Sales transformation: conceptual domain and dimensions

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Abstract

Purpose – This study aims to offer a conceptualization of sales transformation, a phenomenon that is redefining the role of salespeople and the nature of Business-to-Business (B2B) relationships while disrupting the selling logics across a variety of industries.

Design/methodology/approach – Through a two-stage approach, the authors propose and test a conceptual model of sales transformation. The authors conducted 20 interviews and two focus groups with sales directors and managers. The authors then surveyed directors, executives and managers in the sales area (n = 190) and tested a reflective–formative hierarchical model using partial least squares structural equation modeling (PLS-SEM).

Findings – Sales transformation is a multidimensional construct that includes four higher-order dimensions, namely, people, digitalization, integration and acceleration, and 16 sub-dimensions. These dimensions simultaneously contribute to the sales transformation phenomenon that is conceptualized as a systemic process. This study also offers a measurement tool to assess the degree of sales transformation and enhance the value generated through sales.

Originality/value – Although many companies are facing challenges stemming from the process of sales transformation, most studies have only focused on micro-aspects of this transformation. This study provides a holistic view of sales transformation aimed at understanding the complexity of this phenomenon by adopting a macro-level perspective on the different dimensions that contribute to its occurrence and development.

Keywords B2B, Business relationships, Sales, PLS-SEM, Transformation

Paper type Research paper

1. Introduction

Transformation in business markets is a constant phenomenon. However, it is undeniable that the pace of change has dramatically increased in the past few years. Although companies operating in Business-to-Business (B2B) have traditionally tended to be slower in reacting and adapting to change than their Business-to-Consumer (B2C) counterparts, the substantial shifts occurring in business and social contexts are fueling profound transformations in B2B markets (Murphy and Sashi, 2018).

The B2B sales function plays a central role in this process of change, being key for value creation with customers and other stakeholders operating in the service ecosystem (Haas *et al.*, 2012). Several challenges are posed to sales managers and salespeople, questioning the traditional approaches to sales management and personal selling, as well as their fit to the fast-paced change of business environments. In addition, B2B buyers and procurement departments are evolving. For instance, a recent study highlights that 68% of B2B buyers prefer doing business autonomously and online (IBM, 2018). When B2B buyers engage with a salesperson, they expect an experience focused on problem-solving and support in decision-making, transforming salespeople in consultants (IBM, 2018; Lemon and Verhoef, 2016). Procurement departments have a more prominent role than in the past, being more sophisticated and in a constant quest for value generation through advanced techniques, such as supplier segmentation and advanced procurement strategies (Sheth *et al.*, 2008). According to Salesforce (2019), 73% of business buyers state that their standards are higher than before, whereas 81% report that moving their business elsewhere has become significantly easier. In line with this evidence, industrial buyers have increased their level of centralization. Competition outside the traditional arena is also growing, with industry boundaries blurring and customers left swimming in a "sea of sameness," where all salespeople seem to be telling the same story.

Against this background, it is not surprising that organizations are increasingly forced to rethink the role of sales. The rapidly evolving business environment has generated new issues and opportunities for sales research. For instance, Plouffe *et al.* (2013) identify new ways of co-creating value with customers as a consequence of the environmental changes occurring in the markets (Haas *et al.*, 2012). Hartmann *et al.* (2018) suggest that today's market changes point towards the inadequacy of traditional, restricted, firm-centric, unidirectional and dyadic views of sales processes in favor of the need for a more robust theoretical foundation that better interprets the processes and roles of selling in value co-creation

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through market exchange. Similarly, Moncrief (2017) questions if traditional sales are dying or merely transforming, whereas Marshall *et al.* (2012) believe that the word "evolving" does not appropriately reflect this phenomenon as sales are indeed going through a complete revolution.

In this study, we define the change that selling and sales management are experiencing as sales transformation. Sales transformation is a multi-dimensional phenomenon comprising several processes of change occurring with reference to the skills of salespeople, the management of the relationship with customers and external actors and the role played by new technologies in supporting the sales activity. Although originating and developed in managerial practice, this concept has not yet been defined at a theoretical level. Previous literature has mainly focused on analyzing the changes happening in the human and technological areas of sales. For instance, scholars have widely discussed about new salespeople competences (Oh, 2017; Lacoste, 2018; Koponen *et al.*, 2019), emerging sales approaches (Bharadwaj and Shipley, 2020), incentive systems and coaching practices to boost salespeople's motivation (Homburg *et al.*, 2021; Peesker *et al.*, 2021). With reference to the technological sphere, the recent debate has revolved around innovative sales practices through customer relationship management (CRM) applications (Mahlamäki *et al.*, 2020), social media (Agnihotri *et al.*, 2016) and e-commerce (Thaichon *et al.*, 2018).

While scholars and managers agree that a transformation in selling is taking place, a model that captures the nature and dimensions of this phenomenon is yet to be proposed (Hartmann *et al.*, 2018; Cuevas, 2018). Specifically, there is a need for a theoretical framework that combines micro and macro views of this unfolding transformation (McFarland, 2019), explaining the implications for selling and sales-related phenomena (Rapp *et al.*, 2020). This study proposes a conceptualization of sales transformation as a multidimensional construct comprising four different forces, i.e. people, digitalization, integration and acceleration. Based on a multi-stage methodology, we combine qualitative and quantitative insights to provide a theoretical foundation for sales transformation and identify its dimensions and sub-dimensions. In addition, we develop a measurement tool to assess the degree of sales transformation in B2B organizations, with this instrument being applicable across industries. We contribute to the personal selling and sales management literature by exploring the multi-dimensional nature of sales transformation. We provide a holistic conceptualization detailing the inter-relationships among dimensions and sub-dimensions of this phenomenon and evaluating the relevance and contribution of each transformative factor. Our findings show that focusing only on human and technology-related factors is reductive when considering sales transformation. In fact, we identify two key processes, integration and acceleration, which have not yet been specifically analyzed and measured with reference to the transformation of sales.

As the sales transformation phenomenon is rapidly evolving and affecting several organizations across various industries, this study offers timely managerial implications. To date, it has been difficult to fully understand the characteristics and dimensions of this transformation, with this problem being discussed at different organizational levels, from top-level executive managers to salespeople (Harney *et al.*, 2019). We provide a strategic roadmap for companies determining which elements show a stronger transformative power and which ones require particular attention and investment when facing and managing sales transformation.

In the Section 2, we introduce the theoretical background for sales transformation through a literature review. We then outline the methodology applied in the two research stages included in this study in Section 3, followed by a presentation of the findings in Section 4. The paper concludes with a discussion of the study's implications in Section 5, and conclusion, limitations and suggestions for future research are given in Section 6.

2. Theoretical background

2.1 Sales transformation

Selling has been changing at a dramatic pace over the past few years. Citing Moncrief (2017), "Just in the past couple of years, we have seen the business world going through unprecedented changes with mergers, the advent of new forms of competition, staggering capabilities in communication due primarily to technology/social media, and the growth of global sales" (Moncrief, 2017, p. 272). The academic and managerial debate around these changes has rapidly spread, with contributions mainly polarized between those focusing on the changing role and skills of salespeople and those analyzing the effects of digital transformation on selling.

With reference to salespeople, fundamental modifications in the commercial approach consist in moving away from the concept of hard selling and embracing a value-oriented selling approach. Based on this, salespeople work with customers to develop solutions that generate value for both parties (Sisti *et al.*, 2015). As a consequence, different skills are needed compared to the past and salespeople are now required to adapt and change their selling approach and strategies (Cuevas, 2018; Kraft *et al.*, 2019). While the complexity and length of the buying process increases, the product life cycle tends to reduce in length, resulting into increasing pressure felt by salespeople. Getting quickly to grips with increasingly complex products and solutions, salespeople are required to be faster and smarter, quickly adapt to clients' needs and be able to meaningfully personalize selling strategies (Preston, 2019). Nowadays, the most productive sales representatives must act as consultants, knowledge brokers and strategic account managers, which implies a higher degree of adaptivity combined with a remarkable learning orientation (Kienzler *et al.*, 2019).

Osmonbekov *et al.* (2018) suggest modalities to sell to information-empowered customers who already found a solution or at least examined multiple approaches to solving their problems. In this situation, salespeople should concentrate on teaching customers something that they are not able to learn on their own and tell them what is important. Connected to that, research by Dixon and Adamson (2011) demonstrates that the best performing salespeople are able to challenge the status quo of customers and their established knowledge to find a new value space. Similarly, a study provide guidelines to a proactive approach to manage customers who are overwhelmed with information and feel powerless to handle data. The salesperson should thus work with customers to

understand their journey in the purchase process, identify the challenge they face at different buying stages and provide customers with tools to handle these challenges. In the end, customers are no longer looking for salespeople who act as suppliers, make product pitches and offer general product advantages; they are rather seeking trusted advisors who can contribute to their success through solution selling.

Salespeople are no longer simple economic agents but extend their sphere of action to make sense of the market complexity and derive meanings and insights from disconnected pieces of information. It is thus expected that salespeople will increasingly act as boundary spanners in the future: they will deal with stakeholders pursuing different objectives and showing conflicting priorities. This turns time into a crucial resource due to heavier workloads, growing expectations and expanded job roles (Weeks and Fournier, 2010), leading salespeople to often need to meet increasing customer demands with limited organizational resources (Edmondson *et al.*, 2019).

At the same time, the digital revolution is deeply impacting the sales world across all stages of the customer journey (Følstad and Kvale, 2018), requiring adjustments in the sales funnel to support the design of a new customer experience. Digital technologies are disrupting established sales practices and upturning well-known sales theories (Grove *et al.*, 2018; Baumgartner *et al.*, 2016). Kaptein *et al.* (2018) introduce the concept of automated adaptive selling and demonstrate the added value of adaptive selling in e-commerce, thereby pioneering a novel area of research focused on boosting sales influence tactics. Similarly, Breidbach and Maglio (2016) refer to technology-enabled value creation to make the selling process smarter, applying advanced analytics and machine learning to mine rich data sets. Artificial intelligence, indeed, is likely to be more significant and more far-reaching than previous sales technologies (Singh *et al.*, 2019) and expected to improve B2B e-commerce selling strategies (Chaffey *et al.*, 2019; Thaichon *et al.*, 2018). Moreover, B2B buyers particularly appreciate digital channels as they provide immediate access to product information and customers reviews, while suppliers benefit from cost reductions, the generation of new leads and greater customer (Hoar, 2017).

Nevertheless, the use of digital and social media technologies (Kuruzovich, 2013; Marshall *et al.*, 2012), the emergence of big data (Erevelles *et al.*, 2016) and the implementation of team-based structures and groupware technology (Janson *et al.*, 2014) have further boosted stress levels among salespeople, which in turn negatively affected their motivation (Khusainova *et al.*, 2018). The evolution of selling and sales management also has consequences at intra-organizational level, especially regarding the interactions among sales, marketing and customer service departments (Claro and Ramos, 2018). Sales is no longer an independent and isolated function within an organization but is an integrated and cross-functional component of a company's strategy (Storbacka, 2011), which generates further complications: "As exchanges between individuals and organizations continue to increase in complexity, the challenges surrounding the sales domain and our ability to conduct meaningful research will only intensify" (Rapp *et al.*, 2020, p. 232).

Given this background, our study offers a holistic perspective on sales transformation and aims at describing and understanding the complexity of this phenomenon, shedding light on the different dimensions that contribute to its occurrence and development. In line with Harney *et al.* (2019) and McFarland (2019), we propose a conceptualization of sales transformation as a macro-level phenomenon through the identification of micro-level dimensions contributing to its development.

3. Methodology

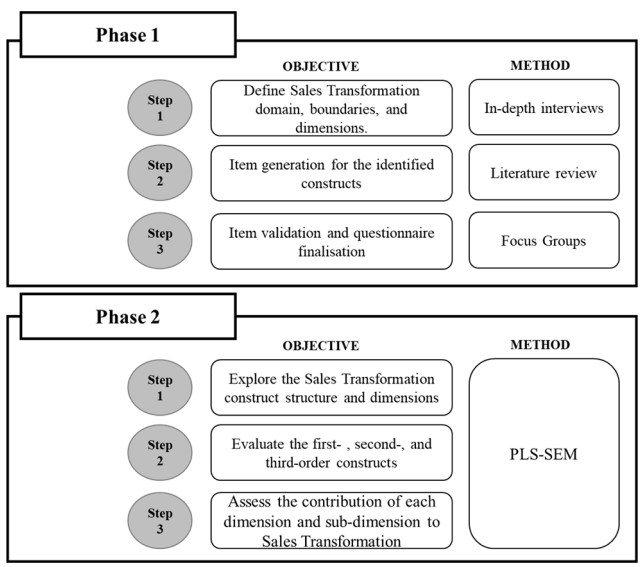
This study proposes a conceptualization of the sales transformation construct with a methodology articulated in two phases. Phase one applies a qualitative approach to define the construct domain, boundaries and dimensions. Phase two adopts an exploratory quantitative approach (Hair *et al.*, 2011; Hair *et al.*, 2017) to unveil the sales transformation construct structure and components. Each phase was further articulated in a series of steps. A complete outline of the research design is presented in Figure 1.

3.1 Qualitative phase

3.1.1 In-depth interviews

A total of 20 semi-structured interviews were conducted with sales directors. We applied a purposeful sampling approach to identify and select information-rich individuals and cover multiple industries and sectors. We thus explored common perceptions related to the sales transformation process and obtained a multifaceted perspective of the phenomenon (Creswell and Creswell, 2018). A total of 40% of participants were females and 60% were males, with an average age of 45 years. A total of 70% of them work in B2B markets, whereas 30% operate in both B2B and B2C. Participants shared their experiences, answering a series of open and probing questions. They were first introduced to the topic of sales transformation and asked about the meaning and the nature of this

Figure 1 Research design



phenomenon within their organizations. The interviews proceeded with a retrospective exercise asking participants to reflect on key changes that had affected their sales departments over the past five years. We identified themes and sales transformation drivers, which were further discussed through probing questions aimed at discovering challenges, opportunities and outlining coping mechanisms associated with sales transformation. Interviews lasted 43 min on average and were audio recorded, transcribed and analyzed using the QDA Miner software.

Data was analyzed through a systematic coding procedure across three stages: open coding; axial coding; and selective coding (Strauss and Corbin, 1998). Through open-coding we created a list of key elements of the sales transformation process. This step was followed by axial coding in which we draw connections between the identified codes. Finally, we identified common categories to reflect the constructs through selective coding. This process supported the identification of key concepts and second-order categories to obtain a detailed description of the phenomenon. We applied the constant comparison method that combines a systematic analysis of all codes with existing findings from previous literature to note emerging themes while comparing them across transcripts to ensure consistency, as well as to identify commonalities and differences (Goulding, 2005). Each category was required to be validated by multiple participants to assure its application beyond a specific organizational or industry context (Bendapudi and Leone, 2002). For example, we used the code "company encouragement to explore" to synthesize "Our company is encouraging us to explore new platforms, including Instagram even if we operate in B2B" [Area Manager, Pharmaceutical]. Next, we merged similar codes and developed our first-order categories so that they mirror our informants' "concepts-in-use" (Goulding, 2005). For instance, "company encouragement to explore" and "new platform adoption" codes were combined into the first-order category company support in using new social platforms. We then clustered conceptually overlapping first-order categories into second-order themes that reflect the dimensions of the sales transformation process. The two authors worked separately on the coding process (IRR = 89%) and regrouped multiple times to discuss the emerging coding structure.

3.1.2 Review of the literature

In the second step, our focus was on generating and collecting items to measure the identified constructs. A review of the literature of past studies regarding themes and constructs identified in the first step was carried out to further define and conceptualize the constructs (Churchill, 1979). To generate a pool of items the literature was thoroughly reviewed and the interview narratives analyzed (Churchill, 1979); The initial pool of items was then presented to sales directors and sales experts to review and refine the conceptualization of the sales transformation dimensions and sub-dimensions.

3.1.3 Focus groups

The review and refinement of the items generated in the previous step was conducted through two focus groups. As an experienced nonprobability judgment sample of "persons who can offer some ideas and insights into the phenomenon" is required (Churchill, 1979, p. 67), focus groups involved a total of 16 sales directors and sales experts with the purpose of validating relevant items and potentially garnering new ones (DeVellis, 2017). Focus groups were chosen, as they represent the best method to foster discussion among participants who exchange viewpoints and discuss disagreements in a common setting, enriching our conceptualization while validating survey items.

During the focus group, the pool of items identified through the literature review, and interviews were discussed and amended to reflect the actual meaning and definition of the constructs (Churchill, 1979). As some constructs were brand new (e.g. lose fast), an item generation exercise was carried out asking participants to write a series of sentences that, in their opinion, would best capture the construct. In the second part of the first focus group, a preliminary draft of the questionnaire was presented to participants for validation. During the second focus group, a pilot test was conducted to examine the wording and meaning of the items included in the questionnaire. These were further validated by sales experts.

3.2 Quantitative phase

3.2.1 Questionnaire and data collection

Data was collected through an online survey distributed to directors, executives and managers in the sales area (n = 190). Respondents were sourced through an online panel leading to a response rate of 14%. The content of the questionnaire was developed based on the findings of the qualitative phase and comprised of a series of questions about the perceived degree of sales transformation in the respondents' company, with a specific reference to the human dimension, the degree of digitalization, the processes of integration and acceleration. Table 2 provides details related to the origin and adaptation of the scales included in the final version of the questionnaire after having been reviewed by sales directors and managers. All items were measured on a seven-point Likert scale. Participants were also asked to provide some firmographic information (number of employees, annual revenue figures, industry, type of business) and demographic information (gender, age, job position, years in that job position). The details of the sample profile are presented in Table 1.

3.2.2 Hierarchical component models

Hierarchical component models are representations of multidimensional constructs that exist at a higher level of abstraction, comprising of a series of underlying dimensions (Becker *et al.*, 2012). Theoretical concepts are not characterized as multidimensional or unidimensional *per se*. However, they can usually be operationalized in either way, representing multiple levels of theoretical abstraction (Law *et al.*, 1998). Hierarchical latent variable models are characterized by the number of levels in the model; and the type of relationship between constructs, which could be formative or reflective (Jarvis *et al.*, 2003; Ringle *et al.*, 2012; Wetzels *et al.*, 2009). In this study, we propose that sales transformation is a third-order formative construct constituted by four second-order formative constructs, which are in turn constituted by a series of first-order reflective constructs. We thus propose a reflective–formative model, where the lower-order constructs are reflectively measured, and the higher-order constructs are formatively measured (Becker *et al.*, 2012). To estimate this model, we adopt the repeated indicator approach

Table 1 Sample profile

Firmographics	
Industry	
Services	40%
Manufacturing	15%
Retail	11%
Telecommunications	10%
Consultancy	5%
Insurance services	4%
Travel and tourism	3%
Health services	3%
Other	9%
Type of business	
Mainly B2B	66%
Mainly B2C	11%
Both B2B and B2C	23%
Number of employees	
Less than 10	10%
10–50	24%
51–250	25%
250+	41%
Annual revenues (in Euros)	
Less than 2 M	14%
2–10 M	18%
10-50 M	26%
More than 50 M	42%
Demographics	
Gender	
Male	83%
Female	16%
Prefer not to say	1%
Age	
25–34	13%
35–44	25%
45–54	42%
55–64	18%
65+	2%
Job position	
Sales Director	35%
Sales Manager	19%
Account Manager	18%
Area Manager	11%
Sales Consultant	7%
Other	11%
Years in the job position	
Less than 1 year	11%
1–3 years	19%
3–5 years	10%
5–7 years	10%
More than 7 years	50%

(Lohmoller, 1989), in which a higher-order latent variable can be constructed by specifying a latent variable that represents all the manifest variables of the underlying lower-order latent variables (Lohmoller, 1989; Becker *et al.*, 2012).

As per Becker *et al.* (2012)'s recommendations, the repeated indicator approach should be used for reflective–formative hierarchical latent variables, as it generally leads to less biased and more accurate parameter estimates, which result in more reliable higher-order construct scores. Moreover, for formative higher-order constructs, the weights of the lower-order constructs are even more relevant, as they represent actionable drivers of the higher-order constructs (Becker *et al.*, 2012).

3.2.3 Data analysis

Due to the exploratory nature of this study, data analysis was conducted through Partial least squares structural equation modeling (PLS-SEM) (Hair *et al.*, 2017). We hypothesize that sales transformation is a higher-order construct, which consists of multiple dimensions and sub-dimensions. Specifically, the dimensions of sales transformation (second-order constructs) are proposed to be formatively measured, while the sub-dimensions (first-order constructs) reflectively measured. PLS-SEM was deemed particularly suitable for this study as this technique is primarily used to develop theories in exploratory research, being a structural equation modeling methodology that accounts for the variance in the dependent variables and can handle both reflective and formative constructs in the same model (Hair *et al.*, 2017).

First-order constructs were developed as reflective variables. Their convergent validity was assessed through the examination of factor loadings, average variance extracted (AVE) values. Internal consistency reliability was assessed using Cronbach's α and composite reliability (CR) values. Discriminant validity appraisal was conducted by examining the presence of cross-loadings and applying the Fornell-Larcker criterion, which compares the square root of the AVE values with latent variable correlations. Additionally, the heterotrait-monotrait ratio (HTMT) of correlations was obtained through the bootstrapping procedure and examined (Hair *et al.*, 2017; Henseler *et al.*, 2015; Fornell and Larcker, 1981).

Second- and third-order constructs were proposed as formative variables. Content validity of these second-order dimensions was tested through an expert assessment during the focus group discussions (Diamantopoulos and Winklhofer, 2001; Jarvis *et al.*, 2003; Hair *et al.*, 2017). As per the recommended procedure from Hair *et al.* (2017), we tested formative measures for multicollinearity issues using the variance inflation factor (VIF) criteria using the conservative tolerance value of 2.0.

4. Findings

4.1 Conceptualizing sales transformation

Sales transformation was discussed as a complex and multifaceted phenomenon by all the interviewees. Specifically, the root cause of sales transformation lies in a sophistication of business customers' needs with a predominant focus on perceived value instead of price. At the same time, customers are increasingly looking for trusted advisors instead of traditional suppliers, leading to higher expectations in terms of service level, problem-solving and solution delivery. Being acknowledged as a phenomenon that entails contextual changes across space- and time-related dimensions, sales transformation is leading salespeople to search for new models to interact with their customers developing tailor-made relational approaches.

Sales professionals identified a series of phenomena that contributed to the transformation of sales. These phenomena could be ascribed to four higher thematic dimensions, which denote the domains of sales transformation: people, digitalization, integration processes and acceleration processes.

> "Sales is increasingly going towards the direction of consulting, but you cannot expect people to change from one day to another, they need to be supported in this transition process." Sales director, Travel.

> "The problem is not the technology, there are so many solutions for marketing automation, e-commerce, CRM. The point is getting people involved in this digital transformation." Area manager, Banking.

> "Everyone talks about collaboration and working in an ecosystem mode, but in reality, such collaborative model is difficult to maintain, especially when it is not clear how to share the value co-created among partners." Area Manager, Pharmaceuticals.

> "New sales approaches should combine the ability to plan the sales funnel with the ability to adjust it continuously." Sales director, Publishing.

Based on these insights, we propose a conceptual model (Figure 2) that is further described and articulated in the next sections.

4.1.1 People

The first dimension arising from the discussion with sales professionals is related to the value and role of human capital in the sales transformation phenomena. The transformation occurring in the people dimension spans multiple aspects that act as catalysts of sales transformation. The first aspects highlighted by the informants relates to the selling style of salespeople. They identify how this style has been changing over time, moving towards a tailored approach focused on delivering problem-based solutions and working together with customers to deliver the highest possible value. We translated these insights into two sub-dimensions of people: adaptivity and sales consultancy.

> "Things change so frequently nowadays that the speed at which salespeople adapt to new customers and contexts is somehow more important than the product you are selling." Sales director, Medical Equipment.

> "A consultancy approach is at the core of selling; the problem is those salespeople who still made product pitches and focus on price rather than value." Area manager, Pharmaceuticals.

In this context, both hard and soft sales skills were identified as critical to shape the relationship with customers. Soft intermediation allows salespeople to become agents of change and generate new thinking patterns while offering insights able to challenge the status quo. However, the soft side of the art of selling requires support by a deep knowledge of products, markets and customers. By activating such knowledge and combining it with salesmanship skills, it is possible to create new avenues for value generation, placing customers at the heart of such value proposition. Thus, we observe how salespeople are increasingly called to act as advisors and required to understand what type of knowledge is most useful to their customers (Verbeke, Dietz and Verwaal, 2011).

> "Sales have gone beyond the era of hyper specialization; it is mostly appreciated to develop transversal competences that allow to interpret complex contexts and find new solutions, thinking outside the box." Sales director, Fashion.

In addition, informants discussed the transformative role played by being able to challenge customers' positions and value ideas to offer a unique perspective. Sales transformation benefits from sales leaders who focus on the best solution regardless of past and consolidated practices and who stand up for their ideas with a positive mindset, avoiding passively accepting solutions perceived as wrong or not optimal. This enables fostering healthy and productive relationships with customers and associates. These insights led us to identify three additional sub-dimensions of people: activate knowledge, salesmanship skills and challenging attitude.

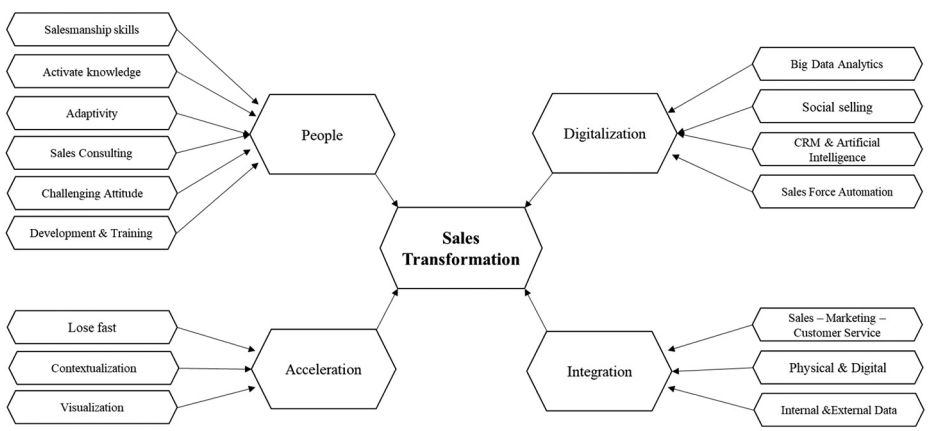
> "Now more than ever, customers do not appreciate too aggressive and commercial attitude from salespeople, you should be empathetic and confident." Sales manager, Beauty.

> "It is very difficult to propose something new to customers, just thinking about our own industry. This is why I try to read about success cases in other contexts and see how I can bring some of this innovation to my customers." Sales director, Food and Beverage.

A final aspect contributing to the transformation in the People dimension is related to training and development opportunities offered to salespeople. Training and development are increasingly proposed to be tailored to the individual salesperson's needs and aimed at developing their salesmanship skills. Training should also be conducted from an emotion management perspective to create empathy with customers and develop long-lasting relationships.

> "What I found most difficult is to put myself in the shoes of the customer. To do that you should also become familiar with their pain points, but often

Figure 2 Sales transformation dimensions



customers are not willing to show you their weaknesses." Key account manager, Advertising.

4.1.2 Digitalization

Digitalization is the second dimension commonly identified by key informants. The role of digitalization in the sales transformation process is closely linked to the application of new technologies in modern selling environments. Specifically, four sub-dimensions of digitalization have been brought to our attention as forces that are currently disrupting the status-quo of the sales function; Social Selling; Big Data Analytics; Advanced CRM & Artificial Intelligence; Sales Force Automation.

Social media applications in B2B were reported to have become of critical relevance when it comes to lead generation and identification of new business opportunities. More advanced applications involve the analysis of clients' behavior and the development of tailored solutions. Social media also contributes to developing new relationships with prospects and generating new opportunities for extending one's network.

> "We are exploring Instagram; it looks very far from our heavy B2B industry, but we realized we could build a storytelling around our manometers and leverage their engaging visual aspect." Sales director, Pressure and temperature instrumentation.

A common phenomenon discussed by participants is associated to the spread of social media applications in the sales function. As salespeople progressively turn to social media, the amount of data available to the sales function increases and becomes more sophisticated and articulated. With data being generated at an unceasing pace, key informants highlighted the crucial role played by Big Data analytics in delivering new and unique insights and enhancing the ability to obtain real-time information about markets and customers. One of the key challenges posed by big data refers to the need to rethink their sales model to embed and leverage the extensive amount of data and information available.

> "Some of our salespeople use CRM but do not know the connection there is among big data, analytics and the dashboard they interact with." Sales director, Fashion.

At the same time, we observe how such a complex data environment transforms the way CRM systems are designed and implemented. Specifically, key informants highlight how CRM platforms are gradually more interacting with social media data and leverage artificial intelligence systems to generate insights and formulate customized recommendations. The outlook for the future sees CRM and Artificial Intelligence systems providing product recommendations and automating email responses and daily administrative tasks seamlessly and effectively.

> "If buyers access our e-commerce website, we can exactly track their journey and if they put something in the basket without purchasing it, the system reminds them that, similar to what happens with Amazon." Key account manager, Publishing.

As technology becomes an enhancer of the relationship with customers, the role of automation has been discussed under multiple perspectives. Key informants commented on the fear that sales force automation could potentially replace or reduce the role of the salesperson within the company. However, automation is also seen as an opportunity to improve time management and reduce the effort dedicated to daily chores, allowing for an increased focus on developing relationships with customers.

> "I love to receive updates on customers and prospects straight on my iPhone." Sales director, Packaging and printing.

> "Whatever technology can help me to save time with administrative stuff and contracts preparation, I am happy to adopt it." Area manager, Insurance services.

> "Sales and Marketing Automation will completely revolutionize the way we do business and build relationships with customers." Sales Director, Publishing.

4.1.3 Integration processes

Participants commonly identified integration processes as catalysts of sales transformation, highlighting how this integration process occurs across different levels and areas and fosters the degree of collaboration within and among companies.

Focusing on the internal dimension, key informants pointed out as a primary level of integration to support sales transformation the one involving companies' departments of sales, marketing and customer service. Due to an increasing sophistication of customers' needs and the emergence of new customer journeys that blend online and offline environments, it is observed that there is a compelling need for deeper and more structured collaborations among these departments. This integration has been discussed to occur in terms of shared visions, goals, information and key performance indicators (KPIs) among departments. Although from a theoretical standpoint, such strategic integration has been widely discussed and analyzed, the implementation of integration processes in practice is still limited, and often departments still act as silos (Baumgartner *et al.*, 2016).

> "I get a commission on renewals. We are incentivized to do our best not only in quick sales, but in creating a relationship." Key account manager, Travel.

> "I would expect marketing to support me better in developing micro-messages towards every specific customer, I do not need general company presentations." Account manager, Fitness equipment.

As previously mentioned, the customer journey has evolved to embrace both the online and offline channels. This evolution requires an increasing integration of the online and offline channels and, at the same time of internal and external data. Key informants highlight how an integrated CRM strategy is critical to managing complexity, creating a seamless journey across the online and offline environments and integrating data stemming from multiple external sources with the ones internal to the company.

> "Everyone declare to be omnichannel but, at the end if you dig, they are only multichannel without any data integration." Sales director, CRM solution provider.

> "We had to threaten distributors to stop working with them if they did not share customer data on a daily basis. They do that only when they have time, as it happens now!" Sales director, Pressure and temperature instrumentation.

Thus, from the discussion with key informants, it was possible to identify three sub-dimensions of the integration process: sales–marketing–customer service integration, physical and digital channels integration and internal and external data integration.

4.1.4 Acceleration processes

A common thread discussed in the interviews referred to the increased pace of processes and events in business markets. Under this perspective, it is proposed that sales transformation is fueled by a process of acceleration, which deeply influences and changes the activities carried out by the sales force.

Three major processes were identified as components of acceleration. The first process links to the idea of sales funnel acceleration and entails the ability to convince customers to make decisions and avoid postponing them to a later time, no matter the outcome. We conceptualize this phenomenon as "Lose fast" which deals with the commonly experienced issue of business proposals remaining in a "no decision" status, which has been estimated to generate losses higher than the proportion of deals won by competing companies.

> "I practiced my ability to convey a sense of urgency in the customer, otherwise they procrastinate over and over." Sales manager, Beauty.

> "What is a 'no' from a customer today, could be a 'yes' in the future, so losing fast today is very important to win in the future." Key account manager, Food and Beverage.

The concept of "losing fast" is strongly connected to the opportunity of having information available in real-time to address customers' needs. The contextualization of sales management is another aspect commonly described as a catalyst for sales transformation. Such contextualization is made possible by the adoption of mobile devices that simplify and make more immediate CRM activities.

> "As a channel director, I can geolocalize where my salespeople are and better organize their activity with reference to the needs displayed by chemists and stores in that specific moment." Area manager, Pharmaceuticals.

The last aspect increasing the pace of transformation in sales is related to the increased importance of visualizing concepts underlying analytics to shape shared perceptions. This process of visualization simplifies the communication of complex information utilizing visual representation that efficiently and effectively conveys the message to the parties involved and reduces the cognitive effort associated with the interpretation of complex insights. Digital intelligence companies are trying to create cross-functional teams involving computer scientists, marketing people, communication experts and designers specialized in information aesthetics to optimize and accelerate this process and identify new ways to provide broad and inclusive representations linking aspects and perspectives.

> We use many visual elements, but they need to be structured around specific meanings, otherwise they only generate chaos." Sales director, Fashion.

> "The attention of customers is very limited compared to the past, this is why I try to engage them in different ways, with stories, images and short videos, of course always maintaining a professional stance." Sales director, Travel.

Based on the above insights, we identify three sub-dimensions of the acceleration process: lose fast, contextualization and visualization.

4.2 Sales transformation dimensions

In the following section, we present the results of the higher-order component model that explores the structure of the sales transformation concept and proposes a measurement approach. Sales transformation has been conceptualized as a reflective-formative-formative third-order construct, with people, digitalization, integration and acceleration being the second-order formative constructs, and the various sub-dimensions identified in the qualitative phase being first-order reflective constructs (Figure 2).

4.2.1 First-order constructs

Though a confirmatory factor analysis, we examined the reliability, convergent validity and discriminant validity of the indicators of the first-order constructs, that are Salesmanship skills, Activate knowledge, Adaptive selling, Sales consultancy, Challenging Attitude, Training & Development, Big data analytics, Social selling, CRM & Artificial intelligence, Salesforce automation, Sales-Marketing-Customer Service Integration, Physical & Digital channels integration, Internal & External Data integration, Lose Fast, Contextualization and Visualization. Table 2 presents the results of the measurement model for the first-order constructs.

All constructs show an adequate level of convergent validity, with loadings greater than the recommended threshold of 0.700 and AVE values greater than 0.500 (Hair *et al.*, 2017). In terms of internal consistency, both Cronbach's alpha and construct reliability (CR) show values exceeding the recommended threshold of 0.600. Discriminant validity was also supported for all constructs as displayed in Table 3.

The square root of AVE values is greater than the highest correlation with any other construct included in the model (Hair *et al.*, 2017). To confirm discriminant validity, we examined the heterotrait–monotrait ratio (HTMT) values and associated confidence intervals. All HTMT values are lower than the more conservative threshold value of 0.850 and confirmed to be significantly different from 1 through the bootstrapping procedure (Henseler *et al.*, 2015).

4.2.2 Second-order constructs

As previously specified, second-order constructs were proposed as formative measures and thus do not necessarily covary. Content validity of these second-order dimensions was assessed during the focus group discussions with sales directors, managers and experts. The sub-dimensions included in each second-order construct were deemed to be appropriate and exhaustive of the different facets of the transformation phenomenon in the areas of people, digitalization, integration and acceleration. This expert assessment assured that there was no exclusion of important facets of the phenomena in the set of indicators proposed for the formatively measured constructs (Diamantopoulos and Winklhofer, 2001; Jarvis, MacKenzie, and Podsakoff, 2003; Hair *et al.*, 2017). We tested the formative measures for multicollinearity issues using the variance inflation factor (VIF) criteria. VIF values were computed for each indicator and proved to be under the recommended tolerance value of 2.0, as presented in Table 4 (Hair *et al.*, 2011).

We then assessed each indicator's relative contribution to the construct by testing if the outer weights were significantly different from zero using a bootstrapping procedure based on 5,000 samples. The results summarized in Table 5 confirmed the significance of the indicators' weights at a 95% confidence level as their *t*-values are greater than 1.96 (Hair *et al.*, 2017).

Evaluating the relative importance of each indicator, we observed that the major contributors to transformation in the people area are Training & development, Salesmanship skills and Activate Knowledge, followed by Adaptive selling, Sales consultancy and Challenging Attitude.

Table 2 Parameter estimates (reflective) of the first-order component model

Constructs	Items	Loadings	α	CR	AVE
People					
Salesmanship skills (Adapted from Rentz *et al.*, 2002)	Ability to influence others to control the outcome of a situation	0.777	0.803	0.871	0.628
	Ability to prospect for customers	0.777			
	Ability to qualify prospects	0.824			
	Ability to close the sale	0.791			
Activate Knowledge (Developed for this study)	Knowledge of customers' markets and products	0.827	0.804	0.872	0.630
	Knowledge of competitors' products, services, and sales policies	0.789			
	Knowledge of product line, including product features and benefits	0.748			
	Knowledge of customers' operations	0.808			
Adaptivity (Adapted from Spiro and Weitz, 1990; Pelham, 2009)	When I feel that my sales approach is not working, I can easily change to another approach.	0.798	0.777	0.871	0.692
	I like to experiment with different sales approaches.	0.836			
	I can easily use a wide range of selling approaches.	0.860			
Sales Consultancy (Adapted from Pelham, 2009)	I spend a lot of time helping my customers diagnose the root causes of cost or revenue problems	0.848	0.738	0.850	0.655
	I spend a lot of time working with my customers to help solve problems and help meet their goals	0.816			
	I spend time working with customers' technical people and our company's ones trying to effectively modify our products/services to better meet my customers' needs	0.762			
Challenging Attitude (Developed for this study)	I challenge customers in order to help them make better decisions	0.844	0.741	0.852	0.659
	When it comes about important matters, I have no problems with getting my voice heard even if the customer disagrees	0.733			
	I am willing to challenge customers' beliefs to offer a better solution	0.853			
Training & Development (Developed for this study)	My company has a strategic approach to training and talent development across the different career stages	0.897	0.912	0.934	0.740
	My company offers intense and structured training activities	0.864			
	In my company, Salespeople achievements are celebrated across the entire company	0.821			
	In my company, sales leaders are successful in channeling pressure towards results and understanding salespeople's needs	0.845			
	In my company, sales leaders are interested in understanding what stimulates and motivates salespeople	0.873			
Digitalization					
Social Selling (Developed for this study)	The usage of social media to identify new business opportunities has increased	0.873	0.868	0.905	0.656
	The usage of social media to identify decision-makers has increased	0.807			
	The usage of social media for selling purposes is encouraged by our company	0.830			
	The usage of social media has improved the quality of the relationships with our customers	0.783			
	Sales and marketing people work together to develop content for social media	0.753			
Big Data Analytics (Developed for this study)	We use extensively big data analytics in sales	0.900	0.911	0.937	0.789
	Everyone who works in sales can access and use insights obtained through big data analytics	0.857			
	We use the insights from big data analytics to support our decisions	0.915			
	We use analytics to predict future scenarios	0.881			
CRM & Artificial Intelligence	Our CRM system can integrate internal data from salespeople with data from social media	0.828	0.822	0.882	0.652

(*continued*)

Table 2

Constructs	Items	Loadings	α	CR	AVE
(Developed for this study)	Our CRM system provides recommendations related to the best actions for each customer	0.816			
	We use chatbots to interact with our customers	0.794			
	My company is investing in artificial intelligence systems to support the sales function	0.791			
Sales Force Automation (Developed for this study)	We use SFA systems to obtain information about existing and new products	0.907	0.931	0.950	0.827
	We use SFA systems to receive and send information to our boss/ manager	0.924			
	We use SFA systems to write letters or follow-up materials	0.900			
	We use SFA systems to create reports of the interactions with clients and changes in the client base	0.908			
Integration					
Sales-Marketing-Customer Service (Adapted from Keszey and Biemans, 2016; Huges *et al.*, 2013)	Are aligned on customers' needs	0.881	0.923	0.938	0.685
	Share each other's performance	0.859			
	Have compatible goals and objectives	0.832			
	Agrees together on the priorities of each department	0.843			
	Collaborate with each other	0.864			
	Our company has shared KPIs to measure the efficacy of the collaboration among marketing, sales and customer service	0.751			
	In my company, it is clear which function s responsible of data and who can use it	0.755			
Physical & Digital channels (Developed for this study)	Our ordering system is integrated across physical and digital channels	0.876	0.878	0.916	0.733
	We have integrated sales policies between the physical and the digital channels	0.773			
	Salespeople can access an online inventory and details of past online orders	0.892			
	Our incentive system is linked to both online and offline sales	0.880			
Internal & External Data (Developed for this study)	We share inventory information with our major customers	0.811	0.763	0.863	0.679
	Our major customers share their demand forecasts with us	0.776			
	We have an information network to share data with our major customers	0.881			
Acceleration					
Lose Fast (Developed for this study)	The data collection about our prospects has been replaced by a continuous monitoring of the information flows	0.819	0.778	0.871	0.693
	Salespeople develop in advance different solution scenarios for the customers' potential problems	0.788			
	In my company, we have fully understood the purchase funnel and we constantly compare it with the sales funnel to push customers towards the next step	0.887			
Contextualization (Developed for this study)	We use mobile devices to quickly answer to the market	0.847	0.849	0.909	0.768
	Sales are supported by real-time information delivered through mobile technology	0.882			
	Salespeople have access to real-time data that detail what prospects need and how to approach them	0.901			
Visualization (Developed for this study)	We extensively use visual insights during presentations to our customers	0.863	0.883	0.920	0.741
	We use visual insights to obtain a broader representation of the different contexts in which our customers operate	0.894			
	We use visual insight to develop a one-to-one approach with customers	0.894			
	Dashboards in our company can be easily interpreted by sales, marketing and customer service people	0.789			

Table 3 First-order component model discriminant validity assessment

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)
(1) Salesmanship skills	*0.793*															
(2) Activate Knowledge	0.465	*0.793*														
(3) Adaptivity	0.456	0.332	*0.832*													
(4) Sales Consultancy	0.252	0.308	0.288	*0.809*												
(5) Challenging Attitude	0.270	0.261	0.390	0.329	*0.812*											
(6) Training & Development	0.306	0.263	0.291	0.261	0.191	*0.860*										
(7) Social Selling	0.359	0.270	0.262	0.236	0.114	0.502	*0.810*									
(8) Big Data Analytics	0.283	0.292	0.197	0.335	0.139	0.474	0.657	*0.888*								
(9) CRM & Artificial Intelligence	0.207	0.283	0.083	0.225	0.132	0.405	0.419	0.515	*0.808*							
(10) Sales Force Automation	0.011	0.030	0.142	0.135	0.058	0.147	0.189	0.230	0.312	*0.910*						
(11) Sales- Marketing-Customer Service	0.284	0.285	0.183	0.302	0.144	0.690	0.456	0.497	0.463	0.148	*0.828*					
(12) Physical & Digital channels	0.177	0.237	0.183	0.184	0.024	0.474	0.477	0.515	0.534	0.250	0.584	*0.856*				
(13) Internal & External Data	0.178	0.236	0.138	0.261	0.101	0.415	0.336	0.400	0.505	0.107	0.533	0.605	*0.824*			
(14) Lose Fast	0.312	0.365	0.178	0.295	0.163	0.551	0.529	0.595	0.566	0.236	0.593	0.510	0.508	*0.832*		
(15) Contextualization	0.256	0.241	0.185	0.267	0.087	0.378	0.455	0.551	0.519	0.348	0.474	0.487	0.427	0.625	*0.877*	
(16) Visualization	0.226	0.350	0.199	0.400	0.139	0.437	0.461	0.479	0.445	0.143	0.582	0.542	0.485	0.596	0.562	*0.861*

Notes: The square roots of AVE values are presented on the main diagonal in italic; other elements in the matrix are bivariate correlations between reflective constructs

Table 4 Parameter estimates (formative) of the second- and third- order component models

Second-order constructs	First-order dimensions	Weights	VIF
People	Training & Development	0.398	1.183
	Salesmanship skills	0.278	1.505
	Activate Knowledge	0.267	1.378
	Adaptivity	0.220	1.454
	Sales Consultancy	0.185	1.241
	Challenging Attitude	0.170	1.272
Digitalization	Big Data Analytics	0.403	2.012
	Social Selling	0.396	1.789
	CRM & Artificial Intelligence	0.296	1.458
	Sales Force Automation	0.219	1.117
Integration	Sales-Marketing-Customer Service	0.584	1.644
	Physical & Digital channels	0.352	1.857
	Internal & External Data	0.230	1.710
Acceleration	Visualization	0.469	1.706
	Contextualization	0.362	1.807
	Lose Fast	0.340	1.917
Third-order construct	Second-order dimensions	Weights	VIF
Sales Transformation	People	0.246	1.572
	Digitalization	0.316	2.265
	Integration	0.362	2.350
	Acceleration	0.255	2.687

Table 5 Significance of the parameter estimates (formative) of the second- and third- order component models

Second-order constructs	First-order dimensions	*t*
People	Training & Development	10.150
	Salesmanship skills	12.706
	Activate Knowledge	10.003
	Adaptivity	11.032
	Sales Consultancy	6.724
	Challenging Attitude	6.168
Digitalization	Big Data Analytics	18.209
	Social Selling	16.487
	CRM & Artificial Intelligence	14.752
	Sales Force Automation	5.182
Integration	Sales-Marketing-Customer Service	29.527
	Physical & Digital channels	23.659
	Internal & External Data	16.560
Acceleration	Visualization	23.125
	Contextualization	24.536
	Lose Fast	20.470
Third-order construct	Second-order dimensions	*t*
Sales Transformation	People	9.745
	Digitalization	18.833
	Integration	19.407
	Acceleration	18.631

Regarding digitalization, the most relevant aspects contributing to transformation are Big data analytics, and Social selling, followed by CRM & Artificial intelligence and Sales Force Automation. In terms of integration, sales–marketing–customer service integration is the predominant indicator, followed by Physical & Digital channels integration and Internal & External data integration. Regarding the process of acceleration, we observe the most relevant contribution stemming from the visualization process, followed by the contextualization process and the lose fast process.

4.2.3 Third-order construct

To assess the third-order construct, we replicated the same procedure adopted for second-order construct testing. As per the second-order constructs, content validity was assessed during the focus groups with sales experts who confirmed the four-dimension structure stemming from the findings of the in-depth interviews. Sales transformation does not present any multicollinearity issue as VIF values for each indicator are lower than 2.0 (Table 4). Through a bootstrapping procedure based on 5,000 samples, we assessed that all indicators' weights are significant at a 95% confidence level with *t*-values greater than 1.96 (Table 5). Examining the weight of each indicator, we observe how they contribute almost equally to the sales transformation phenomenon, with Integration and Digitalization slightly more important than Acceleration and People.

5. Discussion

5.1 Sales transformation as a multidimensional phenomenon

Our research defines sales transformation as a systemic phenomenon composed of four higher-order dimensions, namely, people, digitalization, integration, acceleration, and 16 sub-dimensions that enable sales transformation and are of extreme relevance in today's ever-changing markets. This research addresses a need for a conceptualization of the transformative phenomena occurring in sales which was missing in extant literature (Hartmann *et al.*, 2018; Cuevas, 2018; McFarland, 2019; Rapp *et al.*, 2020). Past studies have addressed this topic focusing on micro aspects mainly related to

the evolution of the role of salespeople and the impact of technology. Similarly, practitioners seem to overlook the holistic nature of sales transformation, focusing their investments and actions either on technology or salespeople. This study shows that the sales transformation process is systemic and fueled by two additional dimensions, integration and acceleration, which set the pace of this phenomenon. Integration and acceleration are key to understand the process of change in contemporary contexts, where the space and time dimensions of relationship development and management are rapidly evolving (Breidbach and Maglio, 2016).

As recently stated by Corsaro and Anzivino (2021), the space dimension of interaction is much more blurred than in the past. Resources can be exchanged at anytime and anywhere (Ostrom, 2010), strengthening the inter-connection among the digital, physical and social realms (Bolton *et al.*, 2018; Edvardsson *et al.*, 2011). In addition, the velocity of interaction has critically increased, leading to a higher need for coordination among heterogeneous actors and for new resource integration processes in the ecosystem. Temporal considerations are also crucial, as the sales discipline moves towards more holistic frameworks while balancing meaningfulness and applicability of findings (Rapp *et al.*, 2020). Our study contributes to this emerging stream of research by showing that integration and acceleration are dimensions that need to be considered when analyzing sales transformation in today's fast-paced changing business markets.

5.2 Sales transformation enablers

Our results show that four dimensions enable sales transformation. In terms of relative importance, Integration processes and digitalization are the two main components of sales transformation, followed by people and acceleration processes.

The push of digitalization generates rising expectations regarding the sales function of the future which will be increasingly smart thanks to new forms of automation and human-machine interaction (Pandey *et al.*, 2020). The research results highlight how the dimensions of Big Data & Analytics and Social Selling are key engines of sales transformation, followed by CRM & Artificial Intelligence. In fact, many companies already use social media for their marketing and sales activities (Kaptein *et al.*, 2018), even if they do not consider them to be relationship-building tools. As emerged from the interviews, social media is mostly used to identify new business opportunities and key decision-makers in customer companies and to generate leads. However, the usage of social media tends to be not fully considered in the sales funnel from a strategic perspective. Similarly, despite the benefits of CRM systems are well-known (Ko and Dennis, 2004), CRM is still not leveraged to its full potential by most companies. Many interviewees reported how CRM systems act as mere information repositories, while more advanced functions such as the interaction between internal and external data, the forecast of future scenarios using analytics and suggestions on future actions are still marginal and not completely implemented. It is then interesting to note how automation is less seen as a way to improve customer relations, but more as a tool to reduce the time spent on collateral activities (administrative duties, preparation of offerings, reporting, etc.). The real added value of such technologies lies in the opportunity to automate low-return activities and chores by reducing the corrupted selling time.

The integration process is the second most important component of sales transformation. This process develops at different levels. Integration starts within the organization. Our evidence highlights that integration should be increased not only between marketing and sales, but also with customer service, whose role is becoming critical in a customer-centric view, even in B2B (Bolander *et al.*, 2015; Claro and Ramos, 2018). The customer service function should help customers satisfy their needs with the purchased product/service while providing solutions (Sandström *et al.*, 2008). Advanced technological applications including sales automation are expected to further encourage the interaction among these three areas to generate a virtuous circle in which data fed and is integrated into the CRM system, which returns analytics and indicators, supporting decision-making with reference to the different touchpoints of the customer journey. Integration also extends outside the company boundaries and focuses on the exchanges occurring in the service ecosystem. Plouffe *et al.* (2016) already demonstrated that the influence directed toward a salesperson's internal business team and external business partners has a stronger relationship with objective performance than the influence directed at customers. But to reach this goal, our study shows that the integration between internal and external data is fundamental to deliver a comprehensive view of customers. However, the degree of this type of integration remains rather weak mainly due to lacking technological applications, which are still used only as data repositories.

Focusing on the people side, our findings support the research conducted by Lacoste (2018), according to which different sets of competences contribute to the transformation in selling. Specifically, transversal skills are becoming more and more relevant for salespeople instead of hyper-specialistic ones. The opposition between the charismatic/relational salesman and the technician/rational seller is now a legacy of the past. The demand for profiles that ride new spaces of "hybrid" value is growing. Sellers need to anticipate trends by combining information of different nature and origin with various perspectives for observing and interpreting the phenomena to capture the bigger picture surrounding the business context. One of the sub-dimensions contributing the most to the transformation of sales is training and development. Investing in the development of people is critical to retain and develop the salesforce. Indeed, the departure of a salesperson can cost the organization up to 200% of the annual compensation (Edmondson *et al.*, 2019). As pointed out by Nguyen and Nguyen (2019), sales organizations acknowledge the positive impact of sales coaching, while most sales managers still lack the proper training to coach salespeople in an effective way. This is due to a lack of clarity about skills and capabilities that drive and improve the sales coaching process. Moreover, sales managers and salespeople could have misaligned perceptions with regards to the time they spend coaching versus being coached. The sub-dimension of challenging attitude brings interesting considerations about selling styles. Literature has shown this as key to challenging existing ideas presented by

informed and empowered customers (Dixon and Adamson, 2011). Nevertheless, in our model, this sub-dimension has a limited contribution to the sales transformation process in favor of other elements, such as the ability to understand the counterpart (Delpechitre *et al.*, 2018), both customers and other members of the sales teams. This insight could point towards the idea that the so called "challenging" approach (Osmonbekov *et al.*, 2018) is somehow considered too persuasive and could be potentially perceived as outdated in current markets, while the emerging perspective selling approach shifts the attention towards a salesperson's ability to understand the customer's world and put him or herself in the customer's shoes (Miller Heiman Group, 2019; Delpechitre *et al.*, 2019).

The fourth pillar in the sales transformation process is the acceleration of sales-related processes. The most interesting element of acceleration that emerged from the study is the use of visual insights and representations in sales communication. Compared to the past, key messages are required to be more concise and leverage visual insights that simplify the communication with customers and attract their attention (Akaka *et al.*, 2014). The use of visual elements to support other forms of communication can facilitate the coordination between different ideas and therefore speed up the decision-making process. Acceleration is also enabled by accessing information through mobile devices, which are another element of speediness, allowing a strong adherence to the context – here and now – and helping make decisions where and when they are needed (contextualization); this approach, in turn, feeds the sales process with granular, highly specific and contextualized data that enable a better customer experience by offering answers when the problem or opportunity arises.

One further sub-dimension is the acceleration of the sales funnel. We define this concept as "lose fast," i.e. the ability to let go of opportunities that absorb a great deal of energy and resources with low guarantees of closure. On that point, Miller Heiman Group (2019) reports that 70% of deals will be lost, which makes the losing fast concept quite relevant in today's markets. In a world where opportunities are often countless thanks to technology, while company resources (especially time) are limited and sales cycles get longer, the correct implementation of the "lose fast" process becomes fundamental. We thus support Paesbrugghe *et al.* (2018)'s view who state that understanding the purchasing function journey is regarded as important not only for identifying the needs of buyers, but also for developing a sales strategy.

6. Conclusions and further research

This study proposes a model that conceptualizes sales transformation, a broadly acknowledged and industry-wide phenomenon that still requires further definition from a theoretical standpoint. We propose that sales transformation is a higher-order construct comprising of four dimensions and 16 sub-dimensions. We introduce a measurement model for sales transformation and discuss the transformative potential of the single elements contributing to this construct. The proposed approach considers each dimension and sub-dimension simultaneously. Although people and digitalization have been previously acknowledged as driving forces of transformation, our study demonstrates that their changing power can be leveraged only when interrelated with spatial and temporal dimensions, i.e. integration and acceleration. Specifically, our study acknowledges the prominent role of integration processes and digitalization in driving sales transformation, followed by people and acceleration processes.

By conceptualizing sales transformation, we offer insights and clarify the nature of the changes the selling activity is experiencing, contributing to a new theoretical foundation for selling. We propose a conceptualization of sales transformation as a phenomenon that involves human and technological components in a specific context characterized by different degrees of acceleration and integration of sales-related activities.

6.1 Managerial implications

Today, 70% of transformative sales programs fail to deliver on the expected outcomes due to excessive costs and implementation time, missing critical functionalities or reductions in scope (Apollo, 2020). For such reasons, businesses are now looking for a more strategic approach to salespeople development equipping them with the right mindset – the ability to think, explore and reflect – to be successful in today's complex, global business environment.

The conceptualization of sales transformation we propose represents a roadmap for companies and managers to understand what stage of the sales transformation they are at and which areas should be further developed to leverage the benefits of this changing process. We also identify key aspects that managers can focus on when approaching for the first time a sales transformation process. Our recommendation leans towards a balanced approach involving the four dimensions of sales transformation, people, digitalization, integration and acceleration. Within each dimension, we identify the sub-dimensions that have a stronger contribution towards the sales transformation process and represent actionable levers in the hands of managers and sales directors.

We expect an enhanced role of the salesforce acting as "boundary spanner" to promote sales transformation by connecting the capabilities of different actors with customers' needs. In complex situations, the salesforce acts as an intermediary in a broad sense, as it influences and shapes customer cognitive processes through a holistic interaction going beyond product characteristics. By combining and integrating knowledge, the seller creates spaces of new value within which placing customers' needs. Sellers must anticipate trends by relating information of different nature and origin and combine it with different perspectives for observation and interpretation of phenomena to capture a "bigger picture" of the business context.

Specifically, the role of training and professional development of salespeople is critical to successfully tackle the challenges posed by sales transformation. Customized training based on individual needs and personality traits combined with a dynamic coaching process at individual and team level can contribute to strengthening the sales function and its members skills and capabilities. The final goal should be to train people the best ways how to move from a "know-it-all" attitude to a "learn-it-all" one, ensuring that a self-critical and open attitude towards the acquisition of new knowledge and key elements for

personal growth is maintained. Finally, to hold a transformative role, coaching should be translated in a formal and dynamic process rather than an extemporaneous one, often confused with mentoring.

We propose that perspective selling will be the selling style of the future. Perspective selling places emphasis on deeply understanding customers' world, experiencing their pain points and seeing business through customers' eyes. Salespersons who are more skilled at interpersonal mentalizing better predict how customers will respond to different stages. Thus, to promote transformation, selling should go beyond the idea of conveying the "bundle" of products and services that better suits customers' needs. Perspective selling originates from a very simple and not new concept in sales: the ability to listen to the customer (Hohenschwert and Geiger, 2015).

The sales transformation process starts with the company by enabling and supporting the integration of the marketing, sales and customer service departments. The analyses show that the fundamental actions required to increase the degree of collaboration and alignment of these areas are as follows: to have common KPIs, as an incentive for collaboration and monitoring methods; to define joint objectives; to share information; defining contents and messages addressed to buyers in a concerted manner. This could be implemented through job rotation, joint KPIs, a social media marketing strategy aligned with the one of social selling and a constant communication between sales and customer service to manage the after-sale relationship best.

Moreover, the role of visual insights and visualizations will be central in the future to communicate value and insights effectively and efficiently to customers and stakeholders. We foresee an opportunity to leverage the visualization process to create shared views across organizations and to promote a "breaking-down silos" mentality within and outside the organization. For example, this can be done through infographics within sales presentations or dashboards to summarize data. The difficulty lies precisely in the design of visualizations that are immediate and above all intelligible unequivocally by the people of marketing, sales and customer service. Similarly, to progress in the field of web customization, customized design and dynamic e-mail (Kaptein *et al.*, 2018), we can expect that in the future dashboards will be automatically adapted based on the interlocutor to whom they are addressed.

Big data analytics and social selling will then lead the way in sales transformation. It is thus fundamental to embrace new technological advancements and leverage them to the benefit of the sales function. In the future, we expect sales to be increasingly based on data-driven insights and artificial intelligence support to optimize the sales funnel. This will allow reaching customers at the right time, in the preferred channel, proposing a specific solution to a problem.

To lose fast and accelerate the sales funnel, it is important for salespeople to be able to create a sense of urgency in the customer and not to be afraid of negative feedback or a "no" from the customer. Salespeople should put themselves in their customers' shoes and see the funnel through their customers' eyes. This last point is particularly critical as salespeople tend to resonate only with respect to their sales funnel, while they should analyze the customer funnel, assessing when and where there are misalignments and help the customer to move towards the next step.

6.2 Limitations and future research

This is an early contribution to the area of personal selling and sales management, and it thus comes with limitations. Although this research provides rich and detailed information and unravels a complex phenomenon, caution should be used in extending these results to different sales situations and sectors. A limitation of this study lies in the limited sample size of companies primarily operating in the services industry and of medium-large size. Future research should involve a wider sample of companies to test the relevance of the dimensions and sub-dimensions of sales transformation across industries and company sizes and types. This will allow to generate more actionable insights tailored to the needs of specific organizations.

Further, the sales professionals in our sample came from companies with different backgrounds and experiencing different stages of sales transformation. This should be considered when referring to our results. Thus, future research should look into the role of the different dimensions across the stages of sales transformation. In addition, our study proposes a conceptualization of sales transformation, but misses to test its impact on business outcomes. Thus, we suggest that future research should analyze the effect of sales transformation on revenue generation, salespeople performance, salespeople retention and value generated for customers. Finally, sales transformation is not a firm-centered phenomenon but develops within a service ecosystem. Our study is focused on selling, leaving out the roles and implications for buyer companies and other stakeholders operating in the service ecosystem. Future research could also address this aspect by investigating the consequences of sales transformation in service ecosystems and analyzing how this phenomenon might fuel transformation in buyers' organizations.

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