiation”.

2.4.2.1 Exposure to ambidexterity

The data from the interviews that Bongers et al. (2021) did for a study about how the introduction of digital sales affects salespeople in B2B contexts, indicate that salespeople need to perform “tightrope acts” when it comes to pushing buyers into digital sales channels.

The majority of the interviewed suppliers agreed on “not forcing buyer firms into digital channels”, allowing them to choose the most suitable channel for their purposes, however, simultaneously, salespeople must also educate buyers about digital channels. Thus, both Inside and Outside salespeople are also responsible for informing and educating customers on how to use new digital applications and highlighting the benefits of their adoption. As a result, salespeople from seller companies face a new conflicting goal, dealing with “substantial ambidexterity”. (Bongers et al., 2021)

Results from the same study also showed that the salespeople who made the effort to help and train customers in online purchasing, end up being in a better position to gain customer loyalty, which puts them again in a conflict: letting buyers choose the sales channel they prefer while being asked to push them into digital sales, trying to follow “two incompatible strategies simultaneously” (Bongers et al., 2021).

Marcos Cuevas (2018) study also provided evidence of “a profound polarization between transactional and consultative selling” that has been growing in the sales force, which makes the author question how will sales organizations deal with these “potentially diverging forces”: transactional selling “focuses primarily in reducing costs to serve with transactions customers, while consultative selling “emphasizes the co-creation of superior customer value with strategic customers” (Marcos Cuevas, 2018). The author argues that both strategic alternatives are difficult to pursue at the same time, which forces, again, salespeople to deal with ambidexterity.

2.4.2.2 The fear of being replaced

The topic of whether new digital technologies can in fact replace salespeople and make human interaction redundant has been largely discussed. Alavi & Habel (2021) argue that the possibility of these new sales tools to substitute salespeople in personal selling it's more difficult in complex selling contexts, such as the industrial environment, but for a long time, this perspective was not shared by several investigators.

Some other authors predicted that the Internet would lead to a significant downsizing, if not disintermediation of traditional sales organizations (Mantrala & Albers, 2010), and that “at least half of today’s selling positions will be gone within five years” (Rackham and De Vincentis; 1999, p3 cited in (Mantrala & Albers, 2010)). Also, Oh (2017) recalled previous claims that predicted that “one million B2B salespeople in the US will lose their jobs to self-service e-commerce by 2020” (Oh, 2017).

In the same topic, Piercy & Lane (2005) quote Neil Rackman, that in 1999 said that “the direct effect of e-commerce is to make more than half sales jobs go away”, to then point out that this didn’t happen. The authors even provided some examples, for instance: in 2000 Merck expanded the salesforce by 30%; Zurich Financial grew the salesforce by 10%; Dell also increased the salesforce (despite more than 50% sales being Internet ordered), because “management believes the Web frees salespeople to sell instead of simply processing orders”. Dell did this on a multi-channel level, putting order taking to the Web and salespeople developing new business.

Four years later, in another paper about strategy in the sales force, Lane & Piercy (2009) mentioned again the “new and emerging” role for the sales organization, with sales teams

becoming more strategic and salespeople acting more as relationship managers, and less as order takers, as companies started to focus more on customers and selling more complex product solutions. “The challenge is to reposition sales as a core part of a company’s competitiveness”, integrating the sales force into the business strategy, which requires firms to “adopt a new mindset” regarding the sales roles and management, towards “value creation and innovation” (Lane & Piercy, 2009).

Therefore, the authors stated, “there is growing evidence that the reality is that the Internet channel operates to make salespeople more productive rather than to replace them” (Spiro et al. 2003 cited in (Piercy & Lane, 2005))”.

Following the same belief, Mantrala & Albers (2010) claimed that, not only “the Internet-based technologies would never replace the salespeople” because buyers still valued Human interaction, but also that these technologies could enhance salespeople’s efficiency and effectiveness. Oh (2017), has a slightly different opinion, claiming that, in the face of Digital Transformation, salespeople need to decide if they want to “stay in the past or reshuffle themselves to adjust to the surrounding changes for survival” (Oh, 2017).

Similarly, Marcos Cuevas (2018) stated that, despite “the profound transformation of sales roles, a set of ‘traditional’ skills will still be relevant in the future”. What modern salespeople need, is an “integrated set of managerial competencies”, that can help them reinforce value creation for the customer.

2.4.2.3 Salespeople job insecurity

As described in the previous chapters, the Internet and technology rapid growth and spread, caused many changes in B2B companies’ sales forces. Most of these changes took a direct toll on salespeople, who constantly need to deal with shifts in their environment, which can lead to an increasing feeling of job insecurity.

As Lapoule & Colla (2016) explained, in a traditional single-channel sales organization, the salesperson’s job was to guide the customer toward the products they knew best. However, this doesn't happen in a multichannel sales force, where customers are each day more familiar with

the Internet, which requires more knowledge from the salesperson. This demand can bring anxiety to the salesperson, by the fear of losing lose their power and seeing their role diminished.

Besides the obvious benefits of e-commerce and automation, already discussed, for the salespeople, “the realization that an activity they have performed for many years” can be replaced by technology “must be disconcerting” (Johnson & Bharadwaj, 2005). And this is one of the reasons why Johnson & Bharadwaj (2005) argue that salespeople “are likely to become somewhat suspicious and distrusting of a process that decomposes, automates, and in essence replicates their skills” (Johnson & Bharadwaj, 2005).

Alavi & Habel (2021) went further, by stating that 70% of digital transformations fail their objectives, mainly due to employees’ reluctance to use digital technologies, because of fear to lose their jobs, or that tasks change dramatically.

These authors also did a cross-industry survey of 584 salespeople to know their reactions to the implementation of new technologies, and the results were complex, with ambivalent perceptions, considering new sales technologies as “a blessing and a curse” (Alavi & Habel, 2021). Although 71% were positive about the potential of new digital sales technologies, and only 15% disapprove it, “for some salespeople, the new digital tools raise fears and concerns”: 27% confessed to feeling their job threatened by new technology; 25% feel likely to be replaced; 23% feel likely to be replaced by colleagues with better tech skills; 21% fear losing personal power due to the knowledge sharing. “Still, the majority does not necessarily share” these concerns, the investigation revealed (Alavi & Habel, 2021).

In the same study, the concerns about job autonomy were more widespread, with 61% of the interviewed salespeople feeling that they can be more monitored with sales technology, and 33% thinking that new tools contribute to mental exhaustion, which, according to the authors, shows that sales managers need to support employees in this challenging transformation effort.

The conclusion of Alavi & Habel’s (2021) study was that the human side is important for Digital Transformation in sales, and that “Digital Transformation efforts rarely fail for technological issues, but for companies' lack of effectively managing the human factor” (Alavi & Habel, 2021).

Another of Johnson & Bharadwaj's (2005) hypotheses proposed in their conceptual model (Digitalization of Selling Activity and sales force Performance Change) was also related to salesperson job insecurity. These authors investigated how fearful salespeople were of losing their jobs due to the potential of new technologies, to the point of generating uncertainty among employees.

Considering that uncertainty increases as the technology implementation process advances, technological advances have the ability to enhance or destroy competence for employees, reason why each one copes differently with the consequences: "some become early adopters by aggressively learning the new technology, while others resist", causing "power and network centrality to be redistributed from late adopters to early adopters, which generates uncertainty and ambiguity of roles expectations" (Burkhardt and Brass 1990 cited in (Johnson & Bharadwaj, 2005)). Also, salespeople may be skeptical and insecure regarding management's commitment to them, when digital channels are being implemented, which lead to another of Johnson & Bharadwaj's (2005) hypothesis being proved: The greater the digitalization of selling activity, the greater the level of salespeople job insecurity.

2.4.2.4 The role of face-to-face interactions in digital selling

In B2B, "it has been argued that digitalization, such as social media, is driving a revolutionary change in the way selling is conducted" (Rodríguez et al., 2020). One of the many questions arising when discussing the impact and the consequences of Digital Transformation in sales, especially after the Covid-19 pandemic, is the survival of face-to-face interactions.

During those two years, many companies were forced to close their facilities or slow their business activity, and most people were sent home and started working from there. And the fact is that business didn't stop and, for some industries, especially the ones that could implement or reinforce e-commerce, it even increased. And, so, the companies found out that it was possible to sell without meeting their customers in person.

When the world opened again, and people were allowed to travel and return to their offices, many preferred not to do it, and home office became a trend. If the digital transformation was already taking a toll in face-to-face interactions, showing that it is possible to make business

through several digital channels, Covid accelerated the shift to digital interaction, and now many are questioning if it has also condemned face-to-face to extinction.

Also for B2B buyers, digital interactions seem to be more important to customers now than they were before the pandemic, with customers showing a preference for digital communication with suppliers, namely “technology-enabled self-service” instead of the traditional interactions with the salespeople (Rangarajan et al., 2021; Ray et al., 2020).

In 2020, Rodríguez et al. stated that information and communication technologies were mainly “used for prospecting and market information, and not for closing sales”, thus “face-to-face interaction is important in establishing trust with potential customers and therefore important in closing the sales” (Rodríguez et al., 2020), therefore, non-replaceable.

These authors concluded that “face-to-face encounters are still needed to close deals”, and for this reason, especially “the later stages in the complex B2B sales process are more difficult to replace with digital interfaces”, thus, “Human factor is still important” (Rodríguez et al., 2020).

2.4.3 How to help salespeople overcome the digitalization challenges

After identifying some of the challenges that salespeople face with Digital Transformation within the sales force, Bongers et al. (2021) also proposed two contextual boundary conditions that help can help them cope with it:

2.4.3.1 Sales buy-in for e-commerce

Buy-in has been defined as the “sales function’s belief that a strategic initiative is appropriate and meaningful (Malshe and Sohi 2009 cited in (Bongers et al., 2021)). One of the interviewed sellers from the authors’ study said, that “e-commerce only works if salespeople are convinced of it”, which shows the importance of having a sales force that really embraces digital selling.

According to Bongers et al., to achieve sales buy-in for e-commerce, it’s crucial as well to attenuate salespeople’s fears related to the introduction of digital sales channels. These fears are mainly related to being “cannibalized” by the new channel, “becoming obsolete”, and “losing their jobs”, as expressed by the salespeople interviewed by the authors. In this context, sales managers, who don’t want really to downsize the sales force, can mitigate those fears by reassuring, “in a continuous and repetitive” way, “that they are unjustified”, and that

salespeople's jobs "are not endangered by the digital channels", convincing them of its efficacy, doing a lot of "internal marketing", as one of the interviewed mentioned. (Bongers et al., 2021)

Moreover, sales buy-in should also be associated with transparency when defining and implementing sales strategy, keeping the salespeople involved in the strategic and management decisions regarding e-commerce, and promoting an open communication policy.

2.4.3.2 Sales empowerment for multichannel selling

This boundary condition is related to "providing salespeople with opportunities to develop the advanced skillset need to meet the requirements from the introduction of digital sales channels". (Bongers et al., 2021). This means that salespeople need to learn new skill sets, for example, how to "defend themselves against purchasers seeking to squeeze out extra concessions", or being customer consultants, developing deep knowledge about the supplier's solution offerings, and how they can serve the buyers' needs.

Therefore, sales management must provide the salespeople with "continuous training", to help them develop "customer-direct sales skills in terms of negotiation, business development, and problem-solving", promoting, in this way, another opportunity for continuous communication (Bongers et al., 2021).

Rodríguez et al. (2020) used the Technology Acceptance Model (TAM) 1-3, which suggests that "the perceived usefulness of the system and perceived ease of use are important drivers for understanding why people use information systems", to argue that there are enablers and obstacles that can be found at different levels in the sales organization, such as:

- *Organizational*: training, user participation, and accurate expectations can be relevant enablers or obstacles.
- *Individual*: supervisory influence, peer influence, and competition influence have a community effect. Thus, salespeople being encouraged to use the new technology; peers using it; and a positive culture in the sales force can also be enablers.
- *Social / cultural*: "individual computer experience and innovativeness can be either enablers or obstacles to the digitalization of the sales process" because using new technologies it's a risk for the individual salesperson that needs to learn about it.

2.4.3.2 *The role of Training*

Johnson & Bharadwaj (2005) suggest *Human Capital Investment*, specifically training and education, to enhance the positive effects of digitalization on salespeople's effectiveness. These authors defined Human Capital Investment as "education and training undertaken to prepare salespeople to function in a digitalized environment". In this context, training is seen as "one of the most persuasive methods for enhancing the productivity of the employee", as it allows to "improve technical skills" and should familiarize salespeople with new processes and innovations. Training should also improve company-specific skills, important in a multichannel selling environment, given that "salespeople with good firm-specific skills are more effective at getting the selling organization to implement their process innovations". Finally, the authors state that Human Capital Investment should also reduce salespeople's job insecurity related to digitalization since salespeople "are likely to see education and training investments as a sign of intended job retention" (Johnson & Bharadwaj, 2005).

Lapoule & Colla (2016) also highlighted the importance of providing proper training, as well as the need of reevaluating salespeople's remuneration system, which should be designed to provide them the required motivation to manage the changes caused by the implementation of a multi-channel sales force.

The author also argued that changing the role of the salespeople is "a time-consuming process" that should involve training skills. Besides requiring basic tools to help them transition from "sell in" to "sell through", salespeople also need additional managerial skills that may be developed with management education modules. Thus, training will help salespeople gradually evolve toward a role of providing personalized advice to their customers (Lapoule & Colla, 2016).

Following the TAM 1-3 reference from Rodríguez et al. (2020), about enablers and obstacles for the use of new technology, the authors explained that, at the organizational level, training, user participation, and accurate expectations can be relevant enablers or obstacles. "Training is important in getting people to accept the information system" – it's been shown that training can increase the acceptance of information systems, such as sales force Automation. Simultaneously, "the lack of training can be an obstacle" and "extensive or informal training will be an enabler". Also, "when users participate and are involved in training, it increases their

understanding of the information system, and makes them more positive toward the implemented information system”. Thus, “salespeople involvement is an enabler, whereas a lack of involvement is an obstacle”. Besides, “when salespeople know what to expect of an information system, it will be easier to understand how it could impact their performance”, which is another enabler (Rodríguez et al., 2020).

2.5 Recommendations for a successful Digital Transformation of sales

Several authors suggested guidelines, strategies, and general recommendations, especially directed to sales management, that can help B2B companies successfully overcome the complex and challenging task of digitally transforming the sales force.

Mattila et al. (2021) defined unlearning as “the process of purposely reflecting on and discarding old ways of knowing and doing”, considering it “vital because outdated beliefs and/or routines that can hinder learning”. Hence, “the adoption of new technologies will be unsuccessful if salespeople continue to rely on knowledge or routines that are obsolete in the new digital environment”. (Mattila et al., 2021). For B2B companies, this means that, if they want to benefit from the opportunities provided by digital transformation, then they must be able to change their old processes and routines, as well as their selling strategy and, even maybe, the business model. Authors also consider managers to “play a key role in motivating and justifying” the implementation of new technologies in the sales force.

(Lawrence et al. (2019) claimed to have found compelling evidence that the salesperson complements the online channels in B2B seller-customer relationships. Their research indicated that “customers who interact with salespeople regularly while searching and purchasing online” generate more revenue. In fact, even though salespeople might seem less important to customers who prefer to engage through digital channels, their research indicates the contrary: salespeople assigned to online customers offer better business and financial outcomes. This happens because the existence of multi-channels allows companies to provide information in complementary ways, therefore, “sellers should encourage and facilitate online activities and equip salespeople with resources required to cultivate interpersonal relationships” (Lawrence et al., 2019).

Moreover, the authors believe that B2B sellers must collect and analyze customer data, gathered through the monitoring of their activity on online channels. Companies should use this data to leverage the information provided and inventory portfolios, in order to explore new opportunities to meet customer needs, improve the targeting of customer-specific discounts, and expand their relationship. By following these practices, B2B sellers “would be well-served by embracing a marketing analytics perspective to assess customer channel activities” (Lawrence et al., 2019).

Oh (2017) stated that managers need to adjust their strategy in a way that reflects the environmental changes, to recognize that complementary skills affect the role change intention, and be conscious of the influence that the organization should have, by supporting and controlling salespeople’s role changes, even if this comes from individual choices.

Johnson & Bharadwaj (2005) presented a framework that reflects their thesis that for a digital channel development, managers need to reduce salesperson ambivalence and encourage the integration of the new channel into the salesperson's job. The results of their study suggest that digitalization increases both the effectiveness and the job insecurity of salespeople and that the last one may be countered with adequate investment in human capital to train salespeople to function more effectively in a digitalized environment.

Rodríguez et al. (2020) interviewed several salespeople from B2B companies and were able to identify, as *internal enablers*, the existence of standardized processes and information flows (organizational enabler) because the standard is easier to digitalize and automate; to provide motives for the digitalization; integrate other departments with sales; to provide technical training to staff. As *internal obstacles*, low budget for digitalization (not enough investment); not having a proper internal organization of salespeople; poor integration of sales with other departments; insufficient technological awareness of the CEO and the sales Manager; unhealthy competition between salespeople from the same department; work overload; lack of relevant and technical devices (software and hardware); staff, especially salespeople, with lack of technical skills; underestimate and not prioritize the potential of digitalization; staff that does not trust technology and digital tools (security).

Referring to the Commitment-trust theory: Rodríguez et al. also emphasized the importance of commitment, but especially trust, considering it vital to build strong long-term business

relationships. The authors state that “managers should not expect technology to replace personal interaction to a great extent in B2B-service contexts”. Selling complex solutions to business customers, “demands a higher level of trust” and “more personal interactions”, which is why “building strong physical relationships in complex B2B sales processes is essential to successfully adapt to new customers and keep existing ones” (Rodríguez et al., 2020). (Qu et al., 2015) also highlighted the importance of trust in B2B, especially between trading partners on e-commerce-based transactions.

Ohlsson (2015) proposed an extended version of the TAM framework so that it could help to understand online shopping behavior in B2B. For this purpose, he did an online questionnaire with several buyer companies, and the results demonstrated that “e-commerce has not been accepted by everyone”. The author listed some important factors that can influence customers’ behavior toward e-commerce.

Factors that can lead buyers to order online are: Order online saves time; accessibility (24/7 ordering); Providing a good overview of the product inventory; recommendation from others; good Website usability / user experience; out of habit: have previously ordered online. Factors that can drive customers away from online ordering are: security issues, such as providing personal information, and online payments; Website with a difficult navigation / user experience; low technology literacy, or lack of confidence in the use of a computer and the Internet; online ordering functionality not working properly or having constant issues; no possibility to place questions to salespeople.

One of Gartner’s Marketing Predictions (Gartner, 2021), was that B2B sales will merge the best of digital and Human methods. According to a report, by 2025, one in five B2B companies will use Artificial Intelligence and / or machine learning, to proactively slow down customers’ journeys, by connecting them with salespeople during e-commerce interactions.

Gartner made this prediction based on the fact that, with the digital-first trend accelerated by Covid-19, B2B customers who buy on their own, without talking to a salesperson, are more likely to regret their purchase decisions. In the face of these events, successful B2B organizations will balance digital customer engagement with Human interactions during key moments to get guidance on their purchasing decisions.

CHAPTER III – METHODOLOGY

The purpose of this chapter is to explain how the presented research was conducted, from planning to execution. Based on the previously described research question and the objectives for this research, it was decided that qualitative research would be the best methodologic approach, specifically the multiple case study.

Finding an answer to the formulated objectives required an extensive investigation and understanding of the contextual conditions, which the Multiple Case Study could provide, by conducting in-depth interviews, that allowed a focus on the contemporary events studied in this research, through a detailed data collection and analysis.

3.1 The Multiple Case Study methodology

Choosing the most appropriate methodology was essential to get a correct understanding of the investigated phenomenon and drive successful research. Considering that the topic always had in mind for this dissertation was related to a human and social problem, and since the goal was to try to answer questions that directly affect companies and people in the real world, it was decided to proceed with qualitative research, using a Multiple Case Study methodology.

Qualitative research involves a set of practices that allow transforming the visible world into representative data, including notes, interviews, and images, among others, thus, the goal of qualitative research is to understand a phenomenon in its real context (Creswell, 2014). When using this methodology, “the qualitative researcher has an obligation to be methodical in reporting sufficient details of data collection and the processes of analysis to permit others to judge the quality of the resulting product” (Patton, 1999; pp.1189–1208).

Gustafsson (2017) cited Jacobsen (2002) to define a case study as “an intensive study about a person, a group of people or a unit, which is aimed to generalize over several units”, and the focus is based on a special unit. Generally, in a case study, one or more real-life context cases are selected and analyzed, in a way that allows getting scores or conclusions. (Dul & Hak, 2008)

The main difference between a single and a multiple case study is, as the name indicates, that the last one implies studying more than one case. Besides the single analysis of each case, the multiple case study also allows one to identify and understand differences and similarities between the cases, crossing the data to find more complex relations (Gustafsson, 2017; Yin,

2009), and, hopefully, delivering a deeper investigation and a better understanding of the research objectives.

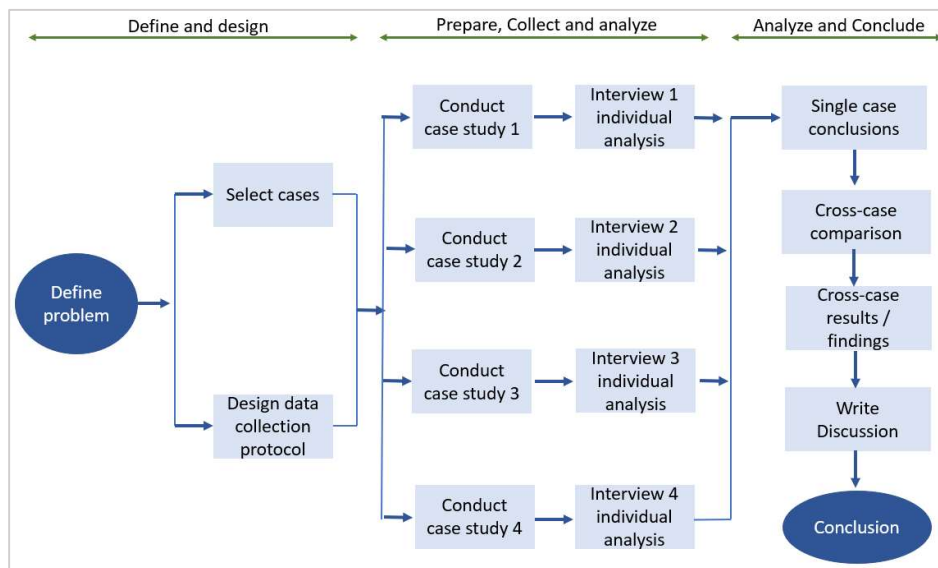
Another advantage of using a multiple case study is the reliability of the collected and reported data. Yin (2009), stated that analytic conclusions occurring independently from two or more cases will be more powerful than those coming from a single case. This means that by studying multiple cases, it is possible to get more reliable evidence, and, ultimately, to create a stronger theory, than if only one case study would be used.

For this study, the multiple case methodology helped in understanding the complex reality of B2B companies and the impact of the equally complex implementation of e-commerce in their selling organizations. Using a Multiple Case Study, allowed not only to get answers for the research objectives, and fill some gaps in the existing literature but also to provide new findings and insights to B2B companies, from which they can benefit.

3.1.1 Research design

Based on Yin's (2009) multiple case study method design, the research design planned for this study is presented in figure 2.

Figure 2: Research design of this study, based on Yin's (2009)



The starting point was the definition of the problem and research questions, moving to the selection of the case studies, preparation, and data collection. Then, it moved to the individual

and crossed analysis of the interviews, until the final report with the data analysis. The next step was the discussion of the findings, against the literature review and, finally, the conclusion.

3.1.2 Selection of the case studies

The initial goal for this research was to find, as use cases, B2B companies based in Europe, doing business worldwide, with a traditional sales force, but that have also adopted e-commerce, preferably using an online shop as an additional sales channel. Ideally, the study would involve three to five companies, across different business areas, with distinct dimensions and cultures, because “one of the most important tasks for the multi case researcher is to show how the phenomenon appears in different contexts” (Stake, 2006; pp 27-29).

This was probably the most difficult part of the research plan because it was extremely hard to find companies that were willing to participate in the study. The first step was an exhausting online search, for B2B companies that would fit the requirements. 17 firms ended up by being contacted, some directly via the emails provided on their websites, and some other through LinkedIn.

To make it easier, and more accurate, it was created scripts for the emails and messages to send, explaining the reason for the contact, the objective of the thesis, and, finally, asking for approval to conduct an in-depth interview with a sales or e-commerce manager. It was also made very clear that all the data collected would be treated in a completely confidential way and offered the signature of a non-disclosure agreement.

Most of these contacts gave no feedback, except for two companies that later ended up refusing. One declined because their Legal department didn't approve the interview for confidentiality reasons, and the other one because they couldn't find the time for the interview.

Through some personal contacts in companies that fit the profile, finally, there were two positive replies, from traditional B2B companies, both with e-commerce and online shops. However, only two cases were far from the goal for the Multiple Case Study, so, after some consideration, it was decided to enlarge the focus of the research to companies on the opposite spectrum: startups, with less than seven years of activity, already born digital, but also with a B2B sales force. This allowed conducting much deeper research and be different from everything that it has been read in the existing literature.

After some research, and again more contacts, two B2B tech companies that fit the established profiles for the research accepted to be part of the study, which left a total of four case studies to analyze: two ‘traditional’ companies, and two startups.

3.3 Data collection

The data collection was based on in-depth semi-structured interviews, with sales or e-commerce managers from the case study companies. Before conducting the sessions, it was necessary to define the protocol guidelines, so that everything would be prepared, and the conditions could be as similar as possible for all the case studies.

3.3.1 Semi-structured, in depth-interviews

Qualitative interviews are generally classified as unstructured, semi-structured, and structured. While structured interviews are usually used to produce quantitative data, semi-structured interviews “are often the sole data source for a qualitative research project and are usually scheduled in advance at a designated time and location outside of everyday events. They are generally organized around a set of predetermined open-ended questions, with other questions emerging from the dialogue between interviewer and interviewee(s)” (DiCicco-Bloom & Crabtree, 2006).

Moreover, semi-structured in-depth interviews are also probably the most widely used in human and social sciences and can make better use of the knowledge-producing potentials of dialogues (Norman K. Denzin & Lincoln, 2018).

The main themes found in the literature review provided the dimensions to be analyzed within the case studies, and the questions added in the script were based on those. In light of this context, the more suitable type of interview, was the semi-structures, because of its flexibility, allowing to collect information related to the identified dimensions, but also providing the opportunity to ask new questions, depending on the interviewee’s answers, that ended up leading to new dimensions.

The interview script was slightly adapted for traditional companies (see Appendix III) and for startups (see Appendix IV), with just some adjustments to reflect their reality, and it was

separated into some main sections, with multiple-level questions. The goal of having this script was not to follow it strictly but to serve as a guideline that helped lead the conversation. The script was previously shared with the interviewed managers so that they could be prepared and gather the required information.

3.3.2 Data collection protocol

All the interviews were conducted by video call, recorded, with the participants' permission, and then transcribed into separate documents, which can be found in APPENDICES V, VI, VII, and VIII. At the beginning of each interview, the participant was reminded of the objective of the session, and that all the shared information would be treated with complete privacy. The recording of the interview was fundamental because it was the only way to get a complete registration of the conversation, providing bigger security for both parties (Duarte & Barros, 2008).

As planned, the script worked very well as a guideline for the interview, providing the opportunity to introduce new topics and questions as the conversation was flowing. All the interviews took around one hour, but the ones with the traditional companies were a bit longer.

After each interview, the recordings were used to produce a detailed transcription of the complete conversation. According to Duarte & Barros (2008), it is recommended to transcribe the recording right after the interview, with a fresh memory, benefiting from immediate inferences, context, and analysis. Also, listening to the recording helps the interviewer to understand details that might be helpful for conducting the following interviews. "If possible, the interview itself should make the transcript" (Duarte & Barros, 2008), which was the case.

As a secondary data source, it was also consulted the companies' websites, to get a better context of their business and history, reading some reports and news, so that the background about the case studies could be wider, which also helped during the interviews.

In order to keep the confidentiality of the case studies involved in this study, the name of the companies, the interviewees' identities, and any other indicators that might lead to their identification have been removed or replaced. In addition, to correctly identify the case studies, each company was given a description, and an abbreviation, to make it easier to make the

references. Hence, in this study, there are *Traditional Company 1 (TC1)*, *Traditional Company 2 (TC2)*, *Startup Company 1 (SC1)*, and *Startup Company 2 (SC2)*.

3.3.3 Characterization of the case studies

The case studies involved in this research are two traditional companies, both with e-commerce and online sales channels, and two startups both tech companies, already born digital, and both connected to e-commerce. All the case studies are based in Europe, although they do business worldwide, and their sales forces have different sizes and shapes.

Table 1 summarizes the characterization of each case study, as well of the people who were interviewed, their roles, and main responsibilities.

Table 1: Case studies characterization

	Traditional Company 1	Traditional Company 2	Startup Company 1	Startup Company 2
Business area	Industrial manufacturer, providing products, solutions, and services, in the test and measurement and weighing technology areas (hardware and software). B2B: business with industries such as automotive, aerospace, industrial, and telecom audio.	Lighting technology industry and components (hardware and software). B2B: business directly with lighting manufacturers only, and a few wholesalers' distributors.	Resale of fashion luxury goods, especially bags; resale tech for business. B2B: business directly with marketplaces, retailers, and direct order clients (other businesses). In the meantime, it was acquired by a bigger company.	Payment platform as a service: processes online payments, connecting clients with relevant financial institutions; (software; no hardware). B2B: business with e-commerce companies. In the meantime, it was acquired by a bigger company.
Number of employees	3000	2000	200	60
Years in business	70	68	7	6
Countries where it operates	It operates worldwide; local sales offices in Europe, Asia-Pacific, Americas, Middle East & Africa	It operates worldwide; local sales offices in the main continents; production centers in Europe and China.	Worldwide: warehouses in Japan and Estonia; Selling to Europe, USA, Canada, Japan, Australia, starting China; Offices in the	Office in Portugal, but doing business worldwide; most clients in Europe, but also the United States and Latin America.

			Philippines and Portugal;	
Interviewee role	Global Head of e-commerce and eBusiness	Sales Managing Director of Iberia-America	Head of Strategy and Sales	Sales Director
Interviewee main responsibilities	e-commerce and eBusiness platforms; drive products forward, with Marketing; still some legacy part also.	Running Iberia and Latin countries, so it's Iberia-America.	Lead the Sales team; with management, define Sales strategy and vision.	Managing the Sales team and making sure the company goals are met.

3.4 Data analysis

Thorne (2000; pp. 28-70) described data analysis as being “the most complex and mysterious of all of the phases of a qualitative project, and the one that receives the least thoughtful discussion in the literature”. It is the part of qualitative research “that most distinctively differentiates from quantitative research methods”, as it is a “dynamic, intuitive and creative process of inductive reasoning, thinking and theorizing” (Wong, 2008; pp. 14-20).

For this study, the main method used to analyze the data was a thematic analysis, but it was also done word clouds for the interview results, as an additional approach.

3.4.1 Word Cloud

As a first high-level approach to analyzing the results of the interviews, it was done a Word Cloud for each interview. After removing all the questions from the transcripts, and leaving just the answers, the text was uploaded to the website <https://www.wordclouds.co.uk/> and got a word cloud for each case study, based on the number of repetitions of each word.

Word clouds “have evolved as a core technique of information visualization that is applied in many different contexts”, and are used to provide an “intuitive and visually appealing overview of a text by depicting the words that occur most often within it” (Heimerl et al., 2014). The result allowed to quickly understand what the main topics were for each case study, because the more frequently words are repeated, the bigger their font size is.

This kind of analysis can provide an additional point of view, to complement the qualitative analysis, as it provides a “purely statistical summary of isolated words without taking linguistic knowledge about the words and their relations into account” (Heimerl et al., 2014).

The Word Cloud analysis results are presented in Chapter IV.

3.4.2 Thematic analysis

After the transcription of the interviews, it was performed a qualitative thematic analysis, which is a method for analyzing qualitative data, by identifying, analyzing, and finding patterns (themes), and then minimally organizing and describing the information in detail (Braun & Clarke, 2006). Besides being a method for describing data, it also involves “interpretation in the processes of selecting codes and constructing themes” (Norman K. Denzin & Lincoln, 2018), possessing, as a distinguishing feature, the flexibility to be applied to a wide range of research. Moreover, thematic analysis is “an appropriate and powerful method to use when seeking to understand a set of experiences, thoughts, or behaviors across a data set” (Braun and Clarke, 2012, cited in (Kiger & Varpio, 2020)).

According to Braun & Clarke (2006), this process requires a “constant moving back and forward between the entire data set”, and the writing is an integral part of it and not something that takes place only at the end, as it happens with statistical analyses. “Therefore, writing should begin in phase one, with the jotting down of ideas and potential coding schemes, and continue right through the entire coding/analysis process” (Braun & Clarke, 2006).

These authors provided a six-step guide to performing a thematic analysis:

- *First:* Familiarizing with the data and transcription;
- *Second:* generating initial codes;
- *Third:* searching for themes;
- *Fourth:* reviewing the themes;
- *Fifth:* defining and naming the themes;
- *Sixth:* producing the report / manuscript.

Braun & Clarke (2006) explain that researchers can employ an inductive or deductive approach to theme identification, and in this case, it was chosen a deductive approach, which “is useful for honing in on a particular aspect of the data or a specific finding that could be best illuminated or understood in the context of a pre-existing theory or framework” (Braun & Clarke, 2006; Kiger & Varpio, 2020).

For this study, the literature review was used to find the dimensions that would be included in the interviews, in the form of themes for the questions and, for this reason, the initial steps of the thematic analysis suggested by Braun and Clarke (2006), such as the coding process, were not necessary, and the focus was especially on the sixth step: producing the report.

In this step, both narrative descriptions and direct quotes from the interviewees should be used, and the analysis “should describe the data and provide an argument for why the researcher’s explanation richly and fully answers the research question” (Braun & Clarke, 2006; Kiger & Varpio, 2020).

To have a better organization of the results of the interviews, all the questions and answers were added to an excel file and aligned, which allowed obtaining a better overview of the topics. Also, the answers from traditional companies were placed side by side, since the script was the same, as well as the startups.

After this, the analysis went through an iteration process, until the final result was reached. Using several word documents, the questions and answers were refined, to make them fit into the same topic, and already added some notes about similarities, differences, and other important patterns. This iteration and refinement process allowed to have a deeper understanding of the answers of each case study, and to perform an analysis, first, of each case study results, then from the traditional companies, and the startups, comparing by type of company, and, finally to cross the results from both traditional companies and both startups.

The results of the thematic analysis are presented in Chapter IV.

3.2.2.1 Dimensions for analysis

As previously mentioned, the main themes for the study were based on the literature review, and used to create the script for the interviews. These themes were converted into the dimensions that were used for the data analysis. During the data analysis of the interviews, it was also found new dimensions, that later were added to the Results section, in Chapter IV.

The dimensions used for the data analysis are presented in Table 2.

Table 2: Data analysis' dimensions

Dimension	1st Sub-dimension	2nd Sub-dimension
1. Characterization of the B2B sales force	1.1 Characterization of the sales force	1.1.1 Sales forces' organization and structure
	1.2 Characterization of the salespeople	1.2.1 Salespeople's roles
	1.3 New: Marketing and Sales relationship	
	1.4 New: Management influence e-commerce adoption	
	1.5 Startups' sales force evolution	
2. Digitalization within the B2B sales force	2.1 Technologies used by the companies	
	2.2 Automation on B2B sales force	
	2.3 Impact of digitalization on B2B sales force	2.3.1 New: challenges of digitalization
		2.3.2 Impact of digitalization on the salespeople
3. B2B Online sales Channels	3.1 Sales channels used by B2B companies	3.1.1 Online vs traditional sales channels
		New: Social media
		New: The role of face-to-face interaction for digital companies
	3.2 Impact of e-commerce on B2B sales force	
	3.3 Impact of e-commerce on B2B salespeople	3.3.1 B2B salespeople roles
		3.3.2 B2B salespeople training
		3.3.3 B2B salespeople commissions
		3.3.4 B2B salespeople job insecurity
3.4 New: Customers' impact on e-commerce adoption		
4. Covid-19 impact on B2B e-commerce		
5. New: The future of B2B e-commerce		

CHAPTER IV – RESULTS

This chapter is dedicated to the reporting of the findings obtained from the interviews data analysis. It starts by presenting the interviews' thematic analysis results, which are separated into main topics that are based on the dimensions that were used to write the interviews scripts.

First, it is present the characterization of the sales forces of the case studies involved in this research, including the salespeople, which provides more extensive knowledge of the way the different selling organizations are structured, and the main attributes of the salespeople's roles. Here, the interviews data resulted in three new sub-dimensions: the Marketing and sales relationship; Management influence in e-commerce adoption; and the evolution of the startups' sales force.

The next main dimension presented is related to Digitalization within the sales force, which addresses the topics of technology and automation existing in the interviewed companies, and analysis of the impact of digitalization on their sales forces and salespeople. Inside this dimension, it was also found a new sub-dimension to analyze, related to the challenges of digitalization.

Following, it is presented the findings of the dimension of the Digital sales Channels used by the studied cases, also adding the findings of its impact, and e-commerce, in the companies' sales force, with a bigger focus on the impact on salespeople. This data also resulted in two new sub-dimensions: social media (LinkedIn) and the role of face-to-face interactions.

Finally, the pandemic effect is also addressed, and lastly, it was analyzed the case studies' visions of digital transformation towards the future, as this topic arose as a new dimension for the study.

At last, it is also presented the findings of the additional analysis performed through the creation of Word Clouds for each of the interviewees' answers.

4.1 sales force characterization

The data analysis of the case studies' interviews allowed to characterize their sales force, also according to some main dimensions found in the literature review, such as the way they are organized. Findings also revealed the salespeople's characterization, especially when it comes to their roles, as well as some new analysis dimensions that resulted from the interviews, related

to Marketing and sales relationship, management influence in e-commerce adoption, and the evolution of the startups' sales force.

4.1.1 Organization

The sales forces of the four case studies have different sizes: TC1 is the biggest, with 600 people, followed by TC2, with 150 people, and SC1, with 23 people. The smallest is SC2 with 5 salespeople.

4.1.1.1 Geography

All the companies do business worldwide, however, in terms of geographic organization, SC2 is the exception. Both traditional companies have sales forces organized by region, with sales offices around the world. TC1 is “organized in regions”, according to “the big areas”, where there are “general managers and sales offices”. In a very similar organization, TC2 sales are “divided into regions”, that can also be “split into areas”, where they have “an Area Sales Manager”.

The scenario is quite different for the startup companies: Until very recently, SC1 had the entire sales forces bases in the Philippines, but with the expansion of the company, they started hiring people in Portugal, for the European market, and the USA, for the American market. Currently, only the Customer Care team is fully based in the Philippines, “servicing all clients, handling all escalations and all orders, from one location, with no face-to-face interaction with anyone”. On the other hand, Account Managers and, mainly the New Business team, are now being organized by geography, as they realized that the Geo-based splits are important, especially for the salespeople responsible for closing new customers, because “the demand based on the nature of the work is what defines how we are organized”. SC2 has the sales forces based only in Portugal, and although there are 3 salespeople in Lisbon and 2 in Porto “this has nothing to do with the roles or type of customers each one handles”.

4.1.1.2 Structure

Besides the geographic organization, traditional companies share several other characteristics when it comes to the sales forces structure, namely the fact that big customers “are handled by

Account Managers”, and if they are spread across regions, TC1 sales forces organize themselves “internally to better serve the customer”. The same happens with TC2: “if it’s a huge client, worldwide established, and we have several sales Area Managers responsible for the branches of that main company, then the client gets a Key Account Manager, who is responsible for organizing the whole process of prices, special conditions, tech support, and all the rest”. TC1 also has a Global Customer Care (GCC) “that is taking care that all the customers are satisfied” and responsible also “for keying in the orders and so on”.

Both traditional companies have a similar customer classification system as well, using letters, where A represents the biggest and more important clients and D the smaller and less important, or distributors. In TC1, “customers are classified and grouped in clusters, according to their potential business revenue: A (biggest, more important), B, C, and D (smallest)”, and TC2 has the AA customers on the “top level, and these get Key Accounts”, then, there’s “the A customers, the B, and the C. And finally, there are the distributors (D). We split them into the potential business we can get”.

The sales forces of the startup companies have different structures: SC1 is organized more towards the customers’ business type, and they have different Account Managers handling clients according to that, independently of being big or small. The sales teams are split into New Business, Tailored Solutions, Account Managers (per channel), and Customer Care. In SC2, salespeople are organized by responsibility, with half the team (2 sales Development Representatives - SDR's) dedicated to prospecting and getting new leads, and the other half (2 Account Executives - AE's) focused on turning those leads into customers. Differently from SC1, SC2 does not consider Customer Support to be a part of sales “because they do more tech support for clients”, and “the entire transactional part (invoicing, payments) is also outside the scope of sales”, being under the responsibility of the Finance department. Only “if the customer doesn't pay or doesn't respond, they go to the sales office, ask if they can help solve the situation”. Neither startup have a customer classification based on size. Instead, they split them based on industry and/or business type.

4.2.1 Salespeople characterization

4.2.1.1 Roles

TC1 has more conventional salespeople roles, with Field sales, Inside sales, and Key Account Managers for the big accounts. Online sales are global, and because of that, e-commerce is being handled everywhere, by the Global Customer Care (GCC) and/or Inside sales teams. In Germany there is a dedicated team handling the online shop, “but this is under construction”. In this company, the Inside sales are growing, “which doesn’t mean that the Fields (outside) sales are shrinking”. What happens is that “Inside sales is getting a new power, especially for the customer who wants to find a digital way with us”.

TC2 used to have a similar role definition for salespeople, but they are now making some changes, so now they have Area Sales Managers (ASM) and Key Account Managers, and “will start with the Solution Sales Manager”, which is related to “the promotion of sales.” The company also has the Customer Service Support team, previously called Internal sales, but the name was changed because they are “managing the orders, the delivery dates, trying to improve the viability and making a link between sometimes the ASM and the customer, but they’re not doing the sales”.

In terms of the salespeople’s background education, both traditional companies are similar. TC1 Field sales are “traditionally engineers”, and almost “all of Inside sales also have an academic background, mainly related to engineering”. The main exception is GCC whose salespeople “need only a good understanding of the products and how they work”. In TC2 most salespeople are also engineers, “but is not mandatory” if, “at least you have the technical background”. Either way, “it’s preferable to have engineers and not the pure sales guys because this is not enough”, they claim.

When it comes to salespeople’s roles in SC1, there are only Channel Heads, Channel Leads, and Account Managers, which are split by channel, or customers business type. Then, there are different teams, also organized by function and business type: New Business Acquisition, responsible for finding new clients, through lead generation and qualification, business alignment and set up, closing and final negotiations; Tailored Solutions: managing big clients and/or partners with customized integrations; B2B: managing Direct Order clients and other businesses that buy directly from an Account Manager or use the online shop; B2B2C, managing

clients with direct integrations, such as API's (mostly marketplaces that sell to final consumer); and Customer Care, who is in charge of the transactional part, like checking orders, and giving support to clients and AM's.

SC2 created new roles and separated them according to the sales tasks. Currently, this startup has three different roles in their sales force: the Sales Manager (SM), responsible for the sales teams, providing support at all stages of the sales funnel, but especially to the AE's, more depending on this role, to close contracts or negotiate prices, because "although they have some autonomy, the final OK is always given by the SM"; the Sales Development Representatives (SDR's), who are doing the prospecting itself, meaning that "they go to LinkedIn, online databases, and so on, to collect data of the customers they want to contact. They end up assembling a database with names, email, telephone numbers, company", set the campaigns and try to schedule a first call with the clients; and the Account Executives (AE's), the ones taking the SDR's deals. In other words, "the SDR's do the initial prospecting work, and they handover the most promising deals to the AE's, who then will try to close each deal".

For the SC2 Sales Manager, this segmentation is especially important, "to have some people focused on feeding the pipeline and others only focused on closing what already exists. Otherwise, it wouldn't be efficient".

Training

When it comes to the sales force training, TC1 is adopting a new strategy that involved "doing a lot of sales training, more about the new products and technologies, as well as personal development. One thing that this company is doing differently from the past is developing the people. It's a huge effort, especially for the managers, to make sure that we develop the people in a good way". With this new approach, the company lets "the people talk and give their opinion and try to react on that and help on their development".

When it comes to training salespeople for their roles and tasks, SC1 admits that they "have never been good at training", because "there was no investment in it", but is "something that we have to build". So, currently, "the best training salespeople get is on the job. They learn by doing". SC2, on the other hand, is focused on training the salespeople, because they couldn't find human resources with the required specific knowledge. So, they ended up "recruiting people directly from the university and providing the training internally" in two areas: the industry itself (e-

commerce), and the customer’s industries that require specific knowledge, “because to make the sale they need to understand what customers do”; and in actual sales: “prospect techniques, tools to use, negotiation, and so on”.

4.1.2 New Dimensions: Marketing and Management

4.1.2.1 Marketing vs sales

In TC1, the fact that the collaboration between Marketing and sales departments has not been the best one over the years, led to a change in the organization, with Marketing (except Product Management) moving into the same wing as sales. The Global Head of e-commerce and eBusiness admits that this change “might be difficult on the people” but expects that it will help sales to achieve better results, especially in “understanding the customer journey before they first contact with a sales Engineer. We don’t use the data of customers behavior in the online shop in a good way”, reason why “this is a need”.

TC2 has gone through this path some time ago, with sales and Marketing “working closely” under the same umbrella, and “depending on each other”, also with the exception of Product Management. Marketing is “more focused on the brand and products communication to customers”.

SC1 doesn’t have a Marketing department, and sales are doing some basic things, such as sending newsletters to clients. At SC2, although there is a Marketing Department, it’s not strongly connected to sales. For example, Marketing has been creating some specific campaigns, to gain leads for certain industry types, but mostly “it’s all pure and hard sales effort”.

Table 3 summarizes the case studies’ sales force and salespeople characterization

Table 3: Sales force and salespeople characterization

	TC1	TC2	SC1	SC2
Size	Around 600 salespeople	Around 150 salespeople	23 salespeople	5 salespeople
Organization	Organized by regions	Organized by regions	previously organized by regions; now by channels	Organized by business type
Roles	. <i>Field sales</i> . <i>Inside sales</i> . <i>Key Account</i>	. <i>Area Sales Manager</i> . <i>Key Account Manager</i>	. <i>Channel Head</i> . <i>Channels Lead</i> . <i>Account Manager</i>	. <i>Sales Manager</i> . <i>Sales Development Representative</i>

	<i>Manager</i> <i>. Global Customer Care</i>	<i>. New: Solutions Manager</i>	<i>. Customer Support</i>	<i>. Account Executive</i>
Training	<i>Focus on sales training:</i> <i>. New products and technologies</i> <i>. Personal development</i>		<i>. No investment in training;</i> <i>. Salespeople learn on the job</i>	<i>Strong investment in training:</i> <i>. e-commerce payments industry</i> <i>. Sales techniques</i>
Marketing vs sales	<i>After a long unsuccessful relationship, Marketing and sales are now under the same “wing”</i>	<i>Marketing and sales working closely under the same “umbrella” long ago</i>	<i>No Marketing department</i>	<i>Marketing is not strongly connected to sales but cooperating</i>

4.1.2.2 Management influence in e-commerce adoption

Digitalization and e-commerce have not been prioritized in TC1, where there is a lack of trust, with the “leadership team saying they no longer support the eBusiness, also not the online shop, because they are afraid that if is not taking you money today, maybe it will tomorrow”. On the other hand, in TC2, e-commerce “is a clear target and a very big investment” for management, who even set a global target of 30% for online sales. “Every year we have new features into the e-commerce platform, and it makes the work easier, and all the customers are putting our e-commerce platform on top of our competitors”, TC2 says, emphasizing that the online shop is “an additional sales ‘guy’, digital, who is doing a very good job” so that salespeople “can focus on other things”.

4.1.2.3 The startups’ sales force evolution

SC1 described its sales force evolution in four stages:

First: At the beginning of SC1 business, all the focus was on getting new business: “We were small and with less ability to compete, and it was difficult to reach the big companies, so we started with small clients, and we would close any client that was willing to work with us”. So, when this startup started, the sales force “was pure execution”, with the company hiring “cheap junior staff because it was helpful to have another person trying to close new clients”, hence “the biggest hiring considerations were costs and potential”.

Second: When the sales force was expanded, the company started “hiring by seniority”, because they needed “someone to figure out what to do next”, so they hired their “first levels of managers, whose job was to optimize what the teams were doing”. These salespeople came already with prior experience because they “could not wait two years for the staff to have the needed skill set”.

Third: As the sales force grew, it started “going into highly specialized skills” and, at a certain point, the sales Manager changed the way the team was organized, and based it on a distribution model, according to the company sales channels. For example, they needed a specialist for marketplaces, so they hired “someone who knew how to speak to developers, who understood how API’s work, who had that kind of technical knowledge and expertise”.

Fourth: After having their specialists, SC1 started to have Support staff, so that Account Managers, “people who will close clients, and manage teams, don't waste their time doing manual tasks and admin work”.

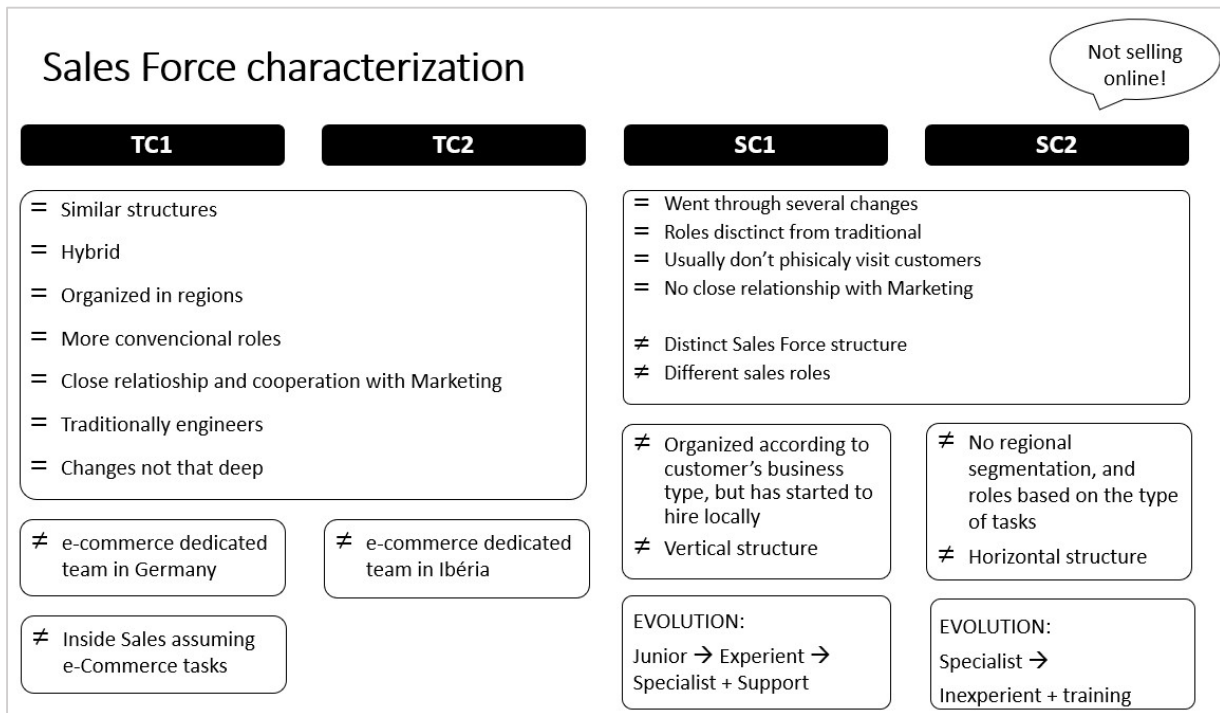
SC2’s sales force evolved as described below:

When SC2 started it had only one person, the current sales Manager, doing everything, “from start to end”. He did the prospecting, “spending days and days on LinkedIn and Google, trying to find contacts”, and he was using Trello as an organization tool, “where each new lead was a new card”. But once they reached a certain level of output, “it started to get very confusing”. With the company’s growth, the sales forces evolved to having two AE's, both doing everything. Then the sales Manager realized that some separation was required, so he segmented the team, creating two different roles: AE and SDR.

At this point, the company adopted the new HubSpot CRM and started creating automated campaigns, being “immediately clear that the output level was much higher”, as the sales team was “able to send a lot more emails, and do the automatic follow-up, without having to worry about the routine, time-consuming tasks”. Then they started using other digital tools that help them “get much more leads, information about potential customers, contacts, and so on”.

As the sales team grew, they also segmented it by industry, with, for example, one Account Manager allocated to high-risk industries, and the other one to low risk, “and the same for SDR’s, so that it doesn’t overlap in terms of tasks”.

Figure 3: Sales force characterization summary



4.2 Digitalization within the sales force

The results of the analysis of this dimension allowed to learn and understand how digitalization is impacting the sales force and the salespeople, and what role technology and automation have within the selling activity of the case studies. The results of the interviews' analysis revealed a new dimension related to the challenges that digitalization is bringing to B2B companies.

4.2.1 Technologies currently used by the sales force

When it comes to the technologies currently used by the sales forces, both traditional companies highlight the importance of the Customer Relationship Manager (CRM), both have the same Enterprise Resource Management (ERP) and both have an online shop, besides the “standard digital tools”, such as Office 365 and Microsoft Teams, especially now, for the meetings. TC2 underlined the importance of CRM, to support “most communication worldwide with the customer, all the projects, business opportunities, so we have a track of everything that is done with the customers and can follow-up. Otherwise, we can't control the business”.

TC1 emphasized the use of other eBusiness technologies, such as electronic catalogs and Price Lists, stating that they are starting to use “more and more” Punchout. When customers ask for it, the company also provides “the connection through platforms like SAP Ariba (a procurement and supply chain collaboration solution that allows companies to connect to a B2B network) and Coupa BSM Platform. Electronic Data Interchange (EDI) is less used, and system-to-system is also “not increasing”. Regarding the online shop, although the one owned by TC2 is recent, it's getting good results. TC1 is selling online for around a decade, but there hasn't really existed an investment and the technology is outdated. In terms of recent technology investment, TC1 is implementing a new CRM and a new website, and TC2 is upgrading the ERP.

When it comes to CRM, SC1 is the exception from all the use cases, because they don't use a proper one, but instead, an internal tool, built in-house, that contains customer and product data, sales history, and transactions, working, at the same time, as a kind of CRM and ERP. Although it has around 5 years, this system is already outdated, and the company is building a new one, to replace it, allowing new functionalities, more like a regular CRM. The online shop is the only platform that SC1 didn't create internally, and it's based on nopCommerce, an open-source e-commerce platform, that is totally customized to the business needs. This is replacing an old online catalog that only allowed customers to create Wishlists, which were later manually handled by the salespeople.

SC2 does not have online sales, but their salespeople completely rely on a more recent CRM (HubSpot), as well as other digital tools, such as Similar web and Hunter, and social media, especially LinkedIn. The sales Manager explained that they don't use digital channels to make the sale itself, but rather to get the leads, being CRM the main one, “used to log in all the activities that took place with the customer, from the moment of the first campaign, the first contact, while it's in a prospecting phase, until later when the customer has been already closed. Everything is registered in the CRM. It's the platform we rely on whenever we want to know the status of a customer”.

In addition to CRM, SDR's use other digital tools, like Similar Web, which “allows them to see the traffic quality and the demographic KPI's of the traffic for each website”, helping the salespeople to prepare the campaigns. This tool also allows them to generate their own leads, “meaning that they can insert parameters and extract a list of websites that correspond to those

parameters”. From here, the team uses LinkedIn “a lot, for example, to find out who is the most relevant person for the initial contact”. And then, they use other tools, like Hunter (hunter.io) which helps them “get the contacts of the person they saw on LinkedIn”. Finally, they set up the email campaign in HubSpot “and the CRM triggers all the emails to those companies, and it follows up automatically, until the moment someone replies”. Here, “it becomes a more manual process”, with the salesperson replying to the email, setting up a call, and then following the sales book”.

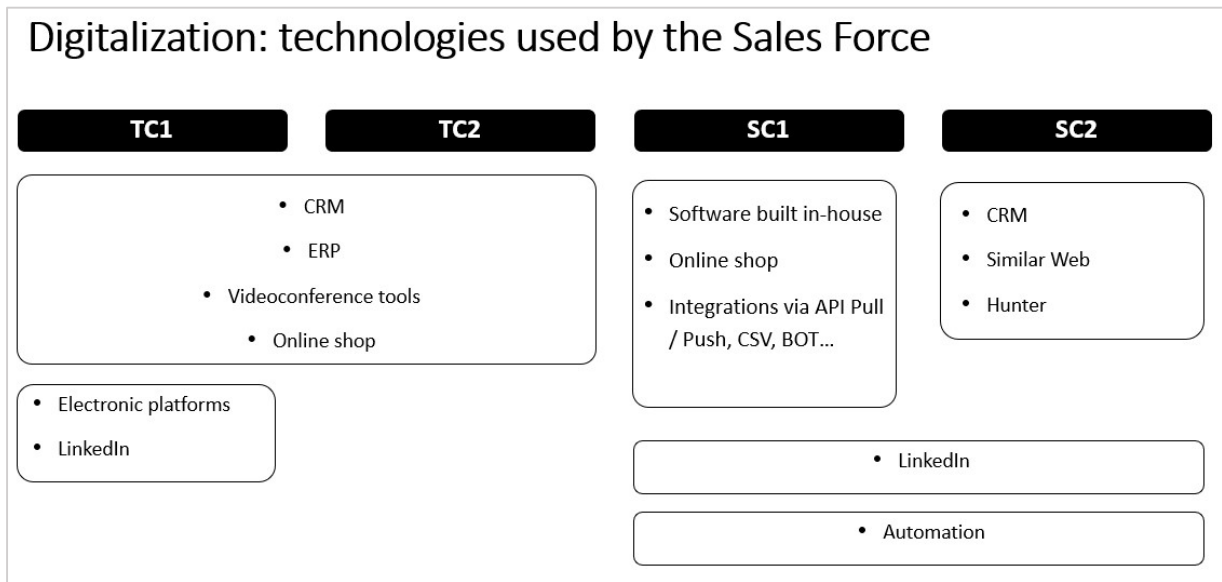
4.2.2 Automation

Concerning automation for sales forces, the traditional companies’ online shops allow customers to place orders on their own and create automatic purchase orders in the ERP and send the data to the CRM. Besides currently doing 13.000 orders per year automatically, TC1 online shop also allows customers to place quote requests, automatically creating a lead in CRM.

Within the startups, SC1 recently created an online shop, but the company had sales automation before, for customers with API connections. Every time a customer places an order, via the online shop or another digital channel, a ticket is created on FreshDesk (a ticketing tool) with the order details. A background job is running every 20 minutes to scrape those tickets, identify the orders, and create an automatic Purchase order in the internal system. From there, the process becomes manual, with Customer Service or Account Managers, depending on the type of customers, checking the open orders, and closing them. Besides the sales automation, SC1 also has pricing automation, so both the online store and the channel integrations automatically provide clients with specific prices and visibility rules.

As mentioned before, SC2 doesn’t have automation in sales itself, because they don’t sell online, however, the prospecting phase, particularly the email campaigns and follow-up are automated, using the CRM. The only time prospecting is not fully automated is when they go to events, “which we used to attend a lot before Covid, and there it was SDR’s job to schedule meetings so that AE’s could attend and close business with new clients”.

Figure 4: Summary of the technologies used by the Sales Force



4.2.3 Impact of Digitalization on the sales force

TC1 admitted that “nothing has changed too much over the last years”, even having the online shop, because “the mindset is still: opportunity, quote, order, order confirmation, invoice - the standard transaction funnel”. Despite this, the company admits that “the requests on automating orders and transactions are increasing a lot”. Also, GCC “desperately needs automation in transaction orders, especially when it comes to repetitive purchases because customers want to do this more and more online”. TC1 response to this demand has been slow, reason why they “need to put more rubber in the road”. In terms of size, “the digitalization did not affect the sales force”.

TC2 has been experiencing a significant transformation, since the days when the sales forces had to “write down so many faxes and calls, take note of everything”, which made them “very rapidly change and push the email – that was the first step”. The following action was to “make customers, to not only make an order but also to have a format to the SAP system”, leading to the implementation of e-commerce, five years ago. The Iberia region was a pioneer in online sales, due to the persistence of the sales Managing Director, that was “begging all the time” for an automated process for the customers. When it finally happened, the company was surprised

by “how the process is done automatically by the customer. And just very few of them are complaining because they have a different system, demanding double work”.

Currently, in the Iberia region, 95% of the orders are placed online, which was “a big transition”. This average drops to 75% of all orders placed via e-commerce, “because there are changes done manually”. Not all TC2 regions have the same success with e-commerce, with some “still at 20%, or even below that”, however, the company set a global target of 30% for online sales, which is, so far, “struggling” to achieve.

SC1 has been digitalizing and automating several manual processes, not only related to order creation but also pricing, with the creation of a Price Engine, that daily automatically generates and distributes thousands of specific product prices, keeping all the channels updated, for all types of clients. Besides “the manual effort being very little, compared to before”, this automation “reduced the human error”, producing “a huge difference in the daily tasks of the sales forces”. At the same time, is allowing the company “to hire more specialized salespeople because we have already some levels of automation, digitalization, and e-commerce absorbing some of these time-consuming tasks”. The company also invested in a wide data analysis team, which prepares and feeds reporting dashboards that sales use to immediately and easily have access to sales metrics. “With only some clicks, we can see how a client is performing, the sales revenue for a specific date, and so on”. Ultimately, technology and digitalization have been allowing SC1 “to automate the less productive and more time-consuming tasks and spend more time investing in what can make our business grow: bring new clients, expand the market, and improve our sales revenue”.

Despite not selling online, SC2 has been benefiting from digitalization and automation, as “the use of HubSpot allowed the sales forces “to focus only on feeding and creating more pipelines. It dramatically increased the output, and there were many more leads passing through for the AE’s to handle”. This was, for the company, “the biggest impact” of using the CRM and automation. Afterwards, by adding the other digital tools, that provided “in advance, knowledge about the main customer needs, based on demographic information of their traffic”, the team was also able to “increase the quality of the leads”, hence, getting a “better response rate to the email campaigns”, that could now be “very personalized. And then it was all snowball effect”.

4.3.3.1 New dimension: Challenges of digitalization

Nevertheless, this digital evolution also brings new challenges to the companies, and SC1 pointed that out: “it sounds really good”, but there is also a downside to it.

- “It's not cheap”: From a cost perspective, “even if a company is saving on support staff”, they still “have to hire developers, and their cost is probably three times higher”. In addition to this, “tech becomes obsolete very fast”, so, “at least every seven years, you're going to have to overhaul your systems”.
- “When something fails, it fails at scale”: The damages from human error, for example, on a call with a customer, are constrained to that one client, but “if I mess up something on my logic or my API, it affects every single client or product, and it’s harder to spot the error, and you notice too late that you’re making business decisions based on potentially false data”, which leads to the next challenge.
- “It's not enough”: There is also the need “to invest heavily in internal control and the integrity of the data and the systems”.
- “What if today we get hacked”: With digital and technology, there is a “higher exposure than if things were being done manually”, so there’s the need to “future proof it”, against all this. “It's really a balancing act between stability and agility”.
- “It generates a lot more data”: which is the major last challenge pointed out by SC2, and it’s a consequence of automation and data collection.

4.3.3.2 Impact of Digitalization on salespeople

TC1 admitted that changes from the impact of Digitalization on the salespeople “are not as much as I would like to see” and added that “the online business is not influencing the salespeople as it should”. However, the interviewee expects to see “more changes than they want” in the future, given that the company has “more requests than it can actually fulfill”, even if “the technology and the readiness on both sides are not matured enough”. Also, the role changes that salespeople have been experiencing are “more related to the company merger”, and the implementation of a “new way of selling” by the management.

TC2 highlighted the benefits of digitalization on salespeople’s tasks, since “now they don’t have to spend so much time” with time-consuming manual tasks, and “have much more time to

dedicate to bring new clients, sell more, think of different strategies”. The company admits that “maybe, in the beginning, they didn’t want this that much” but that they ended up “seeing the benefits”.

In this company, the difference is that now, instead of selling everything, the salespeople “can focus on a product segment”, which is “far more efficient” and provides better opportunities “because they get more in contact with international colleagues, and they can grow”. Thus, it doesn’t matter if the orders are digital or manual because the salespeople “are still responsible for the customer, sales conditions, special prices, and so on. So, changes yes, but to be more efficient”.

On the startups side, SC1 feels that “nobody is afraid of automation or digitalization. In fact, they are the ones pushing it”, so that they can leave the manual time-consuming work”. The responsible added that “the only people that might say no, are people who are afraid that their jobs are in question because they're not sure they're going to be able to continue to bring value”. On SC2, “the very young” salespeople are “always willing to try new things”, and “are proactive enough to suggest new tools”. In fact, all online tools that the sales forces currently use, “were proactively suggested by the salespeople”.

4.3 Online Sales Channels

For this research it was important to understand which channels the case studies are using to sell, especially online, and the results helped find out the reality of the e-commerce status. The results also demonstrate the impact of e-commerce on the sales forces and salespeople, and how it’s affecting them in terms of roles, training, commissions, and job insecurity.

4.3.1 Sales channels used by the company

Traditional companies are both using the same sales channels: direct, indirect (distributors), and online (e-commerce). TC1 has a bigger focus on electronic platforms but, despite this, there are other online channels, such as Alibaba, eBay, or Profishop, where they “refuse to sell” their high technology products, because their business is “configuration and service”. If, traditionally, the online shops are seen as ideal to handle the smaller, easier orders, “that’s not really the truth”

on TC1, since their selling platform “has shown every year there are sales across the complete customer classification”. TC2 had EDI “many years ago, and there are still some big customers using it, as well as some electronic catalogs, but the online shop is the main channel for the customers buying online, “with their specific pricing, and same availability of material”.

In the startups, SC1 is selling mainly online through e-commerce, set up on different technologies, such as customized integrations, Pull or Push API’s, CSV and Bot upload, and online shop, depending on the customer’s business type. SC2 sells its services always through salespeople and has no online channels. Their service is billed monthly, so it’s a recurring sale, but along the way, customers can add new options to the contract.

4.3.1.1 Online vs traditional channels

TC1 is selling around 5% of the company’s total revenue through the online shop, but this percentage does not include the e-platforms, because “unfortunately” they don’t measure them. The interviewee explained that “no one ever did an investigation of this, but we should”. For TC2 the percentage of e-commerce revenue, in the Iberia region, reaches 95%. Globally, “it varies” according to the country, but around 20% would be “the lower percentage”. In the case of the startups, SC1 has the revenue split in the following way: Marketplaces - 50%; Virtual Consignments - 3%; Retailers - 30%; Physical Consignments - 16%; Liquidation auctions - 1%. From this, it wasn’t possible to differentiate between online and traditional sales. In SC2, as previously mentioned, even if the first steps of the funnel are very much dependent on digital technology, sales themselves are 100% direct, with deals being closed only by the salespeople.

4.3.1.2 New dimension: social media

When talking about digital channels, three of the companies mentioned a social media channel in particular: LinkedIn. TC1 said that “LinkedIn is becoming a more and more important channel to inform the people what we provide, what we have, and what we can do”. Stating that this “is not a strategy”, but “a natural thing”, as customers are “getting more information from there”, and as “newsletters decrease in important, with opening rates going down and bounce rates going up”. For the startups, LinkedIn is also a tool. SC1 doesn’t use this social media so

much from a selling or commercial perspective, but more for recruiting and brand awareness. In SC2 salespeople have made a tool out of it, using LinkedIn “a lot, since the beginning”, as a source for contacts and leads.

4.3.1.3 New Dimension: The role of face-to-face for digital companies

SC1 still sees value in physical visits (even though it recognizes that a lot of business can be done digitally) depending on the sales force area. In the case of SC2, the company doesn't want to encourage this, since they prefer to sell standard solutions and do business that can be closed digitally.

SC1 states that before Covid, “there was tremendous value in going out physically knocking on doors, having face-to-face meetings”. And even though “companies are modernizing” and “there are a lot more businesses expanding internationally”, face-to-face “still has value”. This company believes that “there is still a place for physical interaction” but has also realized that “there is a tremendous amount of business that can be done without it”. Once more, for SC1, it also depends on the purpose of each sale team, “because it doesn't have the same value across all sales force”, being more important, for instance, for New Business, that “needs to go after prospects and visit them, to be able to close them as clients”. For this reason, the company is currently hiring more salespeople in different locations, to help expand its market and get more clients.

As a service seller, SC2 salespeople visited “a few customers, on rare occasions” and “only enterprise level”. In fact, this has never been the type of customer that the company prefers, since “it requires customization of their products, making the sale take longer, as it requires the participation of more people”. The sales force focus “was always on ‘bread-and-butter’ customers”. The exception happens when the company participates in tradeshow, where face-to-face with potential customers is indispensable.

Figure 5: Summary of the online sales channels used by the sales force

ONLINE SALES CHANNELS		
TC1	TC2	SC1
ONLINE STORE		
<ul style="list-style-type: none"> • 24/7 • Specific products, prices and payment terms • Checkout with different payment methods • "My Account" area 	=	=
<ul style="list-style-type: none"> • Launched more than 10 years ago • Quotes requests • Online product configuration • Order history 	<ul style="list-style-type: none"> • Launched 3 years ago • Customized products requests submission • Reply within 24 hours 	<ul style="list-style-type: none"> • Online shop: <ul style="list-style-type: none"> • Recently launched • Order history • Integrations with dozen of marketplaces
<ul style="list-style-type: none"> • 5% of sales total 	<ul style="list-style-type: none"> • 95% of sales total (Iberia) 	<ul style="list-style-type: none"> • More than 50% of sales total
<ul style="list-style-type: none"> • E-commerce is not a priority • Lack of investment from management • Distrust 	<ul style="list-style-type: none"> • E-commerce is a priority • Global target: 30% • Investment and benefits communication → Trust 	<ul style="list-style-type: none"> • Technology is the <u>main focus</u> of the company • e-commerce is a priority

4.3.2 Impact of e-commerce on the sales force

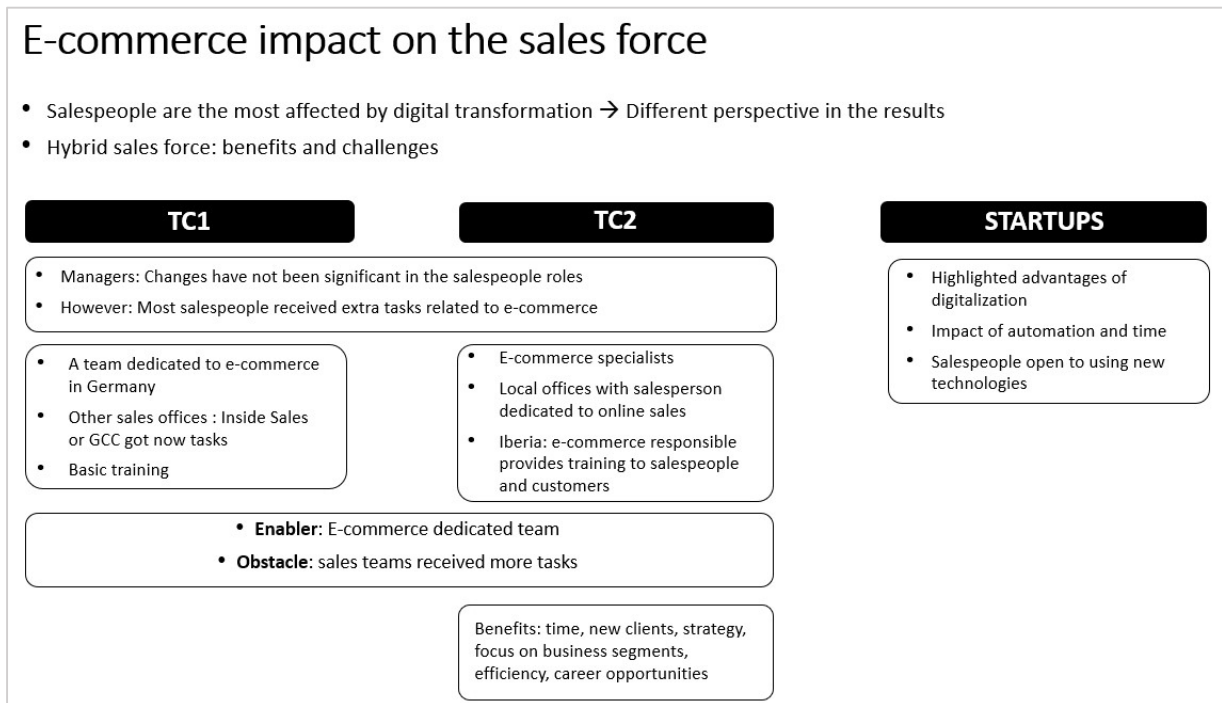
SC1 has been basing its business on online sales since the beginning and the main recent change for the sales force is now the online shop, but the fact that it is in a very early stage doesn't allow to immediately assess its impact. The main difference so far has been the migration of all Direct Order customers from the old electronic catalog to the new store, where they are now able to place their orders on their own, "providing more time to Account Managers to dedicate to bigger clients that require attention". However, SC1 expects a bigger impact in the future, hoping to "hire people to work only with e-commerce, because the goal is to grow this online channel, to automate the selling process for most of the existing clients, and keep a more personalized management for the bigger ones while having more time to prospect and find more new business". The other online channels are also "super important", reason why the company aims to bring more clients for them, "because it allows pushing inventory and prices automatically, almost in real-time, and receiving orders also automatically, saving a lot of manual work". SC2 doesn't sell online.

On the traditional companies' side, TC1 claims that, besides the evident advantage of being able to sell 24 hours a day, 7 days a week, for several countries, the impact is "not much so far",

because the company focus has been the implementation of the new CRM and website. Only then e-commerce will follow, and management is deciding “how that could look like”. The old existing online shop wasn’t enough to create a visible impact on TC1 sales force, with the exception of the creation of a dedicated team in Germany to handle the online selling, because it’s the country where the shop is selling more. For the other countries, the sales teams on local offices are handling online orders, “usually the Internal sales or GCC teams”.

TC2 emphasized the possibility given to small-medium companies to buy at any time, even during weekends, which “is a very good thing for them”. The online shop is mainly for standard products, although, for some products, customers can “write down a comment asking for a different specification” and submit what the company calls a Customer Product Development (CPD). If this customization “is something easy” the process can continue on the e-commerce side and clients “get it quickly”, but if it’s a big development, the order follows a different process “also digitalized”: all the information goes to a platform and the Product Manager makes sure that we can get an answer for the customer within 24 hours. Again, the interviewee underlines the impact of e-commerce, claiming that “the only way the company can do this, is if everything is digital and people get the information immediately, at the same time. Otherwise, it can take days, or weeks. But that was in the past”. The company is so invested in this quick flow, that also set a global target: within 24 hours the customer must have an answer saying when they will get the product.

Figure 6: Summary of the impact of e-commerce on the sales force



4.3.3 Impact of e-commerce on the salespeople

4.3.3.1 Roles

In TC1, the biggest change regarding salespeople’s roles, happened in Germany, with one salesperson being allocated to work exclusively in the online shop, and one other adding the new responsibility to their tasks. For the rest of the markets, “Inside sales is, in most of the countries, responsible for e-commerce as well” and, in others, is GCC. These salespeople were given extra responsibility, and to support that, they received training about the online shop, and now there are “regular meetings with them”. Additionally, with the implementation of a live chat in the online store, some specific people from Inside sales and GCC, “that got training” are also replying to customers.

TC2 got experts for e-commerce, and they made some people responsible for this sales channel only. The company has “one full responsible on top and each region has one person that was working in the Internal sales but can now dedicate more time to the e-commerce”. In Iberia, where the online shop is more successful, there is a person responsible for e-commerce, who’s doing “the interface with the headquarters, training the customers, and doing the follow-up”.

For the sales Managing Director, “this is the proof that you can’t get rid of this person”, meaning, that e-commerce is not replacing salespeople, “because they are doing now double work, are more efficient, and are giving more profit to the company”.

4.3.3.2 Training

TC1 states that the salespeople handling the online sales “got training regarding the online shop, about how to use it, from the Backoffice and Customers perspective, and they all have permanent training as well”. The same happens in TC2, but here there is also an emphasis on “making the salespeople aware that this is good for everyone and why. And then, a few months later, they will realize that it makes a lot of sense, and that is too bad we didn’t do it earlier”. In SC1, the Product Managers of the online sales channels “provided demos, user guides, and training for the salespeople”. For the online shop, for example, they have been taught how to use the new platform from a customer perspective, so that they can onboard the clients on the new store, but also how to use the Backoffice and the management tools they have at their disposal.

4.3.3.3 Commissions

According to the investigation, salespeople have two main concerns regarding e-commerce: that they will lose commissions or even their jobs.

In what concerns the sales commissions, TC1 states that “commissions are the same for orders coming via digital or traditional, whether clients buy through the online shop, or directly with the salesperson”. For TC2 “it’s not relevant if the order is electronic or manual, because if you change this, then you get in trouble with the salespeople. They will really get mad and most probably you will start losing people that are really valuable for the company”.

SC2 salespeople also have commissions based on their sales, and in SC1 salespeople don’t receive any sales commissions or variable wages.

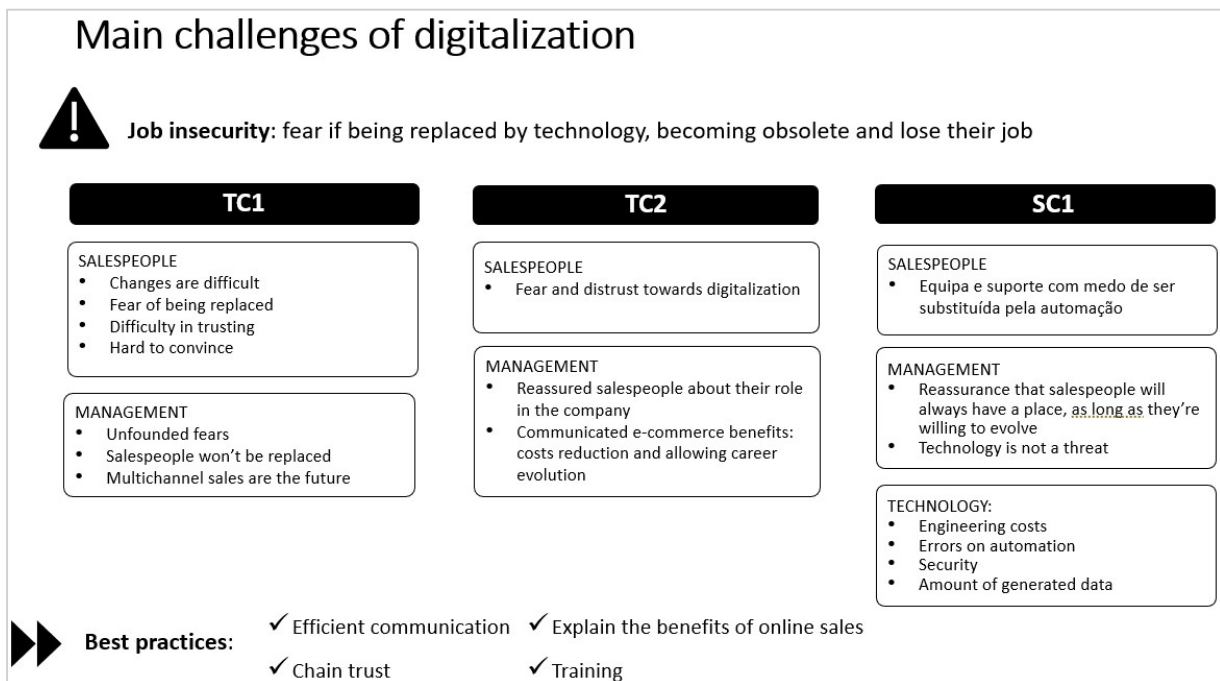
4.3.3.4 Job insecurity

TC1 admits that “the change (caused by e-commerce) is very difficult”, and “it’s a natural thing that people are afraid”, reason why it’s taking “a lot of time to convince and take people with you. It’s hard to make them trust what you say”, because “they are very much afraid of being replaced by technology. These are spoken words from salespeople, not assumptions”. In the face of this situation, TC1 assures that salespeople won’t lose their jobs, because “omnichannel is the way” and this is the value that the company wants to provide to customers.

When it decided to invest in e-commerce, TC1’s sales Managing Director spent “the time explaining why this was important, the benefits, telling they would not be fired, not even the Internal sales (now CS)”, because for them, “digitalization was always a threat”. However also this company guaranteed that salespeople wouldn’t get fired” and explained that the firm would “save a lot of money” and that they would “have time to work on other things, like do a proper market investigation, find new customers, get deeper with the big customers”, tasks that they couldn’t perform before “because they were so busy”. The sales responsible believes that “e-commerce is not more successful because of these people’s insecurity”, and so, he always tried to give “full security”, by telling them their job was granted, and that they just “needed to do a different sales approach”. The incentive and reassurance seem to have brought gains, because if in the beginning, all this was “maybe a little bit threatening”, now salespeople “are happy that they’re not talking all the time with customers for taking the orders, just talking about products, projects, or whatever”.

The effect of job insecurity is also a concern in SC1, but less on the people that are actually selling, and more on Customer Care, which sees a threat in the automation of the order processing. But the company positioning is similar to traditional ones, stating that “if they are skilled, they won’t lose their place at the company”. Instead, “they shift to a higher-level set of tasks. The only time it's scary is when you have nothing else to offer. And if this is the case, is not a problem of the technology, it's a problem of the person”. So, the recommendation is that people “must grow their skills”.

Figure 7: Summary of the main challenges of digitalization



4.3.4 New dimension: Customers' impact on e-commerce adoption

The way customers adopt e-commerce depends on several factors, but according to both the traditional companies, it's very much related to the country where the client is based, and to the local Sales Office effort to push it. In TC1, for example, for companies from countries such as Italy, Spain, and France, "the adoption is harder". And the "difference is really in the countries where you actively force the customers and talk to them about the online channel. If you don't do it, then you don't have a big footprint in those countries". Nevertheless, TC1 sees an increasing trend in digitalization, with customers requesting to connect their ERP's to modern horizontal platforms, highlighting the potential of digitalization for Peer-to-peer (P2P). The Global Head of e-commerce and eBusiness wishes to comply with these requests, and mentions the increasing importance of sustainability platforms, "growing more and more, influencing the decision from the big customers, and one or other vendor. If you have a high score in this kind of sustainability platforms, then you are more recognized as a vendor than a lowest one", because "carbon footprint is also a topic now".

TC2 sales Managing Director's experience on this matter, "after four years using a lot the e-commerce is" that it's crucial "to train the sales force first, convincing them, at the same time, that it makes sense". Then, "the management has to train and convince the Customer Service specialists. Once 90% of the people are convinced, they will support us. Then you have to go to the customer, one by one, inform and train them", and show the benefits that e-commerce can provide them. For this company, the trick is "first, the team, second, the customer". TC2 says that even if some customers will show reluctance, "because it represents double work or they are too old fashioned", and at the same time "to change the mind of someone who is not using electronics is quite difficult", they are "very few". For the sales responsible, "the main issue is the people in the company, not the customer", and he believes that "the only thing that can block the success of e-commerce is the team that a company has inside". In the case of TC2, once this blocker was removed, and with the salespeople aligned, some promotions on the online shop did the rest of the work to make customers buy for the first time, as well as removing "any potential reluctance" from the sales teams, because "it became a demand from the customer". But also, in TC2 the findings "are not the same in all countries", and the responsible believes that the huge success of e-commerce in Iberia is "because of the people".

4.4 The Covid-19 impact on B2B e-commerce

It's a fact that Covid forced many companies worldwide towards a more digital world, especially because for a lot of time, people couldn't physically meet, and video calls took over. With regard to this, the case studies were questioned about the pandemic consequences, to understand if it took them closer to digitalization, why, and the impact it had on the sales force.

The traditional companies had to slow business due to closed facilities (theirs and customers'), but the startups had exponential growth in business due to Covid, whereas because end customers were shopping more online, hence SC1 clients needed to achieve more supply, or because more businesses wanted to sell online and/or improve their e-commerce payments, in the case of SC2. What was common to all of them, was the adoption of digital tools in their daily work and business.

For TC1, the pandemic caused a "change the sales behavior" that was "similar for all companies", where "the video chats probably had the biggest impact". When "all the customers

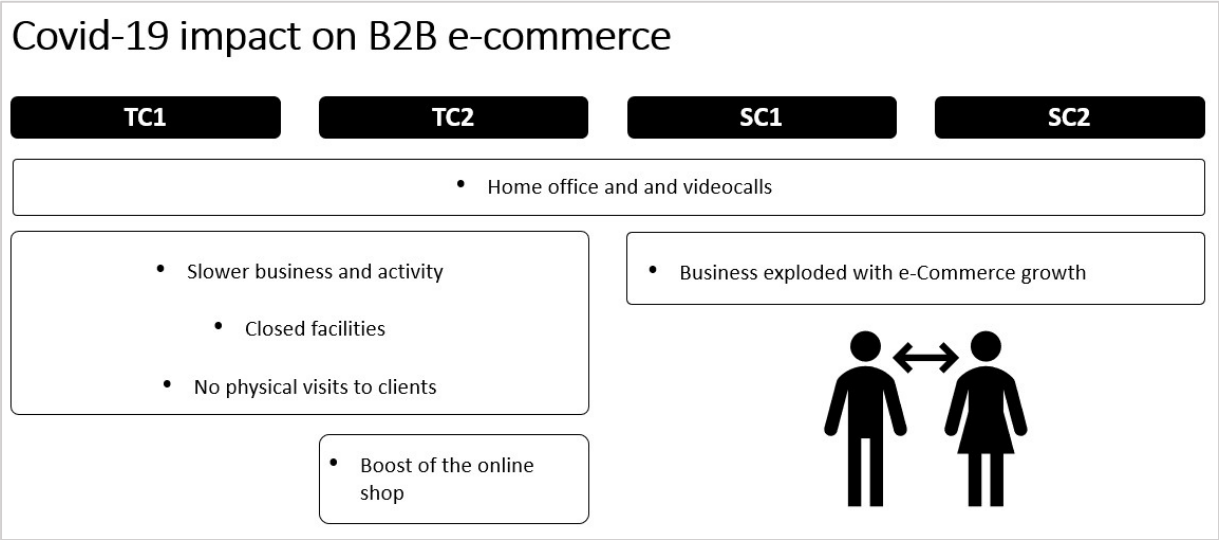
closed their facilities and sent their people home”, the challenge to this company was to find out “how to move on with the business”, and “this was made online”. Thanks to the Internet, “sales Engineers were able to still be very involved when customers wanted it”. Another consequence of the pandemic was that customers “didn’t want to receive salespeople on-site”, and TC1 is not sure “if this pendulum is moving in the other direction”, or even “if this will come back entirely, because companies found out that there is a huge potential in saving costs if you reduce the windshield time, the traveling time, all the travel expenses. They saw that if they don’t provide a desk to everyone, they are also saving money. And nothing is breaking down with people working from home. It seems to work”. Due to this, TC1 is currently defining “remote working guidelines”.

TC2 reported that the main impact, besides the business, was also “the personal relationship”, because they couldn’t visit customers anymore, when before they would visit 3 or 4 per day. Despite “missing having face-to-face meetings with customers” the company sales force did “very good so far, having all the meetings online”, got used to it, and now considers it “very convenient”, because it’s allowing the company to “save a lot of time and money”. The benefit of the pandemic for TC2 was that digitalization “was really proved very fast and now almost everything is done digitally”. In addition to that, the company’s e-commerce platform “is incredibly boosted”, and “the usage that all customers are currently doing of it is incredible”.

On the side of the startups, SC1 repeats the same major impact of Covid, with the impossibility to meet, travel, and “the need to set of rules for everything”, such as finding a solution for an office that was being paid and not used. Video call platforms “became critical” also for this company. But the pandemic ended up being “extremely different” than expected by SC1: “We were prepared for things to be bad, thinking we would have no money, being conservative about hiring and buying, because it was a global pandemic. We were wrong”. With Covid, “the business boomed. Nobody was allowed out of the house, so people shopped online”. As a consequence, TC1 saw “sales growing and the resale business boomed”, because the company partners and clients “were not making money through physical stores, so it actually expedited online”. So, the pandemic, in general, for this company was “largely positive”, and a “massive opportunity”.

When asked about the Covid impact, SC2 started by stating the same: “Our volume exploded”. Having online payments as its core business, the company suddenly was getting contacted by “many new potential customers”, and “many of the existing customers have doubled their monthly billing volume because of Covid”. Even with some businesses industries “decreasing for a while”, for example, sports betting, “because the sports events were all canceled for some time”, in general, SC2 “turnover increased during this period and never went down”. As it happened with the other case studies, remote work was implemented, although, for this company, the transition was a bit challenging in the beginning, “but then everything started to go well, and sales even started to produce more”.

Figure 8: Summary of the Covid-19 impact on B2B e-commerce



4.5 New dimension: the Future of B2B e-commerce

When questioned about the future within the digitalization path, and how it will affect the sales force, and the salespeople, both traditional companies mentioned the importance of data and believe that it will have an important role in the future of sales, but both admitted that they are not prepared yet for it. Even though, the TC1 interviewee manager said that, when comparing to what they had five years ago, digital business “is going more to self-service. Customers still need a quote, they still need to send it to us however they want, and then they want to follow it, the whole way. This self-service is where the music plays”.

SC1, on the other hand, has an extensive team of data analysts and sees automation and digitalization as the future. SC2 mentioned that personal contact is still important for trust, reason why they want to keep participating in events, and have no plans to sell their services online, even being a tech company since the beginning.

TC1 is “convinced” that the future within digitalization “will not reduce the headcount in the sales force”, but “the behavior of the tools and how salespeople use it will change”. The responsible made an exercise to what the future could look like assuming that the Inside salespeople will be responsible for the online as well: “they have their customers, and they get a channel now which they can also use to work with. Instead of having to pick up a phone and give a quote, they will check the abandoned shopping carts, check the leads coming from Marketing automation, from remarketing, consult the customer journeys...”.

The Head of e-commerce and eBusiness conceded that TC1 Field sales are currently “doing active work”, but Inside sales “are still too much sitting and waiting aggressively that the phone is ringing”, and he believes that this “might change with different tools and more data around the customer”.

And data analysis seems to be the solution that the sales force needs to bring visibility to “so many spots” where they are “blind today”. With this future analysis around the customer, and the amount of data collected TC1 sees a new challenge: “to sort it” in a way that allows the sales force to see opportunities, besides the ones coming from Marketing leads. The interviewee confessed that it still surprises him “that companies like Amazon, Facebook, and Google, know so much about each of us, and companies in the industry do not even have 1% of the same possibilities to track those things. We are still in this waiting aggressively, and then we go there and do our great engineering work. Using this data analysis and Artificial Intelligence will play a major role, but we’re still not there now”.

TC2 started e-commerce with the intention to digitally and electronically do the business that is being done by hand, and as they keep building this base, they expect to “speed up other processes”, because they are “saving time”. With the extra time, there’s the opportunity “to do promotion”, “go to the field to get different customers”, “grow the percentage of customers using the platform”, but also “to put more and more information” into the company digital

platforms. The way TC2 sees e-commerce in the future is by doing “almost everything from the sales perspective” and freeing the sales teams to “bring new business”.

TC2 also sees Artificial Intelligence and data analysis in the future of the sales force, “but not yet”, because they still need “to build the people for that”. The responsible believes that the company still doesn’t know how to make use of the analytics, even if they already have some. But “to make a prognosis, or a future development in our industry is still too complicated at the moment”, and “there’s no one dedicated to that now”.

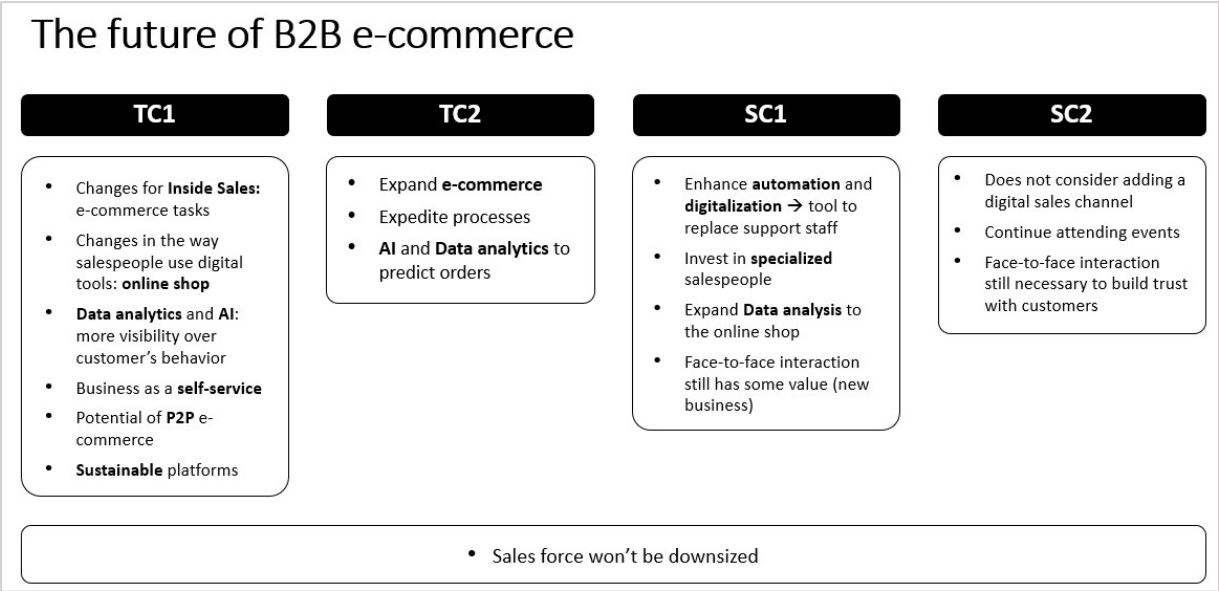
Although the sales force can’t predict orders yet, the Iberia clients are “planning and placing orders from 6 to 9 months. And this is where our electronic platform worked and did a good job”, TC2 claims, because when the order is placed, “the system will split it and the client confirms if this works for them”. If the company would have AI, instead, they would be able to tell the customer what they needed to order for the next months and have everything prepared to fulfill. “That would be really great. But we can’t do it at the moment. There are too many variables around”.

On the startups side, SC1 mentions that the next step of the company’s sales force evolution is to take automation and digitalization further. For the Head of Strategy and sales, the “most ideal scenario” would be “not to have any support staff”, meaning that they would have been replaced by a tool, and therefore, “my entire workforce is an individual contributor or a professional and up”. This would allow the company “to invest in more skilled individuals who can do more strategy, more planning, and more optimization”, because they would no longer “have the need to offload anything administrative or manual” into the salespeople’s tasks.

In terms of data analysis, SC1 is ahead of all the other case studies, as it incorporates a dedicated team for this area. One of the tasks they perform, as an example, is to analyze final consumer preferences, in terms of product categories, and report that to the buying teams, so that the offer fits the demand. The data team is also analyzing prices in the different markets, to suggest the selling prices, besides preparing sales reports. However, no data is being analyzed yet for some online channels, such as the online shop, that really can help the salespeople to better understand the customers’ behavior, so “there is a lot of room for improvement in this area too”.

In the case of SC2, born already in a 100% tech environment, the sales force “is used, since the beginning, to utilize digital channels”, such as social media, email, messaging platforms, and so on, to get leads. However, as mentioned before, they also still resort to more traditional channels such as trade shows and conferences “to increase the intimacy of the sales process”. So, for the future, this company believes that “although it is possible to sell without having physical contact, this helps a lot to create a relationship of trust and it will hardly be put aside in our sales strategy, even if it has been reduced, especially during the pandemic”. Also, although e-commerce is the main focus of their business, “now even more than before” and the plan is to keep working this product, e-commerce for their own services “doesn’t make much sense, considering our business line”.

Figure 9: Summary of the future of B2B e-commerce



4.6 Word Cloud analysis

The Word Clouds analysis allowed to get an immediate visual representation of the collected data. The findings of each case study interview Word Cloud are explained below.

4.6.1 Word Clouds for the case studies

When looking TC1 interview Word Cloud (Appendix I - Figure 11), some words immediately stand out: “want”, “sales”, “online”, “people”, “customer” and “customers” have been repeated more frequently by the interviewee. Still, in the same color, which means it also had a high repetition level, there are “new”, “platforms”, “marketing” and “e-commerce”. On a quick look, the two most prominent words are “want” and “sales”.

TC2 Word Cloud (Appendix I - Figure 12) shows some similar feature words, such as “sales”, the one with a higher repetition, then “customers”, “e-commerce”, “time”, “customer”, “company” and “business”. At first sight, the words that stand out the most are “e-commerce”, “sales” and “customer(s)”, which shows what was the main focus of the interview of this case study.

The findings of SC1 Word Cloud (Appendix I - Figure 13) seem a bit messier than the other ones. “Going” and “staff” are the words that really stand out the most, and then there are several other ones also highlighted: “people”, “business”, “new”, “support”, “team”, “grow”, “sales”, “time” and “hire”.

For SC2 (Appendix I - Figure 14), there is one word that is obviously standing out of all the others: “sales”. This was, by far, the most frequently used word, and only a few others are emphasized: “customer” and “people”, and, at a lower level, “customers”, “team”, “tools”, “crm”, “new”, “prospecting”, “online” and “email”. Evidence shows that SC2 answers were very concentrated around the sales theme.

4.6.2 Overall analysis

For a more accurate reading of the Word Cloud findings, the top 20 of the more frequently used words were listed. The word frequency of the Word Clouds for all case studies is represented in Table 4 – Appendix II.

TC1 most repeated word, “want”, might seem random, but it actually fits the general evaluation of this company interview: online sales and e-commerce are not given importance and not bringing the expected findings, so the interviewee will be to do much more, to achieve a better level of Digital Transformation in the sales force. Still, one of the more important words for this

research, “e-commerce” shows below mid-ranking, being mentioned only 9 times. In opposition, in TC2 interview, “e-commerce” was mentioned 24 times: more than two and a half times repeated.

SC1 interview was very focused on the people and the business, which is visible from their more frequent words, also with a prominent “new”, more repeated by this company than from any of the others. Comparably to TC1, the most repeated word for SC1 was “going”, which also represents the current state of the company and its sales force, which is expanding, with new hiring.

Finally, in SC2 the most prominent is “sales”, standing very far from the second runner. This was the only case study to have the words “tools”, “crm”, “prospecting” and “campaigns” in the top 20 ranking, which also reflects very clearly SC2 sales force’s main goal and tasks since they don’t actually sell online.

CHAPTER V – DISCUSSION

In this chapter will be discussed the findings from the analysis of the interviews conducted with the four companies used as case studies, also resorting to the findings of the literature review.

The main problem of this research was summarized into a primary question: How are the sales forces and salespeople of B2B companies being affected by Digital Transformation, especially e-commerce? To answer it, nine specific objectives were defined, according to which it was discussed the findings of the literature review and the interviews data analysis.

SO1: Understand how the digitalization of B2B selling activity is changing traditional sales forces, in terms of structure and organization

As demonstrated in the literature review, the B2B sales forces have been facing several changes during the last decades. More recently, these changes have been caused mainly by a Digital Transformation that affects all the pieces of the selling organization.

Findings showed that traditional B2B sales forces are mainly organized into regions, with offices around the world, to sell and support customers locally. As customers grew in dimension and importance, and suppliers needed to provide more value to be competitive, the sales forces adapted and created new roles, the Global or Key Account Managers, to handle the firms' big accounts and provide them a single point of contact. Thus, both traditional companies from the study have a similar sales organization structure, that lies mainly on similar and more conventional roles: Outside or Field salespeople, Inside sales, Account Managers that take care of the big customers, and Customer Support staff. Although each company identifies these roles by different names, the general structure is the same, even when it comes to digital sales channels.

One of the more discussed topics in the literature was also the shift in Inside salespeople role, who have been assuming more responsibilities (Mantrala & Albers, 2010), as well the rise of Global Account Managers, to handle big worldwide customers (Sheth & Sharma, 2008), which was also proved by the data analysis, when the case studies described their salespeople roles. In TC1 and TC2, even having different names now, the Internal sales are mostly the ones dealing with online orders.

The traditional sales organizations from the study have more of the characteristics described in the literature review, when the evolution of the sales forces is explained: with the Internet, both companies experienced shifts in the selling activity, due to digitalization and the growth of e-commerce, presenting Hybrid sales structures (Thaichon et al., 2018). This structure involves the traditional and online sales channels, especially e-commerce, and the companies' websites, which is providing extensive information to the customers.

The existence of digital sales channels led also to some changes in both companies' sales forces, allowing them to sell 24/7, worldwide, and caused some adjustments in the selling organization, with the creation of a few roles to specifically handle the online shop. However, in terms of structure, not much has changed, as most of the existing salespeople just assumed new tasks related to e-commerce.

Thus, it is possible to say that digitalization caused some adjustments in terms of the structure and organization of the traditional sales forces, but not really deep changes.

SO2: Compare these changes to the ones that occurred in startup companies, and learn about their sales force evolution

Taking into consideration that the tech companies from the study are still very young, it was possible to learn about all the changes their sales forces have suffered since the beginning of the business. As described in the Findings section, there is a major difference between SC2 and the other case studies, which is the fact that they don't actually sell online. And this is not the only difference, as both startups' sales forces have distinct Structures, especially when it comes to the organization of the salespeople's roles.

Until very recently, SC1 sales force was mainly organized according to the customers' business types, however, with the expansion of the company, they started hiring locally, so that they can geographically cover more ground. SC2, on the other hand, has no regional separation, and the salespeople roles are based on the type of function, working as a funnel, from prospecting to closing the deal.

After comparing the reality of the sales forces of traditional companies and Startups, it was also evident that the last ones don't include, in their sales organization, the conventional Outside /

Fields sales or Inside sales roles, therefore, both get out of the traditional organization pattern for the salespeople's roles. In opposition to traditional companies, in general, startups' salespeople don't physically visit the clients, and all the communication is done digitally.

Another major difference between the traditional companies and the startups, is related to the salespeople's background education, although this is also related to each case study business area. As industrial firms, TC1 and TC2 sales forces are mainly built by engineers, that regularly have technical and product training. SC1 salespeople's background is more or less specialized in the company business area, according to the role they have, but there isn't specific training, and new people learn on the job. On the other hand, SC2 is providing sales and business training to the salespeople, especially because they weren't able to find qualified staff with the required experience.

When comparing the traditional companies and startup sales forces, findings showed another distinction, related to the Marketing Department. If both traditional companies have sales and Marketing working closely, and under the same wing, the same doesn't happen in the startups: SC2 doesn't have a Marketing department, and in SC2, although there is one, the relationship is not that close with sales.

SO3: Learn about how tech startups' sales forces have evolved

If the traditional companies' sales forces have been evolving for decades, from a product-focus strategy to concentrating more on services, solutions, and customers, dealing with all the subsequent changes of a digital transformation, while startups were born digital, so we wanted to understand how the evolution of their sales force was, since the beginning.

Even having some similar characteristics – two tech startups, about the same age, recently acquired by multinational companies – there are significant distinctions between their sales force, especially in terms of size, structure, and salespeople roles, with one selling products mainly using e-commerce, and the other one selling services 100% via their salespeople. Findings provided interesting knowledge about these new companies selling organization, which had different paths in the way both evolved.

SC1 described the steps of their sales force evolution, from the start, when the goal was to get as many customers as possible, using junior staff, while for SC2, the first person working in sales was already someone experienced and specialized, who was performing all the tasks. SC1's following steps lead them to start hiring more experienced people, and then highly specialized people until they required support staff so that the other salespeople didn't have to worry about admin work. On the other hand, when the necessity to grow came, SC2 ended up hiring more people without specific skills, training and then segmenting them so they could become specialists. Nonetheless, findings also showed a major similarity between both startups: the way both companies evolved their sales force toward digitalization and automation, with technology playing a key role in its development.

SO4: Find which technologies, digital tools, and online channels the sales forces are currently using, and how they are affecting the selling activity

The interviews analysis clearly showed that the sales forces from the traditional companies use very similar technologies, with an emphasis on CRM, ERP, and the basic tools for video calls. In terms of online channels and sales automation, both firms have an online shop, and TC1 also mentioned some e-platforms that have been requested by specific customers. As for the startups, while SC1 built its own management system, it was clear that SC2 strongly relies on CRM and other digital tools, and even LinkedIn, to prospect and engage with potential new clients.

With the exception of SC1, all the other three case studies enhanced the importance of CRM in the B2B selling activity, as an indispensable tool, that provided all information about any customer, at any moment. In a study conducted by Alavi & Habel, in 2021, CRM was the top-rated sales technology and was considered by the sales managers inquired as the most mature technology (Alavi & Habel, 2021).

These findings are aligned with Lilien et al. (2015) argument that information gathering is one of the main consequences of technological advances in B2B buying and selling, as firms started using digital tools that help them to identify leads and analytics tools to get more data about the customer's behavior on their websites (Lilien et al., 2015).

And in regard to the website, TC1 was the only company mentioning it, but just to say that they are building a new one. Curiously, none of the case studies referred to their websites when asked about the digital tools or channels. Our assumption is the fact that, nowadays, B2B companies look at their websites as a cornerstone, something that is so deep-rooted, that they see it as a fundamental and natural piece of the business, indispensable both for sellers and buyers. As Sheth & Sharma (2008) stated, in the shift from product to service, most B2B companies built websites that can provide complex service and product information to customers, even maybe better than a salesperson can do it" (Sheth & Sharma, 2008). Thus, is not surprising that, in 2022, a website is the most basic communication channel that a B2B company can provide.

In the same study, Lilien et al. (2015) found that social media was ranked in third place, and three of our case studies mentioned it, specifically LinkedIn, but they all used it for different purposes. TC1 highlighted the increasing importance of this social media, especially as an information channel for customers, and as they see newsletters results decreasing.

For the startups, LinkedIn has distinct objectives: SC1 is using it mainly for recruiting, while SC2 actively uses this social media as a prospecting tool, which became a source of contacts and leads for their sales force. Rodríguez et al. (2020) statement is aligned with these findings, as the author said that "social media became a communication channel for the sales force as well, especially LinkedIn or Twitter that to an increasing development of CRM strategy, which has changed the way a sales force works". (Rodríguez et al., 2020).

Of the four case studies, the one standing out the most in terms of technology and digital tools used in the selling activity is SC1, which built its business around technology, setting up a wide e-commerce network that involves, not only an online shop but several types of Internet connections with most of their customers. The firm online sales have a very high level of automation, especially regarding inventory availability and management, the creation of purchase orders, and pricing.

Despite not selling online, SC2 also implemented automated processes for the prospecting phase, using a more recent CRM, and setting up email campaigns and automatic follow-ups, for example, which has been saving their salespeople a lot of time and manual work.

These findings showed that the Startups sales forces are using automation in different processes, not only the online order through e-commerce, which was expected, due to their technological DNA. Among the several advantages of sales force automation, some authors highlighted the cost savings in transactions, the fact that allows to relieve salespeople from routinized and time-consuming tasks, giving them time to develop other meaningful tasks, the capacity to reduce human error, and the ability to sell 24/7. (Rodríguez et al., 2020; Johnson & Bharadwaj, 2005; Sheth & Sharma, 2008).

SO5: Understand the status of e-commerce in the case studies, and its impact on the sales forces' activities

The interviews findings showed several similarities among the four case studies, when it comes to sales forces context regarding e-commerce, however, it also highlighted different outcomes of e-commerce implementation.

In terms of context, SC2 is the obvious exception, since it doesn't have e-commerce, but all the other three companies have currently online shops that customers can use to buy online. TC1 and TC2 have very similar setups, while SC1 presents a wider range of online sales channels. As stated by Johnson & Bharadwaj (2005), online shops allow customers to see and purchase products, and manage their account details and order history, by themselves, without the help of a salesperson, who can then save time and effort that can be redirected new selling opportunities. (Johnson & Bharadwaj, 2005).

Case study research proved that B2B companies are, indeed, using these online sales channels to provide their customers with a self-service platform, that allows them to buy without the assistance of a salesperson. In any of TC1, TC2, or SC1 online shops, as they log in, customers can see their specific products, pricing, and payment terms, according to what has been agreed in the business contract, and they can checkout using different payment methods.

In general, buyers can also manage their account details, but then some differences show up. TC1 online shop, for example, allows customers to place quotes, and configure products online; in the TC2 online shop, buyers can submit customized products, with the promise of a quick

reply; in SC2 and TC1 online stores, buyers can see their orders history, even if the orders were placed through a different channel, or directly to a salesperson.

Both startup companies from the study were born digital, but for traditional companies, digitalization and e-commerce have been a process, and while in TC1 this has not been prioritized, it's been thriving in TC2, and management positioning seems to have influenced these findings.

The major differences arise when it comes to e-commerce performance, as findings demonstrated that all three online shops have different results. Looking at SC2, which only recently released its online sales platform and just finished migrating all customers into it, it's not a surprise that they are still struggling to get more sales through it. Also considering that this startup also sells through several other online channels, it wasn't possible to calculate the percentage of the revenue coming from e-commerce, against the manual orders placed by the salespeople.

Nonetheless, despite being in an early stage, the online shop already caused some impact on the sales force, especially for the team dedicated to the type of clients that can buy online through that platform, as their orders are now automated, saving time for the salespeople. Besides, the shop is also used as an online catalog, not only by the customers but also by the sales force and other departments, to check inventory, due to being always updated and easy to use.

In terms of current e-commerce performance, the most surprising findings were the differences between TC1 and TC2 online shops, considering all the other similarities that have been found. As described in the data analysis, TC1 online shop was created long ago than TC2's, but the last one has a much higher rate of online sales: TC1 is currently selling around 5% of the company's total revenue through the online shop, while TC2 admitted that their lower percentage would be around 20%, but with very surprisingly high rates in specific regions, as it is the case of Iberia, where 95% of the clients are buying online.

These results show that, even with their worst-case scenario of 20%, TC1 online shop still has a much higher sales rate than TC1, despite all their business and contextual similarities. And the reasons for this were also found in the data analysis, as explained next.

First, TC1 mentioned that the impact of e-commerce in the company was not very significant, because the company is focused on implementing a new CRM and website, as well as a new way of selling. Only then e-commerce will follow, as the company is still discussing the plans.

The interviewee also said that there is a lack of trust in e-commerce, especially from other leadership managers, who don't support the eBusiness, or the online shop, and fear their consequences. In fact, not only there isn't an actual plan for the implementation of the new e-commerce platform that started being discussed years ago, because the current online shop is now around 10 years old and is obsolete, but also TC1's management does not have a real interest in investing on e-commerce.

In addition, TC1 also admitted that the old shop was not enough to have a visible impact on the sales force, except for the creation of a dedicated small team in Germany, the country with more online sales. Regarding the rest of the sales offices, local salespeople were given the responsibility of handling the shop topics, but none really embraced the task.

On the other side, there's TC2, who emphasized the online shop benefits, not only for the company but also for the buyers, as well as the advantages of digitalization, which allowed their sales force to communicate internally and reply to customers much more quickly. The investment of the company in providing quick feedback is so, that the management implemented a global target of 24 hours for the customer to receive a reply. In terms of sales force changes, the company hired e-commerce experts. In Iberia, they promoted one person to be exclusively responsible for e-commerce and for other people in the local sales Offices, where there is also one person now dedicated to the shop.

From the collected data, it was clear the investment that TC2 management did in e-commerce, inclusively, by setting a global target of 30% for the online sales rate. Together with the effort and insistence of the sales Managing Director, and with constant investment in the platform, the Iberia region reached a 95% rate of online sales. Findings have demonstrated not only the investment that TC2 has been doing in the platform but also the changes it caused in the sales forces when it comes to automating the selling process and allowing salespeople to be more efficient and dedicated to different tasks. At last, digital channels "allow customers to buy more efficiently and effectively, whether they use online channels alone or a combination of digital, virtual, and in-person channels" (Zoltners et al., 2021).

Findings showed that when it comes to the buyers' willingness to buy online, two main factors are involved: the country where the customer is based, and the effort of the corresponding local sales office to push the digital channels, reason why the digital sales results are so different, depending on the country.

SO6: Find what have been the main changes for the salespeople, when working on multi-channel and digitalized sales forces

In the matter of the Digital Transformation of sales forces, literature and data analysis demonstrated that salespeople are the ones more affected by changes, and it was clear that working within a digitalized selling environment has numerous benefits, but also significant challenges that they need to deal with. This is why salespeople are not sure if digitalization is unfair competition, or an opportunity (Johnson & Bharadwaj, 2005).

Salespeople have been watching their role change as the Internet, new technologies, e-commerce, and automation started to shift the way sellers and buyers interact. Some of the changes have been beneficial, such as digitalization allowing salespeople to assume a more strategic focus (Johnson & Bharadwaj, 2005), being more customer and solution-oriented, and proving them the opportunity to evolve, because they no longer have to lose time with routine tasks (Lapoule & Colla, 2016).

The data analysis revealed different perspectives regarding the main changes affecting salespeople, but most case studies agreed that the changes caused by a hybrid sales force were positive. While TC1 complained that changes have not been enough, TC2 highlighted some of the benefits that impacted salespeople's work, such as the time saved with time-consuming manual tasks, freeing them to dedicate more time to bringing new clients and strategy; the opportunity to focus more on business segments; more efficiency and better career opportunities. Both startup companies also agreed on the positive effects of digitalization for salespeople, especially regarding the possibility to automate and stop executing time-consuming tasks.

In terms of the salespeople roles, both traditional companies claimed that the changes were not very meaningful, at least, from their managers' perspective, because the findings showed that

most salespeople saw new tasks, related to e-commerce and digital sales, added to their existing work. As already mentioned, in TCI, with the exception of an e-commerce dedicated team created in Germany, which implied the allocation of a salesperson just to handle the online shop tasks, for the rest of the sales offices, on top of their old tasks, salespeople, usually Inside sales or GCC, got responsible for the e-commerce too, taking care of orders and replying to customers in the online chat. To support the new responsibility, they received some training. TC2 got experts specifically for e-commerce, and each region has a salesperson that was working in Internal sales but got to dedicate more time to e-commerce. In Iberia, the region where e-commerce is most successful for TC1, there is a person dedicated to e-commerce only, training salespeople and customers.

When comparing the findings of these two companies, it was possible to assume that having a team dedicated to e-commerce can be a success factor, because, for both traditional companies, the countries where the online shop has higher sales is where those teams are located. It can also be presumed that one of the factors that causes less successful digital sales, is the fact that sales teams are given extra tasks on top of the ones they already have, which can lead to frustration. On the other side, it was also proven that digitalization of selling activity helps salespeople, by relieving them from time-consuming tasks, which raised the question why digitalization is beneficial only for some Sales Offices.

The scenario is different for the startups since both agree on the positive effect of digitalization for the salespeople, that are willing to use new technologies, or even suggest new ones.

SO7: Discover the main challenges that this changing environment is producing, and how the sales forces are dealing with them

According to the literature, not all changes are beneficial, and often represent difficulties, for example, the decline of the salespeople's role as the main information source (Oh, 2017), and they no longer being the main communication channel between the company and the customer (; Lawrence et al., 2019). This shifting environment requires that salespeople are constantly evolving and improving, which also changes the hiring processes (Marcos Cuevas, 2018), and that they quickly adapt to new selling processes (Sheth & Sharma, 2008).

For these reasons, several authors argued that digital transformation became a source of anxiety for the salesperson because it requires changes in their skills (Marcos Cuevas, 2018; Lapoule & Colla, 2016; Johnson & Bharadwaj, 2005).

One of the main challenges referred both in the literature and the data analysis is *job insecurity*. Despite some old predictions that the technology would lead to the sales force and salespeople downsizing and declining have not come true, literature identified salespeople's fear of being replaced by technology, becoming obsolete, and losing their jobs, as one of the main challenges of hybrid sales forces. Several authors mentioned that the emergence of a new role for salespeople, more strategic (Lane & Piercy, 2009), and the digital transformation of the sales force would require a change of salespeople's roles and skills (Marcos Cuevas, 2018; Oh, 2017). Others stated that digital sales channels would make salespeople more productive and efficient, rather than replacing them (Mantrala & Albers, 2010; Piercy & Lane, 2005).

Alavi & Habel (2021) studied the importance of the Human side for Digital Transformation in sales, with the claim that digitalization efforts usually fail because of poor management of people (Alavi & Habel, 2021). Johnson & Bharadwaj (2005) also demonstrated the digitalization of the selling activity increased the levels of job insecurity (Johnson & Bharadwaj, 2005).

Findings from the interviews showed that this topic represents a challenge for all three case studies with online sales. TC1 said that sales digitalization changes are difficult, and that people are afraid to be replaced by technology, which makes it harder to make them trust, taking a lot of time to convince them. Nevertheless, TC1 added that these fears are unfounded, assuring that salespeople won't lose their jobs, because multi-channel sales are the future.

Although TC2 face the same issues of fear and distrust towards digitalization, the approach was different. The sales Managing Director claimed that the secret to e-commerce success in Iberia was the people, and the way their concerns were handled. The interview underlined the importance of reassuring salespeople about their roles in the company, as well as the benefits of e-commerce when it comes to saving costs and allowing them to evolve in their roles.

When it comes to job insecurity, findings from the analysis and comparison of traditional companies revealed that proper communication is key to overcoming job insecurity and

salespeople's distrust of multi-channel sales forces. The effort made by TC2, especially in Iberia, to win salespeople's trust and convinced them that the online shop could be their ally, instead of a threat, allowed them to reach a huge online sales rate, as their e-commerce is thriving, and the company is investing for the same to happen on other regions. The conclusion is that trust is a success factor when driven in a chain reaction: management, regional sales, and salespeople, all were aligned with the goal of growing e-commerce, so they invested in it, convinced every one of its benefits, and ultimately, so did the customers, who now place most of their orders online. It was seen that in TC1, the management was not willing to do this kind of investment, because it doesn't completely trust e-commerce and eBusiness, breaking the chain on top. Therefore, even if some people, such as our interviewee, try to push digital sales, it is harder to convince the salespeople, thus customers won't also be trusting their money to an online shop.

These findings are related to Rodríguez et al. 2020 study about the digitalization of B2B selling, where the authors identified as internal enablers the existence of information flows; providing motives for the digitalization; and providing technical training to staff – which has been done by TC1.

Among the internal obstacles that the authors mentioned, it could be related the following to TC1 case study: insufficient investment in digitalization; lack of internal organization of salespeople; insufficient technological awareness of the management; underestimating and not prioritizing the potential of digitalization; and staff not trusting technology and digital tools.

In SC1, job insecurity was also a concern, but more on the Customer Care team, that are afraid to be replaced by the order automation systems. Similarly to traditional companies, the startup reassured their people will always have a place in the company if they are willing to evolve, enhancing that technology is not the threat, but the people that are not willing to “grow their skills”. Oh (2017) had already raised the danger of obsolescence for salespeople in changing selling environments, highlighting the need of modernizing their role (Oh, 2017).

Another challenge referred to in the literature is *ambidexterity*, caused by the existence of conflicting goals for salespeople, who, on one hand, need to drive buyers to online channels but, on the other hand, to allow customers to choose which sales channels they want to use, begin difficult for them to pursue opposite strategies at the same time (Bongers et al., 2021; Marcos

Cuevas, 2018). This argument also matches our findings and the assumption that a dedicated team to online sales brings better results for multi-channel sales forces than salespeople assuming e-commerce tasks on top of their previous ones. salespeople still can benefit from digitalization, automation, and digital selling, by gaining more time and efficiency, but they should use this extra time to dedicate to evolving in their role, and not to handle also e-commerce tasks. Iberia region is proof that this concept can help companies to have a successful multi-channel environment when teams and roles are properly structured.

Some authors (Lapoule & Colla, 2016; Sheth & Sharma, 2008) also discussed the topic of *remuneration* as a source of lack of motivation for salespeople, that are afraid to lose commissions for the digital sales channels. From our findings, it was understood that this matter can, in fact, be challenging for the sales forces, as it seems that salespeople can see the online shop as competition. However, both traditional companies assured that salespeople commissions are the same, whether they come from traditional or digital sales channels. TC2 showed the importance of this topic and alerted to the danger of changing this, which might lead to losing people.

In SC1 this issue doesn't happen, as they don't have sales commissions and the sales targets are set by team, and not individually, and neither in SC2, since they don't have digital sales.

SO8: Understand if the Covid-19 pandemic influenced the digitalization of selling activity and if yes, how

When it comes to the Covid-19 pandemic effect, it was clear that all the case studies needed to adapt to daily digital communication ruled by video chat tools. However, in terms of business, findings demonstrated very distinct consequences for traditional and startup companies. As manufacturer companies, TC1 and TC2 saw the business going slow, with facilities closed and no physical visits to clients, due to the confinement periods. Despite this, both praised the way the salespeople adapted and did their job and highlighted the convenience of this new way of working, especially in terms of saving costs, while maintaining productivity.

According to McKinsey & Company 2020 report, 'These eight charts show how COVID-19 has changed B2B sales forever', their research on decision makers' behavior across B2B industries

revealed “the big digital shift is here to stay”, meaning that “these pandemic-induced patterns are likely to become permanent” (Bages-Amat et al., 2020).

The same report claimed that “B2B leaders that commit to further digitizing their go-to-market models should derive competitive advantage in the form of more—and more loyal—customers than their slower-moving peers” (Bages-Amat et al., 2020), and TC2, SC1, and SC2 seemed to have understood this, as they took advantage of the pandemic effect to leverage their online sales.

TC2 online shop was “boosted” by the pandemic, leading more customers to use it, and SC1 and SC2 saw their business explode due to e-commerce. First expecting the worst to happen, and taking conservative approaches about hiring and buying, both startups were surprised by a huge growth of their business, due to the general growth of e-commerce during the pandemic.

What happened to SC1 also happened in most e-commerce companies, and consequently SC2 sales volume also “exploded”, due to the higher demand of companies wanting to sell online, and existing clients’ e-commerce businesses growing.

Overall, findings showed that the pandemic had a bigger impact on the startup companies – in the case of SC1 because it had several digital sales channels, and in the case of SC2 because their business is e-commerce-related services – leading to business grow.

SO9: Find how sales Managers foresee the future of the sales forces within the Digital Transformation

In what concerns the future of digital selling, findings revealed that traditional companies and startups have different visions.

The importance of collecting and treating more data in the future of sales was recognized by both traditional companies, however, both also admitted not being prepared for it now. On the contrary, startups are already collecting a lot of data from customers and markets and using it in their businesses.

Regarding the probability of the downsizing of the sales force, due to technology evolution and automation, all case studies agreed that this will not happen in the future, but TC1 believes that

the way salespeople use digital tools will change, especially for Inside salespeople, who should get also responsible for online sales, using the online shop as an extra tool in their daily work. This traditional company foresees even more changes for Inside salespeople, expecting them to be more proactive, as they are given new tools and more customer data to work with.

For this company, data analytics and Artificial Intelligence will provide more visibility about the customers' online behavior, raising, however, a new challenge: to read that data in a way that sales can benefit from it. In the future, TC1 also expects digital business to be more self-service, with customers deciding the path and channel they want to use, highlighting the potential of digitalization for P2P and the increasing importance of sustainability platforms.

For its sales force future, TC2 expects to expand the e-commerce and expedite processes, which will provide salespeople more opportunities to grow and evolve, as the online shop is taking care of sales. Artificial Intelligence and data analytics, for example, to predict orders, are also on the future vision of TC2, but likewise TC1, the company is not prepared yet to deal with it.

Still, in terms of the future, findings showed that the startups' expectations are different from the traditional ones. SC1 foresees that the next step is taking automation and digitalization to the point where a tool would be able to replace support staff, for example, for all order processing, which would allow the company to invest in more specialized salespeople. This was the only case study mentioning the possibility of the extinctions of a sales role, but as mentioned before, not necessarily of the salespeople. Although SC1 has already a Data analytics team working closely with sales, the company believes that there is still a lot to do in this area, especially regarding the online shop.

SC2, which is also already using data analytics in the selling activity, predicts a future where, even if it will be possible to sell only by using digital tools, they will still resort to traditional channels, such as physical events, to reinforce trust in customers relationship. Also, the company doesn't consider adding a digital channel to its sales force, despite being in the online payments business.

After the pandemic and the generalization of digital tools to connect with customers, we also wanted to understand if face-to-face interactions would still survive because, as shown before, traditional companies will keep Field sales and face-to-face interaction with customers. But

where do the startups stand here, being tech companies? Probably because of the difference in the business types (SC1 sells physical goods and SC2 sells digital services), face-to-face interaction has a different importance for both.

In terms of physically visiting customers, SC1 still sees value in it, even if most of the business is done online, so it's more about the sales teams' purposes, for example, the one responsible for getting new clients. SC2 doesn't want to encourage physical visits, because they prefer to sell standard solutions, however, for this startup, face-to-face interaction will still be necessary, especially through participation in business events, to help build trust with customers. Literature suggested the same as the data analysis findings, with Rodríguez et al. claiming that face-to-face interaction in B2B sales will still be important, especially for closing deals, by helping "establish trust with potential customers", highlighting the importance of the Human factor (Rodríguez et al., 2020).

In summary, the most important takeaways from the findings, regarding the future, are that traditional companies want to collect and analyze data, but are not yet prepared for it, while startups are already doing it, and also that the salespeople roles, especially the Inside sales and Support staff, are expected to change with the evolution of the digitalization in sales, but not replaced or downsized, as demonstrated in SO7. Also, face-to-face interaction will continue to have a place in B2B selling activities, even for startups.

Considering the Word Cloud analysis, findings showed, when comparing the traditional case studies, that clearly there is a higher focus from TC2 on sales, e-commerce, Customers, and time. All lined up and grouped, these words make total sense, considering the dimensions inserted in the questions for the interviews, showing that these are important topics for this company, as it was also noted in their answers. When it comes to the startup case studies, curiously, "e-commerce" is not even mentioned in the top 20 most repeated words. Finally, SC2 interview was one of the clearest, in terms of explaining the sales force evolution, and salespeople roles, so it was no surprise that the most prominent was "sales".

CHAPTER VI - CONCLUSION

The Internet, technology, and e-commerce are transforming the sales forces of B2B companies, leading sales managers, and salespeople to face the challenges of a multi-channel environment at structural, organizational, strategic, and Human levels. The main goal of this study was to understand how the sales forces and the salespeople of these B2B firms have been, and still are, affected by the Digital Transformation in selling activity, especially by e-commerce, a problem that was formulated in the initial research question: *‘How are the sales forces and salespeople of B2B companies being affected by Digital Transformation, especially e-commerce?’*.

The literature review, the data collection and further analysis, and the subsequent findings allowed to answer this question, by bringing new information and understanding to this subject, according to the specific objectives initially defined.

Initially, nine specific research objectives were defined, mainly related to the changes that digitalization is causing in the sales force organization, and the way it is affecting salespeople, and it was possible to answer them all, even if new questions emerged during the investigation, but that will be addressed in the suggestions for future research. Overall, the research showed that the changing process caused by Digital Transformation can turn into a very distinct experience for companies with similar characteristics, whether they are long-existing traditional firms or modern tech startups.

Findings revealed significant differences between the case studies, especially when comparing the two traditional companies, showing that the management level of investment in digitalization, a clear strategy for e-commerce implementation, transparent communication with salespeople and customers, and proper training, are important factors in Digital Transformation success, producing a different impact on the sales forces.

The inclusion of the startup companies in the study allowed to collect new data and provide a fresh perspective on the impact that technology and automation can have on the sales forces, revealing completely different challenges from the ones that traditional companies are facing.

6.1 Summary of the main findings

From the analysis of the interviews, it was clear that all four case studies are still dealing with the changes caused by the Digital Transformation within their sales forces. Its benefits and

challenges affect not only the selling activity itself but also the way the sales force is organized, as well as the salespeople, who are right at the center of this transformation.

In terms of structure, salespeople roles, digital channels, training, and relationship with the Marketing department, both traditional companies have very similar contexts, however, they present a very distinct situation when it comes to e-commerce successful adoption, as TC2 is obviously ahead of TC1 in terms of selling through the online shop, even if TC1's has been created longer. As it will be demonstrated ahead, the management investment and the salespeople's commitment to e-commerce has been the key to a successful online sales channel.

On the startup side, the cases don't have so much in common, since they have distinct sales forces organizations, although they are both more structured around business type and not geography. The more obvious difference is the fact that SC1 makes most of the sales using digital channels, and SC2, whose business is online payment services, does not sell online at all. Even though, both have also a lot in common: two young tech companies, that have been evolving their sales force around Digital Transformation. When it comes to the impact of digitalization and e-commerce on the companies' sales forces and salespeople, it was clear that traditional companies have not felt it deeply yet. TC1 and TC1 made some adaptations to the sales structure and salespeople roles, but the changes have been more significant in the Startup sales forces that, in their very short existence have adapted very quickly to technology, experiencing more shifts in the selling activity. Considering that the startups are also much smaller companies than the traditional ones, and being fast-paced tech companies, there is less bureaucracy to deal with, and fewer people making decisions and being involved in the changes, so it is only natural that traditional companies take longer to experience transformation.

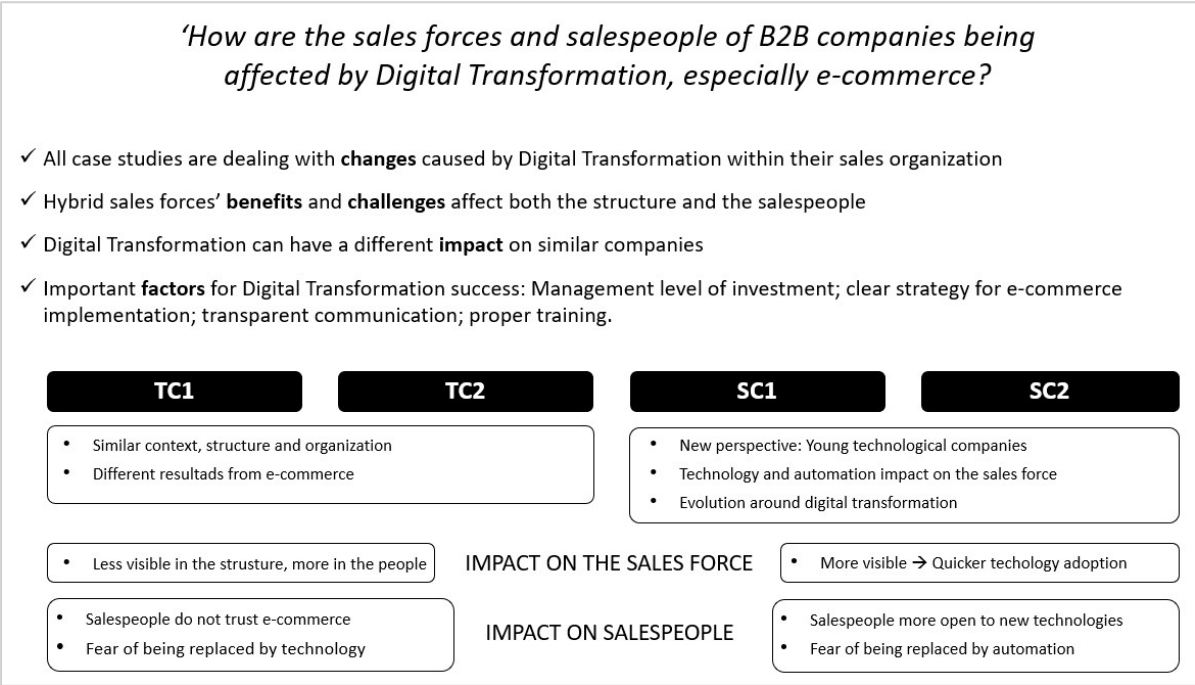
In what concerns the impact of digitalization and e-commerce on salespeople, especially for traditional companies, there was one common characteristic, which is the salespeople's distrust towards e-commerce, and the fear of being replaced by new technologies, which, according to the respective managers, is something that will not happen. Startup salespeople seem to be more willing to adopt new technologies, and perhaps because they are constantly surrounded by them, they embrace them more easily, as an assistant that can help them get the job done.

Finally, in terms of the future, both traditional case studies mentioned data analytics and Artificial Intelligence as something they would like to have in the future, for more effective

selling, however, both admitted not being prepared for it because they still don't have the proper conditions. On the startups side, they want to take digitalization further. Automation and tools that can release the salespeople from less profitable tasks seem to be the way, but curiously, SC2 mentioned the importance of human interaction, and still doesn't intend to sell their services online.

The additional Word Cloud analysis confirmed the findings of the interviews, with traditional companies showing very similar frequent words, but with the difference of "e-commerce" being more prominent for TC2. The startup Word Clouds were very different, with SC1 showing a lot of frequent words that translate the quick evolution stage they are currently living, while for SC2 the word "sales" was clearly highlighted among all the others.

Figure 10: Summary of the main findings



6.2 Answer to the initial research question

The specific objectives initially defined for the research helped to answer the main question of this study: How are the sales forces and salespeople of B2B companies being affected by Digital Transformation, especially e-commerce?

SO1: Understand how the digitalization of B2B selling activity is changing traditional sales forces, in terms of structure and organization: Although sales forces from traditional B2B companies are still organized in regions, they have been creating new global roles to handle big clients, and they can now sell 24/7. Online sales channels have also been transforming the roles of salespeople, by adding new tasks to their daily routines, even if sales managers don't see these changes as significant.

SO2: Compare these changes to the ones that occurred in startup companies and learn about their sales force evolution: Despite being young digital companies, their sales forces have changed a lot since the beginning, growing into a more segmented structure, less organized by regions, more focused on product expertise, and far from the conventional sales roles of traditional companies. Another distinction is the relationship these companies have with the Marketing department, which is closer to sales in traditional firms.

SO3: Learn about how tech startups' sales forces have evolved: Both case studies' sales forces had a distinct evolution, especially in size and salespeople roles, however, the main difference is that SC1 is basing its business more and more on e-commerce, while SC2 doesn't want to sell online. When it comes to hiring and training salespeople, both companies also adopted different strategies, with SC1 searching for a specialized workforce, and SC2 focusing on training inexperienced staff.

SO4: Find which technologies, digital tools, and online channels the sales forces are currently using, and how they are affecting the selling activity: Three of the case studies rely on a CRM to manage and track customer activity and communication, however, it was surprising to learn that SC1 doesn't use this tool, considered vital by the other companies. Besides the digital video call tools, which are now part of the daily routine of all the case studies, the social media network LinkedIn was also highlighted. In terms of digital tools, SC2 highlighted the importance of Similar Web and Hunter to prospect potential new clients, as well as the automation potential of the CRM HubSpot.

SO5: Understand the status of e-commerce in the case studies, and its impact on the sales forces' activities: Except for SC2, all the other case studies are selling online through an online shop, but SC1 has been also building API integrations with most of their customers, basing most of their business in online sales. Findings demonstrated that, although the traditional companies

have a similar e-commerce background, the performance of their online shops is very distinct, due to the different strategies adopted, leading also to different impacts on the sales forces activities. Companies with better results from online sales, also enhanced the benefits of e-commerce, digitalization, and automation, for the sales forces and the salespeople.

SO6: Find what have been the main changes for the salespeople, when working on multi-channel and digitalized sales forces: Except for TC1, who claimed that digitalization didn't bring enough changes to the salespeople, the other three case studies agreed on the positive changes of a multi-channel sales structure, highlighting the time saved by the automation of administrative and routinized tasks, and the possibility of evolving in their role. Especially in traditional companies, salespeople saw new tasks, related to the online shop, being added to their responsibilities, which findings proved that can work if there are also dedicated teams and experts to manage e-commerce.

SO7: Discover the main challenges that this changing environment is producing, and how the sales forces are dealing with them: Findings proved that all these changes have been causing job insecurity among salespeople, mainly in traditional companies, because they are afraid to be replaced by e-commerce and automation. However, both sales managers assured that sales forces won't be downsized. It was also demonstrated that the right strategy, involving transparency, communication, and training, can not only mitigate these fears but also make e-commerce more successful.

SO8: Understand if the Covid-19 pandemic influenced the digitalization of selling activity and if yes, how: Until a certain point, the pandemic affected all case studies in the same way, as they all were forced to adopt video call tools into their daily routines. But the similarities ended here, because in terms of business, while the traditional companies had to slow down, the startups saw their sales volume boom, as people started buying more online.

SO9: Find how sales Managers foresee the future of the sales forces within the Digital Transformation: Both traditional companies believe that data analytics is important for the future of their sales forces, but both also admitted not being prepared for it. In this matter, SC1 is a step ahead, already using data analysis in their selling activity, and plans to take automation and digitalization further, possibly leading to the extinction of the support roles, but not necessarily of the salespeople. As previously mentioned, SC2 doesn't intend to sell its services

online, and even wants to return to the events that allow them to have face-to-face interaction with customers.

In conclusion, we believe that the specific objectives previously described allowed to answer the main question of this research, explaining how the sales forces and salespeople of B2B companies are being affected by Digital Transformation, especially e-commerce.

6.3 Research limitations

This research was complex, long, and difficult to perform in so many aspects, and during its progress, some constraints were standing out. By the time it was finished, the limitations of the study were clear.

As explained in the Methodology section, the main challenge of this research was to find companies willing to participate in the study, which limited the number of case studies available, so it is our belief that the research could have benefited from more firms to analyze.

Also, during the data analysis phase, we realized that it would have been beneficial to include interviews with salespeople from the case studies involved so that we could then cross the information with the one provided by the sales Managers and bring a new perspective to the study. Due to time constraints and considering how difficult it was in the first place to get those interviews, it would require a lot more effort and time to get new interviews with the salespeople.

Regarding the case studies, although it was important to have the perspective of two startups with different business types – one selling products and the other selling services – for the comparison exercise, it could have been beneficial that both startups sold products so that we could have tech companies with similar business context, as we had with the traditional cases.

Finally, although we tried to narrow down the scope of the research, when working on the study, reviewing the literature, and conducting the interviews, there was always the feeling that the scope was too broad, so maybe it would have been beneficial if we have chosen a more specific topic.

Despite the limitations found, we strongly believe that the findings obtained from this research are relevant, bringing a new perspective to the existing literature. It is also our belief that this

work will be able to help B2B companies to have a better understanding of the complexity of the digital transformation in sales, helping them navigate through this challenging shifting environment.

6.4 Managerial implications

The findings originated from the literature review and data analysis provided several contributions, both to the academic and business contexts. Especially for B2B companies and managers dealing with Digital Transformation within the sales force, this study provides insightful advice on how to go through this process, some guidance to handle the main challenges, as well as general recommendations for managing online sales channels.

Findings obtained from the case studies interviews data analysis showed that the investment – not only monetarily, but also in terms of strategy and resources – towards the digitalization of the sales channels is the first step to establishing successful online selling. Then, the sales Managers' commitment to this investment must also exist, so that the salespeople can get on board, and so that customers can follow.

For the last two steps to happen, management needs to make salespeople safe about their job, make them trust, and help them prepare for the changes caused by the digital transformation, and technology itself. Findings have proven the importance of job security for salespeople, and its role in a successful e-commerce internal adoption. The same was suggested in the literature, by Oh (2017), who stated the importance of adjusting the sales strategy, so that it reflects the changing environment, being aware of what these changes represent for the salespeople's roles and skills, and being conscious of the influence that management has by supporting these changes (Oh, 2017).

Several authors were also clear regarding the need to reduce salespeople's job ambivalence and insecurity, by investing in salespeople training, to help them adapt to a more digitalized environment, which will allow them to be more effective (Johnson & Bharadwaj, 2005). These authors emphasized the importance of education and training to prepare salespeople for digitalization and the changes it causes in their roles and see training as “one of the most persuasive methods for enhancing the productivity of the employee”, as it allows to “improve

technical skills” and should familiarize salespeople with new processes and innovations. Hence, salespeople are likely to see this as an investment in them, reducing their job insecurity (Johnson & Bharadwaj, 2005). Others stated also that training can provide motivation for the changes caused by a multi-channel selling environment, and help them evolve in their role, by providing the opportunity to develop new skills (Lapoule & Colla, 2016). Finally, training can also help salespeople to accept new technology and automation and feel involved, fearing technology less if they get to know it (Rodríguez et al., 2020).

Findings also demonstrated that to successfully manage online sales, B2B companies need to invest in training the salespeople, in order to convince them of the benefits of e-commerce. Once they are on board, it will be easier to persuade the customers into buying online, also by providing training, information, and a good user experience.

Some authors also recommend that B2B companies start the transformation by digitalizing the selling stages where interaction with a salesperson is less required, instead of the most crucial to close deals so that customers know that they can still rely and trust on the salespeople (Rodríguez et al., 2020). At the same time, it is also advisable to not remove the salespeople from the digital buying channels, allowing customers to contact a salesperson at any stage of the journey, in a way that e-commerce can be complemented with Human interaction, if necessary (Lawrence et al., 2019). These recommendations are in line with Gartner’s Marketing Predictions 2022 (Gartner, 2021) claiming that B2B companies will have to balance digital customer engagement with Human interactions, especially in key moments.

Data analysis also corroborated this suggestion, as all the case studies, even the startup companies, were unanimous stating that the salespeople won’t be replaced, reinforcing their role in handling the online sales channels, and defended that face-to-face interaction still has and will have value for customers, even if mostly doing business digitally.

What is also important to successfully implement or manage a multi-channel sales force, is to forget and unlearn old processes and routines, so that salespeople stop relying on obsolete practices and are open to the adoption of new selling strategies and sales channels (Mattila et al., 2021). At the same time, literature underlined the value of embracing Digital Marketing and Data Analytics, by monitoring customers’ activity in digital channels, and collecting and analyzing the data, to get leverage in providing information and solutions (Lawrence et al.,

2019). Findings showed that tech startups are already making successful use of data analytics and that traditional companies also want to do it, even though they are not ready yet.

Finally, Ohlsson (2015) alerted to the importance of making sure that the e-commerce platform or online shop is providing the expected minimum capabilities for buyers to order online, such as 24/7 accessibility, good user experience, and overview of the inventory, secure payments methods, direct communication channel to the salespeople.

6.5 Future work directions

This research had the main goal to explore and learn about the impact that e-commerce and digitalization are having on B2B sales forces, and we believe that this study's specific objectives were accomplished, answering the main question. Despite all the new information obtained from the investigation, several new questions were also raised, reason why we would like to suggest some research work to be done in the future.

One of the topics that leave more open directions is the challenges that tech companies face, having high levels of digitalization and automation. Challenges for the salespeople have been explored and studied, but the effects of the events on the sales forces processes, sales results, and business consequences, are still to be studied. SC1 mentioned some of these challenges, namely the cost of the engineering teams, and of the technology itself, which needs to be constantly up to date, monitored, controlled, and secured; the high-scale damages that tech failure can cause; the security hazard; and what to do with all the generated data. SC1 was the only case study raising these issues, and the literature review also didn't mention it, which indicates that, in general, the B2B sales forces are not still is a very advanced level of digitalization, which opens a completely new subject matter for research.

When it comes to the relationship of the sales and Marketing departments, despite the different contexts of the sales forces, it was possible to establish a pattern among the traditional companies. Again, if we compare the e-commerce success rate of both companies, findings indicated that the way this relationship is built, and the work that both departments do together, can also make a difference in the Digital transformation of the selling activity.

While there is a vast literature about the evolution of B2B Marketing, and the role of Marketing in B2B sales, in the literature review performed we couldn't find specific information about the direct relationship between sales and Marketing. Rodríguez et al. (2020) said that B2C requires more Marketing effort than B2B; Bongers et al. (2021) argued that internal Marketing is important to convince salespeople of the digitalization benefits; Lawrence et al. (2019) highlighted the importance of embracing Marketing analytics to better understand customers behavior. This research findings, and the few mentions of how Marketing and sales should cooperate for e-commerce to have a successful impact on sales forces, open a new path for research, which is worth being explored.

This research also allowed to understand how modern tech companies have their sales forces organized, what type of roles they have, what technologies they use, and how their salespeople are dealing with digital sales channels. However, literature is very scarce regarding sales, B2B, and startups or tech companies. Some dated articles were found from the early 2000's, about e-commerce implementation, but no recent research provides understanding and knowledge about how these modern companies are selling, which is why our research is important, not only for literature but also as a guide for sales managers. We believe that studying the business buying and selling activities of tech companies, is a field with tremendous research potential for the future.

Finally, it was also considered that it has still not been given B2B online sales channels the attention they deserve. Until today most B2B companies, especially the traditional ones, believe that online shops just need to fulfill the purpose of buying and selling, however, many specialized agencies have been recognizing that the buying experience in B2B needs to be as close as possible from the one that customers have in B2C, taking, for example, design and usability into consideration. This is something that we strongly recommend being included for future investigation.

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APENDIX I – Word Clouds

Figure 11: Word Cloud for TC1



Figure 12: Word Cloud for TC2



APENDIX II – Word Cloud frequency table

Table 4: Word Cloud frequency

TC1		TC2		SC1		SC2	
Frequency	Word	Frequency	Word	Frequency	Word	Frequency	Word
30	want	31	sales	21	going	22	sales
27	sales	25	customers	20	staff	11	customer
18	online	24	ecommerce	16	people	10	people
16	people	21	time	15	business	9	lot
15	customer	19	customer	15	one	7	customers
13	customers	18	company	14	new	7	team
11	say	14	business	14	need	7	tools
10	new	13	area	13	support	7	crm
10	platforms	13	need	13	team	7	new
9	marketing	12	one	13	grow	6	one
9	ecommerce	12	product	12	sales	6	example
9	companies	11	manager	12	time	6	prospecting
9	use	11	responsible	12	hire	6	online
8	work	10	work	12	something	6	email
8	inside	10	marketing	11	clients	6	campaigns
8	need	9	big	11	work	6	training
7	different	9	different	11	want	6	use
7	together	9	orders	10	client	6	started
7	big	9	everything	10	able	5	manager
7	one	9	platform	10	company	5	ae's

APENDIX III – Traditional companies semi-structured interview script

INTRODUCTION

- **Interview motivation** (explain the fundamentals and goals of the interview):
 - Start by thanking for the collaboration
 - Briefly explain the research
 - List the goals of the interview
 - Talk about confidentiality regarding all the data provided
 - Ask permission to record (If online interview)

TOPICS AND QUESTIONS

1. Interviewed characterization

- 1.1. What's your role / position in the company?
- 1.2. What are your main responsibilities?

2. Company background

- 2.1. For how many years has the company been in business?
- 2.2. What is the main business area?
- 2.3. In which countries does it operate?
- 2.4. How many employees does it have?

3. sales force characterization

- 3.1. What's the size of the sales force?
- 3.2. How is the sales force organized, in terms of:
 - 3.2.1. Geography
 - 3.2.2. Structure (teams composition; management per customer / account; management per location / geography; other)
 - 3.2.3. salespeople roles (Field / outside sales; inside sales; online sales; other)
 - 3.2.3.1. What's the ratio per role?

4. Digitization within the sales force

- 4.1. Which technologies does the sales forces currently use? (Examples: CRM; ERP; task manager; other...)

- 4.1.1. Could you briefly explain the use of each of the mentioned technologies?
- 4.2. Do you have sales automation?
 - 4.2.1. If yes:
 - 4.2.1.1. How have sales been automated?
 - 4.2.1.2. What was the impact of sales automation in the sales force
 - 4.2.2. If no: Why? (It was never implemented; it was implemented, but it failed...)
- 4.3. How did digitization affect the sales force during the last two decades, in terms of:
 - 4.3.1. Size
 - 4.3.2. Structure: customers management; teams composition;
 - 4.3.3. Other – please describe which one and explain
- 4.4. How did digitization affect the salespeople during the last two decades, in terms of:
 - 4.4.1. Roles (tasks and skills)
 - 4.4.2. Training / education and recruitment
 - 4.4.3. Remuneration / compensation / commissions
 - 4.4.4. Other – please describe which one and explain
- 5. Digital sales channels**
 - 5.1. What sales channels are used by the company?
 - 5.1.1. What's the sales ratio (percentage) per channel?
 - 5.2. Does the company sell online?
 - 5.2.1. If yes: What online channels does the company use to sell?
 - 5.2.2. If no: Why? (It was never implemented; it was implemented, but it failed...)
 - 5.3. (If yes) How did e-commerce affect the sales force during the last two decades, in terms of:
 - 5.3.1. Size
 - 5.3.2. Structure: customers management; teams composition;
 - 5.3.3. Other – please describe which one and explain
 - 5.4. (If yes) How did e-commerce affect the salespeople during the last two decades, in terms of:
 - 5.4.1. Roles (tasks and skills)

- 5.4.2. Training / education and recruitment
 - 5.4.3. Remuneration / compensation / commissions
 - 5.4.4. Other – please describe which one and explain
6. How did Covid-19 affect the company sales force regarding the previous topics? (Changes in the sales forces; technology, digitization, and online adoption; other...)

CONCLUSION

- **Interview closing**
 - To thank again for the collaboration
 - Exchange direct contacts for any necessary future contact
 - Ask if they would like to receive a copy of the final work

APENDIX IV – Startup companies semi-structured interview script

INTRODUCTION

- **Interview motivation** (explain the fundamentals and goals of the interview):
 - Start by thanking for the collaboration
 - Briefly explain the research
 - List the goals of the interview
 - Talk about confidentiality regarding all the data provided
 - Ask permission to record (If online interview)

TOPICS AND QUESTIONS

1. Interviewed characterization

- 1.1. What's your role / position in the company?
- 1.2. What are your main responsibilities?

2. Company background

- 2.1. For how many years has the company been in business?
- 2.2. What is the main business area?
- 2.3. In which countries does it operate?
- 2.4. How many employees does it have?

3. sales force characterization

- 3.1. What's the size of the sales force?
- 3.2. How is the sales force characterized / organized, in terms of:
 - 3.2.1. Geography
 - 3.2.2. Size
 - 3.2.3. Structure: customers / accounts management; teams composition; other
 - 3.2.4. Recruitment
 - 3.2.5. Remuneration / compensation / commissions
 - 3.2.6. Other – please describe which one and explain
- 3.3. How is the salespeople characterized, in terms of:

3.3.1. Roles (Field / outside sales; inside sales; online sales; other)

3.3.1.1. What's the ratio per role?

3.3.1.2. Tasks and skills

3.3.2. Training / education

3.3.3. Other – please describe which one and explain

4. **Digitization within the sales force**

4.1. Which technologies does the sales forces currently use? (Examples: CRM; ERP; task manager; other...)

4.1.1. Could you briefly explain the use of each of the mentioned technologies?

4.2. Do you have sales automation?

4.2.1. If yes:

4.2.1.1. How have sales been automated?

4.2.1.2. What was the impact of sales automation in the sales force

4.2.2. If no: Why? (It was never implemented; it was implemented, but it failed...)

4.3. What impact do you think the digitization currently has in the sales force?

4.4. What impact do you think the digitization currently has in the salespeople?

5. **Digital sales channels**

5.1. What sales channels are used by the company?

5.1.1. What's the sales ratio (percentage) per channel?

5.2. Since it started operating, has the company adopted new digital sales channels?

5.2.1. If yes: Which ones?

5.2.2. If no: Why?

If the company uses only digital sales channels:

5.3. What are the challenges of being a digital company?

If the company uses both traditional and digital sales channels:

5.4. How does e-commerce affect the sales force, in terms of:

5.4.1. Size

5.4.2. Structure: customers management; teams composition;

5.4.3. Other – please describe which one and explain

- 5.5. How does e-commerce affect the salespeople, in terms of:
- 5.5.1. salespeople roles (tasks and skills)
 - 5.5.2. Training / education and recruitment
 - 5.5.3. Remuneration / compensation / commissions
 - 5.5.4. Other – please describe which one and explain
6. How did Covid-19 affect the company sales force regarding the previous topics? (Changes in the sales forces; technology, digitization, and online adoption; other...)

CONCLUSION

- **Interview closing**
 - To thank again for the collaboration
 - Exchange direct contacts for any necessary future contact
 - Ask if they would like to receive a copy of the final work

APENDIX V – Traditional company 1 (TC1) Interview Transcript

TOPICS AND QUESTIONS

1. Interviewee characterization

1.1. What's your role / position in the company?

Global Head of e-commerce and eBusiness

1.2. What are your main responsibilities?

I'm responsible for e-commerce and eBusiness platforms; to drive products forward, with Marketing; but I'm still managing some legacy part also.

2. Company background

2.1. For how many years has the company been in business?

70 years.

2.2. What is the main business area?

TC1 is an Industrial manufacturer, providing products, solutions, and services, in the test and measurement and weighing technology areas (hardware and software). B2B: business with industries such as automotive, aerospace, industrial, and telecom audio.

2.3. In which countries does it operate?

Worldwide; local sales offices in Europe, Asia-Pacific, Americas, Middle East & Africa.

2.4. How many employees does it have?

Around 3000 now, after the merger.

3. Sales force characterization

3.1. What's the size of the sales force?

About 600 people, also after the merger.

3.2. How is the sales force organized, in terms of:

3.2.1. Geography

We now organize ourselves in a different way; we have sales and Marketing together under a Chief Commercial Officer; this is Marketing and sales (not Product Management); sales force is about 600 people. Cannot give all the information, only to explain how it works high level. In general, TC1 is organized in regions; the big areas, Central Europe, EMEA, ... with general managers and sales offices.

3.2.2. Structure (teams' composition; management per customer / account; management per location / geography; other)

3.2.3. Salespeople roles (Field / outside sales; inside sales; online sales; other)

We have a GCC (Global Customer Care), the team that is taking care that all the customers are satisfied, with all the questions, they are also responsible for keying in the orders and so on, and then Operations takes over. We are organized in regions and eBusiness and e-commerce across the regions.

For larges companies? We work with account managers; the big customers are handled by AM's, oi it's a big one across, we do the best to organize ourselves internally to better serve the customer.

We are implementing on a new way of selling, which means a reorganization of the responsibilities of people (can't say the details). We have Field sales, Inside sales, Key Account Managers for the big accounts, and in some of the countries we also have dedicated people taking care of Online shop, especially in Germany, but this is under construction. e-commerce is everywhere, int's in the GCC, it's in the Field sales, not so much with the KAM, but if a big client wants to buy online, we can do that. We provide everything that a customer wants to do, in terms of self-service, commerce, it doesn't matter. It's an omnichannel approach; it doesn't matter where you want to buy, where you get the details from, we want to help you to increase your services along the supply chain.

3.2.3.1. What's the ratio per role?

Has the ratio changed during the years? The Inside sales is growing, which doesn't mean that the Fields sales are shrinking. Inside sales get a new power, especially for the customer who do not want to have us on the side, and they want to find a digital way with us.

4. Digitization within the sales force

4.1. Which technologies does the sales forces currently use? (Examples: CRM; ERP; task manager; other...)

4.1.1. Could you briefly explain the use of each of the mentioned technologies?

They always use the CRM system, it's an important tool; we have the online shop; we also have the tools of electronic catalogs and Price Lists; we have the EDI connections, we are starting more and more to use Punchout (<https://www.punchout2go.com/frequently-asked-questions/>), and we also provide (this is mainly when customers ask for it) the connection through platforms like Ariba, Coupa (Coupa BSM Platform)... We can see an increasing trend here, customers want to streamline their transactions through those kinds of horizontal platforms; this can then be connected though EDI, but we don't have too much EDI; system to system is not increasing, it's just one or two cases; it's more through this kind of platforms. They have all their purchasing

or ERP systems, want to connect through a horizontal platform. If you have 5 companies, then you have 10 wishes of how to use it, and every single request is different, for the good and the bad. Some clients say, “we want to receive the invoices through a portal, we want to push our order to your portal, or we want to get the order confirmation back, or the full way, or whatever else”. Up to the full stack “we want to have your catalog online, or we want to punchout, where we actively purchase and get it back automatically”. There is an increasing trend of requests regarding these technologies, digitalization of this P2P. That’s what we see at the moment. Dominic did his thesis in a similar area, and he asked around 2000 TC1 customers answered about the use of eBusiness, e-commerce, and so on. And they all have something burning online.

New question: So, there is an effort, from the company side, to answer to all these requests?

Yes, we are in a position to say: however, you want to purchase or whatever the information you want to have, here is... What we see also other platforms, like sustainability platforms, is more and more growing, which influence the decision from the big customers, from one or other vendor; if you have high score in these kind of sustainability platforms, than you are more recognized as a vendor than a lowest one. Carbon footprints are also a topic.

4.2. Do you have sales automation?

4.2.1. If yes:

4.2.1.1. How have sales been automated?

Especially through the online shop, where customer can place orders by themselves, and then those orders are automatically created in the ERP.

4.2.1.2. What was the impact of sales automation in the sales force

If we talk about how the pandemic over the last two years have changed the sales behavior, I think that it was the same for all, Microsoft Teams and all the video chats probably had the biggest impact, if you want to call it digitalization, selling online.

Nothing has changed too much over the last years. We have the shop, which is for us doing 13000 orders automatically (year), but the thinking is still: opportunity, quote, order, order confirmation, invoice. The standard transaction funnel, but the requests on automating orders and transactions is increasing a lot. And GCC desperately needs automation in transaction orders. We have this little stream where we have the Attraction phase and so on, and when it comes to repetitive purchases customers tend to say we want to do this more and more online. We are building this up at the moment, to provide this, but we need to put more rubber in the road (*talk about the time that is taking to implement new CRM, e-commerce, etc; merger*).

4.2.2. If no: Why? (It was never implemented; it was implemented, but it failed...)

4.3. How did digitization affect the sales force during the last two decades, in terms of:

4.3.1. Size

Not at all. The digitalization did not affect the size of the sales forces.

4.3.2. Structure: customers management; teams composition;

4.3.3. Other – please describe which one and explain

4.4. How did digitization affect the salespeople during the last two decades, in terms of:

Not as much as I would like to see. But I would say yes, they feel a change in their roles, but this is more dependent on this merger goes together. Our new management wants to have a new way of selling. Unfortunately, it's not influenced by... Depends on who you ask. If you talk about the CRM (sales Force) project, then they say "we asked all of our customers how they want to be served, and SF tool is the goal medal..." – bullshit... Actually, the online business is not influencing the salespeople as they should. Sometimes, smaller steps, yes. There is an MDM (Material Data Manager) and this is obviously more importance for Mercedes and Diamon Trucks because they are looking into this platform and they only approve products which have been classified in this tool. These kinds of things also going on. But the sales forces influenced, just a minor percentage.

New question: Do you see it happening in the next years?

Yes. More than they want.

New question: Is it a need for the company?

Yes. We have more requests than we actually can fulfil, and unfortunately and the technology and the readiness on both sides is not matured enough, but is coming more and more... What I see, compared to what we have 5 years ago, is that is more going to self-service. They still need a quote, they still need to send it to us however they want, and then they want to follow it, the whole way. This self-service is where the music plays.

New question: Do you feel some kind of resistance of the salespeople to these changes?

The change is really, really difficult and taking a lot of time to convince and take people with you. And they are very much afraid of being replaced by technology. These are spoken words; nothing that I just assumed; from people saying, also my colleagues in the leadership team, that they do not support the eBusiness, also not the Online shop, because they are afraid that is not taking you money today, but maybe tomorrow.

New question: It will?

No. Omnichannel is the way; is the value that we want to bring. It doesn't matter for the customer where to buy, and even jumping between channels should be possible. This is what we can provide when we remove the roadblocks we have. People are afraid. It's a natural thing, but the other thing is that it's so hard to make them trust in what you say, and if you say... setting anything online for the customer and say here's the platform – take or leave it, that doesn't work anymore. Thar was 10 years ago. They want to always have the feeling that they can be in contact with a Human Being. They want to do everything online, but they want to, if they are stuck, or if they have a question, to have someone there sitting next to them immediately. This is the way it goes.

4.4.1. Roles (tasks and skills)

4.4.2. Training / education and recruitment

Fields sales is traditionally engineers. For sure we are also doing a lot of sales trainings (more about the new products / technologies) and development. One thing that this company is doing differently from the past is developing the people; it's a huge effort, especially on us, as the managers, to make sure that we develop the people in a good way. This is a new flavor; nothing that I've seen earlier. We let the people talk and give us their opinions and try to react on that and develop the people on that.

Inside sales? Almost all of them also have an academic background, mainly related to engineering. GCC not necessarily; they need a good understanding of the products and how they work, but Inside sales and sales, most of them have an engineering background.

4.4.3. Remuneration / compensation / commissions~

4.4.4. Other – please describe which one and explain

5. Digital sales channels

5.1. What sales channels are used by the company?

Direct, indirect, e-commerce / online.

5.1.1. What's the sales ratio (percentage) per channel?

Online for us is around 5% but is only regarding TC1 (original company before the merger) products. But because of the merger, the biggest portion is direct, and the indirect in some of the countries, but I don't a ratio.

New question: This 5% also include eBusiness?

No, there is something that unfortunately we don't measure. The full score, EDI, e-commerce, and all together, in a transactional perspective, than it's bigger. No one ever did an investigation of this, but we should.

5.2. Does the company sell online? Yes

5.2.1. If yes: What online channels does the company use to sell?

Online shop, and the other mentioned. We don't sell through channels like Ariba, eBay, Profishop or any other platforms, simply because our business is to sell configuration and

service, the full thing, and this is not possible with those platforms. And we refuse to sell this high technology; this is not made for Alibaba or platforms like that. It's not our strategy.

New question: What about the Online chat?

Most of the customer still use telephone most; chat is coming, but not a high runner.

5.2.2. If no: Why? (It was never implemented; it was implemented, but it failed...)

5.3. (If yes) How did e-commerce affect the sales force during the last two decades, in terms of:

5.3.1. Size

5.3.2. Structure: customers management; teams' composition;

5.3.3. Other – please describe which one and explain

Besides the team in Germany, not so far, because, because at the moment everything is, first of all, is implementing the new SF system together with a new way of selling, and then, in the next step, e-commerce will follow. And we are still discussing how that could look like. For sure we want to handle the high number of small, easy orders, but that's not really the truth. At the end we showed that across the customer classification (*company divides customers into A, B, C and D clusters, according to it's dimension / revenue; A are the largest and more important... D are the smallest and that make lower and less frequent purchases*), we have sales every year. I have my suggestion on the table, but it still needs to be discussed and approved when the foundation has been done. The merger has created so much confusion, so much work in progress situations.

These group in Germany, they got responsible for the channel, they all got trainings, and they all have permanent training as well. And for sure we have workshops and be-weekly meetings with all of the markets. Inside sales is in most of the countries responsible for e-commerce as well, as we have regular meetings with the markets and the salespeople.

5.4. (If yes) How did e-commerce affect the salespeople during the last two decades, in terms of:

5.4.1. Roles (tasks and skills)

5.4.2. Training / education and recruitment

5.4.3. Remuneration / compensation / commissions

5.4.4. Other – please describe which one and explain

Nothing has changed: Italy, etc. The difference is really in the countries where you actively force the customers and provide and talk about the online channel. If you don't do it, then you don't have a big footprint in the countries.

New question: Do you notice differences in terms of e-commerce adoption from clients from different countries?

You should probably mention that we have social media; mainly talking about LinkedIn; is becoming more and more important channel to inform the people what you provide, what you have and what you can do. It's not a strategy, it's a natural thing that the world is living and working in LinkedIn; they're getting more information from there. Newsletters are not as important anymore, the opening rates are going down and bounce rate going up, is more the LinkedIn. We can see more and more people doing things mobile and LI is going away from long email newsletters.

New question: Is Marketing working together with sales?

With our new Global Marketing Manager, David Palmer, he's aligned with me here, saying that what we don't do today in a good way is to understand the customer journey and use and facilitate everything, before they first time with a sales Engineer. Everything they're doing online, adding to shopping basket, etc., we don't use this customer journey in a good way. We could say, understand the customer journey better, and react to that, that could be a kind of a strategy. That's actually a need.

New question: Do you see positive changes with this proximity?

It's the best thing that was done; we need to have them on the wing also with in marketing there is a trend not to separate the different daily jobs / topics in different groups, don't separate digital Marketing, from solution Marketing, from whatever Marketing, bring them all together. They all need to talk to each other. This is a trend that we see. Does it help the SF now that we are one group? I hope so but is also very much difficult on the people. With the old structure this never happened, because it was always defending, defending; stop all this defending it's the only chance.

6. How did Covid-19 affect the company sales force regarding the previous topics? (Changes in the sales forces; technology, digitization, and online adoption; other...)

All the customers closed their facilities and sent their people to the home offices; how to remain and move on with the business? This was online. All over the world we have quite good Internet; we have sales Engineers are still very involved, when customers want that, the pandemic just changed that they don't want to see us on site. Not sure if this pendulum is moving to the other direction; I'm trying to find out if after this time that you don't have people on site, they want to go get together now. I'm not sure. Not completely sure if this will come back entirely, because companies found out that there is a huge potential in saving costs if you reduce the windshield time, the traveling time, all the travel expenses, and they want to have them back; and they saw that if they don't provide a desk to everyone, that's also saving money. And nothing is breaking

down with people working from home; it seems to work. A little bit will come back, some companies want that, but I also know a lot of companies that want to keep this. TC1 is working on remote working guidelines.

New question: What impact will the current projects (digitalization) have in the future of the sales forces?

What I'm absolutely convinced is that it will not reduce the headcount. It's definitely not the case, but the behavior of the tool and how they use them will change. Let's assume the Inside salespeople will be responsible for the online as well. They have their customers, they get a channel now which they can also use to work with; instead of having picking up a phone, giving a quote, this will change to: I checked the abandoned shopping carts; I checked what came from Marketing automation, from remarketing, I checked the customer journeys... Software or products end of life is going to expire, and this might be some years ago, but what I know from different companies, if that they know, before a product is breaking, that is going to break. And they actively go to the customer. At the moment Field sales are doing actively work, and Inside sales are still too much sitting and waiting aggressively that the phone is ringing and that might change with different tools, and more data around the customer. I think this is what summarizes it all, that in so many spots that we are blind today, this will be filled with data and the challenge is to sort this data so good, that we can say, not only form leads, that here it is an opportunity that we should take. Analysis around the customer... It still surprises me that companies like Amazon, Facebook, Google, know more from each of us, as we would like to know actually, and companies in the industry, do not even have a same point 1% of the same possibilities to track those things; we are still in this waiting aggressively, and then we go there and do our great engineering work, write a quote, etc. Using this intelligent data and AI will play a major role... I know that with a lot of companies outside a lot of things are doing on, but we're still not there now.

APENDIX VI – Traditional company 2 (TC2) Interview Transcript

TOPICS AND QUESTIONS

1. Interviewee characterization

1.1. What's your role / position in the company?

Managing Director – TC2

1.2. What are your main responsibilities?

I'm running Iberia and Latin America countries, so it's Ibero-America.

2. Company background

2.1. For how many years has the company been in business?

Was established in 1954.

2.2. What is the main business area?

Lighting industry and components; the brain of any fixture or luminaire. We only do business directly with OEM, lighting manufacturers. We don't work with clients that are not OEM, and just a few wholesalers' distributor, a very small amount, to make the product accessible to the market.

2.3. In which countries does it operate?

Worldwide. A small part in Central and South America, the US we started just a few years ago, but is worldwide and we are almost everywhere, even South Africa, Australia, in the 5 continents. We have the production center split in Europe and China, mainly. And it's own production. It's really a multinational company.

2.4. How many employees does it have?

In total there should be 2000 something worldwide.

3. sales force characterization

3.1. What's the size of the sales force?

Globally, around 150 people.

3.2. How is the sales force organized, in terms of:

3.2.1. Geography

sales are split into regions, then the region is split also into areas, and then you and an Area manager. Example: “Name 1” is the Area sales Manager of Portugal – a part of Iberia; one area there is only one Area SM, unless there is a big area, then is split into two.

3.2.2. Structure (teams’ composition; management per customer / account; management per location / geography; other)

The Area sales Manager is responsible for the whole industry. If it’s a huge company that is worldwide established and you have several sales area managers responsible for those branches of that main company, that you get the Key Account Manager, who is responsible to organize the whole process of selling prices, special conditions, tech support, and all the rest, and then it goes down to the areas, or the sales Managers to have to copy paste and we cannot move very much, but there is a bidirectional conversation between the sales region and the KA; sometimes you need some flexibility in some regions. But yes, there is it is a top level, we call them AA, customer, they have Key Accounts. Then you have the A customers, the B and the C. And then the are the distributors (D).

We split into potential business we can get from a customer. We branch it depending on what is the potential and how much potential we can get.

3.2.3. salespeople roles (Field / outside sales; inside sales; online sales; other)

It’s almost all the same role, which is the Area sales Manager, the second level would be the Key Account Manager, and if there’s nothing else, it goes to the Country Manager, then Region Manager, and VP. But for sales is Area SM and KAM. Now we will start with the Solution sales Manager, a new development we are introducing in the company, which is the promotion of sales. So not directly, but pull the market, the demand, and ask them for TC2 products here and there. We are going to visit planners, specifiers, architects, and users, big facilities, maintenance, companies, and so on. We don’t go there to sell, but we go to make them ask for TC2. This is the third position linked to the sales.

This a different treatment. We have what we called in the past Internal sales; but the IS do not do sales; is supporting sales. Now it’s Customer Service Support, or Expert, or Specialist; “Name 1” (Area sales Manager) is responsible for the whole area, and then he gets some support from the Application Engineer, who is also the sales team, and the Internal sales, who is now called Customer Service Specialist, they are managing the orders, the delivery dates, trying to improve the viability and making a link between sometimes the ASM and the customer; but he’s not doing the sales; that’s why we stopped calling them Internal sales.

Education: Most are engineers but is not mandatory. At least you have to have the technical background. It’s preferable to have engineers and not the pure sales guys. Is not enough.

3.2.3.1. What’s the ratio per role?

4. Digitization within the sales force

4.1. Which technologies does the sales forces currently use? (Examples: CRM; ERP; task manager; other...)

4.1.1. Could you briefly explain the use of each of the mentioned technologies?

The ERP System is SAP; we have the CRM integrated, the Business Warehouse, the SAP / are 3 now moving to the upgrade Hana S4, but it is the same. CR is integrated; most communications worldwide with the customer are done via CRM, all the projects, opportunities of business that we can find in the Market are all into the CRM, so we have a track of what is doing every single customer, what is the potential, the opportunity, and also during the year, what business arising from projects coming and we keep a record and tracking because we need to follow-up. Otherwise you can't control the business.

The other digital tools are the standard ones: Microsoft Teams, Office package 365, we have the tablets, mobile phones that we can work with, computer... In the last 2 years this digitalization, for known reasons, was really proved very fast and almost everything is done digitally. Also, our e-commerce platform was in place 3 years ago, and now it is incredibly boosted; the usage that all customers are doing is incredible at the moment. All communications are done via digital: Teams is the main tool we use, Skype as well; we do all the meetings via Teams, even with customers. We miss to have face to face meetings with customers, but we did very good so far; we are very used and is very convenient. We are saving a lot of time and a lot of money.

New question: Marketing?

We work closely with Marketing; for electronic devices companies, the product isn't something you can have a nice picture of and show it. It's inside; we are facilitating to the market; the product is doing the right thing. So Marketing is more focused on the communication: to make the brand communication properly, to make the product communication to our customers. We are more and more using the Marketing, and Marketing is more and more involved. We are in the same department (sales and Marketing) and depend on each other. There is another Marketing, which is the Product Marketing, but is different. We need the communication; what we do, why, etc. We are more and more involved and that's why digitalization is the way that we use CRM with Marketing.

4.2. Do you have sales automation?

4.2.1. If yes:

4.2.1.1. How have sales been automated?

Fortunately, yes. TC2 Iberia was established 10 years ago, and if I bring back the memories from the beginning, where we had plenty of customers, you can't imagine how many faxes and calls we had to write down, take note of everything. Customer weren't sending emails because they were driving, or busy, so they called. Very rapidly we changed and tried to push to the email – that was the first step.

Then it was: can we make them to not only to make an order and to have a format to the SAP system, and then it came to the e-commerce, 4 to 5 years ago. We started with the e-commerce, and Spain and Portugal were at the target of the company because I was begging all the time: please do it, so that we can have an automated process to the customers. And it happened and I was really surprised how the process is done automatically by the customer and just very few of them are complaining because they have to do double work, because they have a different system.

4.2.1.2. What was the impact of sales automation in the sales force

95% of the clients are already in the e-commerce. It was a big transition. This is referring to Spain and Portugal, not to TC2 global. Because we are in a average of 75% of all orders coming via e-commerce, is higher but there are manual changes, then it goes away from the e-commerce and gets into the manual; that's why it goes down from 95 to 75%. Anyhow, if we look t other regions, there are still some ar the 20%, or even below that, and the company set a target of 30% and is struggling; it was very smart from to company to do this. This year was the first one global and that was set to 30%, which is a lot.

If you ask me why are Spain and Portugal so good and other not so, I believe it's because "Name 1" is a nice guy, his colleagues are nice, and I'm also nice. It is because we decided to go this way, and I spent the time explaining why this is important, the benefits for us; telling they would not be fired, not even the Internal sales (now CS), because there is always a threat. "Digitalization? The company is getting rid of me". No; the company will save a lot of money and you will have time to do other stuff; you can be working on other things, sales, but you will have time to make a proper market investigation, find new customers, get deeper with the big customers that you are not in because you're so busy at the moment, and stop getting the orders; you don't need to do it. I can see what they have done; it's in the system. My believe is that e-commerce is not more successful because of the people; insecurity. What I have them was full security: guys, don't worry, your job is granted, but we need you to do a different sales approach. If you ask any of them, in the beginning maybe it was a little bit threatening, but now there are happy they're not talking everything to customers for taking the orders. Just talking to customers about products, projects, or whatever.

4.2.2. If no: Why? (It was never implemented; it was implemented, but it failed...)

4.3. How did digitization affect the sales force during the last two decades, in terms of:

4.3.1. Size

4.3.2. Structure: customers management; teams composition;

4.3.3. Other – please describe which one and explain

4.4. How did digitization affect the salespeople during the last two decades, in terms of:

- 4.4.1. Roles (tasks and skills)
- 4.4.2. Training / education and recruitment
- 4.4.3. Remuneration / compensation / commissions~

This doesn't change. They are still responsible for the customer. It's only the process that is automated, but he's still responsible for the customer, pricing, sales conditions, special prices, etc. They are still full responsible for this. So, it doesn't matter if the order comes from electronic or the manual. It's not relevant because if you do that, then you get into trouble with the SF; because then you have to change a lot of things and they will really get mad and most probably you will start losing SF that is really valuable for the company. So nothing has to change; everything is the same. The difference is that now we can focus into a segment. We have indoor, outdoor, emergency lighting, etc. Everybody was selling everything. But now, that they have a little bit more time, there is a guy responsible for the outdoor, he transfers the information for the team colleagues... We can focus better on a product segment, and this person gets the full information and splits the information or send to the other guys. And this is far more efficient and makes them also to have a better position; now they get more in contact with international colleagues, and they can grow. It's a question of making everybody happy: the customers and the sales. So, changes yes, but to be more efficient.

- 4.4.4. Other – please describe which one and explain

5. Digital sales channels

This digitalization has been pushed by the management... Yes. it's a clear target and a clear investment which was very big and is improving. Every year we have new features into the e-commerce platform, and it makes the work easier, and all the customers are putting our e-commerce platform on top of our competitors. To me, that means that we have an additional sales 'guy', digital, who is doing a very good job for us, and we can focus on other things, and at the same time the computer is taking care of the customers, which is great.

Having 24/7... In these 2 countries, customers buy on Sundays; the owners of the companies go on Sunday, just to check if everything is ok. Giving them this opportunity, to small-medium companies is also a very good thing for them. Even if is a holiday in one country and not in the other, they can still be working with no problem, so there is no influence of who is or not that day to write down the orders.

5.1. What sales channels are used by the company?

Online shop / e-commerce. EDI was first one, many years ago, and there are big customers who are using it (not in Iberia); and there is, not a platform, but a database, in which some customers can get in to avoid this double work (electronic catalogs). But mainly EDI for big, big accounts

and e-commerce for the rest of the customers. And it doesn't matter if you are A, B or C, because all the prices are there, and you have access to the whole catalog. There are not blockers; just the price is different and the availability of material is equal for all of them.

Do you sell only standard products, or also configurable? e-commerce is for the standard products; you can order or write down a comment where you want this product, with a different specification. And this is called for us a CPD - Customer Product Development; we tailor some products. And if it's something easy, they can do it on the e-commerce and they can get it quickly, but if it is a development, or a change in the electronic, we need to go to a different process. Also digitalized: all the information goes to a platform and the responsible for that product, the Product Manager, gets it and he transfers the information to the department, to get an answer. We need to give an answer in 24 hours to the customer: yes, we can do it; or no, we can't do it. But it has to happen in 24 hours. And the only way we can do that is if everything is digital and people get the information immediately, at the same time. Otherwise, email, the guy is not there, and he replies to the next day, and goes 24, 48, a week, 2 or a month. That was in the past. So now it has to be, and is a target of the company as well, 24 hours it has to be there: not the product, but the answer, and the answer has to say when they will get the product.

This is the ideal world and is what we try to achieve as target. Also, the platform is used for this specific business.

New question: How was the e-commerce adoption for the customers?

My experience after 4 years using a lot the e-commerce is: you have to train the SF first, and at the same time you have to convince them that it makes sense. Then the management has to train and convince to the Customer Service specialists. Once you get it done, 90% of the people is convinced, they will support us, then you have to go to the customer, one by one, let them know what it is about, train them, give information and make the story around e-commerce is interesting because you save this and that; we're not cheating anyone. And we give examples of streaming platforms – it's the same thing and this is how we want to move. First, the team, second, the customer. And yes, you might find reluctance from the team; not in our case, and some into the customer base. There are some, because is double work or they are too old fashioned, and to change the mind of someone who is not using electronics is quite difficult. But it's very few. To me, the main issue is the people in the company, not the customer.

I believe that the only blocking the success of e-commerce is the team you have inside.

The trick to have more customers buying online was a 2% discount on a certain period of time. We just needed to do it 3 times, and we had 75% of the business; and we don't need to do it anymore. And then we jump over the Area sales Managers potential reluctance because the customer is demanding. Not sure if this would work the same way in all countries.

5.1.1. What's the sales ratio (percentage) per channel?

95% → 75% (because some need to be changed manually).

5.2. Does the company sell online?

5.2.1. If yes: What online channels does the company use to sell?

5.2.2. If no: Why? (It was never implemented; it was implemented, but it failed...)

5.3. (If yes) How did e-commerce affect the sales force during the last two decades, in terms of:

5.3.1. Size

5.3.2. Structure: customers management; teams composition;

5.3.3. Other – please describe which one and explain

We have experts in the company for e-commerce; one full responsible on top and each region has one person that was working in the internal sales, and because of we are having released some time, this person can now dedicate more time to the e-commerce issues. We have 2 in Iberia; one is responsible for the e-commerce, she's the interface with the headquarters, training the customers, doing the follow-up; so, we have one person, that before was only working as internal sales, oncoming orders, etc., now she's doing the same thing and taking under control the e-commerce, which is growing and growing. That's the proof that you can't get rid of this person; because she is doing now double work and is more efficient and is giving more profit to the company.

Firs is the people you have, what you have to do is train and work with the people and make them aware that this s good for everyone and why. And then, just the time, a few months later, they will realize that it makes a lot of sense. Too bad we did not do it earlier.

5.4. (If yes) How did e-commerce affect the salespeople during the last two decades, in terms of:

5.4.1. Roles (tasks and skills)

5.4.2. Training / education and recruitment

5.4.3. Remuneration / compensation / commissions

5.4.4. Other – please describe which one and explain

6. How did Covid-19 affect the company sales force regarding the previous topics? (Changes in the sales forces; technology, digitization, and online adoption; other...)

The main impact, besides the business, of course, was that we could not see each other, we could not visit anyone, no one could come to our office, there was no lunches and meetings; we could visit 3 or 4 customers in a day. And we could not do it for the last 2 years; we start now, with a lot of precautions. I started travelling and visiting customers again recently, and customers are pleased to see us, but everybody with a mask, is not really comfortable. But better than computer. The biggest impact for us it was the personal relation.

New question: How do you see e-commerce and digitalization growing in the next years in the company?

The idea is to have the foundation, the base of the regular business. We started the e-commerce with the intention to have the business that we are doing now by hand, to have digital, electronic, and then we can speed up other processes. And those processes are new targets for the company that you can do because you are saving time. I can have a SM to make less visits and do more pre-selling (prospection? Promotion?). Why don't we do it today? Because we cannot. He can't have 50% or 255 of the time of every week go visit big end users, municipalities, trying to sell our solutions, selling the idea, because he has no time yet. While we have this base that we can support, we can put into here all the business processes that we have in the company: the Marketing communication, the selling processes, the orders incoming, checking stock level, prices, updates and everything can e done automatically; we don't have to have any interaction with the client, just a call to say "you can find it now" or "get into the link and you will find the new information".. that's 3 minutes. And now you have time to do this other stuff and the idea is to grow the percentage of customers using the platform, to get more and more information tat you can get from an Area SM into the system. And we can use the time doing the business on the field, to get different business.

At the end, you need to through, somehow, because you save time. Otherwise, how do you grow? Either you buy and you get the growth, or if the market is not growing, you cannot grow. So what is the mind of TC2? If you are working for an OEM, who is not growing, we will not grow. I need other OEM's. the only way you can get other OEM's into your side is that someone else to pull your product inside, so is not normal that the component company goes to the market saying "my component is great"; that's the point, when you get the e-commerce platform, you put more and more stuff what we are doing on a daily basis there, frees time to me and to the team to work in this direction, which is the same, but is a different thing. This is the future how we see the e-commerce will do almost everything on the sales perspective and we will be bringing new business, on a personal level. Artificial Intelligence we'll probably do it, but not yet. We need to build the people to do that for the company.

Data Analysis? I think it's still not the time we know how to make use of the analytics. We do have some, but to make a prognosis, or a future development in our industry still is too complicated at the moment. It's depending on multiple factors. We don't have anyone now dedicated to that.

We can't predict orders. But in Iberia clients are planning and placing orders from 6 to 9 months. And this is where our electronic platform worked and did a good job. Because we said: put the order and the system will split it and you confirm if this works for you. But if we would have this AI working for the company, able to say: in the next months you need to order this and that, and have this prepared, that would be really great. But we can't do it at the moment; there are too many variables around.

APENDIX VII –Startup company 1 (SC1) Interview Transcript

TOPICS AND QUESTIONS

1. Interviewee characterization

1.1. What's your role / position in the company?

Head of Strategy and sales

1.2. What are your main responsibilities?

I'm the leader of the sales team, which means that, together with management, I help defining the sales strategy and long-term vision.

2. Company background

2.1. For how many years has the company been in business?

7 years

2.2. What is the main business area?

Resale of fashion luxury goods, especially bags; resale tech for business.

2.3. In which countries does it operate?

Offices in the Philippines and Portugal; Warehouses in Japan and Estonia; Selling to Europe, USA and Canada, Japan, Australia, starting China.

2.4. How many employees does it have?

Around 200.

3. sales force characterization

3.1. What's the size of the sales force?

23 people.

3.2. How is the sales force characterized / organized, in terms of:

3.2.1. Geography

Customer Care is in the Philippines; Account Managers in the Philippines and Europe;

3.2.2. Size

23 people

3.2.3. Structure: customers / accounts management; teams composition; other

New Business Acquisition: 2 (1 Channel Head, 2 Channel Lead, and open position for NewBiz Associate;

Tailored Solutions: 5 (1 Channel Head; 2 KAM; 2 AM)

B2B: 2 (1 Channel Head; 1 Channel Lead)

B2B2C: 4 (1 Channel Head; 3 AM)

Customer Care: 10 (1 Head of Customer Care; 1 CS Supervisor; 4 CS Support; 1 OB Supervisor; 3 OB Support) – Organizational Behavior???

Many openings, so sales are growing.

3.2.4. Recruitment

3.2.5. Remuneration / compensation / commissions

3.2.6. Other – please describe which one and explain

If you consider SC1 to be a one of the more modern companies, this is what we look like, functionally. So, you have a New Business team, tailored solutions, and this is how SC1 is organized. Channel and Account Management, Customer care. When it comes to closing a client, this is where you have the most value in a face-to-face interaction. If I wanted to close a client in Italy, I have a better chance of closing that deal if one, whoever is talking to them, at the very least, speaks Italian, right; if understands Italian culture, has worked there, probably already has the contacts within the Italian market, and understands how the Italians like to do business. If you wanted to do business in the Philippines, it's all about who you know. You can be the most talented person in the world, if you don't have the, the network doors will not open for you. And it could be the same and true for other markets.

This is my sales team. What you're talking about in terms of going after clients, being able to close those deals visiting them, where does have value? It doesn't have the same amount of value across all teams. It's most important only here (New Business). If I wanted to close clients in China, I need people in China. I need people in the US and I need people in Europe. So this is where we're trying to transform that. If you look at the older versions of how we were organized, we had no new business and then when we did have new business, the only person that I had there was Gary, who was the only person in new business last year, but we understand that the Geo-based splits are important and it's more important on this team that it is anywhere else.

This is the only team that is organized by geography. But these guys are sales too. But this is where it matters. If I take another on the extreme and of the other side, Customer Care, this team, unlike Lucia's and Joanna Viera's team, this team here is a hundred percent Filipino They're servicing all clients that handling all escalations or handling all orders, but they're doing it from one location with no face-to-face interaction with anyone. Does it make sense? If you have a complaint regarding your bill, do you not prefer as a customer to just get on the phone, or to chat or to send an email versus the have to go to the Verizon store? And line up. So, the demand based on the nature of the work is what defines how you are organized.

New question: How was this evolution since the beginning of SC1 until now? How did you understand that you needed to have a different structure, a different organization? It was from the demand, I understand, but how was it in the beginning?

In the beginning, all we wanted was new business, no matter what industry you're in, whether I'm in fast food, I'm in fashion, or I'm in home. Every single one of these companies, if they're running a salesforce, are going to want more places to sell their product. Strategy is what's going to define where you focus on. So, let's take an example: This year SC1 said: Should I focus on China? Should I make China an actual OKR?

In the beginning we had “Founder 1” and “Founder 2”, who are both Europeans starting to source in Japan and then pushing product only to Europe because that's what they knew. They were the whole company once upon a time. Very long time ago. Enter now a few people, okay great, we're starting to grow. But we were so small and when you're small you have less ability to compete, right? Six years ago, I was not in a possession to even book a meeting with Caring Group. I was too small. I'm like literally a drop in the bucket that they're not even going to entertain a meeting with me. Fast forward to today, if I'm knocking on that door and I'm saying, Hey Caring, give me all of your stock, I'm going to sell it. I can do that, because I have the backing of a billion-dollar company called “company name”. I show up as “company name”.

In the beginning, when you're smaller, you're less established, you don't have as much expertise, you have no money, no staff, no sales, you have to take what you can get. So we started also with small clients. And we would close any client that was willing to work with us. And then, as that client starts to grow, you're also building your experience and you're able to go after much larger fish. You cannot have a conversation about entering Brazil or China, I want to try and build the US market, if you have no money to hire people. So, it literally will follow the scale of where you have the ability to invest. Any company, any year, no matter where they are in the life cycle of their business, is always going to invest in sales and growing that, because that's how they grow. But there is a direct correlation with how aggressively you can grow and how much money you're willing to put on the table. And that's how you define. So, based on the amount of money I have to spend, where can I grow the most? I'm going to grow the most with what I have immediate access to. And what I've immediate access to, in the beginning, is Europe, with “Founder 1” and “Founder 2”, making those calls themselves, making the newsletters, calling their friends. Then we hired “Name 1”. And then from there, you develop your strategy. What do I need to build within my company, within my pitch, within my capability, so that the next time I go after that guy, they open the door.

3.3. How are the salespeople characterized, in terms of:

3.3.1. Roles (Field / outside sales; inside sales; online sales; other)

3.3.1.1. What's the ratio per role?

New Business Acquisition: 2; Tailored Solutions: 5; B2B: 2; B2B2C: 4; Customer Care: 10

3.3.1.2. Tasks and skills

3.3.2. Training / education

Truthfully SC1 has never been good at training. Inside this company, where HR learning and development is one of the least mature departments we have. If I look at R&D versus HR, the headcount alone tells you where we're investing. And that's also why we're bad at it, because we don't have the staff; we didn't invest there; we didn't put our expertise there, we didn't build that. So at SC1, the best training that you get is on the job. You learn by doing because you're given

exposure, you're given a tremendous amount of growth. Do we have that infrastructure in SC1? No, it's still something that we have to build. Do I have the ability to give a new salesperson step by step, what he needs to do to close a client, yes, I can define for you the skills that you need to build, according to the sales area. That's what training looks like, but it's very much on the job atmosphere.

3.3.3. Other – please describe which one and explain

4. Digitization within the sales force

4.1. Which technologies does the sales forces currently use? (Examples: CRM; ERP; task manager; other...)

4.1.1. Could you briefly explain the use of each of the mentioned technologies?

Active Campaign as a kind of CRM and for email marketing; System – a kind of CRM built inhouse, where all clients, products, etc. are; Channel Manager: being built inhouse to replace System; so far only client profile module has been released.

Pricing Engine: allows to automatically get prices, with or without discounts, to each client, according to each specifications;

sales also rely on a strong Data team;

4.2. Do you have sales automation? Yes

4.2.1. If yes:

4.2.1.1. How have sales been automated?

FreshDesk receives the order notification from the several channels used to sell, creates an AutoPO that is then sent to System. CS monitors the tickets and solve the orders that are not automated; even some automated orders still have manual steps, being closed by AM's, for example.

4.2.1.2. What was the impact of sales automation in the sales force

4.3. What impact do you think the digitization currently has in the sales force?

4.4. What impact do you think the digitization currently has in the salespeople?

New questions: What impact has this automation steps that we have been building all over the time, have in the salesforces and in the salespeople?

Remember how I walked you through the evolution of how you grow, that at some point, you have to hire support staff? If we were to push that forward, your next step is automation digitalization, and so forth. What's the upside? What happens, there is: your salesforce will not grow. Or at least, your support staff, will not grow where you invest in resource. So, instead of me hiring more people in sales, what I'm going to do as a company, is I'm going to hire more people on the R&B team. The R&D theme is going to build correct tools, so that even if we go

from 2000 to 10,000 orders per month, I don't have to hire more support staff, because you've managed to automate it. So, it either means that you're able to reduce your head count on the support side, or you're able to grow, but without increasing your head count. Your third and your best most ideal scenario, is: you have no support staff, meaning your entire support staff is a tool, and therefore, my entire workforce is an individual contributor or a professional and up. I'm not investing in support anymore, because instead of me having people there, I have really good systems really, good tools, really good automations, and therefore, I can invest all of my money in more skilled individuals who can do more strategy, who can do more planning, who can do more optimization, because I have no need to offload anything administrative or manual.

5. Digital sales channels

5.1. What sales channels are used by the company?

Direct integrations with clients (especially Marketplaces): BOT's; CSV import; API's Push and Pull; Online catalog; new online Store for Direct Order Clients (B2B).

5.1.1. What's the sales ratio (percentage) per channel?

Marketplaces: 50%; Virtual Consignments: 3%; Retailers: 30%; Physical Consignments: 16%; Liquidation auctions: 1%.

5.2. Since it started operating, has the company adopted new digital sales channels?

5.2.1. If yes: Which ones?

Online Store;

5.2.2. If no: Why?

If the company uses only digital sales channels:

5.3. What are the challenges of being a digital company?

New question: What have been the main challenges for the salesforces with all this changes, digitalization, e-commerce, what has been the challenges for the salesforces and salespeople?

The thing about digital, is that it sounds really good: automation, digitization, API's, you have everything kind of moving. First of all, it's not cheap. This of it from a cost perspective: I'm not hiring support staff, but I do have to hire developers. And the cost of my developer is probably three times more the cost of my support staff. So, first of all, it's not cheap. And second, it's not enough: You also have to invest very heavily in internal control and in the integrity of the data and the systems. Sure, you have a bunch of developers who are making APIs, but what happens if you don't maintain those APIs. Tech is something that also becomes obsolete very fast, because you always have something new. So, at least every seven years, you're going to have to overhaul your systems, right? It's not cheap. Second major challenge here, with digital, when something fails, it's going to fail at scale. Imagine if I were a person, if I mess one call, I constrain my damage to that one client; if I screw up something on my logic or on my API, it affects every single client that we have. Our favorite story here, and our best example of this was basically Black Friday last year. Big retail season, we know we're expecting a lot of money; for hours before the campaign goes live, the tech team of the client gives us a call and says: I don't know

what's going on with your feed, but we have every single one of your items priced at one euro. Four hours before Black Friday campaign was supposed to go live; it affects every single SKU. That's your risk with digital, and if you're not investing in control, if you're not investing in the integrity of those systems, that's what it opens you up to a hell of a lot more exposure than if you were doing things manually. What if today we get hacked and they ruin all of our data? Where does it leave us as a company? That's your risk with digital, which also means that one of your challenges here is: How do you future proof it, against legacy, against obsolescence. It's really a balancing act between stability and agility. Sometimes we want to do things properly and we're willing to take our time; other times: we're like: MacGyver that because we need it today. The last major challenge with digital is that it might generate a lot more data for you, because all of a sudden, you're able to track so many things, you have a bunch of stuff automated, you have the mechanisms to collect. But it could also mean a loss of disability. Let me give you a non-tech example: In the past, censorship was about blocking things out, right? You would take a pen and you would say: you're not allowed to have access to this information. Censorship in the modern world is: you flood all of the channels with misinformation. There's so much information out there, you don't know what to believe, you don't know what's true. That's what modern day censorship looks like. So, within the realm of a company, if you're not investing in control... Example: we have the Pricing engine; and all of a sudden, for some reason, we have a bug, and it makes the prices just slightly wrong. Not crazy amount. If you're not able to spot that, you could be potentially making decisions on faulty information. But because everything is fully automated, you have no thing that's going to sound the alarm and say: Wait! Sometimes it looks black and white. If I give it to you in the form of a dashboard, you believe it's correct. And it's not. It's math, it's numbers, it's logic, but it's not correct. And you base all of your business decisions on something that is potentially false, and you don't even realize that it's false, until much later down the line. That's your risk; that's your challenge, and that's what comes with going digital.

If the company uses both traditional and digital sales channels:

5.4. How does e-commerce affect the sales force, in terms of:

5.4.1. Size

5.4.2. Structure: customers management; teams composition;

5.4.3. Other – please describe which one and explain

There was a big change in the last years, because of Covid and we could not travel. In the past, yes, absolutely. Is there their value in going out physically knocking on those doors, having face to face interaction? Yes, tremendous value. But at the same time companies are also modernizing. There's a lot more businesses that are going more global, expanding internationally, and we're doing that from a recruitment perspective as well. So, yes, it still has value. There is still a place for face-to-face interactions, but we're also seeing that there is a tremendous amount of business that can be done potentially without it.

5.5. How does e-commerce affect the salespeople, in terms of:

- 5.5.1. salespeople roles (tasks and skills)
- 5.5.2. Training / education and recruitment
- 5.5.3. Remuneration / compensation / commissions
- 5.5.4. Other – please describe which one and explain

New question: One of the things that comes up a lot in the literature and also in the companies that I interviewed is the reaction of the salespeople to the digitalization or to e-commerce, because many times, they are afraid that they will lose their jobs because the sales are being automated or doing by the self-service by the customers online. Now that you are implementing this online store and there are lot of clients already with integrations buying by themselves, how has been the evolution of the salespeople regarding these new technologies used in sales?

I think that we at least in SC1, we feel the opposite. Nobody's afraid of automation or digitization. In fact, they wanted, and your pipelines are full. They are the ones look for it and who are pushing for it. That's our experience within this company. Josh is happy for store is perfect, so that he doesn't have to call them anymore and he can do something else. I I asked our service staff: Would you prefer that Freshdesk is fully automated, so that you guys don't have to do this? Every single one of them is going to say yes. The only people that say no, okay, the people who are afraid that their jobs are in question, it's because they're not sure they're going to be able to continue to bring value. If I automate everything, and let's say you guys hire an army of developers and then all of a sudden, we can automate the full order processing, what happens to my customer care team? If they are skilled and had enough exposure to the rest of the department, it's true. They no longer have to do the job that they have to do today, but do they lose their place and look exclusive? No; they shift to a higher-level set of tasks. And so long as they qualify for those tasks, they stay. The only time it's scary is what if you can't do anything else, what if you have nothing else to offer? That's the only time it's scary. And if you have nothing else to offer, it's not a problem of the technology, it's a problem of the person. You must grow your skills.

New question: How did the clients usually react to online sales? Are they all so conservatives they prefer to do business, you know, changing emails, talking to someone on the phone, how it's been that? The reaction of the customers to this? How it's been that the adoption to these technologies to sell?

It depends on where they are in their life cycle. For example, “Client 1”; when we worked with them, when we first worked with them, several years ago, they had no B2B partners, and we were the first partner that developed an API for them. So, at the time, when e-commerce was still, so small, so new, and API was considered cutting edge, we needed to work with partners that had the willingness to invest, were a little bit gutsy on the tech side, because it was something that could be a strategic advantage. Fast forward to today, APIs are ... so it's a question of how invested they are in their own systems. We are on the supply side, we're B2B which basically, means more often than not, we don't call the shots. So, think about the integrations that we want to build: *if* the customer has an existing API endpoint, great, Let's build it. But if their system is through something like Channel Advisor or Magento, we are the ones who adjust, we're the ones who comply. So, when it comes to, you know, digital technology, I think it's really helpful and important to have standards. Because then, otherwise

they would have their system, we would have our own way of doing things and then, the two can't talk to each other, and then We're fighting about it. You want something that's common, because it's cheaper, it's easier for everybody; and being different here is both risky, but it can also just remove you from the playing field altogether; it still hard to work with you, I don't want to.

So, adoption is really that: when we work with more established companies, our systems need to be flexible enough to be able to convert to the way that they want to work. If you're lucky, you're able to get everybody else to adjust to you. But you have to be market leader for that to happen; there are very few companies that sit in that position. If you're the one who gets to set the base, you define the standard everybody follows suit. In our case, we're the ones who's adjusting all the time: What does your system look like? How can I come in? We make the adjustment; we build for what they are able to accommodate.

If you had to very shortly, explain how the sales forces changed it, so in terms of size, for example, you went from what one, or two people for two, the ones that we have now?

Here's what the generic evolution looks like: When you first start out, your salesforce is pure execution. So, what you're hiring is cheap junior staff because it's so helpful to you to just have another person trying to close new clients. And they're running on scripts, they're making those calls. So, in the beginning, you're hiring junior staff, all purely execution. The second thing that you're going to hire eventually, either you promote, that's how your salesforce will change, either you promote, or you when you expand your salesforce a second time, you're starting to hire for seniority. So, the next set of people that I'm going to bring in; I have a junior pool of staff, that's at least doing the work; now I need somebody to figure out what are we going to do next. So, then you hire your first levels of managers, whose job it is to optimize what the teams are doing. They come with prior experience. So, when you're working with junior staff, you're your biggest hiring considerations are costs and potential. Look, you're cheap, you know nothing, you're a fresh graduate, but I can train you, I can grow you, and one day you'll be productive. But I'm going to book you; I'm going to get you super cheap and I'm going to get three of you. And then you get somebody that you're hiring more for their experience. This is somebody I no longer have to teach; there's a lot that we can do; I no longer have time to train, I cannot wait two years for my staff to have the skill set that I need, therefore I will bring that in. That's the next evolution.

Your third evolution is a specialist: as your team grows and as you start to build your more senior staff, you start going into highly specialized skills. This is also when you start to slice and dice in deeper ways. For example: at some point, I changed the way that we organize our team, based on the distribution model. Which basically means that if I'm going to hire somebody from marketplaces, I need somebody who knows how to speak to developers, who understands how APIs work, who has that kind of technical knowledge and expertise, versus if it's purely direct order, it's just hardcore sales; the skill set is low. You will have to hire specialists eventually. I'll give you another example of a specialist: I run the salesforce of the company, so you would think that we are in sales, but I actually have a lot of positions which are more like an analyst type in nature. So, after you have your specialist, and you optimize, and you grow and you increase your headcount, you start to have now support staff; You're not actually helping my top line; My, my ethos is: I need to bring in revenue. So, if I want to bring in revenue, what makes sense is: I bring in Account Managers, I bring in people who will close clients, I will bring in people who can manage those teams, right. But now, because I have senior staff, because I have specialists; obviously these reasons resources are more expensive, they are more senior, they have very specialized knowledge, they have domain expertise; I don't want to waste

their time doing manual tasks, doing admin work, processing stuff. Which basically means I now need to hire support staff, so that I'm fully optimizing and using them, based on where they can contribute the most. If I'm paying you \$40 an hour, I don't want you copy pasting anything that makes your tasks super expensive. *If something needs to be copy pasted, We're going to do it with a cheap staff, not with you. That's your evolution.*

6. How did Covid-19 affect the company sales force regarding the previous topics? (Changes in the sales forces; technology, digitization, and online adoption; other...

The first major impact of covid was exactly that: suddenly, we can't meet, we can't travel, and we needed a new set of rules for everything. We were paying for an office that nobody was using; Zoom and Skype and all of these platforms all of a sudden became critical tools; that's one aspect.

But Covid for SC1 was extremely different. We were expecting that things would be bad. We were bracing. We thought we would have no money. We said: I have to be conservative about hiring, about buying, because this is a global pandemic. We were wrong. If you look at our numbers last year, you're going to see a hockey stick of growth. With Covid, the business boomed.

Nobody's allowed out of the house. What are you going to do? You're going to shop online. So we saw that suddenly sales grew. Resale boomed, and because our partners and our clients were not making money through stores, it actually expedited online. Clients that have said they didn't want to work with us before, were the ones who were coming back saying: Hey, I need revenue. Can we do something together? So covid, I would say in general for us was largely positive. The big changes were in how we needed to work as employees, but from a business perspective, it was a massively opportunistic for us.

APENDIX VIII –Startup company 2 (SC2) Interview Transcript

TOPICS AND QUESTIONS

7. Interviewee characterization

7.1. What's your role / position in the company?

sales Director

7.2. What are your main responsibilities?

Managing the sales team and make sure the company goals are met.

8. Company background

8.1. For how many years has the company been in business?

Founded in 2014. Started operating in the end of 2016.

8.2. What if is the main business area?

We sell services, specifically software for online payments.

8.3. In which countries does it operate?

The company is based in Portugal, but our clients' portfolio is spread across the world. Most part in in Europe, but also in the US and Latin America.

8.4. How many employees does it have?

60 people.

9. sales force characterization

9.1. What's the size of the sales force?

We are 5 people.

9.2. How is the sales force characterized / organized, in terms of:

Geographically, there are 3 in Lisbon and 2 in Porto, however this has nothing to do with the roles / functions or type of customers each one has.

9.2.1. Geography

9.2.2. Size

9.2.3. Structure: customers / accounts management; teams composition; other

In the beginning, as we were still few, there was not much segmentation by industry, although in the end we were already kind of splitting people a lot by industry. For example, one Account Manager is allocated to high-risk industries, another to low risk, and the same for SDRs, so as not to overlap in terms of tasks. But the team was too small for there to be a great need for this segmentation.

9.2.4. Recruitment

9.2.5. Remuneration / compensation / commissions

Our salespeople have commissions over the sales they get.

9.2.6. Other – please describe which one and explain

9.3. How is the salespeople characterized, in terms of:

9.3.1. Roles (Field / outside sales; inside sales; online sales; other)

The sales department is divided into three roles: sales Manager, SDR's (sales Development Representatives) and Account Executives (AE's). What distinguishes them is the nature of the role; the SDR's are the ones who do the prospecting itself, that is, they go to LinkedIn, online databases, etc., and they are the ones who collect the data of the customers they want to contact; they end up assembling a DB with names, email, telephone numbers, company... and eventual topics to be explored with each of these prospects for our company. The AE's are the ones who take the SDR's deals. In other words, the SDR's do the initial prospecting work, where they set up the DB's and campaigns, especially email, and then schedule a first call with the clients. And here there is a handover of the most interesting, promising deals, to the AE's, who then will try to close each deal. On top of this, the sales Manager manages these people and provides support at all stages of the sales funnel, but especially to the AE's, who depend more on the SM, for example, to close a contract, negotiate prices, etc. Although they have some autonomy, the final OK's are always given by me.

9.3.1.1. What's the ratio per role?

We have 1 sales Manager, 2 SDR's, and 2 AE's. Customer Support is not included in sales (or not considered at least).

9.3.1.2. Tasks and skills

In the beginning we tried to hire people who had training, or at least experience in e-commerce, but the only person hired with training or experience was me. We gave up a bit of that, because in Portugal it is rare, so we ended up recruiting people directly from the university and we provide the training internally.

9.3.2. Training / education

We are training the salespeople in two aspects: the industry itself, training them in e-commerce, the customer industries that requires specific knowledge, because to make the sale they need to

understand what customers do; and then training in actual sales: prospect techniques, tools to use, negotiation, etc.

9.3.3. Other – please describe which one and explain

10. Digitization within the sales force

10.1. Which technologies does the sales forces currently use? (Examples: CRM; ERP; task manager; other...)

CRM (Hubspot); online tools: Similar web, Hunter; Social Media: LinkedIn.

10.1.1. Could you briefly explain the use of each of the mentioned technologies?

We don't use many tools to make a sale. The main one is the CRM, HubSpot, and it's what we use to log in all the activities that took place with the customer, from the moment of the first campaign, the first contact with the lead while it is in a phase of prospecting, until later, in the stage when the customer has been already closed, we add all support tickets, etc. Although these are no handled by the sales team, but by the Customer Support team, it's all registered in the CRM, contracts, etc. It's the platform we rely on whenever we want to know the current situation or if we have any doubt about a customer.

In addition to CRM, SDR's use also a lot of tools, like Similar Web - which allows us to see the traffic, traffic quality and the demographic KPI's of the traffic for each website, which helps us then to prepare the campaigns. Considering that we target a lot of customers with worldwide processing, this helps us a lot to understand the demographic dispersion of each potential customer's traffic. Afterwards, this tool also allows us to generate our own leads, meaning that we can insert parameters and extract a list of sites that correspond to those parameters. From the moment we have a list of websites, we use LinkedIn a lot, for example, to find out who is the most relevant person for our initial contact. And then we use some tools, like Hunter (hunter.io) which helps us get the contacts of the person we saw on LinkedIn. Then we set up the email campaign in HubSpot and the CRM triggers all the emails to these companies, and it follow-ups automatically, until the moment someone replies, and then it becomes a more manual process: we reply to the email, set up a call and then follow the sales book.

New: This means that the prospecting phase is fully digital?

Yes. The only time prospecting is not fully automated is when we go to events, which we used to attend a lot before Covid, and there it was SDR's job to schedule meetings, so that AE's could attend and close business with new clients.

It's important to have some people focused on feeding the pipeline and others only focused on closing what already exists, otherwise it won't be efficient.

New: How is the relationship with the Marketing department?

We have a Marketing department, which was creating campaigns to try to attract companies more within the low-risk industry and then, if there were positive responses or interactions, the sales team responded and stayed with the customer. But everything that is high-risk, is very

much an initiative of the sales teams; it was all outbound. It was all pure and hard sales effort. Many of our sales come from referral.

10.2. Do you have sales automation?

We don't have automation in sales itself. We have some automation in the prospecting phase, as well as the customer management, with the CRM.

New: Are your sales one-time transactions?

We sell services, not products, and the sales are not online. Our service is billed monthly, so it's a recurring sale. But, for example, a client in the initial scope of the project can hire only one payment method; and half a year later he can add a new payment channel. So, the sale itself is not online, and it's on a recurring basis, since it's a paid monthly service.

New: This transaction part is also allocated to the sales force, or are there other people doing it?

The entire transactional part (invoicing, payments) is outside the scope of sales; it's with the Finance department. At the end of the month, they have access to the dashboard, see the entire history, see the processed transactions, cross-check the contract, send the invoice; if the customer doesn't pay or doesn't respond, then yes, they go to the sales office, ask if they can get access to someone else, to help solving the situation..

10.2.1. If yes:

10.2.1.1. How have sales been automated?

Email campaigns are sent automatically, and follow-up is also automated. Whenever we set up a client, we have the contractual conditions, the billing cycle, etc. Every month it generates a report that the Finance team uses to send invoices.

These reports for Finance are also created automatically: in the dashboard itself, Finance has a mechanism that creates invoices automatically.

We don't have online sales, or any type of e-commerce.

10.2.1.2. What was the impact of sales automation in the sales force

When the company was born, it was just me, from beginning to end, doing the prospecting: I spent days and days on LinkedIn and Google, trying to find contacts. We used Trello, where each new lead was a new card, but once we started to reach a certain level of output, it started to get very confusing. Then we evolved to two AE's, and they were both doing everything. Then I became sales Manager and realized that we needed to split things up, so I segmented the team, and created two different roles: AE and SDR. And that's when we started to adopt the new

HubSpot CRM and creating automated campaigns. It was immediately clear that the output level was much higher. They were able to send a lot more emails, do the automatic follow-up, and I didn't have to worry about these routine, time-consuming tasks.

This allowed me to focus only on feeding and creating more pipeline. It dramatically increased the output and there were many more leads passing through for the AE's to handle. I would say that was the one that had the biggest impact. Then we added Similar Web, and the quality of the leads also increased, but also the response rate to the email campaigns was much better because we were able to prepare very personalized emails, since we already knew in advance the main customer needs, based on demographic information of their traffic, which made the response rate to emails sent, higher. And then it was all snowball effect.

10.2.2. If no: Why? (It was never implemented; it was implemented, but it failed...)

10.3. What impact do you think the digitization currently has in the sales force?

10.4. What impact do you think the digitization currently has in the salespeople?

Positive. We are talking about very young people, not old people adverse to change. They are always willing to try new things, they have a lot of energy, just out of university. It is much easier to say what to do than with older people. They themselves are proactive enough to suggest new tools. Many of them even suggested, for example, more efficient tools to extract emails, than the ones we had. All services that were proactively suggested by the SDRs.

11. Digital sales channels

11.1. What sales channels are used by the company?

All our sales are done by the salespeople. We don't have e-commerce (although we sell e-commerce services!)

11.1.1. What's the sales ratio (percentage) per channel?

11.2. Since it started operating, has the company adopted new digital sales channels?

No.

11.2.1. If yes: Which ones?

11.2.2. If no: Why?

If the company uses only digital sales channels:

11.3. What are the challenges of being a digital company?

If the company uses both traditional and digital sales channels:

11.4. How does e-commerce affect the sales force, in terms of:

11.4.1. Size

11.4.2. Structure: customers management; teams composition;

11.4.3. Other – please describe which one and explain

11.5. How does e-commerce affect the salespeople, in terms of:

11.5.1. salespeople roles (tasks and skills)

11.5.2. Training / education and recruitment

11.5.3. Remuneration / compensation / commissions

11.5.4. Other – please describe which one and explain

12. How did Covid-19 affect the company sales force regarding the previous topics? (Changes in the sales forces; technology, digitization, and online adoption; other...)

Our volume exploded. Since the core of our business is online payments, we had one or other company that put our services on hold, but many came to us. We had a lot of people talking to us at this time: many existing customers have doubled their monthly billing volume because of Covid. We had some businesses that decreased for a while, for example sports betting, because the sport events were all canceled for a while, but then there was an offset on the other side. In general, turnover increased during this period and never went down.

We started to work remotely; before we were all at the office. The company had never been much of a remote supporter before Covid and the transition was a little shaky, but then everything started to go well, and sales even started to produce more.

New: Did you usually do visits to clients?

Only a few, on rare occasions. Only enterprise level customers, but these is not a type of customer that we prefer, because it requires customization of our products, which makes the sale take longer, as it requires the participation of several people, so it was never our focus. The sales team was always very focused on bread-and-butter customers.

New: How do you see the future of your sales force, in terms of digital transformation?

Our salespeople are used, since the beginning, to utilize digital channels, such as social media, email, messaging platforms, and so on, to get leads. However, we still want to attend events and conferences to increase the intimacy of the sales process. For us, although it is possible to sell without having physical contact, this helps a lot to create a relationship of trust and it will hardly be put aside in our sales strategy, even if it has been reduced, especially during the pandemic.

New: Do you think you sell your services online?

Now even more than before, e-commerce is our main business, and the plan is to keep working this product, but e-commerce for our services doesn't make much sense, considering our business line.