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Sales digitization and sales process optimisation for firm performance: Evidence from European firms

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ABSTRACT

This study explores how the adoption of sales enablement platforms (SEPs) influences each stage of the business-to-business (B2B) sales process in medium-sized companies. The research addresses a critical issue, as sales digitisation is increasingly recognised as an enabler of firm performance, sales management, and customer engagement. Based on in-depth interviews with 27 chief executive officers and sales directors, along with three case studies of European medium-sized firms, this study explores how SEPs support greater collaboration and performance within firms. The findings demonstrate four dominant pathways (digital skill endowment, marketing ownership in the sales process, strategic implications and value creation), that altogether contribute to firm capabilities and sales performance. One of the key advantages of using SEPs are organisational collaboration optimization, reducing costs, increasing flexibility in implementing digitally oriented solutions and processes. We establish the foundations for future research on the digital transformation of sales and its impact on firm performance.

1. Introduction

The digitisation of sales processes, particularly through the adoption of sales enablement platforms (SEPs), has emerged as a critical driver of organisational performance (Audretsch and Belitski, 2021) and inter-organisational collaboration (McClure et al., 2024; Mukhopadhyay et al., 2025). These digital tools are transformative in modern sales operations by enabling information autonomy and enhancing customer satisfaction, loyalty, and trust (Agnihotri and John-Mariadoss, 2022; Nguyen et al., 2024; Mukhopadhyay et al., 2025). However, firms are often unprepared to adopt and effectively use SEPs (Friess et al., 2024), largely due to a lack of resources related to SEPs adoption and distinct business types (Agnihotri et al., 2023; Nguyen et al., 2024).

Adoption of SEPs is important to achieve higher performance and market innovation as these platforms enable operational efficiency, revenue growth, increase in conversion rates for customers, reduction in time required to close deals, and cost reduction (Ganotakis et al., 2023; Nguyen et al., 2024). This can lead to several financial and non-financial benefits for firms, including improved customer engagement, better strategic alignment across the organization and its units, increased lead management, enhanced collaboration between organisations, and

greater transparency in information flow (Kramer and Krafft, 2023; Chaker et al., 2022; Mukhopadhyay et al., 2025). Empirical evidence from Salesforce suggest that the adoption of these tools enables on average 12 % increase in sales productivity and a 10 % increase in firm's competitive position in the market compared to firms that do not adopt them. Gartner (2023) also suggests that SEPs deployment generates value for firms and customers.

Although existing literature explains how SEPs can improve sales performance, there is limited understanding of how these mechanisms are adopted in sales management tools. Furthermore, the role of SEPs as a dynamic capability within a sales enablement ecosystem remains largely unexplored (Mukhopadhyay et al., 2025).

Despite extensive prior research on digital tools and technologies adoption in organisations (Li et al., 2016) and to enable firm resilience (Audretsch et al., 2022), understanding the holistic role of sales technology in business-to-business sales (B2B) remains incomplete (McClure et al., 2024). In particular, prior research overlooks how different tools interact, their combined impact on sales management and sales outcomes, and the dynamics of these interactions (Agnihotri et al., 2023). A better understanding of how SEPs can be adopted by a firm, requires the development of a theoretical framework that can examine and visualise

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the interplay between SEPs, salesperson, marketing, sales management and perceived impact in sales performance. Thus, moving beyond the impact of isolated tools on individual salesperson or sales outcomes.

Building on dynamic capabilities theory and the work of Teece et al. (1997) and Peterson et al. (2021a, 2021b), this study applies the socio-technical model of sales force change (Hartmann and Lussier, 2020) to examine the interconnected effects of SEPs adoption on four key areas: the salesperson (including knowledge, skills, abilities, and traits), tasks (such as selling and managing employees), structure (the systems that coordinate these tasks), and sales management. This approach is both novel and significant, as it extends the contributions of Rangarajan et al. (2020), Lauzi et al. (2023), and Mukhopadhyay et al. (2025). It demonstrates how SEPs adoption can be strengthened beyond traditional, linear models of sales enablement, by recognising the strategic importance of organisational context, people, processes, and performance in creating value.

This study has two main objectives. First, it explores how the adoption of SEPs supports the B2B sales process. Second, it aims to develop a framework to optimise SEPs use in sales management, improving sales processes and potentially enhancing firm performance. The central research question guiding this study is: How can sales enablement platforms facilitate the business-to-business sales process?

Using the data of in-depth semi-structured interviews with 27 sales leaders from medium-sized companies (50–250 full-time employees) across the United Kingdom, Finland, Germany, and Denmark, the contributions of this study are twofold. Firstly, we propose a conceptual framework that not only demonstrates how SEPs adoption can facilitate sales processes for firm performance, but it also proposes a hierarchical relation between operational SEPs factors and how they can relate to higher level pathways within organisations. The novelty of this framework lies in how these pathways collectively explain the influence of SEPs, going beyond just the technological implementation to include aspects like skill development, inter-departmental collaboration, strategic decision-making, and the ultimate value derived. By doing so, we bridge within-organisational factors and operational outcomes. This framework is different from prior research as it focussed on strategic and operational improvement of sales processes leading to financial and non-financial performance outcomes. Therefore, contributing with qualitative empirical insights to previous works (Peterson et al., 2021a, 2021b; Badrinarayanan et al., 2022; Agnihotri et al., 2023; Mukhopadhyay et al., 2025) which mainly looked at SEPs-firm performance links with the sales processes.

Secondly, we provide valid empirical evidence testing our propositions on the role that SEPs adoption plays in sales performance, sales management, sales professionals and operational dynamics within firms. For example, we demonstrated that adopting SEPs directly improves sales performance and sales force management while also enhancing firms' understanding of customer needs and purchasing journeys. This expands previous research on the reasons for SEPs adoption and their functionality (Kramer and Krafft, 2023; Chaker et al., 2022; Nguyen et al., 2024).

Additionally, we outlined how SEPs enhance collaboration, improve forecasting accuracy, increase communication precision, and reduce sales costs, all while strengthening sales and marketing operations. These findings build on the work of Cheng et al. (2023) and Mukhopadhyay et al. (2025) by further clarifying SEPs' role in the sales process and firm performance. Together, these insights offer valuable guidance for sales managers and CEOs on optimising SEPs adoption to drive higher sales performance.

2. Theoretical background and propositions

2.1. Factors enabling firm digitalization

It is suggested that the adoption of technologies require ongoing changes within the organization, updates and new approaches to

manage the sales processes, investment in staff digital upskilling, and the launch of new strategic business initiatives (Zheng et al., 2023; Agnihotri et al., 2023; Nguyen et al., 2024; Mukhopadhyay et al., 2025). Even though SEPs are relatively easy to adopt and implement, using them requires strategic and commercial creativity (Cassia and Colombelli, 2010), alignment with business goals, managerial commitment (Chaker et al., 2022; Peterson et al., 2021a, 2021b), training and continuous support for sales teams (Agnihotri et al., 2023). Revealing the effects of digitalisation and adoption of SEPs in the sales process of medium-sized firms is crucial, because by firms becoming more digitally sophisticated, the expected financial gain for Europe could reach EUR 3.4 trillion in economic value, which represents a significant 21 % of the EU's current economy (European Commission, 2024). Additionally, the sales function is responsible for generating revenue and providing to other departments of the company with rich and updated information about customers' desires and needs, actions from competitors, and changes in customer behaviour (Audretsch et al., 2024a).

Existing research has examined the adoption and impact of digital transformation, highlighting the complexity and key factors influencing the adoption of digital technologies (Loro and Mangiaracina, 2022; Mai and Liao, 2022; Nguyen et al., 2024; Friend et al., 2024). For example, one notable trend is the shift from external to internal sales teams, driven by corporate buyers' growing preference for digital channels and tools at the top of the sales funnel.

Reduced importance of face-to-face seller-purchase interactions (Marcos Cuevas, 2018), consequently an increased focus on strategic orientation and ambidexterity is required from sales professionals. For the seller firm's digital sales tools increase market reach, revenue and the combination with traditional sales channels, ultimately positively impacting firm's performance (Loro and Mangiaracina, 2022; Mai and Liao, 2022; Mukhopadhyay et al., 2025).

The extant literature has demonstrated eight dimensions of digital transformation and technologies processes: hybrid sales structures (Ramos et al., 2023; Marcos Cuevas, 2018; Thaichon et al., 2018), digital sales channels (Loro and Mangiaracina, 2022; Bongers et al., 2021), digital transformation of sales processes (Ganotakis et al., 2023; Nguyen et al., 2024), blurring and blending of traditionally inside and outside sales forces (Corsaro and Anzivino, 2021; Hartmann and Lussier, 2020), integration of content marketing in the sales process (Järvinen and Taiminen, 2016; Mukhopadhyay et al., 2025), combining automated tasks and human tasks in sales activities using artificial intelligence (Colombelli et al., 2023a; Cheng et al., 2023; Mukhopadhyay et al., 2025), social media usage in selling process (Terho et al., 2022; Corsaro and D'Amico, 2022; Høgevold et al., 2024), and big data and analytics (Upreti et al., 2021). We summarized the highlights of this literature in Appendix A (Table A).

For example, in the dimension of hybrid sales structures (internal and external sales channels) information systems are providing new opportunities to retrieve, synthesize and analyse customer information, therefore customer insight becomes part of organisational capability (Marcos Cuevas, 2018; Thaichon et al., 2018; Ramos et al., 2023; Mukhopadhyay et al., 2025). Digital channels enabled new market reach, growing revenues and allocation of sales resources to more valuable activities (Bongers et al., 2021; Nguyen et al., 2024). Studies on the digital transformation of the sales process have highlighted firms' ability to uncover unique customer insights and effective information sharing both within and outside the firm (Alamäki and Korpela, 2021; Mullins and Agnihotri, 2022).

SEPs enable higher efficiency and competitiveness through collaboration between sales structures and networks (Zheng et al., 2023; Kramer and Krafft, 2023). For example, retargeting, automated lead generation and scoring leads. Faster, accurate, complete and useful interactions with customers, value co-creation and easier and more fluid interactions between actors of the purchasing committee (Rustholkarhu et al., 2022). Digital enhanced sales capability is positively related to financial performance and customer relationship performance (Nguyen

et al., 2024). Digital communication tools, social media, and customer relationship management solutions play a crucial role in enhancing the sales performance of B2B sales teams (Høgevoid et al., 2024).

As sales management technology continues to evolve, its integration into each stage of the sales process helps align a firm's broader capabilities. This alignment improves sales management efficiency and contributes to greater value creation for both the firm and its customers (Mukhopadhyay et al., 2025).

Based on these discussions on the multifaceted impact of SEPs in the sales management processes, considering both the technological and organisational dimensions we develop our first proposition:

Proposition 1. The successful implementation of Sales Enablement Platforms demands continuous organisational adaptations in sales functions.

2.2. Digital technologies for sales

SEPs, play a fundamental role in modern B2B sales processes by shaping how corporate buyers engage with seller firms and complete their purchasing journeys (Friess et al., 2024; Mukhopadhyay et al., 2025). Technology plays a significant role in sales enablement by acting as a crucial component that enhances the efficiency of the sales process and various sales activities such as onboarding, training, and customer engagement (Lauzi et al., 2023; Mukhopadhyay et al., 2025). There is growing evidence that these platforms can be implemented to enhance various stages of the sales process, such as lead qualification (Eggert et al., 2019; Moncrief, 2017) and content marketing (Paschen et al., 2021), ultimately enabling cross-functional collaboration in sales enablement, where marketing, sales operations and sales teams align to create more value for the firm and customers (Lauzi et al., 2023; Friess et al., 2024; Mukhopadhyay et al., 2025).

Research also highlights that the impact of digital sales technologies on firm performance depends on various factors. Simply deploying new tools is not enough, their success relies on careful alignment with the organization's structure and sales environment (Peterson et al., 2021a, 2021b; Oliveira et al., 2024; Mukhopadhyay et al., 2025). As a result, scholars increasingly recommend that marketing and sales departments focus on targeted, manageable transformations that digital technologies can realistically improve (Agnihotri et al., 2023; Høgevoid et al., 2024). Such focused efforts help firms maximize the benefits of digital tools while minimising potential drawbacks.

Both organisational and individual factors influence sales managers' readiness and willingness to embrace digital transformation. Effective change communication, mobilisation efforts, and psychological considerations are also critical to successfully digitising sales processes (Badrinarayanan et al., 2024).

Based on these evolving discussions regarding the role of digital platforms in different stages of the sales process, we propose:

Proposition 2. Sales Enablement Platforms accelerate firm performance by enabling marketing ownership of the B2B sales process, enhancing efficiency and driving targeted value creation throughout the sales process.

With the growing proliferation of diverse digital tools, organisations are increasingly challenged by potential distractions and information overload (Kramer and Krafft, 2023). These issues can drive up operational and transaction costs (Audretsch and Belitski, 2020, 2023a). To address these challenges, firms must ensure their sales teams are well-equipped with SEPs (Nguyen et al., 2024). Digital literacy is crucial for sales professionals, enhancing their ability to leverage technology effectively for better sales performance (Agnihotri et al., 2023; Mukhopadhyay et al., 2025). This can be achieved by automating processes and improving access to data across multiple information systems, allowing for the consolidation and interpretation of customer information (Ramos et al., 2023; Oliveira et al., 2024). As a result,

gaining customer insights has become a critical capability for organisations (Peterson et al., 2021a, 2021b; Marcos Cuevas, 2018; Oliveira et al., 2024).

Recent research highlights six significant tensions in sales organisations arising from the use of digital technologies: autonomy, innovation, information, interaction, resources, and control. These tensions can manifest both positively and negatively across various hierarchical levels, affecting sales directors, managers, and salespeople differently (Micallef et al., 2024). Addressing these tensions requires firms to equip their sales teams with essential digital skills, integrating traditional and digital sales strategies. This integration not only expands market reach and revenue potential but also supports the ethical and transparent standards customers increasingly demand (Agnihotri et al., 2023).

The adoption of digital sales channels has further reduced the emphasis on face-to-face interactions between sellers and buyers (Loro and Mangiaracina, 2022; Mai and Liao, 2022). By 2025, it is expected that 85 % of customer interactions within companies will occur without human intervention (Gartner, 2023). While this shift offers convenience and potential cost reductions for seller firms, it also presents challenges in maintaining the depth and quality of buyer-seller relationships (Mukhopadhyay et al., 2025). The digital transformation of sales poses the most significant tension: internal sales personnel are becoming more digitally proficient, but there is still a pressing need for external sales teams to enhance their digital skills (Chaker et al., 2022; Corsaro and Anzivino, 2021). SEPs have the potential to foster relationship-building with customers and provide insights into their operations (Agnihotri et al., 2023).

The combination of AI-automated tasks with human involvement in sales processes has become a focal point of discussion. Ho and Chang (2022) and Crisafulli et al. (2022) argue that while AI can effectively manage repetitive tasks, particularly in the early stages of the sales funnel, there remains an undeniable need for human interaction, especially for relationship-building between firms and their customers (Colombelli et al., 2023b). AI can offer customized experiences, but these need to be complemented by the intuition, empathy, and relationship-building skills of sales professionals (Colombelli et al., 2023a). Balancing automation with human interaction is crucial to ensure personalized and effective customer engagement (Oliveira et al., 2024).

Based on this analysis, we propose the following:

Proposition 3. Sales enablement platforms facilitate value creation by leveraging the human element in digital collaboration and communication.

3. Method and sample

3.1. Data collection

To test our theoretical propositions, we carried out in depth-interviews with 27 experienced CEOs and sales directors of medium-sized European companies from diverse industries across the United Kingdom, Finland, Germany, and Denmark (detailed sample profile on Table 1). Our focus is on digitally driven firms and in digitally advanced developed countries (Digitally Driven, 2022) which fits the objectives of this study. According to OECD (2024) SMEs in these countries have invested heavily in cloud computing-based services, such as SEPs. Comparing with the total SMEs in the country, the OECD report indicates that in United Kingdom 69 % of SMEs have invested in cloud services, while in Finland 91 %, Germany 42 % and 76 % in Denmark.

The Interview protocol (Appendix B) was informed by the seven stages of a sales process (prospecting, pre-approach, approach, sales presentation, overcoming objections, closing and follow-up), (Dubinsky, 1981). This approach allowed a deeper understanding of the effects SEPs have in each stage of sales process.

A qualitative method with constructivist and inductive approaches

Table 1
Participants' profile.

Interview	Country	Industry	Position	Time in position	Quantity of sales professionals
1	UK	App Health Service	CEO	2 years	11 to 50
2	UK	Marketing Technology	CEO	12 years	11 to 50
3	UK	Online Banking	CEO	7 years	>50
4	UK	Software As a Service	CEO	13 years	11 to 50
5	UK	Broadband Network provider	CEO	2 years	11 to 50
6	UK	Software As a Service	CEO	14 years	1 to 10
7	UK	Software As a Service	CEO	11 years	1 to 10
8	UK	Software As a Service Medical	Sales Director	6 months	11 to 50
9	Finland	Diagnostic Manufacturer Cyber	Sales Director	3 years	1 to 10
10	UK	Security—Software as a Service	Sales Director	3 years	11 to 50
11	UK	Hospitality	Sales Director	15 years	11 to 50
12	UK	Software As a Service	Sales Director	1 year	1 to 10
13	UK	Construction	Sales Director	2 years	>50
14	UK	Technology	Sales Director	5 years	1 to 10
15	UK	Health Care Company	Sales Director	9 years	11 to 50
16	UK	Manufacturing	Director of Sales	5 years	>50
17	UK	Software As a Service	Head of Sales	1 year	1 to 10
18	UK	Computer software	Sales Director	3 years	1 to 10
19	UK	Life Sciences	Sales Director	3 years	>50
20	Finland	Manufacturing	Sales Director VP	5 years	1 to 10
21	Finland	Software As a Service	Global Sales	1 year	1 to 10
22	UK	Legal Tech	Sales Director	1 year	1 to 10
23	Denmark	E Learning Game Platform	Head of Sales	1 year	1 to 10
24	Finland	Recruitment Company	Head of Sales	1 year	11 to 50
25	Germany	Retail	Sales Director	3 years	1 to 10
26	UK	Distributor Training and consulting	Sales Director	3 years	1 to 10
27	Finland	Software As a Service	Head of Sales	1 year	1 to 10

Source: Compiled by the authors.

were adopted, enabling a deeper understanding of participants' experiences (Saldaña and Omasta, 2016; Gioia et al., 2013) regarding the impacts of adopting SEPs on firms' sales and marketing processes, from both managerial and personnel perspectives.

In this context, we used non-probabilistic purposive sampling method, which involves deliberately selecting participants based on specific characteristics or criteria relevant to the research question (Bell et al., 2019). In this line, purposeful sampling strategies intentionally avoid random selection, focusing instead on ensuring that specific types of cases (firms) and respondents (CEOs, sales directors) relevant to the

study are included in the final sample. This approach assumes that, given the study's objectives, certain respondents may hold unique and diverse perspectives on the topics under investigation, making their inclusion essential (Saldaña and Omasta, 2016).

Using purposive sampling (Etikan, 2016) we argue is appropriate if respondents hold senior positions in the firm, who were actively involved in developing sales and marketing strategies and leading their teams in executing these strategic decisions. Their responsibilities included the adoption of SEPs and managing its consequences on team dynamics, outbound and inbound sales activities, and the human-machine relationships that influence sales representatives (see Table 1).

Therefore, informed by Luborsky and Rubinstein (1995) the inclusion criteria we applied for selecting participants in this study was: a) Holding a leadership position with direct responsibility for sales decision-making and team management, including formulating strategies, acquiring SEPs, and allocating resources; b) Being employed by a European firm; c) Leading a sales team comprising at least five and no >100 sales representatives; d) Have led the deployment of SEPs in their firms.

These criteria are critical, as CEOs and heads of sales are key decision-makers responsible for strategizing sales channels, allocating resources, training, motivating, and monitoring the performance of sales teams, which ultimately impact the firm's performance. Specifically, the study focused on their experiences of adopting SEPs and going through the stages of adaptation linking it to changes in their sales strategy, people, intradepartmental relationships and decision-making. These inclusion criteria strongly linked to our study objectives reduced the potential for purposive sampling approach bias.

The heterogeneity of the sample, drawn from diverse industries and enterprises in four countries, varying sales team sizes, was intended to identify commonalities across different groups. This diversity enhances the potential for generalising findings within the context of medium-sized firms in Europe (Robinson, 2014). Ultimately, the study prioritised the insights of heads of sales and CEOs, whose perspectives were central to understanding the broader implications of the adoption of SEPs. However, our findings are not intended to be generalized, as they are dependent on the context in which they were obtained and the diversity of experiences that a new data sample or study purpose might present.

The sample profile spans diverse sectors, including software as a service, medical device manufacturing, construction, hospitality, training, consulting, and recruitment. Therefore, the heterogeneity of the sample enables the identification of shared patterns and key factors influencing SEPs adoption and its impact on firm performance. The systematic identification of shared patterns across industries in digitally advanced countries supports credibility by ensuring that findings are grounded in real experiences (Robinson, 2014). Therefore, the credibility and validity of findings are supported by the detailed description of the process how data was collected, from sampling respondents' profile and size to data collection, analysis, and interpretation. We identified and contacted potential participants for the study using LinkedIn Sales Navigator. The tool allowed us to segment our search granularly and contact only professionals who met our sample criteria. We sent an introductory online message outlining the research project, inviting participants, and providing a link to an online calendar for interviews to a selected sample using the InMail function available on the platform. We approached approximately 80 potential participants, of whom 27 booked an interview.

All interviews were recorded and transcribed verbatim, faithfully capturing the views and experiences of participants (the data is available by request). Online interviews were conducted using Microsoft Teams, with real-time automated transcripts. The interviews length in average 60 min and were carried out between November 2022 and March 2023, resulting in >64 pages of transcripts.

To triangulate our findings, we performed three stand-alone case studies of companies across three distinct fields which adopted SEPs.

The case studies were developed based on data collected from the transcripts of interviews with participants and from annual reports published by the companies during 2020–2024. Case studies demonstrate how SEPs are introduced in the companies and how they changed the routines and shaped the performance, in particular business-to-business sales. The cases are presented in [Appendix C–E](#).

3.2. Data analysis

The study applied an inductive reasoning approach ([Saldaña and Omasta, 2016](#)), where knowledge emerged from the data collected. We deployed an interactive and simultaneous flow between data collection and data analysis, with findings written after completing each interview, then we connected the new findings with reviewed findings of current literature ([Robinson, 2014](#); [Saldaña and Omasta, 2016](#)).

We employed axial and open coding ([Gibbs, 2007](#)) using NVivo 12 to support data interpretation and analysis. From the transcripts, participants' original statements were extracted and coded. The most recurrent thirty-one codes were encapsulated into ten first order categories (first level categories). Then, these categories were grouped within ten second-order themes. Subsequently, the ten second-order themes were organised into four main themes, digital skill endowment, marketing ownership in the sales process, strategic implications and value creation ([Ketokivi and Mantere, 2010](#); [Gioia et al., 2013](#)). [Table 2](#) and [Fig. 1](#) illustrate and detail these iterative coding processes.

To ensure the validity and credibility of the coding and thematic allocation, authors independently engaged with the transcripts and carried out coding. This simultaneous analysis approach facilitated the identification of data saturation, which occurred after twenty-four interviews, when further data analysis no longer generated new second-order themes ([Strauss and Corbin, 1998](#)). Axial coding structured the data, allowing us to build and connect first-order findings into categorical labels. This involved thoroughly examining and re-examining the data from a theoretical lens to identify distinct patterns. The second-order themes analysis included content analysis of each interviewee's account, assessing consistency across interviewees, extracting conceptual dimensions from emerging patterns, refining codes until the data structure stabilized, and consolidating these insights into a coherent data structure ([Fig. 1](#)). We identified four aggregate main themes to develop a more refined theoretical framework.

The sampling inclusion criteria ensured that the participant could provide relevant information related to our research aims and research question following the interview protocol ([Robinson, 2014](#)) (see [Appendix B](#)). The validity of the analysis rests on the accuracy and originality of the transcripts, which were peer-reviewed by two senior academic researchers (co-authors) for consistency and reliability ([Robinson, 2014](#)). Additionally, we adhered to the principles of qualitative research by avoiding overclaiming our findings or extrapolating them beyond the context of the data collection window, as recommended in qualitative inquiry literature ([Saldaña and Omasta, 2016](#); [Robinson, 2014](#)).

4. Results

4.1. Digital skill endowment

Proposition 1 suggests that successfully implementing SEPs requires ongoing organisational adaptations within sales functions. This involves multiple aspects, including organisational structure, talent acquisition, and the integration of technology into sales processes. Interview data supports this proposition, highlighting a sales environment where continuous change is not just anticipated but strategically managed to maximize the benefits of digital platforms.

Organisational structure and strategy are foundational elements that determine the effectiveness of technologies. Companies are increasingly moving toward more agile, responsive sales structures that can integrate

Table 2
Themes and sub-themes of sales digitization.

Themes (second order)	Sub-themes (first level categories)	Examples of Direct Quotes from Interviews
Digital Skill Endowment	Adapting to a Smart Sales Funnel	"We are now learning the process together with the marketing people" — Participant 5
	Skills & behavioural adaptation	"For lead generation, we are using different tools. One tool that we use very much at the moment or that I am mainly using is LinkedIn" — Participant 3
	Attitudes adaptation and barriers	"When you're using our software [sales enablement platform] you can do the opening message automatically" — Participant 1
Marketing Ownership in the Sales Funnel	SEPs as Smart tools	"We can see that a different kind of sales pipelines and different kind of AI models how they're working like we can do more analytics" — Participant 1.
	AI-enabled data analysis pipelines	"We're not really doing a lot of AI ML analysis of the data set. "m dealing with things much further down and further advanced in the sales funnel"— Participant 11
	Automated prospecting tools for B2B	"Automation is really important when you're trying to manage all of those hundreds if not thousands of potential interactions" — Participant 15
Strategic implications	AI-Enhanced Efficiency	"It is important to have digital tools that make life easier for the salesperson, because also those big customers... they have certain timing, and when you can't keep the timing, they will not do the project with you." — Participant 3
	Demand generation	"So that everybody within the organization can see at any time in real time where those front end sales opportunities are and more importantly what as an individual they need to do in their role to help contribute move that sales forward"— Participant 2
	Customer trust	"We have to focus on scalable solutions. Tools must help streamline our processes without demanding overtime from our team. It's about enabling growth while maintaining efficiency."- Participant 10
Value creation	Customer engagement	"Salesforce gives us a full aspect of opportunities, but it's about embedding this data into broader demand discussions, especially for accurate forecasting and aligning sales strategies." — Participant 5
	Data analytics	"We track how many of the prospects generated by the platform actually convert into paying customers." - Participant 1
	AI-generated communication templates	"Having a visualised pipeline
Financial metrics	Automated message engagement tracking	(continued on next page)
	Real-time collaboration platforms	
	Agility	
Strategic implications	Resource management	
	Human-Machine Interactions	
	Personalized Brand Interactions	
Value creation	Balancing traditional and digital methods	
	Financial growth	
	Capabilities	
Strategic implications	Accuracy and Transparency	
	Future Prospects	
	Performance and efficiency tracking	
Financial metrics	Customer acquisition cost (CAC)	
	Pipeline performance	
	Revenue and profit growth (regional, per customer, per	

Table 2 (continued)

Themes (second order)	Sub-themes (first level categories)	Examples of Direct Quotes from Interviews
Non-financial metrics	product mix) Return on Investment	allows us to spot bottlenecks quickly and allocate resources effectively." - Participant 6 "The finding leads to greater awareness of the lead is something that we are investing the most at the moment because we are creating those Google ads, Facebook ads, and marketing campaigns. These are the costliest actions at the moment." - Participant 5 "We analyse the progression of leads and the time they spend in each stage to optimise resources and reduce the cost of acquisition." - Participant 10
	Speed of response to customer queries	"The negotiations are fact-based from the start, so meetings are more about agreeing on terms rather than convincing the client." - Participant 4
	Reduction in sales cycle time	"Tracking email open rates and response times has helped refine our follow-ups." - Participant 6
	Conversion rates	"The platform tracks progress and provides reminders, keeping the team organised." - Participant 10
	Sales conversion rates	"Real-time updates ensure everyone is on the same page and can respond to changes quickly." - Respondent 8
	Deal closure rate	
	Alignment index between marketing and sales KPIs	
	Retention rate of salesperson	
	- Customer engagement metrics (i.e. Net Promoter Score)	
	Time to close	
	Percentage of time spent on selling activities	

Source: Compiled by the authors.

digital tools and adapt to market demands. This shift is apparent in the strategic re-engineering of sales teams to better align with digital sales channels. For example, participant 6 detailed an organisational restructuring to accommodate a more diversified sales approach, demonstrating adaptability to the digital transformation in sales. *We are in the process of creating a new team which is effectively a mix of sales, legal, and marketing where they will help the sales team to close the deal in terms of contract negotiation and bringing all of that together* – Participant 6.

This adaptation reflects a strategic response to the evolving B2B sales process, where cross-functional collaboration, defined as coordinated efforts between different departments to achieve shared goals, is facilitated by SEPs. In terms of talent management, firms are recalibrating their hiring practices to ensure that new recruits are equipped with the necessary digital skills to use these systems effectively. Participants emphasized the preference for hiring individuals with pre-existing digital competencies".

"Do you hire the people and train them on the technology, or do you choose your technology and hire people that already know it? It is more of the latter, right? When we did an assessment before we hired our head of marketing, we knew we were going to use HubSpot. So, we hired for someone that has this skill set because otherwise it is got incredibly steep learning curve to get to mastery on that". – Participant 2.

This approach minimizes the learning curve and accelerates the integration of the technology into the company's workflow.

"The sales representative needs to be able to engage in a consultative way with clients. And then, use digital technologies to quickly understand customers' pain points to be able to put proposals together and present very clearly." – Participant 7.

These findings support Lauzi et al.'s (2023) suggestions that sales enablement extends beyond tools to include training, onboarding, and strategic support, which aligns with the focus on organisational

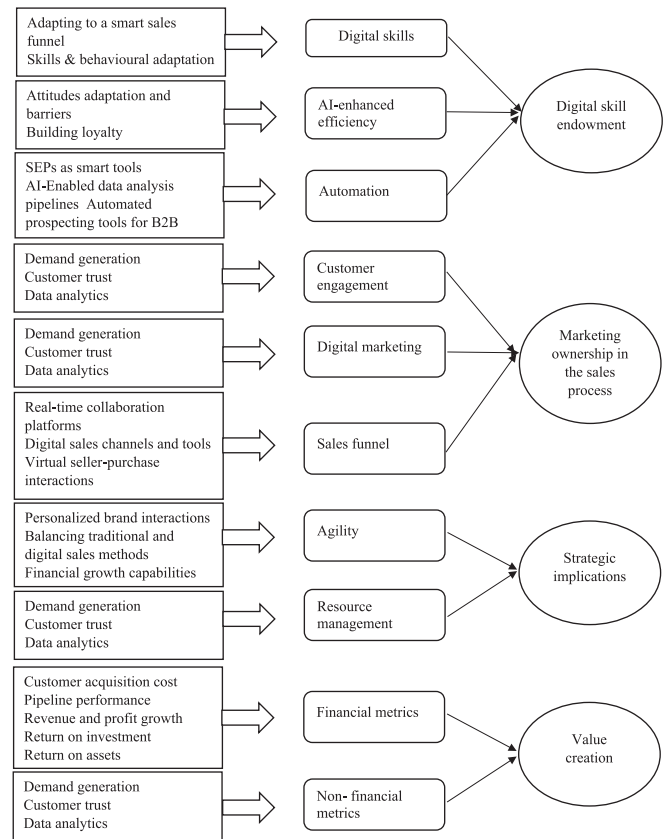


Fig. 1. Data structure on SEPs implementation analysis for sales processes optimization and firm performance.

adaptations to maximize SEPs utility. A salesperson's digital skills play a crucial role in accessing and sharing knowledge about potential customers across all levels of the seller firm. These findings reinforce the importance of equipping sales professionals with digital competencies, enabling them to work more innovatively and efficiently (Bongers et al., 2021; Colombelli et al., 2023b). By developing these skills, salespeople can enhance their agility in responding to customer needs and market changes (Lauzi et al., 2023; Mukhopadhyay et al., 2025).

Adaptations are not limited to organisational structure and hiring practices. They also involve the strategic use of technology in the sales processes. As digital tools become more integrated into the B2B customer journey, firms are adapting by employing these tools to enhance customer engagement and sales efficiency. Another interviewee highlighted the strategic importance of digital enablement platforms in their sales operation:

"Technology is not just an enabler but a strategic asset. We use different digital applications to gather actionable insights, which allows us to anticipate customer needs and personalize our approach" - Respondent 10.

This statement reflects the growing consensus that these technologies are essential to modern sales strategies. Salespeople serve as a vital link between a firm's capabilities and the evolving needs of customers. When SEPs are integrated with CRM systems, they provide seamless access to customer information, acting as a central hub for sales interactions. This enables sellers to share and update key stakeholders within the purchasing committee throughout the buying process (Peterson et al., 2021a, 2021b).

These channels are known as digital sales rooms (Gartner, 2023) that sales professionals can use to present and manage interactions and information during the sales process. It works as a one stop shop, or an experience centre (Mukhopadhyay et al., 2025). In this digital sales rooms, salespeople share with clients, all documents related to the negotiations, broadcast video messages, contact details and presentations

about the products/services. AI systems work on the background analysing each interaction and predicting the likelihood of a positive sales conversion, and recommending actions to the sales professional, therefore enhancing sales management, improving efficiency, and facilitating accuracy of pipeline forecast. Additionally, some SEPs have integrated digital signatures in the digital sales rooms to facilitate the progress and formalization of deals.

Interviewees revealed various tools utilised across distinct stages of the sale process (Fig. 2). While traditional sales methods remain valuable in later stages of the sales funnel, during initial sales interactions (top-of-the-funnel), SEPs are increasingly employed by marketers to automate tasks previously handled by sales professionals. This finding supports and expands upon the research of Rusthollikarhu et al. (2022), who catalogued over 150 SaaS tools adopted by professionals to manage customer journeys. Furthermore, it adds more insights to Mukhopadhyay et al. (2025) that investigated how sales enablement is enhanced through the adoption of diverse AI solutions and systems. However, it contradicts previous empirical evidence that SMEs consider automation tools unaffordable and unsuitable for their business (Corsaro and D'Amico, 2022). This means that rapid advancements in AI-enabled technologies are making these tools more affordable.

Furthermore, we support previous claims suggesting that sales automation surpasses human salespeople in the early stages of the sales funnel (Chang, 2022).

"IBM's new Watson is now part of Microsoft for natural language processing, so we do a lot of voice spots, and if you are going into one of our big customers that uses natural language processing, you have to understand about the technology. So, tell me, (anonymized name), how does this work? What does this actually mean? So, talk about a bit about neural networks and how does the technology work? How do I make sure that I am getting high performance? How can I train my system? Compliance knowledge, technical knowledge" – Participant 5.

The bidirectional arrows in the Smart Sales Funnel (Fig. 2) indicate that SEPs are used throughout the entire sales process, while the soft blue shadow boxes highlight that even when sales professionals are using traditional sales methods, SEPs are essential to manage every interaction during the seven stages of the sales funnel (Dubinsky, 1981). Consequently, these tools allow real-time monitoring of sales team performance.

Some participants highlighted the importance of digital tools that help sales professionals identify potential customers more efficiently. These findings support the idea that digital tools can motivate

salespeople to acquire new skills and adopt a customer-centric approach (Rusthollikarhu et al., 2022; Román and Rodríguez, 2015).

"We are building a pipeline, so we are building people who have business development skills, who can engage people in different ways and then they come into sales that way. But the people who come straight into sales, we really want them to be very much focused on. Need to be digitally aware, able to use things like Salesloft. Being able to more sophisticated in terms of their personalization of emails." – Participant 7.

Interviewee evidence highlights the need for businesses to be agile and adaptable, with a focus on continuous learning, when integrating SEPs. As technologies evolve, so must the organisational structures, strategies to retain and attract talents, and sales processes of the firms that employ them. This dynamic relationship between technology, people and organization is crucial for maximizing the benefits of these tools while maintaining a competitive edge in the rapidly changing sales environment.

The findings presented provide robust evidence in support of Proposition 1. Participants statements emphasise the significance of hiring individuals already proficient in specific digital tools. This approach mitigates the steep learning curve associated with mastering new technologies, ensuring a smoother integration of new hires into the company's digital ecosystem. The emphasis on salespersons' knowledge of SEPs and the importance of using these tools to gain insights about clients and competitors emphasizes the crucial role of digital skills in improving sales performance (Marshall et al., 2012; Jang and Nemeh, 2017). The growing use of digital tools in sales, coupled with evolving sales roles, stresses the crucial need for strong digital skills for sales professionals.

4.2. Marketing ownership in the sales process

Proposition 2 posits that sales enablement platforms accelerate firm performance by enabling marketing ownership of the B2B sales process, enhancing efficiency and driving targeted value creation throughout the sales process. Our research demonstrates that marketing's role has evolved beyond demand generation (through content creation and digital interaction) to encompass sophisticated customer behaviour analysis facilitated by these tools. The invisible boundary conditions between sales and marketing are evident as marketing teams increasingly engage with prospects at the top of the sales funnel.

"The split between sales and marketing is getting very blurry. In the marketing team, we have 15 marketing people that are dealing with the top

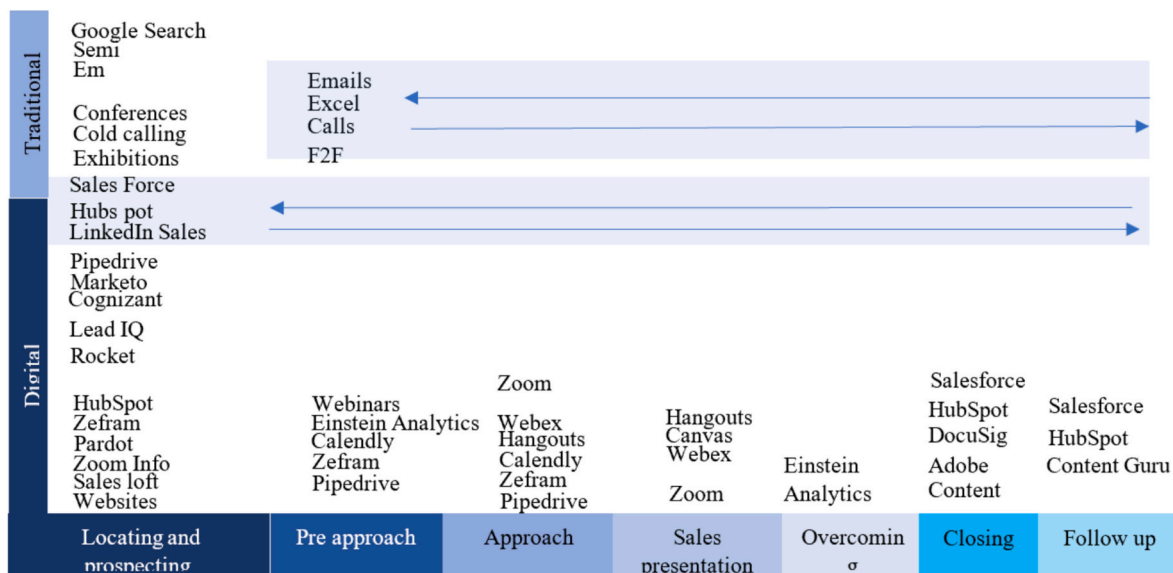


Fig. 2. Smart sales funnel. Source: Authors.

end of the sales funnel". – Participant 18.

Digitization significantly influences key performance indicators, particularly sales conversion rates from marketing qualified leads. This has driven the emergence of joint reward schemes that include marketing professionals, incentivizing them to generate high-quality leads. Concurrently, sales teams now engage exclusively with these pre-qualified leads, optimising sales efforts. This integrated approach, where marketing plays a crucial role in the early stages of the sales process, requires a unified management structure for sales and marketing, aligning with the perspectives of Mullins and Agnihotri (2022) and Corsaro and D'Amico (2022).

"A salesperson does not get involved until there is a lead that has been qualified by marketing, and then that we have another layer of people that get involved turning that marketing qualified lead into a sales qualified lead. It is only then that a salesperson gets involved and the prospect talk to a real person." – Participant 18.

Consequently, marketing professionals assume a pivotal role in orchestrating and overseeing automated processes, ensuring desired outcomes and expanding their digital market presence (Audretsch and Belitski, 2024). Marketing teams are now responsible for qualifying prospects, anticipating their conversion into sales opportunities. This aligns with existing research emphasizing the significance of adaptive selling in driving sales performance (Ohiomah et al., 2019). However, our findings indicate that these tasks are increasingly delegated to marketing professionals rather than internal sales teams.

"Participant 19 aptly summarized this shift: *"I am going to call it generalized e-mail spamming. These companies that send out a newsletter, then a factoid, and then you know a little bit of information. They just bombard their customer base with these bullet points..."*

This heightened emphasis on marketing automation raises concerns about information overload for customers. Consequently, participants reported a decline in conversion rates as companies increasingly automate activities in the initial stages of the sales funnel.

This analytical capacity is employed to create tailored content for diverse audiences, a practice that participant 2 describes: *"Provide information based on GeoCities... perhaps give other materials more or greater visibility to visitors who are coming through from France, Germany, Spain."* This approach contributes to the micro-segmentation trend in marketing, suggesting an overlap between marketing and sales in creating value propositions, previously a domain of sales professionals (Alnakhlil et al., 2021).

"When we roll out with the customer, we capture all the usage data from their employees—there are hundreds, even thousands, of metrics we gather. We use Tableau to generate internal reports, which allows us to track customer adoption and usage, helping us shape an account plan. Then we use Marketo." – Participant 1.

"We will create what you will know as a Marketing Qualified Leads (MQL). So, we will have people visiting our website and we will obviously use analytics on the website. It might be something like Marketo that we are using to analyse." – Participant 4.

Sales directors are leveraging SEPs for an in-depth analysis of sales activities, which complements traditional CRM features by correlating various data points across the sales cycle. This analytical insight is crucial for managing customer engagement, ensuring that the consistency and standardization of sales interactions are maintained. Participant 1 emphasizes, *"There is also an element of the journey consistency... you need to run a thread of consistency through that"*. This finding is in addition to the suggestions that a comprehensive understanding of the customer journey by different members of a purchasing committee is a prerequisite to enable the sales firm to adapt and personalize content to buyers involved in an iterative customer journey (Terho et al., 2022; Mukhopadhyay et al., 2025).

We propose a blur effect and overlap of sales and marketing functions in the initial activities of a sales process, which extends propositions that companies should consider the integration of marketing and sales in a selling-purchasing journey (Rouziès et al., 2005; Järvinen and

Taiminen, 2016) and SEPs facilitating sales-marketing collaborations (Peterson et al., 2021a, 2021b; Mukhopadhyay et al., 2025), nationally and internationally (Audretsch and Belitski, 2023b).

The alignment of communication across various digital mediums is vital for attracting and engaging prospective buyers, as social media interactions play a pivotal role in building customer trust (Rose et al., 2021). The use of tools like LinkedIn Sales Navigator enables the identification of stakeholders affecting negotiations, addressing the increased complexity of the sales cycle, as noted by Participant 6, *"Our sales cycle has gone to six months... The economic climate COVID-19 has made everyone a lot more worried about signing off for software purchases."*

The involvement of numerous decision-makers in the purchasing process necessitates a comprehensive understanding of the customer journey, as more stakeholders conduct their research on offers and competition (Mukhopadhyay et al., 2025). Participant 2 highlights, *"The buying committee has collectively changed... Now that number is much higher, and it is somewhere between six to ten decision makers in the sales process."* Managing bids and engaging multiple stakeholders requires a strong team and a strategic approach to SEPs integrated with CRM systems. This ensures buyers receive precise and relevant information, facilitating customer engagement and knowledge sharing (Lauzi et al., 2023). Our findings align with recommendations to leverage AI within CRM systems and other digital tools to enable data-driven sales enablement strategies (Nguyen et al., 2024; Lauzi et al., 2023). For example, tracking digital buyers' engagement over time can help seller firms understand their purchasing stage (Terho et al., 2022). Additionally, we emphasise the importance of clear and simple communication. This ensures that the complexity brought by different members of the purchasing committee remains accessible to all stakeholders (Corsaro and Anzivino, 2021).

In summary, the integration of sales enablement platforms is reshaping the sales process. By facilitating collaboration between marketing and sales (Mukhopadhyay et al., 2025), these platforms empower firms to navigate the complexities of modern sales processes, from lead generation to deal closure. This integration aligns with the extended propositions of Rouziès et al. (2005) and Järvinen and Taiminen (2016), who advocate for the convergence of sales and marketing functions throughout the customer journey. The insights provided by the interviewees corroborate the proposition that SEPs are instrumental in enhancing sales-marketing collaboration, significantly expanding the capabilities of sales professionals beyond the limitations of traditional systems (Peterson et al., 2021a, 2021b).

4.3. Strategic implications

Proposition 3 suggests that SEPs drive value creation by integrating human interaction within digital collaboration and communication. These platforms, with their diverse functionalities, not only bridge the gap between knowledge and action in sales but also enable innovative value-creation strategies. Our contribution to the theoretical discussion builds on Agnihotri et al. (2023), showing how SEPs prompt organisational adaptations in response to changing market demands. Our findings indicate that these adaptations are essential for firms to fully leverage digital tools. SEPs, with their wide-ranging capabilities, help translate market knowledge into actionable sales strategies, ultimately enhancing value creation for sales organisations. Table 3 outlines examples of SEPs, detailing their sales enablement capabilities, the specific functions they support, and the value they generate for sales organisations based on participant insights. This analysis demonstrates how SEPs contribute to value creation within seller firms, as observed in the study's interviews.

It is demonstrated that the adoption of these tools can catalyse innovation, advance the development of new workflows, and facilitate the adaptation, acquisition, or combination of resources.

The integration of these technologies across sales processes has introduced a paradigm shift in how sales activities are conducted.

Table 3

Value creation by sales digitization and sales progress.

SEPs	Sales Enablement Capability	Enhanced Sales Functions	Value Created to the Sales Firm
Pardot	Market knowledge competence (Li and Calantone, 1998)	Machine learning is used to select leads with highest probability to purchase.	Reduce costs per lead and maximize salesperson efforts by allocating resources in warmer leads with higher potential to close a deal.
Zefram	Market orientation–innovativeness capability (Menguc and Auh, 2006).	Construction of sales playbooks, sales training and analytics about potential customers.	Higher accuracy and precision in the prospect stage of the sales process, reducing costs and improving conversions.
Waalaxy	Online personalization capabilities (Ying et al., 2006); Sales force management capability (Guenzi and Habel, 2020).	Support lead generation through automation of connection requests and messages using social media. Analysis of lead engagement with online content, flagging to sales teams the best moment to approach the lead, enabling warm calling and suggesting adaptations to content.	Faster conversion of prospects into customers. Lower acquisition costs per customer.
Rocket Reach	Customer knowledge capability (Menguc et al., 2013).	Advanced lead identification enabling personalized and more precise interaction with potential customers.	Faster conversion of prospects into customers due to higher precision. Lower acquisition costs per customer.
Cognizant	Customer knowledge capability (Menguc et al., 2013).	Real-time data analytics integrating customer behaviour with internal databases.	Higher sales and marketing management capacity, knowledge management and accuracy of sales forecasting.
Adobe Marketo	Customer knowledge creation capability (Menguc et al., 2013); Market research capability (Morgan, 2012).	Build predictive market segmentation, sentiment analysis of interactions with leads.	Higher prospect engagement with content promoted by the seller firm. Accuracy augmentation of sales hunting.
Einstein Analytics and Gong.io	Sales force management capability (Guenzi and Habel, 2020).	Automation of sales workflows. AI generated emails, conversations, sales coach guide salesperson throughout the sales process, with AI generated instructions.	Higher sales and marketing management capacity. Higher accuracy of sales forecasting and creation of relevant content.
Content Guru	Customer knowledge capability (Menguc et al., 2013); Market research capability (Morgan, 2012).	Integration of different social media to track and analyse the interactions potential customers have with content posted on social channels.	Knowledge management and customer engagement.
Docusign/Adobe sign	Sales force management capability (Guenzi and Habel, 2020).	Digital signature of deals and contracts with automated workflows.	Accelerating the conclusions and formalizations of deals with customers.

Source: Authors.

Participant 9's insight attests to the scalability achieved through technology: *"Being able to do a lot. A lot of scaling up to the extent that's not imaginable without technology"*. This sentiment captures the essence of value creation through SEPs, highlighting the exponential reach these platforms provide, which was previously improbable.

Efficiency gains are another aspect of value creation brought forth by SEPs, as observed in the conduct of sales meetings. Participant 11 remarks on the impact of online tools: *"In the past, if you were traveling you could maybe get two or three meetings a day. I'm regularly having eight or nine meetings in the day"*. This increased efficiency underscores the role of SEPs in streamlining sales processes, thus freeing up valuable time for sales representatives to focus on higher-value activities.

The advancement of AI within sales processes signals a deeper integration of technology within human-led activities also reflected in prior research on AI and firm performance (Colombelli et al., 2023b). Participant 1 reflects on this progression: *"I feel like we and other companies are going deeper into automating sales pipelines"*. This evolution is indicative of the transformative impact digital platforms have on sales strategies, offering new avenues for executing tasks and combining resources effectively.

However, the proliferation of SEPs requires an agile response from companies to maintain a competitive edge. Participant 3 describes the dynamic nature of sales technology: *"So, it is a journey of change because what we find is that technology is not static. We are deploying stuff all the time. And therefore, it is changing all the time."* This constant evolution demands that companies swiftly adapt to technological advancements and evolving client needs throughout the sales process, demonstrating the critical importance of a continuous monitoring and adaptation mindset to drive performance gains.

Monitoring the adoption and value added by SEPs is paramount, as indicate by Participant 1: *"The Board will also look for what are the red, amber, and green status in your customer accounts, what the renewal and use utilization is. And whether we have a mitigation plan to make sure they have high adoption, high usage and hopefully how it drives the expansion"*. This strategic oversight ensures that investments in the platforms are not only about the acquisition of technology but also about sustaining an

environment where human resources and value creation can flourish.

The role of human resources in this digitally enhanced sales process is further emphasized by Participant 2, who notes, *"It is our job as a business to make sure that we have got enough people at different stages"*. The comment speaks to the necessity of having a workforce capable of navigating the complexities of a digital sales process, furthering the argument for value creation through human-SEPs collaboration.

4.4. Value creation (financial and non-financial metrics)

Interviews revealed key metrics used by participants to evaluate SEPs effectiveness, including increased revenue, higher conversion rates, faster deal closure, reduced costs associated with data analysis and unqualified leads, and improved project pipeline velocity. Interviews also identified several non-financial metrics used by firms, including improved prospecting quality, enhanced customer engagement, increased lead capacity per salesperson, reduced time spent on low-value tasks, increased inter-organisational collaboration, and improved information transparency. These insights contribute to a deeper understanding of how SEPs influence both quantitative and qualitative dimensions of sales performance.

4.4.1. Financial metrics of success of SEPs implementations

Most participants highlighted conversion rates as a key indicator of SEPs success, demonstrating the ability of these platforms to identify and engage high-potential leads effectively.

"Tracking the percentage of leads that convert into paying customers allows us to assess whether the platform justifies its investment by delivering tangible revenue results." – Participant 1.

Participants mentioned that SEPs adoption enables targeted revenue growth. By enabling segmentation, sales teams are better positioned to differentiate customer segments and when required focus on high-value customer groups to increase sales. As one participant stated, *"Our system allows us to identify the 20% of customers contributing 80% of revenue, ensuring strategic efforts are concentrated on the segments that matter most."* – Participant 3. This capability to select customer segments and

differentiate between them allows sales firms to focus their efforts on high value-added customers, thereby increasing overall turnover.

SEPs also enabled automating prospecting and lead qualification processes. Several respondents indicated that these tools supported reduction of costs associated with manual data analysis and unqualified leads, which affects final profit margins. Participant 2 noted, *"We measure the cost per qualified lead to understand how effectively the platform enhances efficiency and reduces overheads in our sales operations"*.

Another widely recognised metric was the reduction in time required to close deals which was mentioned by several participants. Particularly the automation of communication and lead scoring in early stages of the sales funnel. This enables moving into negotiation process quickly and facilitating informed discussions between sellers and potential buyers. Participant 5 explained, *"With automated tools, we no longer waste time on unqualified leads. The focus is on those most likely to convert, and this has drastically reduced the length of our sales cycle."*

Another key financial performance measure was the speed at which projects moved through the pipeline. As Participant 7 noted, *"The SEP categorizes opportunities by their likelihood of closing, enabling us to prioritize advanced-stage deals and maintain consistent pipeline progression"*.

Summarizing the insights from the interviews, financial performance measures could be divided into four categories. First, related to customers, such as conversion rate improvement, which means SEPs help to increase the percentage of prospects (potential customers who have shown interest in a product or service) that become paying customers. This metric directly reflects how effectively SEPs enable sales teams to identify, engage, and convert high-potential leads. The second category relates to sales growth, which often occurs through segmentation. SEPs help boost revenue by guiding sales teams to focus their time and resources on customers who bring the most value. This also includes looking at profit margins, such as how much profit is made from sales and from the initial investment. We also consider how productive the sales team is overall. Since SEPs automate routine tasks, salespeople can spend more time on important, high-impact work, which increases the amount of revenue each employee can generate.

The third category focuses on reducing costs. By automating data handling, SEPs help cut down on the time and labour needed, which lowers wage and operational costs. The fourth category is about shortening the sales cycle. Thanks to automation, SEPs help sales teams find customers and close deals faster, making the whole process more efficient.

4.4.2. Non-financial metrics of success of SEPs implementations

Many participants valued the adoption of SEPs for its ability to enhance understanding of prospecting quality using data-driven insights and automated communication tools. One noted, *"We rely on these systems to pre-qualify leads and identify patterns in customer behaviour, which makes prospecting less random and more strategic."* – Participant 8.

Non-financial measures also include improving customer engagement. For example, how often customers open emails (open rates), click on links within them (click-through rates), and how long they interact with the content (engagement time). These indicators are often used to show how relevant and effective SEP-generated communications are in supporting sales performance. A participant stated, *"Dashboards allow us to monitor engagement trends, such as how prospects interact with our messages, which is invaluable for adjusting our campaigns."* – Participant 9.

Adoption of SEPs increase team productivity, such as the number of leads managed per salesperson and reduction in time allocated to high-value activities, were also significant. As one interviewee explained, *"Automation provided by the system frees up sales teams to focus on strategic tasks, enhancing their overall efficiency and output. The platform not only tracks progress but also provides reminders and updates, which help the team stay organised and meet deadlines."* – Participant 10.

Other participants also noted that adopting SEPs supports collaboration and transparency within organisations. They measured these benefits using metrics such as task completion rates and adherence to

sales playbooks (a sales playbook being a set of guidelines, best practices, and strategies that sales teams follow to engage with customers and close deals effectively). One respondent remarked, *"The ability to see what everyone is working on, from task statuses to lead progress, has improved coordination between sales and marketing teams."* – Participant 8.

Interestingly, Participants 7 and 9 mentioned that using SEPs could also help improve customer satisfaction and keep customers coming back. The interviews showed that SEPs play a role in making customers more satisfied and loyal (both of which are often measured by a score called Net Promoter Score (NPS)), which shows how likely customers are to recommend a company to others. Several participants highlighted that using personal and data-driven communication helps build customer trust. For example, Participant 9 observed, *"Customers appreciate that we can address their needs with data-backed insights, which builds trust and encourages repeat business"*.

Adoption of SEPs helps to reduce onboarding time and consistency in sales pitches by both junior and senior colleagues delivering clear training benefits. As Participant 13 explained, *"The platform standardises sales approaches, helping newer team members perform at the same level as their more experienced counterparts"*.

Based on the findings we distinct four nonfinancial performance measures of SEP adoption Firstly, SEPs adoption improves customer engagement metrics, with more customers expressing interest in products and services, also affecting click-through rates, and communications with target audiences.

Secondly, SEPs adoption enables cross-functional collaboration within organization and with external stakeholders, including customers. SEPs adoption enhance coordination between marketing and sales teams through shared dashboards, task tracking, and sales playbook adherence which generates more interest and quicker information exchange. Thirdly, customer retention rate and social capital could be improved. Enhanced personalization enabled by SEPs and data-driven services contributes to improved customer satisfaction and higher customer satisfaction scores such as net promotor scores. Fourthly, sales service consistency especially with junior staff, by standardizing pitches and enabling quick onboarding.

5. Discussion

This study analyses the role that SEPs adoption plays in facilitating sales process and eventually leading to both financial and non-financial outcomes. Our results enrich the discourse in the literature on the role of sales technologies adoption for firm performance and add to prior research (Peterson et al., 2021a, 2021b; Badrinarayanan et al., 2022; Agnihotri et al., 2023; Mukhopadhyay et al., 2025). Previous studies primarily examined the impact of customer-centricity, information sharing (both internal and external), and the speed of technology adoption and adaptation on sales performance (Agnihotri et al., 2023; Mukhopadhyay et al., 2025). These studies found that the adoption of SEPs and other digital technologies significantly enhances the sales performance of SMEs by providing competitive advantages. These advantages include improved product quality, increased operational efficiency, and enhanced customer engagement (Badrinarayanan et al., 2022; Agnihotri et al., 2023; Mukhopadhyay et al., 2025).

In contrast, our study focuses specifically on how the adoption and implementation of SEPs can facilitate the management of sales processes and customer engagement. We investigate how SEPs can be leveraged to enhance both financial growth (through increased sales) and non-financial aspects of firm performance (through optimised sales processes and human-machine interactions). Based on our findings we developed Table 4 that can be used as a conceptual framework illustrating how SEPs enhance a firm's capabilities through three interlinked dynamic capabilities, drawing on Peterson et al. (2021a, 2021b) conceptualisations: insight triangulation, enablement infrastructure, and sales support development. We find that these capabilities align with the key findings of this study and are detailed in Table 4, which outlines

Table 4

SEPs: Enhanced Capabilities and Key Performance Metrics.

How SEPs enhance sales firms' capabilities	Enhanced dynamic capability	Suggested KPIs
<p>Enabling functional and cross-functional business functions</p> <p>Faster utilization of information about customer's needs</p> <p>Automation of inbound and outbound sales activities</p> <p>Real-time management of sales activities</p> <p>Content sharing tailored to regional and customer-specific contexts</p> <p>Stabilizing the cost of sales</p>	Insight triangulation	<ul style="list-style-type: none"> - Customer acquisition cost (CAC) - Speed of response to customer queries - Reduction in sales cycle time - Conversion rates - Percentage of time spent on selling activities - Sales conversion rates
<p>Analytics of B2B sales activities and customer journey</p> <p>Accurate and precise sales pipeline forecasting</p> <p>CRM augmentation through AI analytics and predictions</p> <p>CRM integration with SEPs</p> <p>Consistency and standardization of B2B customer journey touchpoints</p>	Enablement infrastructure	<ul style="list-style-type: none"> - Pipeline performance - Deal closure rate after support interventions - Alignment index between marketing and sales KPIs
<p>Speedy and accuracy of sales tasks</p> <p>More productivity in the sales reach</p> <p>Adapting strategies to meet rapidly changing market conditions</p> <p>Seamless onboarding and professional sales development</p> <p>Integrate flexibility into sales enablement strategies and foster a culture of continuous learning and adaptability.</p> <p>Unified and standardised sales approaches</p> <p>Providing immediate support for sales before critical customer meetings</p>	Sales support development	<ul style="list-style-type: none"> - Retention rate of salesperson - Revenue and profit growth (regional, per customer, per product mix) - Customer engagement metrics (i.e. Net Promoter Score) - Time to close - Percentage of time spent on selling activities

Source: Authors.

their potential impact on firm performance, and suggesting the KPIs mentioned by participants. We also created [Table 5](#) to show how our SEPs framework fits alongside other well-known frameworks used in digital sales. This helps highlight how our work adds something new and valuable to what already exists in the field of sales digitalisation.

Using the socio-technical model of the sales force (Hartmann and Lussier, 2020) as a starting point, our findings show how SEPs help improve the sales process and support different aspects of a company's performance. We build on this model by showing how SEPs help sales teams better understand customer needs, engage with the right people, and improve the overall customer experience. SEPs also make it easier for employees to access and share important knowledge within the company (Peterson et al., 2021a, 2021b). This expands on earlier research by showing that SEPs are more than just digital tools or CRM systems, they also help companies gain deeper insights into customers and the market. Additionally, we empirically demonstrate how SEPs offer a more granular perspective on buyer behaviours and market trends. By incorporating a customer-centric component into the socio-technical model of sales engagement (Hartmann and Lussier, 2020), our findings highlight how firms can achieve both higher sales performance and greater customer satisfaction, resulting in financial and non-financial benefits.

Our conceptual model explicitly identifies the role of AI-powered tools within SEPs in enabling predictive analytics, improving pipeline forecasting accuracy, and refining customer segmentation. This extends the previous findings of [Mukhopadhyay et al. \(2025\)](#) by demonstrating

Table 5

Competing frameworks in sales digitization and new elements of the concepts introduced by this study.

Framework	Key elements in existing frameworks	New elements introduced by this study
Socio-Technical Model (Hartmann and Lussier, 2020)	Integration of technology with salesforce processes. Emphasis on structural and human components in sales enablement.	Expansion of the socio-technical model to include customer engagement and AI-driven insights. Introduction of SEPs as central enablers.
Sales Enablement Capability (Peterson et al., 2021a, 2021b)	Conceptualizes sales enablement as a dynamic capability. Focus on insight triangulation, enablement infrastructure, and sales support.	Empirical validation of SEPs in bridging cross-functional collaboration. Greater focus on marketing-sales alignment KPIs.
AI-Powered Sales Enablement (Mukhopadhyay et al., 2025)	Integration of AI for predictive analytics. Automated pipeline forecasting and customer segmentation.	AI-enhanced real-time decision-making. More granular understanding of buyer behaviours through SEPs. Improved AI-driven customer segmentation.
Customer-Centric Sales Enablement (Høgevoid et al., 2024)	Customer knowledge enhancement through digital tools. Personalization in sales interactions. Impact of CRM on sales efficiency.	Extension beyond CRM tools to full-fledged sales enablement ecosystems. Demonstrates scalability and adaptability of SEPs in dynamic markets. Further contextualization of
Sales Digitization & SEPs Adoption (Mukhopadhyay et al., 2025)	Focuses on SEPs adoption as a dynamic capability. Examines the interplay between digital tools, sales management, and firm performance.	SEPs within firm-wide collaboration. Introduces new performance KPIs (alignment index, sales outreach time, retention rates).

Source: Authors.

the strategic value of AI-driven insights in sales enablement.

Our work within the socio-technical model (Hartmann and Lussier, 2020) clarifies the enablement infrastructure, emphasizing how SEPs foster cross-functional collaboration through centralized data access, automated workflows, and AI-driven insights. These mechanisms ensure seamless coordination between sales, marketing, and customer service, reducing operational misalignment and enhancing firm-wide efficiency. This extends the research of Hartmann and Lussier (2020) and Rangarajan et al. (2020), who stressed the importance of integrating sales and marketing efforts to eliminate operational silos and improve firm-wide strategies.

The impact of SEPs implementation can be assessed through key performance indicators (KPIs), such as the accuracy of sales pipeline forecasts, deal closure rates (the percentage of sales opportunities that successfully result in a completed sale), and alignment between marketing and sales. SEPs also help different departments work better together by offering shared dashboards to track progress, tools that automatically check if a sales lead is a good fit, and systems that use AI to predict future sales.

These tools help synchronize decision-making processes across teams, reducing inefficiencies and improving collaboration. These contributions reinforce and expand the findings of [Peterson et al. \(2021a, 2021b\)](#), [Lauzi et al. \(2023\)](#), and [Mukhopadhyay et al. \(2025\)](#).

Sales support development, as a dynamic capability, focuses on continuously enhancing sales teams' ability to close deals efficiently, identify high-potential customers, and allocate resources effectively. [Lauzi et al. \(2023\)](#) emphasise that effective sales enablement requires e-learning platforms, tailored training sessions, and the continuous alignment of sales strategies with evolving market needs. Our study corroborates this by showing how SEPs contribute to sales support development through real-time data access, automation of

administrative tasks, and intelligent sales recommendations.

The adaptability facilitated by SEPs is particularly relevant in dynamic environments, where firms must respond to the diverse needs of digitally empowered buyer committees. Høgevoid et al. (2024) highlight the importance of customer relationship management solutions and AI-driven insights in delivering tailored content, actionable recommendations, and real-time support for sales teams. These capabilities directly influence revenue and profit growth across different markets and customer segments, as corroborated by participants and existing literature (Peterson et al., 2021a, 2021b; Mukhopadhyay et al., 2025).

SEPs enable interdepartmental collaboration by integrating shared CRM platforms, predictive analytics, and internal communication channels. For instance, automated lead management systems ensure that marketing-qualified leads (MQLs) are seamlessly transferred to sales teams, while AI-driven customer insights help align sales strategies with personalized marketing content. This structured integration enhances coordination, minimizes redundancy, and facilitates real-time decision-making across departments.

Finally, SEPs enhance scalability and innovation by balancing human expertise with technological capabilities (Hartmann and Lussier, 2020). This integration enables firms to automate routine tasks while prioritizing high-value strategic activities, fostering a synergistic environment for growth. The strategic alignment of people, processes, and technology is essential for achieving a sustainable competitive advantage (Lauzi et al., 2023; Rangarajan et al., 2020; Mukhopadhyay et al., 2025). Important measurements, like how well companies keep their sales staff, how quickly they contact new leads, and how much time salespeople spend selling, exemplify how SEPs can help improve overall business performance. In conclusion, SEPs help businesses become more adaptable by combining insights from different sources, creating the right support systems, and helping to grow their sales teams (Peterson et al., 2021a, 2021b). When these efforts are linked to clear goals, companies can grow in a steady way, reduce costs, and better keep up with the changing demands of modern B2B sales.

5.1. Theoretical implications

Our contribution to technology forecasting and social change literature is in developing conceptual propositions and empirically validating them by drawing on the extant literature (Badrinarayanan et al., 2022; Kauffman and Pointer, 2022) on digital tool adoption (Audretsch and Belitski, 2024; Mukhopadhyay et al., 2025). SEPs adoption can facilitate the enablement of sales capabilities, such as sales force management and customer knowledge creation. Value is created for the sales firm through improvements in sales processes, including better cross-departmental collaboration, accuracy of sales forecasting, precision in communication within and outside the firm, stabilization of costs of sales, and agility to adapt sales activities to a digital-first purchasing process (Ramos et al., 2023; Rustholkarhu et al., 2022; Thaichon et al., 2018).

Building on Mukhopadhyay et al. (2025), who conceptualized sales enablement as a dynamic capability, this study provides expanded exploration of how SEPs specifically impact different stages at the sales process level. While Mukhopadhyay et al. (2025), emphasized the role of digital technologies in facilitating internal work efficiencies, this paper identifies and elaborates on four distinct pathways through which the adoption of the platforms enhances firm capabilities. These pathways clarify the operationalization of enablement infrastructure, bridging strategic enablement with actionable sales practices, thus addressing gaps in the integration of organisational resources and frontline processes highlighted in their study. Notably, digitalization of sales give emphasis to the transformative potential of digital tools (Chang, 2022). These tools not only enhance the selling process but also facilitate collaboration between sales representatives and clients (Rustholkarhu et al., 2022).

The findings substantiate and expand upon McClure et al. (2024),

who discussed AI's transformative potential in automating and augmenting sales tasks. By focusing on SEPs' role in enabling collaboration and addressing human-machine interaction challenges, this study highlights how AI-driven SEPs equip sales teams to manage customer insights and align internal processes effectively. Specifically, this study helps us better understand how people and technology work together in sales. It adds to the work of McClure et al. (2024), who focused on how artificial intelligence (AI) is used in areas like lead scoring (which means ranking potential customers based on how likely they are to buy), and conversation analytics, which involves using AI to analyse sales conversations to improve communication and results. This aligns with their call for research on AI's interplay with sales organisations, offering a detailed qualitative account of these digital tools as a conduit for integrating AI into sales enablement practices.

The study contributes to technology forecasting and social change literature by expanding knowledge about the enablement infrastructure dimension of SEPs and by explaining how it is adapted for sales. It also demonstrates how sales executives, their sales teams and marketing use and benefit from sales digitization (Chaker et al., 2022; Corsaro and Anzivino, 2021; Zheng et al., 2023). Drawing on the socio technical model of sales force change (Hartmann and Lussier, 2020), the study reveals how SEPs address the complexities of sales digitisation by balancing human and technological inputs across the B2B sales process. Unlike Mukhopadhyay et al. (2025), who focused primarily on internal efficiencies and customer-facing interactions, this research explored the collaborative potential of SEPs in aligning sales, marketing, and customer success teams. It identifies how these platforms support role-specific adaptations, such as empowering sales managers with actionable insights and fostering cross-functional collaboration, thereby extending the conceptual framework of dynamic sales enablement capabilities. Further, the study reveals that the adoption of SEPs facilitate intra-firm collaboration and relationships (Claro et al., 2024), as marketing and sales KPIs converge and the evolving ownership of marketing in the early stages for the B2B sales process (Corsaro and Anzivino, 2021; Hartmann and Lussier, 2020).

5.2. Practical contributions

There are a number of practical implications that managers in marketing and sales can derive from these results. Firstly, the findings highlight the importance of digital skills endowment within sales and marketing teams. To maximize SEPs benefits, managers must develop a plan to upskill sales and marketing teams in digital skills. To implement this, conducting a Skill Gap Analysis can be an initial step. In addition, when adopted with established framework such as the Design Science Research Method (DSRM) it can also lead to the design and co-development of artifacts that can help address the skills gap (McKenney and Handley, 2020). In addition, managers can adopt established or outsourced certification programs to validate proficiency and incentivize continuous learning (Prebil and McCarthy, 2018). Furthermore, managers need to adapt hiring practices to prioritize candidates with pre-existing competencies in SEPs. In addition, incorporating SEPs skills in job descriptions as well as partnering with educational institutions to ensure that their curriculum is informed by industry needs can help bridge skills gaps at the hiring stage. This ensures a shorter integration period and a quicker realization of platform benefits.

From a senior leadership perspective, CEOs and other C Suite roles should champion digital literacy initiatives, and allocate budgets for training and development to reflect the importance on digital literacy enhancement. CEOs may also want to redefine roles in sales and marketing to optimise the use of technology. Enable marketing teams to own and manage early sales funnel activities, while sales teams focus on advanced stages of lead conversion. SEPs could be used strategically to create faster feedback loops, enabling better allocation of marketing resources and improved demand generation strategies. Managers of

SEPs and CEOs may want to revise the performance metrics by using both financial (e.g., revenue growth, conversion rates) and non-financial metrics (e.g., engagement levels, team productivity) indicators to evaluate SEPs effectiveness comprehensively. Implement mechanisms like digital literacy monitoring and AI-driven analytics to continuously evaluate team performance and return on investments on these platforms.

CEOs need to treat SEPs as an integral part of strategic planning to enhance customer engagement and personalize interactions effectively and thus, foster unified management structures that integrate marketing and sales for seamless collaboration throughout the customer journey.

Policymakers may want to subsidize training programs as they are expected to provide incentives or grants for SEPs related workforce development, especially in medium businesses. Policy should enable the affordability of SEPs solutions for smaller firms to democratize access to advanced tools. Our practical recommendations for managers of SEPs, CEOs and policymakers and how they can be implemented are summarized in Table 6.

6. Conclusion

The exploration of sales digitization within technology forecasting and social change literature validates three theoretical propositions we posit in this study, each highlighting a distinct facet of how sales digitization shapes business functions and processes and facilitates sales once the technology is adopted.

Firstly, the successful implementation of SEPs is contingent to changes that go beyond organisational structures, but that also include a more strategic use of hiring practices to ensure talent with the appropriate skills join the organization. This proposition highlights the

importance of businesses staying agile and responsive in an evolving digital sphere. Integrating sales enablement platforms requires strategic adjustments in organisational structure, talent acquisition, and sales processes. Companies that adapt effectively, for instance by creating multidisciplinary deal desks and recruiting for digital skills, are better equipped to maximize the benefits of these platforms. Such adaptation is not solely a reaction to new technologies but a deliberate strategy to align with the changing dynamics of digital sales channels.

Secondly, SEPs play a key role in enabling value creation through human-machine collaboration. Their integration into business functions connects knowledge with action, promoting innovation and efficiency in sales processes. The incorporation of AI and other digital tools within these platforms signifies a deeper use of technology in sales, requiring a workforce skilled in digital processes. In this context, value creation is not solely driven by technology but is greatly enhanced by the strategic and innovative application of human resources. This highlights the importance of a flexible corporate culture and a workforce capable of managing and benefiting from the complexities of digital sales environments.

Finally, we posit that use of digital technologies is a transformative in business practices for firms of different sizes and at various stages of firm lifecycle, however, to fully derive the benefits from these technologies firms need to ensure that their organisational structures, talent acquisition practices, and sales process design adapt toward greater integration between marketing and the sales process. Furthermore, by improving human-machine collaboration, value creation within the firm can be enhanced. These propositions highlight the dynamic nature of modern sales practices and the critical role of SEPs in driving effective, efficient, and innovative sales strategies in the digital age.

Table 6
Recommendations for practitioners and policymakers.

Criteria	SEPs Managers	CEOs	Policymakers	Implementation strategy
Digital Skills	Develop training programs and certifications and monitor skill gaps through Skill Gap Analysis and DSRM	Invest in digital literacy as a strategic priority. Senior leadership championing digital literacy initiatives.	Subsidize training initiatives for workforce upskilling in emerging technologies (e.g. direct grants and funding, tax credits for employer-sponsored training, development of National Skills Frameworks.	Design a tiered certification program (e.g., Bronze to Platinum) for SEPs usage tailored to different sales roles. Track digital adoption rates quarterly.
Hiring Practices	Recruit candidates that are proficient in SEPs tools. Include SEPs skills in job descriptions Partner with Educational Institutions.	Allocate resources to attract digital-savvy talent.	Incentivize hiring practices for roles requiring advanced digital competencies (e.g. tax breaks for hiring digital talent, support of apprenticeships and internships).	Include “SEPs proficiency” as a minimum requirement in job descriptions. Example: “Familiarity with Salesforce, HubSpot, or Outreach platforms required.”
Role Adaptation	Redesign roles to integrate cross-functional collaboration.	Align organisational structures with SEPs driven processes.	Encourage research and development grants for role evolution in digital sales.	Create hybrid sales-analyst roles (e.g., “Sales Data Strategist”) to integrate analytics into client engagement. Pilot programs with KPIs measuring collaboration. Implement weekly dashboards to share SEPs data across departments (e.g., deal velocity, lead quality). Run monthly optimization sessions based on analytics. Standardize reporting requirements. Promote open data initiatives.
Feedback Loops	Leverage analytics to optimise resource allocation.	Use SEPs driven insights for strategic decisions.	Mandate transparency in metrics reporting to promote informed decisions.	Define a balanced SEPs scorecard (e.g., cost-per-lead, NPS, sales cycle time). Integrate SEP metrics into quarterly business reviews. Deploy AI-based SEPs features such as predictive scoring or conversation intelligence (e.g., Gong.io or Salesforce Einstein).
Performance Metrics	Utilize dashboards for real-time tracking.	Align KPIs with holistic financial and non-financial goals.	Encourage standardization of SEPs related KPIs across industries.	Launch cross-functional “Sales-Marketing Alignment Councils” using SEPs data to drive joint decision-making. Set shared OKRs (Objectives & Key Results).
Technology Strategy	Deploy AI tools for customer journey personalization.	Integrate SEPs into long-term strategic planning.	Provide tax benefits for investments in advanced digital tools.	Offer SEPs access across all departments (not just sales) with tiered user roles. Example: Dashboard access for marketing and customer service.
Unified Governance	Foster collaboration between sales and marketing.	Develop unified strategies for marketing-sales alignment.	Promote frameworks for integration of sales and marketing in B2B and B2C contexts.	
Accessibility	Optimise SEPs for scalability and user-friendliness.	Focus on democratizing technology within the organization.	Support affordability through subsidies or industry partnerships.	

Source: Authors.

7. Limitations and future research

This study has several limitations. Firstly, the participants represent early adopters of technology in relatively stable markets with low volatility and slow growth. This limits the generalizability of our findings, as is common in qualitative research. Secondly, potential biases may exist due to the sampling method. All participants were heads of sales who volunteered to participate at a specific time and place. This "purposive sampling" may not accurately represent the broader population of firms using SEPs. Furthermore, the research team subjectively selected which heads of sales and CEOs to approach, potentially excluding certain demographics (e.g., companies in specific countries or industries). Future research following a similar methodology should consider a broader geographic and sectoral scope to provide empirical evidence. In addition, quantitative research with a wider range of sampling (i.e. multi-country/multi-industry) can provide a pathway toward greater generalisability.

The paper's findings suggest a potential area for future research on SEPs that are integrated into sales processes. They inherently collect extensive data from interactions between sellers and customers. Data collection and analysis using these platforms are crucial for enhancing customer engagement and sales efficiency and for providing actionable insights on sales and decision-making. For example, the use of tools like HubSpot, LinkedIn Sales Navigator, and Salesforce, as mentioned in the findings, implies a significant level of monitoring and analysis of sales activities. This level of surveillance, while beneficial for business optimization, raises questions about the extent and implications of monitoring sales representatives and marketing professionals. The constant tracking and analysis of their interactions, performance, and strategies could lead to concerns regarding privacy, job autonomy, intellectual property, and the psychological impact of working under continuous surveillance. Therefore, the paper supports a call for future research into the balance between effective use of AI empowered digital technologies for business growth and the ethical considerations surrounding the surveillance of sales and marketing personnel's work. This exploration is particularly relevant in understanding the societal changes brought about by digital transformation in the workplace, where data-driven management practices are becoming increasingly prevalent.

New studies examining the use of sales enablement platforms by individuals and departments can provide insights into how digital tools enhance collaboration across functions and influence market share and financial performance in organisations of varying sizes and sectors. Future research may address two pathways of research. The first aims to establish more relationships between the adoption of SEPs and firm

performance. Three key questions related to the adoption of these platforms and their impact on firm performance are: (i) What are the financial implications of adopting sales enablement platforms for small and medium-sized firms as well as established companies, and how do these implications differ for entrepreneurial ventures? (ii) What are the boundary conditions under which these platforms enhance firm performance, considering factors such as market share, productivity, job creation or reduction, sales growth, customer engagement quality, and customer satisfaction? (iii) What is the difference between using SEPs at different stages of the firm lifecycle? (iv) How other alternative SEPs instruments, such as digital sales rooms can, create additional value for Firms and complement existing technologies?

The second research pathway offers an opportunity to explore the intersection of technology, ethics, and workplace dynamics. As SEPs become integral to sales processes, their ability to collect and analyse vast amounts of data presents both significant advantages and ethical challenges. While these platforms enhance customer engagement, optimise sales strategies, and drive data-informed decision-making, they also introduce concerns about privacy, job autonomy, and the psychological effects of continuous monitoring. Understanding the implications of these technologies is essential for addressing the ethical dilemmas posed by data-driven management practices. Research in this domain should aim to identify frameworks that balance technological innovation with ethical and human-centric considerations, ensuring that SEPs contribute to both organisational success and employee well-being.

Possible research questions are: (i) How can organisations balance the use of sales enablement platforms (SEPs) for monitoring and optimising sales processes with the need to protect the privacy and autonomy of sales and marketing professionals? (ii) What are the psychological and behavioural impacts of continuous surveillance on sales and marketing personnel, and how does this influence their performance and job satisfaction? and (iii) What frameworks can organisations adopt to ensure ethical data-driven management practices while leveraging SEPs for business growth and innovation in digitally transformed workplaces?

CRediT authorship contribution statement

Fabio Oliveira: Writing – original draft, Validation, Software, Resources, Formal analysis, Data curation, Conceptualization. **Maksim Belitski:** Writing – review & editing, Visualization, Project administration, Investigation, Funding acquisition, Formal analysis, Conceptualization. **Rodrigo Perez-Vega:** Visualization, Methodology, Investigation, Formal analysis.

Appendix A

Table A

Literature review on the effects of digitization on sales.

Dimensions	Effects on Salesperson	Effects on the buying firm	Effects on the selling firm	Theoretical lens	Authors and Outlets
Hybrid sales structures (internal and external sales channels).	High reliance of sales professionals on digital technologies to execute tasks. Transfer of external sales activities to internal salesperson. Higher sales complexities in specific segments. Salesperson needs to influence internally to secure resources to fulfil the promises made to customers. Salesperson has	Value added services to customers. Complex relationship with suppliers, far reaching and blurred extending over period of time period, therefore the relationships are ongoing and dynamic. High reliance of sales professionals on digital technologies to execute tasks. Transfer of external sales activities to internal	Information systems are providing new opportunities to retrieve, synthesize and analyse customer information, information; therefore customer insight is an organisational capability. Selling of integrated offers (sterilization). Shift to consultative approaches. More ethical, transparency and accountability	Inside Sales Customer Value Creation Social Exchange Theory Customer Value-Based Theory Network Theory Service-Dominant-Logic Resource-Based View Socio-Technical Model of Sales Force Change	Ramos et al., 2023 (JBR); Marcos Cuevas, 2018 (IMM); Thaichon et al., 2018 (JPSSM).

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Table A (continued)

Dimensions	Effects on Salesperson	Effects on the buying firm	Effects on the selling firm	Theoretical lens	Authors and Outlets
Digital sales channels	to become knowledgeable about the customer business, not just experts in their products and services. Co-creation of services and solutions with customers. Sales automation prescribing the frequency and channel for interacting with customers. Salesperson need an integrated set of managerial competences, not just traditional selling-related skills for customer development and value creation. Salesperson is required to understand, collaborate with the customer (customer-centric sales method). Constant improvement in personal qualities above functional expertise. Acquire knowledge about customer management tools and techniques. High ethical standards.	staff. Higher sales complexities in specific segments.	demanding by customers. Our study contributes by identifying the value created by the adoption and usage of SEPs through sales enablement capabilities and enhanced sales functions.		
	Replacement of external for internal sales-person. B2B word of mouth increases number of quotations and transactions. The need to add more value in complex sales, higher focus on strategic orientation and ambidexterity. Reduced importance of face-to-face relationships between sellers and buyers.	Word of mouth increases number of quotations and transactions. The need to add more value in complex sales, higher focus on strategic orientation and ambidexterity. Reduced importance of face-to-face relationships between sellers and buyers. Higher sales person availability, convenience. Potential reduction of procurement costs. Independence and autonomy in the purchasing process. Higher risk of sales channels conflicts. E-Marketplaces enable optimization of supply and demand, and gain market intelligence.	New market reach, growing revenues. Sales person allocation to more added value activities. Facilitate insights into buyer preferences. Digital complements traditional channels.	Expectancy value theory Personal selling Strategic change in sales organisations Organisational change theory Socio-technical systems theory Ambidexterity and paradoxical leadership	Loro and Mangiaracina, 2022 (IMDS); Mai and Liao, 2022 (JBIM); Bongers et al., 2021 (JPSSM); Hartmann and Lussier, 2020 (IMM); Singh et al., 2019 (JPSSM); Thaichon et al., 2018 (JPSSM); Marcos Cuevas, 2018 (IMM); Syam and Sharma, 2018 (IMM).
	Internal sales person are more digital savvy than external sales person. Stronger need for external salesperson technical skills. Facilitates building relationships with customers, and acquire knowledge of existing and potential buyers' operations. Digital technologies improve inside sales performance, adaptive selling and lead follow-up intensity. Digital technologies can overload and stress salesperson decreasing job satisfaction. Sales professionals abilities to unlearn traditional mindsets, and be open to adopt technologies in their practices. High connectivity and real-time interactions within and outside the firm. Information technology	"Faster and better customer service. Facilitates building commitment and trust in relationships with suppliers. Digital technologies enable greater information accessibility and availability. Digitally embedded individuals place greater relevance on information collected online when making decisions, and are more willing to adopt innovations. Buyers feel more cognitive attached to sellers. Better coordination and collaboration between customer and seller. The need to acquire and implement technologies and disintegrate legacy IT systems. Change throughout the organization. Technology adoption has a positive and significant impact on the	New and unique insights on the customer and sharing of information within and outside the firm. Stronger need for faster adaptation to customers' needs. Higher efficiency and competitiveness through collaboration between sales structures and networks. For example, retargeting, automated lead generation and scoring leads. Faster, accurate, complete and useful interactions with customers. Value cocreation and easier and more fluid interactions between actors of the purchasing committee. DT provide more information to both parties faster. DT sales capability is positively related to financial performance and customer relationship performance. Marketing and Sales	Inside sales Task-technology-fit. Service-dominant-logic Attention-based view Temporal model of vertical relationships Service-dominant-logic Industrial marketing and purchasing Organisational information processing theory Technology-enabled sales capability technology-Organization-environment (TOE) Psychological capital Dynamic capabilities	Chaker et al., 2022 (IMM); Corsaro and Anzivino, 2021 (MT); Singh et al., 2019 (JPSSM); Ohiomah et al., 2019 (JBR); Kauffman and Pointer, 2022 (JBIM); Corsaro and D'Amico, 2022 (JBIM); Corsaro and Anzivino, 2021 (MT); Krijestorac et al., 2021 (POM); Badrinarayanan et al., 2022 (JPSSM); Pullins et al., 2020 (JOEPP); Guenzi and Habel, 2020 (CMR); Mattila et al., 2021 (JPSSM). Marshall et al., 2012 (JPSSM). Alamäki and Korpela, 2021 (BJM). Mullins and Agnihotri, 2022 (JAMS). Ganotakis et al., 2023 (TFSC). Zheng et al., 2023 (TFSC). Kramer and Krafft, 2023 (EJM). Wengler et al., 2021 (JBIM). Jang and Nemeh, 2017 (TFSC). Nguyen et al.,

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Table A (continued)

Dimensions	Effects on Salesperson	Effects on the buying firm	Effects on the selling firm	Theoretical lens	Authors and Outlets
	reduce the ambiguity of salesperson dependent of the sales complexity, time in the job and relationship with customers. The online search skills of the salesperson of gaining deeper knowledge about the competition boosts sales performance. Digital technologies can overload and stress salesperson decreasing job satisfaction. Sales professionals abilities to unlearn traditional mindsets.	sales performance of SMEs. Technology provides competitive advantages, such as improved product quality, operational efficiency, and customer engagement. Implementing higher levels of both customer-sensing and customer-linking Innovative digital sales technologies can have a positive complementary effect on firm profit. Digital technologies in sales organisations leads to six major tensions: autonomy, innovation, information, interaction, resource, and control. Sales enablement facilitates customer-facing sales interactions, identification of sales opportunities, engagement with sales leads, guide the sales approach and interactions with customers and assist salespeople to communicate value proposition. Facilitate customer value realization.	functions are blurring. Marketing-Sales joint rewards influence digital selling readiness. Digital technologies support sales growth during external crisis. Failure to capture value from digital transformation is due to a lack of knowledge of the factors that enable value.		2024 , Agnihotri et al., 2023 (JPSSM). Friess et al., 2024 (IJRM). Micallef et al., 2024 (JPSSM). Badrinarayanan et al., 2024 (JBIM). Lauzi et al., 2023 (IMM). Mukhopadhyay et al., 2025 (IMM).
Blurring and blending of traditionally inside and outside sales forces, sales roles and marketing activities.	Our study contributes by revealing that salesperson interactions and cross department contributions increases, as marketing and sales key performance indicators converge.	Higher sales person availability, convenience.	Our study contributes by highlighting the evolving marketing ownership in the early stages of the sales process (top of the funnel) facilitated by the adoption of SEPs. Marketing automation of first contact with customers through digital touch points. Generates intelligence about customer journey and higher analytics of customer engagement with firm related personalized content. Marketing becomes a strategic decision-making function.	Organisational change and socio-technical systems theory	Corsaro and Anzivino, 2021 (MT); Hartmann and Lussier, 2020 (IMM).
Integration of content marketing in the sales process	Allocation to selling rather than qualifying leads. Higher quantity of high quality leads to contact. Higher conversion.	Relevant and personalized content potentially creates value to the customers.		Customer engagement Customer journey Sales funnel conceptualization	Terho et al., 2022 (IMM); Järvinen and Taiminen, 2016 (IMM).
Combining AI automated tasks and human tasks in sales activities in the stages of the sales funnel	Demand for digital skills to allow the usage of digital tools that empower analytical skills and market knowledge, support intuition, empathy and build relationships. Automation can be more effective in repeated tasks performed in the earlier stages of the B2B sales funnel, and in transactional sale, and to monitor the relationship with clients regularly. Develop relational networks and enhance the selling process and value for customers, by better salespersons' responsiveness.	Customized experiences. Self-service purchasing process for transactional and recurring services/products. Digital influencers' competence enhances purchasing intention.	Potentially reduces time and improve sales conversion, for example, by dynamic pricing or/and digital influencers and segmenting customers.	Relationship lifecycle theory AI job replacement theory Stereotype content model Service-dominant-logic	Ho and Chang, 2022 (JBR); Crisafulli et al., 2022 (IMM); Paschen et al., 2021 (AMJ); Cheng et al., 2023 (EJM).
Social media usage in B2B selling process	Salesperson can be more assertive in conversations with prospects, mainly in the early stages of the sales	Information autonomy (suppliers and purchase options), and defining/ establishing relationships with suppliers. Shared beliefs, social media communication, effective customer to seller communication influence loyalty and trust. Better	Real-time ongoing relationship building with customers. Improved scanning of market conditions and changes in the purchase committee. Improve information flow, sales performance and profit. Aid customer segmentation. Easier access	Supplier-customer relationships B2B customer trust New service development Industrial marketing and purchasing Relationship marketing Interactional psychology theory Sales funnel conceptualization Social selling Task-technology-fit	Kumar and Srivastava, 2022 (JBIM); Corsaro and D'Amico, 2022 (JBIM); Rose et al., 2021 (IMM); Alam, 2021 (JBBM); Fraccastoro et al., 2021 (IBR); Karampela et al., 2020 (EJM); Bocconcilli et al., 2017 (JBIM); Guesalaga, 2016 (IMM);

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Table A (continued)

Dimensions	Effects on Salesperson	Effects on the buying firm	Effects on the selling firm	Theoretical lens	Authors and Outlets
Big data and Analytics	funnel. Build reputation by sharing success stories. Using social media enhances and enable better acquisition of customer insights, connecting to relevant people in the purchasing committee, and engaging with customers. Social media usage enables proactive servicing and value-oriented offers to prospects. Enhances upselling and cocreation of value.	salesperson responsiveness enhances customer satisfaction. It can enhance buyer's trust beliefs on salesperson's ability, integrity and benevolence.	to the global market place. Reduce cost of customer acquisition. Combine traditional and social media channels to develop innovative services. Social media presence has a positive impact on customers' interactivity, perceived quality and commitment. Social media must be part of various models of interactions to create innovation. Social media usage improves prospect attraction and conversion. Digital communication tools (DCT), social media (SM), and customer relationship management (CRM) solutions have a significant impact on the sales performance of B2B salesforces. Strong relationship between the salesforce's ability to leverage DCT, SM, and CRM for customer and market Combining potential customers browsing data with marketing content data to improve the content marketing in B2B interactions in the sales funnel. Increasing profit ratios, evidence based management, identifying new business opportunities. The use of customer big data enables sales growth and improve customer relationship performance. High predictive power of customer intention to buy. AI models potentially generates high quality prospect lists to the sale team.	Capital theory Trust theory Deep and surface learning	Agnihotri and John-Mariadoss, 2022 (IMM) ; Terho et al., 2022 (IMM) ; Bowen et al., 2021 (IMM) ; Itani et al., 2023 (EJM) ; Delbaere et al., 2021 (P&M) ; Høgevold et al., 2024 (JBBM) .
	Opportunity for future qualitative studies	Opportunity for future qualitative studies		Information foraging theory Relationship marketing Customer acquisition framework	Upreti et al., 2021 (IMM) ; Hallikainen et al., 2020 (IMM) ; D'Haen and Van den Poel, 2013 (IMM) .

Outlets: IMM - 20 (Industrial Marketing Management); EJM - 1 (European Journal Information); JBIM -9 (Journal of Business & Industrial Marketing); JPSSM - 8 (Journal of Personal Selling & Sales Management); JOEPP - 1 (Journal of Organisational Effectiveness: People and Performance); CMR- 1(California Management Review); BJM -1 (Baltic Journal of Management); JAMS - 1 (Journal of Academy of Marketing Science; BSR -1 (Business Strategic Review);IMDS -1 (Industrial Management and Data Systems); MT - 3 (Marketing Theory); JBR - 3 (Journal of Business Research); POM - 1 (Production and Operations Management); AMJ -1 (Australian Marketing Journal); JBBM - 2 (Journal of Business-to-Business Marketing); IBR - 1 (International Business Review); TFSC - 3 (Technological Forecasting and Social Change); EJM -3 (European Journal of Marketing); P&M - 1 (Psychology and Marketing).; JKE – 1 (Journal of the Knowledge Economy). IJRM – 1 (International Journal of Research in Marketing).

Appendix B

B.1. Interview Protocol

Overarching Themes:

Theme 1: Sales process and digital technologies.

Theme 2: Investment in digital technologies in the sales process.

Theme 3: Value creation through the sales process.

Theme 4: Measures of performance and return on investment.

Theme 5: Future of investments in digital technologies in the sales process.

Theme 6: Tangible and intangible value creation through digitalisation of the sales process.

Theme 7: Strategic impacts of digitalisation for the sales process.

Theme 8: Impacts of digitalisation on the sales professional.

Theme 9: Company and customers relationships.

Questions:

- How are digital technologies adopted in your sales process?
- Which stage of the sales process receive the major investments in digital technologies? And what are the reasons for this investment (lead generation, proposal presentation, negotiation, closing or on-boarding, and post-sale follow up)?
- What are the digital technologies adopted in your sales process?
- Why is your company adopting digital technologies in the sales process?
- What value (tangible and intangible) is digital technologies creating for the sales process, the company and customers?
- Where is the most positive impact of digital technologies in the sales process?
- What Key Performance Indicators do you use to measure the impact of digital technologies?
- Who is responsible for capturing value from these investments in your company?
- What is the return on the investment in digital technologies used in the sales process?
- What are the emerging digital technologies you foresee to have an impact on the sales process in the next 5–10 years?
- What is the impact of the adoption of digital technologies in selecting, hiring and developing high performers in the sales team?
- Who is the main leader in your company responsible for the adoption of digital technologies in the sales process?
- What are your expectations now and, in the future, from the adoption and investment in digital technologies in the sales process?
- What are the gaps in the company's capabilities that require your attention and decisions due to the adoption of digital technologies in the sales process?
- What is the level of investment in digital technologies used in the sales process compared with other departments of the company?

Appendix C. Appendix C: case study of sales enablement platforms at Cynergy bank

C.1. Case selection

We have chosen Cynergy Bank, a specialist financial institution founded in 2018, due to its innovative business model and its position as a digital bank that leverages technologies to improve operations, including customer acquisition and customer experience. Cynergy Bank operates in a specific segment of the market, focusing on ambitious SMEs, property entrepreneurs, and high-net-worth individuals. This focus demonstrates that even in a market dominated by large and traditional banks, there is room for new entrants to thrive by allocating and leveraging the right resources, such as advanced technologies and skilled people. Additionally, the bank's adoption of digital platforms exemplifies the development of dynamic capabilities that allow it to adapt and compete effectively in a dynamic financial landscape (Peterson et al., 2021a, 2021b; Eisenhardt and Martin, 2000).

Cynergy Bank's vision is to empower UK-based entrepreneurs and professionals to achieve their ambitions through bespoke financial solutions. With a focus on medium-sized businesses and family enterprises, the bank operates across three core segments: property finance, commercial banking, and private banking. By 2023, the institution managed £3.6 billion in lending and £3.8 billion in deposits, reflecting consistent growth from prior years.

This study explores how investments in Sales Enablement Platforms (SEPs) could have contributed to Cynergy Bank's financial performance, particularly in the acquisition of new customers. Data from annual reports (2020–2023) and a structured interview with the CEO inform this analysis, alongside insights from relevant academic frameworks on dynamic capabilities, the techno-social framework, and sales enablement literature.

C.2. Data collection

The data utilised in this case study includes Cynergy Bank's annual reports from 2020 to 2023 and an interview with the CEO. These sources provided quantitative and qualitative insights into the bank's strategic initiatives, operational achievements, and customer engagement methods. Additional theoretical grounding was provided by academic works on dynamic capabilities (Eisenhardt and Martin, 2000), socio-technical systems (Hartmann and Lussier, 2020), and sales enablement (Peterson et al., 2021a, 2021b).

C.3. Data analysis

Applying the Dynamic Capabilities Framework (Teece et al., 1997; Peterson et al., 2021a, 2021b) and the Socio-Technical Model of Sales Force Change (Hartmann and Lussier, 2020), we conducted a thematic analysis on the gathered data to investigate the multifaceted implications of Sales Enablement Platforms (SEPs) adoption. This analysis focused on the interrelated impacts concerning sales strategies in the overall performance of the firm.

We engaged with coding, categorization, and theme construction to identify patterns and establish connections within the data (Strauss and Corbin, 1998). The analysis process was characterized by ongoing refinement, while coding results underwent cross-verification by our research team to maintain consistency. Moreover, we enhanced the reliability of our findings through triangulation of primary data with secondary sources (Farquhar et al., 2020).

C.4. Findings and discussion

Our analysis illustrates the role of Sales Enablement Platforms (SEPs) in enhancing Cynergy Bank's sales performance and operational efficiency. Drawing on the bank's annual reports and insights from its leadership, we observe how digital tools and innovative processes contributed to streamlined workflows, improved customer engagement, and growth in financial performance.

Specifically, Cynergy Bank's investment in Salesforce as its core CRM system supported sales operations by ensuring data continuity and improving customer segmentation and targeting capabilities. These enhancements align with the bank's strategy to leverage scalable systems and technology to meet the evolving demands of its target market. The findings highlight the interplay between technology adoption and dynamic capabilities (Teece et al., 1997; Peterson et al., 2021a, 2021b), offering a practical example of how firms can adapt to competitive pressures and achieve sustainable growth.

C.4.1. Investment in digital technologies

Between 2020 and 2023, Cynergy Bank consistently invested in technology to support customer acquisition and engagement. According to the 2021 annual report, the bank allocated significant resources to develop its digital infrastructure, including its partnership with Google Cloud and Wipro. These investments enhanced customer onboarding processes and sales funnel optimisation, contributing to improved cost efficiency in acquiring new customers.

This aligns with the dynamic capabilities framework, which highlights how firms integrate, build, and reconfigure internal and external resources to adapt to changing environments (Teece et al., 1997). Cynergy Bank's deployment of Salesforce as a CRM system exemplifies the "enablement infrastructure" component of sales enablement, facilitating the seamless integration of insights into frontline practices (Peterson et al., 2021a, 2021b).

C.4.2. Technology's role in enhancing sales operations

Evidence from the reports and CEO interview highlights the role of SEPs in improving sales operations. The CEO noted that Salesforce improved customer segmentation, data visibility, and lead targeting capabilities, which reduced reliance on manual processes and enhanced efficiency (Interview with CEO, 2022). By automating workflows, the bank increased its ability to manage customer relationships effectively, contributing to its ability to reconfigure resources dynamically (Eisenhardt and Martin, 2000).

Moreover, Cynergy Bank's approach demonstrates the socio-technical systems theory, which posits that the interplay of social (human and organisational structure) and technical (technologies and processes) variables is critical for achieving systemic change (Hartmann and Lussier, 2020). By digitising and automating key processes, the bank strengthened its organisational resilience and adaptability.

C.4.3. Financial growth and operational efficiencies

While explicit cost of customer acquisition figures are not available, financial performance metrics suggest significant operational efficiencies:

Profit before tax (PBT) increased from £30 million in 2020 to £55.2 million in 2023 (Cynergy Bank, 2023). Underlying total income improved from £88 million in 2020 to £159 million in 2023, reflecting effective use of digital platforms to support growth (Cynergy Bank, 2023).

These results can be further understood through the lens of dynamic capabilities theory. As highlighted by Eisenhardt and Martin (2000), dynamic capabilities involve reconfiguring resources to adapt to market demands, which resonates with Cynergy Bank's use of SEPs to improve operational efficiency and financial performance. The development of digital tools and SEPs has not only enhanced workflow automation but also facilitated customer-centric innovation, a key aspect of dynamic capabilities (Teece et al., 1997). By integrating technology into their operational model, Cynergy Bank demonstrated an ability to adapt to shifting market conditions and deliver enhanced value to their customers.

From a socio-technical perspective, Cynergy Bank's approach integrates technological advancements with organisational and social structures, illustrating Hartmann and Lussier's (2020) techno-social framework. This framework emphasizes the interconnectedness of technological systems and human factors in achieving organisational efficiency and adaptability. Cynergy's investment in CRM systems, such as Salesforce, highlights its commitment to fostering collaboration and ensuring data continuity, particularly during periods of organisational change, such as staff turnover.

Moreover, the enhanced operational efficiencies and revenue growth reported by Cynergy Bank align with Peterson et al.'s (2021a, 2021b) findings on sales enablement as a dynamic capability. Sales enablement orchestrates distributed intra-firm resources and aligns them with market demands, enabling organisations to optimise customer interactions and improve sales effectiveness. The consistent increase in Cynergy Bank's total income and profitability is evidence of the strategic importance of SEPs in creating sustainable competitive advantages.

By integrating advanced digital solutions with human-driven interactions, Cynergy Bank exemplifies how organisations can balance technological advancements with social dimensions to drive performance and sustain long-term growth (Hartmann and Lussier, 2020).

C.4.4. Customer engagement and satisfaction

Our analysis highlights the role of Sales Enablement Platforms (SEPs) in enhancing Cynergy Bank's sales performance and operational efficiency. Drawing on the bank's annual reports and insights from its leadership, we observe how digital tools and innovative processes contributed to streamlined workflows, improved customer engagement, and growth in financial performance.

Specifically, Cynergy Bank's adoption of SEPs and digitised processes improved the customer experience. For instance, the 2023 report highlighted that the bank refreshed its Business Current Account to include a fully digital, paperless account-opening process, significantly enhancing the speed and convenience for customers. This digital transformation enabled companies, including those with up to ten directors, to complete their application process in minutes, reflecting Cynergy Bank's commitment to simplifying user experiences while maintaining high standards of efficiency (Cynergy Bank, 2023).

Further evidence from the 2023 report points to an improved customer satisfaction score, with a Net Promoter Score (NPS) of +57, showcasing positive feedback from clients regarding the enhanced digital tools and customer service model (Cynergy Bank, 2023). These initiatives not only supported operational improvements but also strengthened customer retention and loyalty, which are critical to the bank's growth strategy.

This emphasis on combining technical innovations with customer-centric strategies aligns with the techno-social framework proposed by Hartmann and Lussier (2020). By integrating advanced digital solutions with human-driven interactions, Cynergy Bank exemplifies how organisations can balance technological advancements with social dimensions to drive performance and sustain long-term growth.

C.5. Discussion of thematic insights

The insights gained from Cynergy Bank's case provide a foundation for understanding the strategic role of digital transformation in digital banking. By exploring the bank's efforts, we can demonstrate how specific frameworks, and theoretical approaches validate and extend the observed outcomes. This section unpacks three critical themes that illustrate the practical and theoretical implications of Cynergy Bank's strategies: dynamic capabilities, the techno-social framework, and sales enablement as a strategic capability.

C.6. Dynamic capabilities and operational efficiency

The integration of SEPs with the bank's existing systems reflects its ability to dynamically reconfigure resources to improve efficiency and adapt to market changes (Eisenhardt and Martin, 2000). This capability is critical for firms operating in competitive and volatile environments.

C.7. Techno-social framework in action

Cynergy Bank's digital transformation illustrates the importance of aligning social and technical systems to achieve sustainable growth. The interplay between its digital platforms and human-centric approach supports the argument that socio-technical harmony drives resilience and adaptability in organisations (Hartmann and Lussier, 2020).

C.8. Sales enablement as a strategic capability

The findings support the conceptualisation of sales enablement as a dynamic capability, enabling Cynergy Bank to align internal resources and external market demands effectively. This aligns with Peterson et al. (2021a, 2021b), who emphasise the role of sales enablement in fostering organisational learning and driving performance improvements.

C.9. Conclusion

Cynergy Bank's strategic investments in Sales Enablement Platforms have supported operational efficiencies, customer acquisition, and financial growth.

Appendix D. Appendix D: case study of sales enablement platforms at Kooth

D.1. Case selection

We selected Kooth, a publicly traded digital mental health service company (stock symbol: KOO) operating in the health technology sector through a Software as a Service (SaaS) model. Founded in 2001 and listed on the London Stock Exchange in 2020, Kooth provides mental health support and resources for employees in corporate organisations and public sector bodies like the NHS. Its services target human resource professionals and organisational decision-makers seeking to improve employee well-being and address workplace stress.

Kooth's offerings aim to enhance access to mental health resources, support employee retention, and provide insights into organisational mental health trends, delivering value to both employers and their workforce. By the end of 2023, Kooth expanded its workforce to approximately 400 employees and achieved an Annual Recurring Revenue (ARR) of £64.6 million, a sharp rise from £21.1 million in 2022. Total revenue also grew by 66 % year-over-year, reaching £33.3 million in 2023, up from £20.1 million in 2022.

Kooth employs two distinct sales strategies. For the public sector, the company focuses on the NHS, navigating long sales cycles and relationship-building influenced by political and funding dynamics. In the private sector, Kooth uses targeted marketing campaigns and digital channels like LinkedIn ads and webinars, supporting a more agile sales process led by Sales Development Representatives (SDRs) and Business Development Managers (BDMs).

D.2. Data collection

This research collected primary data through a semi-structured interview with the CEO of the company and triangulated with three public annual reports (2021, 2022 and 2023) which content were analysed to support the primary data with additional facts and substantiate the impacts of adopting sales enablement platforms (SEPs) as enabler of firm's financial and commercial performance.

D.3. Data analysis

Applying the Dynamic Capabilities Framework (Teece et al., 1997; Peterson et al., 2021a, 2021b) and the Socio-Technical Model of Sales Force Change (Hartmann and Lussier, 2020), we conducted a thematic analysis on the gathered data to investigate the multifaceted implications of Sales Enablement Platforms (SEPs) adoption. This analysis focused on the interrelated impacts concerning sales strategies in the overall performance of the firm.

We engaged with coding, categorization, and theme construction to identify patterns and establish connections within the data (Strauss and Corbin, 1998). The analysis process was characterized by ongoing refinement, while coding results underwent cross-verification by our research team to maintain consistency. Moreover, we enhanced the reliability of our findings through triangulation of primary data with secondary sources (Farquhar et al., 2020).

D.4. Findings and discussion

Our analysis offers key insights into how Sales Enablement Platforms (SEPs) influence sales performance and operational efficiency in medium-sized firms. Kooth's annual reports consistently highlight improvements in these areas. Specifically, the 2021 and 2022 reports detail the expansion of sales, streamlined operational workflows, and enhanced sales and marketing processes to drive market growth in the UK and the U.S.

The CEO confirmed the adoption of Salesforce as Kooth's core CRM system, supporting sales process management and ensuring data continuity, particularly during staff turnover. This adoption aligns with the company's need for scalable systems to sustain its growing operations.

The evidence suggests a strong connection between Kooth's investment in SEPs and its broader strategic and operational advancements. This relationship is evident across several key themes:

D.5. Marketing automation and customer engagement

Kooth's 2022 and 2023 annual reports highlight strategic investments in digital marketing and customer engagement that have significantly contributed to scaling sales and improving operational efficiency. Although the reports do not explicitly reference Sales Enablement Platforms (SEPs)

like Salesforce and HubSpot, the company's growth initiatives strongly indicate the use of these technologies to support business expansion.

In 2022, Kooth intensified its marketing efforts to enter the U.S. market, securing a \$3 million pilot contract in Pennsylvania and expanding its Kooth Adult platform to reach 8.8 million adults. This expansion required advanced lead generation, nurturing, and customer engagement strategies, likely driven by marketing automation tools. The CEO's confirmation of HubSpot adoption for marketing and sales automation and lead nurturing directly supports this move. HubSpot's features, including automated email campaigns, sales funnel management, and customer interaction analysis, likely streamlined Kooth's marketing operations and enhanced engagement with both public sector and corporate clients. SEPs facilitate organisational collaboration, cost reduction, and operational flexibility. Kooth's enhanced marketing automation and lead nurturing through platforms like HubSpot exemplify how digital tools streamline sales and marketing functions, improving firm performance (Agnihotri et al., 2023).

By 2023, Kooth's marketing strategies scaled further to support a \$188 million, four-year contract with California's Department of Health Care Services. This expansion demanded complex marketing campaigns, outreach programmes, and targeted communication strategies. The annual report details significant investments in digital marketing, community engagement, and market research to facilitate entry into additional U.S. states. These initiatives suggest a strong reliance on integrated marketing technologies, such as HubSpot, to effectively manage and optimise these large-scale campaigns.

Additionally, Kooth launched its next-generation platform, Soluna, co-developed with input from over 200 young users. This development was supported by marketing and sales strategies focused on maximizing user engagement and adoption, demonstrating how marketing and sales automation have driven platform success. Enhanced digital marketing efforts allowed Kooth to personalize outreach, refine audience targeting, and expand its user base more effectively.

The use of Salesforce as Kooth's central CRM system further strengthened lead tracking, customer relationship management, and sales progression. Salesforce enabled Kooth's sales and marketing teams to maintain consistent and effective communication with prospects and clients, supporting operational improvements highlighted in the annual reports.

Kooth's emphasis on expanding digital marketing and customer engagement, as shown in the 2022 and 2023 reports, aligns with the CEO's confirmation of adopting HubSpot and Salesforce. These tools have been critical in enhancing marketing automation, streamlining sales operations, and driving revenue growth. The alignment between Kooth's reported marketing strategies and the CEO's statements highlights how investments in sales and marketing technologies have been central to the company's market expansion and customer engagement success.

D.6. Data integration and sales transparency

Kooth highlights ongoing efforts to improve data integration and operational transparency, particularly in scaling sales efforts and managing customer relationships. In 2021, the company invested in software development to enhance its platform capabilities and internal systems, leading to streamlined internal workflows and improved data management. This included the implementation of integrated sales tools aimed at improving data visibility across teams.

The CEO references Cyrus Insight as a tool integrated with Salesforce to capture and manage customer communications, providing a clear, transparent view of sales interactions. This integration has helped sales teams improve efficiency and enhance customer engagement through features such as email tracking, follow-up reminders, and meeting scheduling directly linked to popular email platforms like Gmail and Outlook. This seamless access to Salesforce data has been instrumental in Kooth's operational improvements.

Further advancing these efforts in 2022, Kooth expanded into the U.S. market, which required scalable sales operations and a stronger reliance on data-driven decision-making. The company strengthened its data-driven marketing strategies and customer insights to improve sales process efficiency and market penetration.

By 2023, Kooth launched the Soluna platform as part of its digital transformation strategy. This initiative introduced advanced user engagement tools and improved the company's market adaptability (Mukhopadhyay et al., 2025). Enhanced reporting and performance tracking mechanisms supported the company's growing global operations, further reinforcing its commitment to operational transparency.

These integrated systems and technologies have collectively enabled Kooth to scale efficiently, manage customer relationships more effectively, and sustain its growth trajectory in both existing and new markets.

D.7. Impact of sales enablement technologies on cost structure and revenue growth

Kooth's investments in sales enablement technologies (SEPs) have positively influenced the company's cost structure, particularly in relation to the cost of sales compared to total revenue. An analysis of year-over-year financial data reveals that in 2021, Kooth's cost of sales accounted for approximately 30.5 % of total revenue. This figure kept stable in 2022 and decreased to 22.4 % in 2023.

These incremental improvements in operational efficiency, driven by the adoption of SEPs, allowed Kooth to scale its sales processes effectively. As a result, the company achieved a substantial 66 % increase in revenue, rising from £20.1 million in 2022 to £33.3 million in 2023.

This reduction in the cost of sales as a percentage of revenue demonstrates how the strategic integration of SEPs has enabled Kooth to optimise its sales and marketing operations while simultaneously driving significant revenue growth.

D.8. New dynamic capabilities created through investments in SEPs

Kooth's strategic investments in SEPs have fostered significant dynamic capabilities, particularly in adaptability and employee engagement within sales and marketing functions (Hartmann and Lussier, 2020). This evolution aligns with the framework of dynamic capabilities by Audretsch et al. (2024b), focusing on a firm's ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments.

The integration of SEPs such as Salesforce, HubSpot, and Cyrus Insight has enhanced Kooth's adaptability in responding to market demands. The CEO emphasized that SEPs have been pivotal in transforming lead nurturing and post-sales engagement, enabling Kooth to deliver continuous value to clients and adapt marketing strategies efficiently. Additionally, Kooth uses SEPs for customer engagement, allowing the company to align its marketing activities with predictable HR cycles and broader consumer trends. Kooth provides clients with near real-time anonymous trends and insights into population mental health, allowing them to adapt marketing and resource allocation to align with broader consumer trends. This capability likely relies on sophisticated CRM and sales enablement technologies, which align with theories on improving customer satisfaction and loyalty through digital tools (Nguyen et al., 2024).

Data from the annual reports reinforce this adaptability, highlighting Kooth's strategic expansion into the U.S. market and the development of the Soluna platform, co-created with users to enhance mental health services. This customer-centric product innovation reflects Kooth's dynamic capability to sense and respond to market needs rapidly. The CEO's statements emphasise Kooth's strategic focus on embedding engagement leads within local communities, rather than solely relying on digital promotion. This strategy suggests the use of advanced sales enablement tools to manage and adapt engagement processes effectively.

The CEO confirmed that Kooth's recruitment strategy evolved to prioritize digital competencies, specifically hiring professionals already proficient in sales technologies like HubSpot and Salesforce to reduce onboarding times and enhance sales performance. This strategic hiring aligns with Teece's emphasis on building competencies that support the firm's evolving strategic goals.

Kooth's 2022 Annual Report also details company-wide initiatives to foster continuous learning and career development, including a digital performance appraisal system to track competencies and training needs. These investments in human capital reflect Kooth's commitment to cultivating internal capabilities that align with technological advancements.

Kooth's adoption of integrated reporting tools has enabled a more consultative sales approach. The CEO explained how Cyrus Insight integrates email communication with Salesforce, providing sales teams with comprehensive visibility into customer interactions. This capability allows sales representatives to tailor solutions based on real-time customer data, enhancing responsiveness and customer engagement.

Further evidence of this data-driven approach appears in Kooth's use of Tableau for analysing customer adoption and usage patterns, feeding insights into account planning strategies. This aligns with Teece's concept of "sensing" capabilities, where firms leverage data to identify market opportunities and adjust strategies accordingly.

Kooth's strategic adoption of SEPs has led to the development of critical dynamic capabilities in adaptability, workforce competence, and data-driven decision-making. These capabilities have not only optimised sales processes but also enabled Kooth to respond effectively to evolving market demands and expand into new markets. The alignment of technology investments with talent acquisition, operational strategies, and customer engagement exemplifies how Kooth leverages dynamic capabilities to sustain competitive advantage and drive growth.

D.9. Conclusions

Kooth's strategic adoption of SEPs has driven operational efficiency, revenue growth, and the development of dynamic capabilities. The integration of Salesforce, HubSpot, and Cyrus Insight has enhanced adaptability, data-driven decision-making, and market responsiveness. These tools have transformed sales tasks, strengthened employee competencies, and optimised organisational structures, aligning with the Dynamic Capabilities Framework (Teece et al., 1997; Peterson et al., 2021a, 2021b) and the Socio-Technical Model of Sales Force Change (Hartmann and Lussier, 2020).

Triangulating CEO insights with annual report data confirms that Kooth's SEP investments have been pivotal in improving performance, validating interview findings and reinforcing the critical role of technology in sustaining competitive advantage.

Appendix E. Appendix E: case study of sales enablement platforms at Optomed

E.1. Introduction and context

Optomed, a Finnish medical technology company, is a global leader in handheld fundus cameras and associated software, aiming to revolutionise diagnostics for blinding diseases such as diabetic retinopathy. Operating across >60 countries, Optomed combines cutting-edge imaging technologies with artificial intelligence (AI) solutions. As the firm navigates a dynamic healthcare market, its strategic focus has shifted toward leveraging digital technologies to enhance operational efficiency, improve sales processes, and sustain growth.

Optomed was selected for this case study due to its dual emphasis on technology-driven solutions and rapid organisational adaptation. The company's investments in sales enablement platforms (SEPs) and other digital tools align with the objectives of this research: to explore the transformative impact of digital technologies on sales processes, organisational structure, and financial performance. The availability of detailed annual reports and an interview with the Sales Director, further supports this choice.

E.2. Data collection

This study applied the concept of dynamic capabilities (Teece et al., 1997; Peterson et al., 2021a, 2021b) and the socio-technical model of sales force change (Hartmann and Lussier, 2020) to explore the implications of sales enablement platforms (SEPs) adoption in firm performance. The data analysis employed thematic techniques to explore connections between sales strategies and overall organisational performance. Processes such as coding, categorization, and theme construction were utilised to identify patterns and ensure consistent findings (Strauss and Corbin, 1998). To enhance reliability, primary data were triangulated with secondary sources, including annual reports and interview transcripts (Farquhar et al., 2020). Data for this study was gathered from Optomed's annual reports (2024), providing insights into revenue growth, R&D expenditures, and market performance. A semi-structured interview with the sales director, exploring practical experiences with sales technologies and organisational changes. Academic literature on dynamic capabilities and socio-technical frameworks informed the contextualisation of findings.

E.3. Findings and analysis

Our analysis reveals key insights into the transformative effects of sales enablement platforms (SEPs) on Optomed's sales performance and operational efficiency. The company's annual reports from 2020 to 2023 consistently highlight improvements in these areas. Specifically, the adoption of SEPs and AI-driven tools has driven revenue growth, enhanced customer relationship management, and improved sales processes.

The interviews with the firm sales director, confirmed that the integration of advanced analytics tools into Optomed's sales processes significantly improved customer engagement and sales team performance. This adoption reflects the company's commitment to scalable and data-driven systems, enabling consistent sales performance even during market disruptions.

The findings suggest a strong correlation between Optomed's investment in SEPs and its strategic advancements. This relationship is evident across several critical dimensions:

E.4. Progression of sales performance and digital investments

Optomed's focus on digital technologies has significantly impacted its sales performance and operational efficiency in recent years. Between 2020 and 2023, the company's revenue steadily grew from €13 million to €17 million, driven by strong demand in Western markets and the launch of innovative AI-based products, such as the Aurora AEYE AI camera (Optomed, 2024). This growth was further supported by a 37.6 % increase in research and development (R&D) expenses in 2021, enabling continuous innovation and the development of advanced diagnostic tools.

These digital investments not only expanded Optomed's product range but also improved cost efficiency. By adopting streamlined digital workflows supported by SEPs, the company optimised operations and achieved better cost management. As a result, gross margins increased from 68.8 % in 2020 to 71.3 % in 2023, demonstrating the financial benefits of integrating digital solutions.

This trend is supported by Peterson et al. (2021a, 2021b), who emphasise the role of SEPs in driving operational and financial improvements. By leveraging these platforms, Optomed enhanced collaboration between sales and operational teams, enabling greater agility to respond to market needs while supporting scalable growth.

E.5. Impact of SEPs on sales processes

Optomed's adoption of sales enablement platforms (SEPs) has had far-reaching effects on its sales processes, as evidenced by interview insights and the company's annual reports.

Enhanced Efficiency: SEPs have streamlined lead generation and management, enabling Optomed's sales teams to prioritize high-value prospects more effectively. This efficiency is reflected in revenue growth of 30.7 % between 2020 and 2023, driven by increased demand in North America and Europe and a rise in recurring revenues from existing customers (Optomed, 2024). Peterson et al. (2021a, 2021b) argue that SEPs facilitate the coordination of resources, which is critical for handling complex sales environments. Optomed's use of analytics tools to refine sales targeting exemplifies this theoretical perspective.

Data-Driven Decisions: The integration of AI and analytics tools into the sales process has transformed decision-making at Optomed. Detailed customer insights allowed sales teams to tailor approaches, improving engagement and conversion rates. Recurring revenues from software solutions grew by 2.8 % in 2022, highlighting the value of subscription-based sales models (Optomed Annual Report, 2024). This aligns with Hartmann and Lussier's (2020) socio-technical model, which emphasizes the interplay between technological tools and human adaptability.

Adaptation to Market Changes: The flexibility enabled by SEPs has allowed Optomed to respond swiftly to changing market dynamics. During the pandemic, the company leveraged online engagement tools to sustain operations, with Western markets showing recovery and demand growth of 40 % in the Devices segment in 2021 (Optomed, 2024). This reflects the findings of Peterson et al. (2021a, 2021b), who highlight the role of SEPs in fostering organisational resilience in volatile markets.

In sum, Optomed's experience demonstrates how SEPs, when integrated effectively, can transform sales processes by enhancing efficiency, supporting data-driven strategies, and fostering adaptability in challenging environments.

E.6. Structural and organisational impacts

The implementation of digital tools also influenced Optomed's organisational dynamics:

Reskilling and Training: The adoption of digital tools necessitated a comprehensive training programme for sales teams to fully utilize AI-driven and analytics technologies. As outlined in the interview with Ville Pitkänen, the training focused not only on the technical aspects of SEPs but also on integrating these tools into daily sales operations, ensuring a seamless transition and reducing resistance to change. This reflects the socio-technical model's emphasis on harmonising human and technological systems. By equipping employees with advanced skills, Optomed positioned itself to maintain competitive agility.

New Revenue Streams: Optomed's digital solutions, particularly the Avenue Flow software tailored for eye clinics, introduced a subscription-based revenue model. This shift enhanced financial predictability and reinforced resilience during market disruptions, as detailed in the 2022 Annual Report. The recurring revenue stream, bolstered by SEPs' efficiency, contributed to a 2.8 % growth in subscription sales in 2022. This innovation underscores the dynamic capabilities framework (Teece et al., 1997), highlighting how technological advancements enable organisations to adapt and thrive in evolving market conditions.

E.7. New dynamic capabilities created through investments in SEPs

Optomed's strategic investment in Sales Enablement Platforms (SEPs) has contributed to the development of dynamic capabilities that are critical for thriving in a volatile healthcare market. This aligns with Rangarajan et al.'s (2020) conceptualisation of digital sales enablement as an integrative hub that combines technology, processes, and sales infrastructure to enhance salesforce effectiveness.

Enhanced Market Responsiveness: Optomed's deployment of SEPs has improved its ability to detect and swiftly respond to market changes. For example, during the COVID-19 pandemic, the integration of digital tools allowed the company to sustain customer engagement via virtual platforms, minimising disruptions to its sales pipeline (Optomed, 2024). Similarly, Rangarajan et al. (2020) highlight the role of digital technologies in enabling real-time customer interaction and lead engagement, which reinforces Optomed's responsiveness as a key enabler of dynamic capabilities.

Scalable Sales Processes: Optomed has utilised SEPs to streamline and scale its sales processes, essential for its global expansion. In 2021, this led to a 14.1 % increase in revenue, reflecting success in Western markets (Optomed, 2024). Rangarajan et al.'s findings corroborate this by demonstrating that SEPs facilitate internal work efficiencies, including resource allocation, lead scoring, and sales process automation, which allow firms to expand without compromising service quality.

Innovation in Revenue Models: The implementation of SEPs has supported Optomed's transition from one-off sales to subscription-based models. The introduction of Avenue Flow software illustrates how recurring revenue models enhance customer relationships and long-term profitability (Optomed, 2024). This finding resonates with Rangarajan et al.'s emphasis on sales enablement's role in supporting adaptive revenue models and leveraging digital tools to meet evolving customer needs.

Collaborative Organisational Culture: The integration of SEPs at Optomed has fostered a collaborative culture by connecting sales, marketing, and operations teams. This aligns with Rangarajan et al.'s discussion of the socio-technical benefits of sales enablement, where digital tools facilitate inter-

departmental coordination and enhance communication to support collective organisational goals. For example, Optomed's use of CRM and data-sharing platforms mirrors the digital conduits described in Rangarajan et al.'s framework.

The findings from the analysis of [Optomed's annual reports \(2024\)](#) extend [Rangarajan et al.'s \(2020\)](#) framework by showcasing practical applications of digital sales enablement in the healthcare technology sector. Specifically:

Market Responsiveness: Optomed demonstrates how SEPs enable firms to respond dynamically to global disruptions, such as pandemics, aligning with the framework's emphasis on sensing and seizing opportunities.

Process Scalability: The scalability achieved by Optomed substantiates the framework's proposed outcomes of internal efficiencies, particularly in managing complex, international sales networks.

Revenue Innovation: Optomed's subscription model innovations exemplify the framework's capability to reconfigure revenue streams through digital tools.

Optomed's advancements highlight how sales enablement infrastructure can translate into actionable, real-world strategies, contributing to the broader understanding of sales enablement in dynamic, high-growth industries.

Applying the Dynamic Capabilities Framework ([Teece et al., 1997](#)), Optomed's ability to sense opportunities (AI advancements), seize market potential (new products), and reconfigure resources (training programmes) underpinned its competitive advantage. The Socio-Technical Model of Sales Force Change ([Hartmann and Lussier, 2020](#)), highlighted how interdependencies between technology, tasks, and structure facilitated smoother transitions during the digital transformation.

E.8. Leveraging SEPs for data integration and transparency

Sales Enablement Platforms (SEPs) have allowed Optomed to centralise data across its global operations, improving decision-making and strategic planning. During the COVID-19 pandemic, SEPs played a pivotal role in enabling the company to pivot effectively to virtual platforms. Digital tools facilitated remote interactions with customers, ensuring business continuity and supporting gross margins during market disruptions ([Optomed, 2024](#)). Predictive analytics further enhanced Optomed's ability to forecast demand, particularly in Western markets, where revenue grew by 14.1 % in 2021. This data-driven approach allowed the company to adapt to recovery trends and scale operations post-pandemic ([Optomed, 2024](#)).

Optomed's efforts to enhance sales transparency were equally critical. The introduction of Avenue Flow software in 2022 integrated data from marketing, sales, and customer service into a unified platform. This system improved decision-making and fostered seamless collaboration between departments ([Optomed Annual Report, 2024](#)). Operating in over 60 countries, Optomed used SEPs to maintain consistent sales processes globally while accommodating regional variations. These tools provided centralized reporting, ensuring transparency across international markets.

The implementation of SEPs aligns with academic perspectives on their role as integrative hubs. [Rangarajan et al. \(2020\)](#) emphasise SEPs' capacity to enhance salesperson capabilities, facilitate customer-facing interactions, and streamline internal processes. At Optomed, SEPs equipped sales teams with tools to manage leads, improving engagement and productivity. Drawing on socio-technical systems theory, [Hartmann and Lussier \(2020\)](#) highlight how technological interventions enable rapid adaptation during crises. Optomed's use of SEPs during the pandemic reflects this, showcasing the platforms' ability to restructure workflows and maintain operational resilience.

The strategic importance of SEPs was further demonstrated by Optomed's response to key market opportunities. The introduction of the CPT 92229 reimbursement code in the United States significantly boosted the adoption of AI-powered diagnostics. This code, which supports autonomous diabetic retinopathy screening, allowed Optomed to position its Aurora AEYE solution effectively in the high-growth US market. SEPs played a central role by integrating clinical trial data and aligning sales and marketing efforts to communicate the advantages of reimbursement compliance. This approach ensured consistent messaging about benefits like higher reimbursement rates compared to traditional screenings ([Optomed Annual Report, 2024](#)).

Optomed demonstrated how technological interventions could drive structural and cultural shifts. The company's success in scaling operations and maintaining transparency highlights SEPs' transformative potential in navigating complex market dynamics.

By leveraging SEPs, Optomed enhanced operational efficiency and strengthened its ability to adapt to an evolving healthcare landscape. The company's use of these platforms offers valuable insights into their role in improving data integration, fostering transparency, and driving organisational success.

Data availability

Data will be made available on request.

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