

Managing the Sales Transformation process in btob: between Human and Digital

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Track: The (digital) transformation of selling in business-to-business context and managing strategic customers-converted

Abstract

A process of sales transformation is taking place that is leading to a change in the competences of sales people, the technology they use, as well as customer relationships and sales-marketing interface. Different factors boosted sales transformation: digitalization, the transformation of organizations into service businesses, the increasing sophistication of the purchasing function and the increasing attention in the measurement of results.

While at managerial level many companies are experiencing such process of change, at theoretical level it is still missing an understanding of the phenomenon of sales transformation and what it relates to.

Based on in-depth interviews and two focus groups (41 participants), this paper will map the process of sales transformation and explain the four main dimensions that compose it: people, technology, integration in space and acceleration in time. Each of these dimensions is characterized by factors on which companies can act for a successful implementation of the transformational process.

Keywords: marketing, sales, transformation, btob, business relationships, CRM.

Introduction

The sales function is an engine of growth and sustainability within organizations. It is important to understand the customer's value drivers, to communicate the company's value proposition, and to spread insights on the market within the organization (Lacoste, 2018; Haas, Snehota and Corsaro, 2012).

This deep change in the market and social contexts is leading organizations to rethink the role of sales. This is a pervasive change, which affects the skills of sales people, the management of customer relationships, the organization of sales function as well as the impact of technologies to support the commercial activity.

In managerial literature this is known as Sales Transformation, and it is caused by different factors. First, the purchasing function is playing a more strategic role than in

the past (Sheth, Sharma and Iyer, 2009). It has experienced a higher sophistication, since it has a greater responsibility in realizing high profits and margins, containing costs, contributing to a higher value for the stakeholders and increasing attention to the measurement of facts (Peasnrughe, et al. 2018; Janda and Seshadri, 2001). Nowadays, 80% of btob purchase decisions require the approval of an executive level, including finance, whose voice is increasingly important for the decision making process (Riesterer, 2017).

Secondly, there is a process of servitization which is affecting many industries and according to which the value-in-use logic has supplanted that of exchange value: companies, in addition to consumers, are less interested in paying to buy and own an asset, but rather prefer to access to the use of the same. Third, thanks to digitalisation sales will be more intelligent, including new forms of automation and human-machine interaction. The number and type of touchpoints for salespeople has multiplied (Jaakkola and Alexander, 2014; Shams and Kaufmann, 2016), which, in turn, has led to a higher heterogeneity of actors involved in business relationships. The velocity of business interaction has increased dramatically, leading to an acceleration process in sales approach too (Baumgartner et al., 2016). Mobile technology, for instance, has helped to create the so-called 'culture of immediacy': 64% of business customers expect the company to interact with them in real time.

Today, however, only 25% of companies believe they can adapt their sales development plans to changing environments (Sales Management Association, 2017). At the same time, according to Miller Heiman Group (2016), the percentage of companies that have a sales enablement program has gone from 19% in 2013 to 36% in 2016.

Notwithstanding its relevance, the phenomenon of sales transformation seems to remain quite ambiguous and not clearly described at theoretical level yet (Corsaro, 2018; Moncrief, 2017). Given that, this paper's aim is providing a conceptualization of the Sales Transformation process in btob. Empirically, we interviewed sales directors from companies operating in different industries and organized two focus groups for a total of 41 key informants. This study provides a model representing the main dimensions of sales transformation, organized around four pillars: Person, Technology, Processes of Integration and Processes of Acceleration. Thanks to this, the research will also provide guidelines that can be useful for managerial practice.

Methodology

The qualitative part of the research consisted of 30 semi-structured interviews, carried out in 2019 (see Table 1) and two focus groups involving 11 managers (see Table 2). The heterogeneity of industries included in our theoretical sample aimed at gaining a multi-sided and rich perspective of observation, in order to identify commonalities in sales transformation process rather than differences.

The people interviewed were all sales directors who we consider key informants since they have a strategic view of the sales transformation process and who, at the same time, could formulate considerations on how sales transformation translates for salespeople under their responsibilities (Ivanova-Gongne & Törnroos, 2017).

In this study we adopted the “systematic combining” approach, a process in which theoretical framework, empirical fieldwork, and case analysis evolve simultaneously to develop new theories (Dubois & Gadde, 2002).

The interview scheme included direct and open questions like: Has the term Sales Transformation any sense for you? What is Sales Transformation? Which are the main changes affecting sales approach and sales organization in the last 5 years? How do you cope with changing environments? What is the role of technology in this transformation? Which are the main skills of salespeople that you think will matter in the future? Which are the last training activity you and your salesforce experienced? How do you select sales people?

The interviews as well as the focus groups also included indirect questions where the narrative of episodes and events that occurred in their relationships were discovered. Data analysis involved a detailed coding process that identified the major themes addressing the research objectives of the study. Primarily, we have selected a particularly ‘rich’ transcript from each respondent and analyzed these transcripts, line by line, in order to develop an initial list of first-order concepts (the value actions). As subsequent transcripts were coded, the set of concepts expanded.

Once the initial coding was complete, we searched for associations between first-order concepts (factors of sales transformation) and categorized them into higher, second-order concepts (dimensions of sales transformation). For example, the activities we labelled ‘loose fast’ and ‘access from mobile’ were aggregated to the dimension of acceleration process.

A framework for interpreting the Sales Transformation

A sales transformation process is in act in companies of different industries which makes relevant to understand its effects and implications (Moncrief, 2017). This

implies not only a change in the role and skills of the commercial function, but also an alignment of the entire organization and the relationship with the external context. Our study has identified a model to interpret sales transformation that is composed by four dimensions: People, Technology, process of Integration and process of Acceleration.

As for people, although purchasing departments often state that price is the most important variable in sales relationships, when their processes are analyzed in depth, a greater relevance of the service and sales experience emerges. Customers, especially key customers, are looking for valuable experiences that go beyond the concept of supply. Moreover, the increasing bargaining power of the purchasing function along with the market hyper competition are making the sales force central to put the accent on the points of difference compared to competitors and identify new ways of co-creating value with customers (Haas, Snehota, Corsaro, 2012).

We already know from the literature that the job of sales managers is becoming more and more transversal and includes different roles. Sisti et al. (2015) identified the roles that salespeople should take in a modern sales approach: customer's partner, market analyst and planner, sales team coordinator, customer service provider, customer purchasing behavior expert, collector of market information, sales forecasting expert, cost analyst and technologist. Sales skills are therefore configured as a set of technical, relational and interpersonal skills that make their combination and amalgamation quite complex. In addition to those that have emerged so far, we carried out a more detailed analysis of the skills that are needed to be strengthened in the future for sales transformation purposes.

The salespeople of the future will be more and more hybrid figures that combine soft and hard skills, have an in-depth knowledge of customer processes, operations and performance measurement metrics. They will have to develop capacity for adaptation, relational intelligence, being ready to challenge the status quo of the customer context and offering unique perspectives. Put differently, they moving from the role of salesman to that of advisor 'in context'.

This implies that in the future the sales force will increasingly act as boundary spanner, but whose purpose is not only to link the supplier's capabilities with the client's needs (Lysonski & Johnson, 1983) rather the sales force will act as an intermediary in a broad sense, which influences and shapes the client's cognitive processes through interaction, often in a holistic manner, going beyond the characteristics of the product and considering both the business, cultural and social context jointly. Adopting a relational perspective centered on people, which is now prevalent in sales, means seeing the person holistically, as an expression of their different identities that interact: the person-consumer who is also a corporate

decision-maker, and change his/her behaviour according to the social and business contexts in which he/she finds. Somehow, managers themselves often mention that the distinction between btob and btoc is becoming increasingly meaningless for them, especially when their sales process is very human-centered.

It follows that being charismatic is not sufficient anymore for sales people (Dubinsky et al., 1995). On the one side, they should be very prepared and informed on the customer processes and provide facts about the economic and non-economic impact of their solution on the customer's business; on the other side they should be able to communicate the 'value story', and thus develop storytelling skills by creating a narration of the value. This is becoming important also in btob where it is increasingly shown that buyers are not involved only at rational level, but emotionally too (Hall et al., 2017).

In terms of sales technology, in developing a social media strategy, we observed that btob companies are more and more looking at btoc to understand the social selling practices that can be experienced also in their context. For example, it has been shown that corporate buyers involved in non-complex purchases, seek purchasing experiences similar to those that live as consumers: immediacy, simplicity, mobile access, engagement and socialization.

The sales process will be supported by increasingly granular and contextualized data that will lead to enabling a better customer experience across all touchpoints, both physical and virtual (Miller Heiman Group, 2016). Our analysis revealed that experimenting increasingly proactive and intelligent sales through virtual assistants, predictive and artificial intelligence would free the time of sales people dedicated to administrative activities or low value added (corrupted selling time), allowing them to concentrate on those activities with the greatest return and also that motivate them more.

However, people and technology are not sufficient to understand the sales transformation in course (Edmunds, 2017). Processes of integration in space and acceleration in time are also needed to stress the contextual nature of sales transformation.

Integration makes the change a fluid and comprehensive and occurs at different levels. First of all, integration is occurring between physical and virtual sales in order to take advantage of technology to enable an integrated strategy across multiple sales channels and markets. To reach this goal, social CRM are diffusing which are able to integrate data from inside and outside, in order to offer few but relevant insights, in real time, and easy to understand, also thanks to visual dashboards.

The business customer journey is mapped in order to guarantee a smooth customer experience along all the touchpoints with the customer by offering contents studied

jointly by marketing and sales. Technology is used to listen, attract and engage the customer, to improve human-machine interaction and integration, as well as to empower people's abilities.

New forms of interaction between the sales force, channel partners, and other actors in the inter-organizational network are part of the process of integration (Bolander et al., 2018), which also implies the use of technological tools to support information sharing in network and the availability of multi-channel sales dashboards.

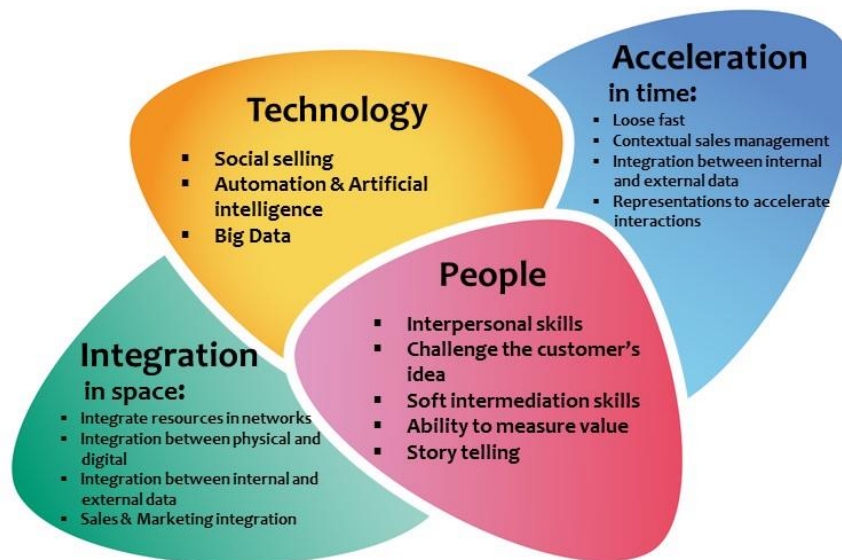
But integration occurs at intra-organizational level then, especially between marketing and sales (Rouziès et al., 2005; Malsche et al., 2017) based on a formal process of collaboration, and not informal as it often happens. The two areas start to share information through CRM and contribute to lead qualification and to guide management. They jointly identify market opportunities, participate in mutual meetings, carry out job rotation activities and last but not least, implement KPIs to measure the performance of common initiatives.

Finally, our study revealed that acceleration is important in a world where everything is going extremely fast: companies should understand how to cope with this velocity and maintain the quality of the relationship at the same time. Organizations that have a dynamic sales process are able to adapt better to change, and more quickly. Technology of course has a role in making the sales process increasingly smart, capable of shaping itself with respect to changing contexts (and also to changes in subjects in different contexts). Technology will be able to enhance and accelerate the management of the sales funnel, especially in the qualification phase of the leads. But velocity is also about moving deals in a 'no decision state' to the next level, even if it would imply to lose the deal.

Furthermore, mobile facilitates interaction with business customers in real-time client and, in turn, having real-time analytics and granular data generates better adherence to the context. Modern CRMs themselves are now native mobile and provide increasingly predictive (what will happen) and prescriptive (what to do) indications, so as sales managers will soon develop a decision-making approach based on real-time observation of interactions as they occur.

Lastly, the study confirmed the importance of leveraging visual representations and symbols to facilitate interpersonal and offline/online communication (Corsaro, 2014). It's extremely important to generate sufficiently flexible representations that can be quickly transferred to different contexts and communicated to different interlocutors. Figure 1 contains an illustration of the dimensions and factors that characterizes the process of Sales Transformation as we mapped in the study.

Figure 1: A map of the Sales Transformation process in business to business



6. Managerial implications

As a consequence of the changing customer behaviour, salespeople are required to offer customized solutions with high added value, which leads to a deep level of interaction with customers to understand their needs, objectives and business processes.

In the following list, we can find suggestions to manage sales transformation in a practical stance:

- Select **sales talents**. Identify the predictive traits of the personality and test the emotional intelligence. Leveraging on cognitive diversity. Reduce the time needed to make sales people productive.
- **Customize training**. Develop sales skills while respecting the individual characteristics of people. Combine lectures with self-learning mode. Create and share contexts of experience as a way of learning.
- Develop a formal **coaching** process. Train people to a 'learn-it-all' attitude rather than 'know-it-all'. Formalize a dynamic coaching process. Train both the individual and the team. Strengthen improvement and establish kpi for coaching activities.
- Implement **heterogeneous KPIs**: important to have both short and long term performance kpi. Combining economic and financial kpi (turnover, margins,

growth, etc.) with the quantification of softer and more intangible dimensions (effort, empathy, alignment, relational atmosphere, opportunism). Translate scenario forecasts into three-year sales plans and allocate sales budgets to opportunities beyond the current year.

- Enable **marketing and sales integration**, through job rotation, joint kpi and a social media marketing strategy should be aligned with that of social selling
- **Encourage people**. Link sales people performance to customer experience measurement metrics. Make incentive plans clear to motivate people, especially in a changing environment.
- Enable **human-machine interaction**. A gradual approach to automation is recommended, focusing on what the technology will do and not on what it can do. It emerges the need to train service personnel interacting with machine in a purposeful way. Investment in/enthusiasm for technology must not throw a shadow on investment in human resources.
- Implement a **social CRM system**, which should be in cloud, mobile, highly customizable and which provide integrate internal and external data and provide dashboards and analytics easy to be understood.
- Identify the **agents of change**. Communicate the change in a simple way. Create a story of change. Translate the story into a few continuously repeated messages. Involve people from the start in change processes. Assign the most suitable people to guide the transformation by providing them with appropriate resources.
- Create **sales leadership**. Help people move between a more comprehensive and their own vision, contributing to the creation of a collective vision. Clearly define what the leader expects from people. Give people the power to do what they do best and achieve their personal goals. Generate trust, credibility and respect.

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Appendix

Table 1: Key informants interviewed divided by company and industry

<i>Companies</i>	<i>Industries</i>
Wika	Thermic measurement equipment
Perrigo	Pharmaceutical
Reputation Institute	Service/Consulting
Technogym	Fitness equipment
DNVGL	Service/Certification
Sei Laser	Packaging/printing
Coca Cola HBC	Beverage
General Electric- Medical	Medical equipment
Salesforce	CRM solution provider
Akamai	Cloud computing
Doxa	Market Research
Comark	Export consultancy
Copernico	Co-Working spaces
Gruppo Cimbali	Coffe Machine equipment
Reckit-Bankiser	Pharmaceutical division
Danone	Food industry

Vagheggi	Beauty industry
Gattinoni	Travel chain agency
BIT	Consultancy
Volksbank	Banking
Lavazza	Coffè producer
Scheffler	Manufacturer of rolling element bearings
Urban Vision	Advertising
Cameo	Food Industry
RCS	Publishing House
Campari	Beverage
Twinset	Fashion
Evoca	Vending Machine
Airplus	Travel Credit Card
Rovagnati	Food Industry

Table 2: Focus Groups Participants

Companies	Industry
Best western	Hospitality
Centro Medico Santagostino	Healthcare
Credit Agricole	Banking
Credem	Banking
Dale Carnegie	Training
Mondadori	Publishing House
Callipo	Food Industry
Faber-Castell	Art & Graphic
Digi-International	ICT Security
Mayborn Group	Baby products
Connexia	ADV agency

Table 3: Some exemplifying quotes

People	Interpersonal skills	
		<p><i>“I don’t think our market will move into a completely digital sale. I think there will still be plenty of space, more and more, for sellers because empathy is still key”.</i> (Wika, Sales Director).</p> <p><i>“Even in the tender phase, sometimes the proposals are very similar and it is difficult to be able to establish oneself as distinguished, so it is the relationship that wins”.</i> (Gattinoni, Sales Director)</p> <p><i>“The seller’s task is to align his decision-making style with that of the client to increase the probability of success. Understanding the decision style of the customer will become increasingly important in the future, also to avoid the customer procrastinating his decision”.</i></p>
	Challenge the customer’s idea.	<p><i>“That is, I am not looking for people who actively listen and then do work, but who are a constructive and contributory. The market is constantly evolving, and who better than the people who are doing something in the market every day, can help you understand, improve a system or whatever”</i> (Technogym, Sales Director).</p> <p><i>“We realize that people in our sector are often much less reported and often presumed to know everything, to have already done everything. If this type of belief is not undermined, it becomes difficult to take any result home.”</i> (Lavazza, Sales Director).</p> <p><i>Because they have a clean mind. That is, to make a person who comes from a different sector and who has the open-mindedness and willingness to question them, allows them to work together on projects without any filter and prejudice.</i> (Campari, Sales Director).</p> <p><i>“We had a salesman who got excellent results by selling equipment for body treatments. His colleagues were surprised because he had sold them in the months of November and</i></p>

		<i>December, so months in which in the sector (which lives by a certain seasonality) we talk more about the face than the body. And then the colleagues said -but how did you sell the body equipment in the face season?" And he replied "but sorry what is the face season?"- This means that he did not have that superstructure that they had, and he went to the customer, he analyzed what the customer lacked and what would have helped him to make the customer center perform at its best, and he made a sale not only effective for him, but above all for the customer" (Vagheggi, Sales Director).</i>
	Soft intermediation skills.	<i>"The intelligence activity should be part of the DNA of the commercial function and not be seen only as a sporadic activity made ex-post the occurrence of important events."(Scheaffler, sales Director) "It is a diagnostic, preventive and continuous activity. The tendency to look ahead should become institutionalized."(Volksbank, Sales Director)</i>
	Ability to measure value	<i>"Reasoning in the multinationals is a fundamental in a financial perspective. Thinking about local companies is a little less pressing point, but in multinationals it has become almost the fulcrum" (Perrigo, Sales Director) "Today there is certainly a need to have salespeople that, in addition to turnover, are able to calculate and estimate. Buyers have a higher attention to marginality that in the past when probably it was not so important". (Connexia, sales director)</i>
	Story telling.	<i>"Simply telling the truth is not enough, the truth must be made alive, interesting and theatrical" (Carnegie, 2008).</i>
Technology	Social selling	<i>"More and more because the SEO and digital presence, however, even in B2B, people are like consumers because people inform themselves and look at social networks (we are also present on social networks) and then they are visited by our commercial" (Airplus, Sales Director). "We are active exclusively on LinkedIn and on Youtube. Still the company does not see FB, Twitter, Instagram as channels for our world". (Wika, Sales Director). "We study their behavior over time and we qualify the leads, in fact in the field we call it Digital lead generation, which is a tool through which we try to qualify interests from parts of existing customers or potential customers" (DNVGL, Sales Director). "We have launched an e-commerce about 2 years ago but sales are still insignificant on the overall volume and we also want to preside over that channel waiting to see what will happen. It is obvious that a part will move, but we must still think that customers buy as a company and not as private individuals, so even our client companies have to structure themselves to buy digitally. For example, many companies do not have a company credit card to place orders, or they do not have their integrated management systems". (Wika, Sales Director).</i>
	Automation and AI	<i>"Based on our segmentation we have certain types of customers where the presence of a commercial is necessary, while other customers where the whole sale can be completely digital and on which we are working on specific segmentation" (Airplus, Sales Director).</i>
	Big data	<i>"Leads are attracted by these digital tools, which in the consumer world are already widespread; while we are strongly pushing it this year with a system that gives us the possibility to trace everything that happens in the digital world and on what to take action. We believe the customer is interested and has given us consent." (Scheaffler, Sales Director).</i>
Process of integration in space	Integrate resources in the relevant external network.	<i>"A salesman in this type of business who does not have a loyal customer portfolio, has no value for us. So inserting a junior figure at a commercial level is absolutely unthinkable". (Gattinoni, Sales Director). "Before we prefer to recruit new sales people from other industries so that they had a fresh perspective and can learn our approach without resistance. Over time, we changed strategy and now we select them based on their portfolio of contacts" (Reputation Institute, Sales Director).</i>
	Integration between physical and	<i>"We think that when we combine the machine and the human interaction in the service experience, the effect is not a sum but a multiplication" (Reputation Institute, Sales Director)</i>

	digital	<p>“We have a tool called WIKA customer portal, which practically looks like a complete e-commerce dedicated to the customer: enter with a username and password, find all the prices there, configure the product and then send us the orders. We try to take advantage of all the news that digital is giving us, but at the same time a mix between traditional sales and digital sales will come out. (Wika, Sales Director)”.</p> <p>“It is essential to devote as much time as possible to negotiation, the relationship with the client and less to that which is the management of the external customer, to the part of sending the order, formation of the order and all the internal procedures. So the one with automated systems that provide a fast and suitable service to man is fundamental.” (Akamai, Sales Director)</p> <p>“Wasting time in entering orders, checking discounts, etc. means arriving later at the point of sale and therefore providing our customers with a much lower service (Sei Laser, Sales Director)</p>
	Integration between internal and external data	<p>“For us these worlds are a bit separated. The CRM uses the traditional sales network and is little connected” (Wika, Sales Director).</p> <p>“Now we have a CRM that is not integrated with most other business tools. It was taken by itself without integrating it with other systems, so it does its sales work, but it is not integrated for example with the part that uses our customer care, for product management. The one we are going to implement, will be the starting point of everything: the customers will be in there and anyone will look at a customer from any angle, including marketing. With Microsoft Dynamic we would have a single tool that goes from the lead to the sales part to the numbers part and so on”. (Airplus, Sales Director).</p> <p>“Social CRM are now able to integrate data from inside and outside the organization, in order to propose (few) relevant insights, in real-time, easy to understand, also thanks to the support of dashboards.”</p> <p>“CRM 2.0 should also enable new forms of interaction between sales force, channel partners, and other actors in the inter-organizational network and provide both predictive (what will happen) and prescriptive (what to do) indications.”</p> <p>“Welcome to the Internet of customers, where every company can connect every app, employee, partner, product, and device with its customers using the power of social, mobile, and cloud” (key account manager, Europe).</p>
	Sales-Marketing Integration	<p>“Marketing and sales are converging; it is then in the organizational ability to make them work together. In our company, they have common kpi on the digital transformation part, on the one that generates the digital channel”. (DNVGL Sales Director).</p> <p>“I have always argued that we should have a global sales-marketing director who integrates these two functions and this is not the case. It is a typical defect of German companies. I don't think our CEO attaches great importance to marketing” (Wika, Sales Director).</p> <p>“The crucial element for me is the trade marketing, in the sense that it is the trade union between the pure marketing vision (which often remains outside the commercial logic) and the pure sales vision (which just as often remains outside what is internal company vision). A strong trade marketing allows a constructive and profitable relationship between these two functions” (Perrigo, Sales Director).</p> <p>“I always say that it would be enough to stay two days in the shoes of the other so we realize that the points of view change”. (Vagheggi, Sales Director).</p>
Process of acceleration in time	Loose fast	“Since we know that 70% of deals will be lost, what is really important is to lose fast, in order to free energies to invest in other opportunities” (Miller Heiman Group, Sales Coach).
	Contextual sales management	<p>“The fact of being able to think that if something works today, it must also work in a year and instead it is absolutely not true. Among other things we have created an internal motto: “if it works it is already obsolete”, it begins to think about how to do things differently.” (Technogym, Sales Director).</p> <p>“It is essential to create channels that allow you to respond quickly and be decisive and efficient on the market. Anticipating competitors on certain topics is the winning key and we are living proof of this” (DNVGL Sales Director).</p>
	Representation	“In this process the customer is an integral part of the context and is put in a position to

	to accelerate interactions	<i>concentrate on what he sees, finding an impact visualization and thus generating a one-to-one approach; it is not just a receiver, but the data is contextualised according to your environment” (Sales Director, Coca Cola HBC).</i>
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