Drivers of Business-to-Business (B2B) Sales Success and the role of Digitalization after COVID-19 Disruptions

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(Authors' version)

Abstract

Purpose - The purpose of this research is to investigate the drivers of business-to-business sales success and the role of digitalization, in a selling and sales management landscape being disrupted by COVID-19.

Design/methodology/approach – The methodology follows a discovery-oriented grounded theory approach which consists of a two-stage qualitative study with sales professionals in Chile, and a Fuzzy-Set Qualitative Comparative Analysis (fsQCA).

Findings - This research shows that interfunctional coordination, agility in the selling process, and business customer engagement are critical determinants of B2B sales success, while digitalization moderates these relationships.

Originality/value - This research responds to a call for more research on the impact of digitalization on business relationships in different contexts and perspectives. We study the Chilean context, through a two-stage qualitative study, and a fsQCA analysis, which constitutes a novel combination in this stream of research.

1. Introduction

The practice of B2B sales has inevitably been disrupted by the COVID-19 pandemic crisis, and this has encouraged several scholars to study the new sales landscape and its implications on sales strategies and processes. We could summarize this literature in two main questions that have been addressed: (1) Which elements of B2B sales strategies, processes, structure, and outcomes have been affected by COVID-19, how, and which changes are expected to remain after the crisis? (Good *et al*., 2022; Flaherty and Schroeder, 2022; Giovannetti *et al*., 2022; Hartmann and Lussier, 2020; Rangarajan *et al.,* 2021); and (2) How should sales organizations respond to the challenges brought by the pandemic crisis, in several dimensions such as strategy, structure, processes and digital technology? (Cortez and Johnston, 2020; Epler and Leach, 2021; Sharma *et al*., 2020; Sheth, 2020).

One of the major consequences of the COVID-19 pandemic has been the acceleration of the digital transformation in organizations and the resulting digitalization in B2B sales (Good *et al*., 2022: Guenzi and Nijssen, 2021), which deserve special attention when studying today's sales environment. In the past few years, research has examined the potential benefits of digitalization in several stages of the sales process, such as prospecting, developing value propositions, or communication with customers, among other activities (Alavi and Habel, 2021; Bongers *et al*., 2021; Singh *et al*., 2019). Likewise, research has identified several challenges that digitalization present to salespeople (e.g., extra stress and workload, and job insecurity), to sales managers (e.g., how to lead remotely; or how to evaluate performance), and to the sales organizations at large (e.g., customers' preference for reduced contact with suppliers) (Bharadwaj Shipley, 2020; Micallef *et al*., 2022; Wengler et al., 2021).

Despite the valuable contributions of the aforementioned studies, scholars have requested additional research to understand how the pandemic disruptions and, in particular, digitalization in

sales, affects B2B sales and how sales organizations should respond (e.g., Good et al., 2022; Kaufmann and Pointer, 2022; Zoltners *et al.*, 2021). So far, research on how the Covid-19 pandemic has shaped the sales landscape, function and processes has been mostly conceptual, or of qualitative nature to suggest ideas for future research, but without exploring empirically the interrelationships and interaction among factors that impact sales outcomes. The purpose of this study is to contribute to such gap in the literature by studying the main drivers of B2B sales performance, and the role of digitalization after post COVID-19 disruptions. Specifically, we focus on *B2B sales success* (Ohiomah *et al.*, 2020), as this concept considers a holistic view of sales performance, including factors under the categories of salesperson, organization, customer, and environment. Therefore, we propose two research questions: (1) What are the main drivers of B2B sales success in a post-COVID-19 world, and the conditions or causal configurations with respect to such drivers?; and (2) What is the role of digitalization in sales in this post-COVID-19 landscape, as a potential facilitator ofB2B sales success?

We draw on a discovery-oriented grounded theory approach (Corbin and Strauss, 2014) and conduct a qualitative two-stage-study (Creswell and Creswell, 2017) with sales professionals in Chile. In the first stage, we conduct an online focus group with seven sales experts to identify the most critical drivers of B2B sales success after COVID-19 disruption; in the second stage, we interview 35 sales executives, to inquire about the drivers identified in the first stage and the role of digitalization in this new, disrupted, sales landscape. We then conduct a Fuzzy-Set Qualitative Comparative Analysis (fsQCA) and propose a framework for drivers of B2B sales success and the role of digitalization.

2. Literature review

2.1. *Drivers of B2B sales performance/success*

In a seminal meta-analysis of 116 articles published between 1918 and 1982, Churchill *et al.* (1985) find that salesperson performance is determined by several factors which, ranked by statistical significance, include role variables, skill, motivation, personal factors, and organizational/environmental factors. These authors show that the strength of the relationship between those factors and sales performance varies depending on the type of products sold (mainly consumer goods, industrial goods, and services). More than two decades later and building on the work by Churchill *et al.* (1985), Verbeke *et al.* (2011) conduct a meta-analysis of 268 studies published between 1982 and 2008. They identify selling-related knowledge, degree of adaptiveness, role ambiguity, cognitive aptitude, and work engagement to be the most significant predictors of sales performance. The significance of some of these predictors was moderated by the type of customer (consumer versus business customer), the sales governance type (internal salesforce versus independent agents), and the type of performance measures (output-based versus behavioral-based, and relational versus traditional). More recently, to account for the changes in sales practice in the past decade, Chawla *et al.* (2020) systematically review 261 articles published between 1983 and 2018, on the determinants of sales performance, extending the framework by Verbeke *et al.* (2011) to include new predictors that capture the implementation of strategic actions, the use of technology, and the role of psychosocial factors.

Despite the value of the aforementioned studies, a question remains about whether those predictors are sufficient to explain a somewhat broader concept: business-to-business (B2B) sales success. Ohiomah *et al.* (2020, p. 438) define B2B sales success as "the level of achievement of sales goals and objectives within a specific period of time or according to a specified parameter, which can be based on results achieved by the sales organization, a sales project or sales task, or qualitative and quantitative results of salespeople". We use this conceptualization in this research because it is broader than the performance of salespeople, as documented in the meta-analysis by

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Ohiomah et al. (2020), which finds 31 determinants of B2B sales success in four categories: salesperson (e.g., adaptive selling, commitment, goal orientation, motivation, and role perceptions); organization (e.g., sales strategy and leadership, control and support systems, and sales technology); customer (e.g., satisfaction, trust, and relationship quality); and environment (competitor influence and market dynamism).

2.2. *Emergent approaches to the post-COVID-19 sales environment*

Since the COVID-19 crisis outbreak, several scholars have studied its impact on B2B selling and customer management. For example, Cortez and Johnston (2020) identify some key practices to successfully manage the pandemic crisis: (1) with respect to *digital transformation*, train customers on ecommerce, develop in-house data analytics, and enhance dynamic buyer-seller communication; (2) in relation to *decision-making processes*, decentralize power, embrace agile principles and flexibility, and reinforce relationship orientation; and (3) with respect to *leadership*, coordinate functional roles, and drive morale enhancements. Similarly, Hartmann and Lussier (2020) find that the COVID-19 pandemic affects the sales force and organization outcomes through sales force variables in four categories: (1) *task*, including nature, frequency and reasons for the activities performed; (2) *human*, including number of employees, knowledge skills and abilities, traits and states; (3) *technology*, including tools, devices, software, hardware and other exogenous knowledge; and (4) *structure*, including goal, quota, workload, incentives, rules and reporting relationships. The work of Epler and Leach (2021) analyzes salespeople's need to adapt to such environmental disruption and the use of available resources to meet new challenges, perform adequately and create opportunities. They find that salesperson's creativity, learning orientation, and grit are significant antecedents of salesperson bricolage (a combination of "making do" under resource constraint) which, in turn, has a positive impact on salesperson

performance, with the strength of this relationship being stronger in more disruptive sales environments. In addition, Sharma *et al.* (2020) propose that resilience is needed in the sales organization, which requires salespeople's adaptability in their functioning (perform all steps in selling), scaling (reduce the boundary between insourced and outsources talent), and use of technology (be able to utilize multiple technologies and adapt to the needs of the customer). Also, Hartmann et al. (2023), more generally referring to sales shocks, suggest that salespeople's acceptance and adaptation to changing conditions is shaped by the support received from business relationships.

Rangarajan *et al.* (2021), in turn, examine which changes in the sales strategy and processes are likely to remain after COVID-19 pandemic, and their impact on organizational structure, cross-functional coordination, and sales performance. These authors find that after the pandemic there will be an increased use of digital communication technologies, as well as sales enablement and sales engagement tools. Also, customers will increase their preference for virtual meetings and self-service options, which is expected to elevate salespeople's work-related stress, work overload, and job insecurity. Finally, companies will emphasize more activity-based measures of performance, relative to outcome-based ones. Moreover, research on the effects of the pandemic on sales suggests that salespeople and sales force managers need to respond to varying customer needs and situations and perform higher levels of service-oriented behaviors, offering advice and assistance beyond the provision of products and services and relying much more on technology (Hartmann and Lussier, 2020; Sheth, 2020). The digital transformation of business is here to stay and, therefore, companies must provide training to employees and customers on ecommerce, develop data analytics capability, and use social media to disseminate information, among other practices (Cortez and Johnston, 2020). In conclusion, digitalization has intensified the digital interaction between vendors and customers (Epler and Leach, 2021; Matthews *et al.*, 2022)

and increased the use of digital technologies throughout the selling process (Cortez and Johnston, 2020; Rangarajan *et al*., 2021).

A recent work by Flaherty and Schroeder (2022) draws on institutional logic perspective to analyze salespeople's choices with respect to either defy the new logic of the pandemic distortion, comply with the new logic, or blend both new and old approaches. They study several factors that drive such a choice, including the salesperson career stage his/her assessment of disruption as demand or opportunity, and the availability of resources. Similarly, Giovannetti *et al*. (2022) also examine salespeople's resistance or acceptance to change that, as it is in the pandemic crisis, is mainly customer driven. They find that differences in salespeople's attitude toward change depend on their perceptions of customer environments and their capabilities, as well as sales management and organizational factors.

2.3.   *Digitalization in B2B sales*

We now turn the attention to digitalization, which is considered a core engine of the Fourth Industrial Revolution, which contributes to the transformation of business models (Matt *et al.*, 2022). In the business-to-business context, digitalization refers to "the application of digital technologies that brings about changes in business-to-business firms and business markets caused by digitization" (Ritter and Pedersen, 2020, p. 182). There is a consensus that digital transformation is happening very rapidly in firms, and the use of new digital technologies can enhance collaboration in B2B settings and facilitate the flow of goods and services (Gölzer and Fritzsche, 2017). Ritter and Pedersen (2020) discuss how a firm's digitization capability interacts with its business model to allow for data-enabled growth and distinguish between digitization and digitalization. We adopt their notion of digitalization as the application of digital technologies that brings changes in business-to-business firms and business markets, which is caused by

digitization. The rapid development of digital technologies has, to some extent, disrupted well-established sales practices, requiring vendors to innovate in their selling process to capture new opportunities, such as digitizing sales channels to simplify selling processes and obtain buyer preferences, powering sales funnels with artificial intelligence, and digitally enhancing products and services to meet customer needs (Bongers *et al*., 2021; Singh *et al*., 2019). This digital sales transformation requires the adoption of new technologies by salespeople, to support the collection and analysis of customer data, the implementation of customer relationship management programs, the selling through digital channels, and the interaction and communication with customers and other sales executives (Alavi and Habel, 2021; Guenzi and Nijssen, 2021).

On the negative side of digitalization in sales, Guenzi and Habel (2020) advise that digital transformation in sales is complex, and companies struggle to capitalize on investments in technologies that could affect different sales processes. For instance, routine and administrative sales tasks are being replaced by technology, and salespeople must expand their capabilities toolbox to add significant value to customers, like practicing social selling and collaborating both with internal teams and external participants of the sales ecosystem (Fischer *et al*., 2023). Also, time constraints and a lack of digitization know-how are common barriers to effective digitalization in sales (Wrengler *et al*., 2021). It is interesting to note that, together with training sales managers and executives to learn about new technologies, engaging in cognitive unlearning of old sales management practices is also crucial (Mattila *et al*., 2021). Furthermore, the use of technology in sales can provoke different types of tensions in salespeople, related to issues of autonomy, innovation, information, interaction, resources, and control (Micallef et al., 2022). In addition, from the customers' perspective, Bharadwaj and Shipley (2020) argue that B2B buyers have an increased preference for interacting digitally with vendors, which presents a challenge for sales executives in how to communicate effectively with customers.

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In response to the fact that digitalization in sales has not been easy, Zoltners *et al.* (2021) identify three critical stages for sales digitalization success: (1) digital readiness, which involves initiative prioritization and a digital-appropriate team; (2) adoption, driven by perceived usefulness and perceived ease of use through intention to use; and (3) sustainability, which entails role and skills change, and ongoing evolution. In a commentary on the article by Zoltners *et al.* (2021), Brüggemann (2021) provides three additional recommendations: define the scope of digitalization and consider the risks involved; ensure simplicity and user value; and deploy agile processes during development implementation and operation.

In summary, an increase in digitalization could follow a virtuous cycle, where digital investments contribute to solving managerial problems and facilitating communication with customers, making buyer-seller relationships increasingly digital. However, a vicious cycle could also happen, where digitalization negatively affects buyer-seller relationships (Salo *et al.*, 2020), and the benefits in productivity and other performance metrics are still missing in many companies (Wengler *et al.*, 2021), that is why digitalization should guide the emergent approaches to post-COVID-19 sales environment.

3. Methodology

This research follows a discovery-oriented grounded theory approach (Corbin and Strauss, 2014) through a qualitative two-stage study (Creswell and Creswell, 2017; Yin, 2014) to gather the perspective of sales experts and sales executives in Chile. In the first stage, we conduct an online focus group with sales experts, to identify the main drivers of B2B sales success in the new post pandemic sales context. In the second stage, we conduct in-depth interviews with sales executives and inquire about the identified drivers of B2B sales success, to understand their relevance and

role in today's sales practice and success. The data from the interviews is analyzed in two ways: (1) a *content thematic analysis*, to extract the main insights and quotes, and (2) a *fuzzy-set qualitative comparative analysis* (fsQCA), to identify the paths by which B2B sales success can be affected by the identified drivers.

3.1. Stage 1: Online focus group with sales experts

We conducted an online focus group with seven B2B sales experts, including three senior executives from business customers, two academics with expertise in B2B sales, and two consultants in marketing and strategy in business markets. The selection of participants met two criteria: (1) certain level of professional background heterogeneity (Flick, 2018), and (2) belonging to a common population (Bell, 2014). The session was synchronous and lasted 80 minutes. The discussion was moderated by one of the researchers of this study, who used open-ended questions to facilitate complete responses, allowing more initiative to participants (Charmaz, 2006). The data was recorded, transcribed and subject to thematic analysis by three researchers. This first study facilitated the identification of main drivers of B2B sales success and the possible moderating role of digitalization.

3.2. Stage 2: In-depth interviews with sales executives

We conducted in-depth interviews (Boyce and Neale, 2006) with 35 sales executives from different industries. The main topics of the interview were:

- The influence of COVID-19 pandemic on the selling and buying process.
- The use of technology in B2B sales and the impact of digital transformation.

- Key success factors in B2B sales, and the influence of interfunctional coordination, agility in the selling process, and business customer engagement.

We used purposive sampling strategy (Patton, 2015) and covered different segments of business customers and sectors. The sample consisted of 35 participants, all of them with more than three years in their companies. None of them had participated in the first stage of the study. Ethical aspects were discussed with each participant, and we provided each one a personal information sheet and a consent form that they had to sign before participating in the interview. Interview sessions lasted between 40 and 60 minutes, all of them were recorded and transcribed using professional services.

The transcribed documents were imported to NVivo 12, a computer-assisted qualitative data analysis software widely used (Schmieder, 2014), and the data collected was subjected to thematic analysis (Braun and Clarke, 2006). The authors independently coded the raw data to assure intercoder reliability at a nominal level (O'Connor and Joffe, 2020) and a subsequent dialogue and reflexivity took place within the research team. We decided to do it in parallel and not sequentially to avoid any possible influence between the coders. The coding frame was informed by the findings from stage 1 and applied to the data systematically as an analytical instrument.

Once the coding was finalized, the codes were re-classified into more general themes in two hierarchical levels, deleting and merging based on academic criteria and considering the level of saturation (Corbin and Strauss, 2014). Maps and tables were developed and critical discussion among researchers took place in critical dialogue with the relevant literature on the topics that were identified. The codes were refined, and final structure facilitated the development of the framework, which was supported with the illustration of selected quotes.

In the next section we present the findings of this research by combining findings from relevant literature with the insights obtained (Dubois and Gadde, 2002).

4. Drivers of B2B sales success and the role of digitalization

In this research, we focus on B2B sales success, as it not only considers individual behavior and results, but also organizational performance and environmental factors (Ohiomah *et al.*, 2020). The drivers of B2B sales success that emerged in the first stage of our study, the online focus group, were: interfunctional coordination, agility in the selling process, and business customer engagement. The common ground for these drivers was digitalization, which was presented as a factor that could potentially strengthen the impact of these drivers on B2B sales success. In the second stage, we conducted in-depth interviews to examine these potential drivers of B2B sales success, understand its logic and nature, and explore the role of digitalization. We complemented a content analysis of the responses with a Fuzzy-Set Qualitative Comparative Analysis (fsQCA).

4.1. Drivers of B2B sales success

4.1.1. Interfunctional coordination

Interfunctional coordination facilitates the integration of available resources across departmental boundaries to create superior customer value (Narver and Slater, 1990). In that sense, it has been found a positive impact of interfunctional coordination on business performance (Javalgi *et al.*, 2014). Most participants in our study agreed that COVID-19 has changed the way different departments interact. One participant reflects this well:

> Before the pandemic outbreak most of departments were competing internally to attract resources and to keep power and control, but since COVID-19 started to punish us, there was no room for internal fights, and we focused on providing solutions to the customer before we could lose them. The coordination between departments has now increased substantially. (Pharmaceutical Company)

A high degree of interfunctional coordination can improve the agility of communications between departments and the development of customer solutions, which can increase business and sales performance solutions (Flint and Mentzer, 2000; Inglis, 2008).

Interfunctional coordination was investigated in business markets before pandemic and it was found to facilitate customer orientation with a positive impact on business performance (Ruiz-Alba *et al.*, 2020). These authors find that digitalization, technology, and processes were key strategic drivers of interfunctional coordination. In our study we have corroborated these findings with a particular emphasis on how the use of video conferences has increased interactions between departments with a clear impact on sales success. As one of the participants expressed:

> Before the pandemic, we hardly met with colleagues from other departments. The virus outbreak thrown us into a spiral of countless e-meetings with other functions of the firm. In the past meeting someone meant booking an appointment, going to their office, and a waste of time. Now we have developed the new habit of using videoconferences which has been proven to be effective. In our company this is having a positive impact on efficiency and profitability. (IT Solutions Provider)

In addition, participants highlighted the importance of interfunctional coordination within the supplier firm as critical, to effectively provide service to customers and reduce their perceived uncertainty. The following quotes illustrate this idea:

> To meet our customers' requirements, be flexible, and reduce their anxiety, we have had to align the Supply Chain, Finance and Operations areas to adjust our production and sales forecast…which has been a great challenge. (Food Producer)

> The problem with 'Human Capital' is that we are immersed in an adaptive process of high uncertainty, stress, and vulnerability, and still, we need to coordinate among ourselves, our functional units, to achieve the higher level of adaptability that our customers need. (Energy Provider)

Finally, we find that due to the pandemic crisis, interfunctional coordination requires more planning and preparation than before. One of the participants mentioned the following:

> Because of the sense of vulnerability that the pandemic brought to us and our customers, we need extra planning and preparation as a team to really provide support and deliver value to our customers. (Consulting Services)

4.1.2. *Agility in the selling process*

Agility is considered a capability of a firm that allows operating profitably in competitive environments that are continually changing (Goldman *et al.*, 1995), and it is crucial when a firm needs to respond to changes in the environment. In a study about agility in selling, Chonko and Jones (2005) distinguish between four types of changes: anticipated, created, unpredicted and unprecedented. We could assume COVID-19 pandemic to be both unpredicted and unprecedented, an exceptional critical event that exemplifies the need for an agile approach. Moreover, Bourguignon *et al.* (2021) find that salespeople engage in agility selling to amplify, innovate, cooperate, or mitigate turbulence to capitalize on business opportunities while reducing the negative effects on both the supplier and the buyer.

Previous research highlights the importance of speed in agile selling and the ability to respond to changes quickly and properly (Bourguignon *et al*., 2021; Haas *et al*., 2012). Consistent with this, one of the participants manifested:

> We were fast before the pandemic, but after COVID the speed of light is what better describes our new culture: agility in our selling process is the only way to meet customers' expectations and to achieve higher revenues and profitability. (Financial Services)

Another element that characterizes sales agility is the ability to anticipate problems or opportunities within the business relationships with customers, to then mobilize internal resources

that can adequately address such problem or opportunity (Bolander *et al*., 2017). Thus, salespeople

have an important role in customer sensing and responsiveness for the whole supplier firm

(Bachrach *et al*., 2017) and therefore require having the willingness to accept change and adapt in

an agile way (Kalra et al., 2023). One of the interviewees, admitting a failure in this respect,

indicated:

> In March what happened was that sales exploded during the first two weeks and then exploded twice the other two weeks, and this generates many logistical problems, problems of product availability in our warehouse, in the customers' warehouses, and in the retailers. All of this was super complicated because we weren't prepared for this explosive increase in demand, so we couldn't react and lost a valuable business opportunity. (Food Producer)

A novel finding of this research is that *flexibility* appears to be considered a meaningful dimension

of agility in the selling process, both from the supplier and the customer perspectives. Both points

of view are critical. On the one hand, changes in customers' behavior can be unnoticed and

unpredictable, but highly rooted in a lack of suppliers' agility (Chonko and Jones, 2005). On the

other hand, agility in the selling process is increasingly relevant in the turbulent nature of the B2B

global supply chain and requires the joint effort from the areas of Sales and Supply Chain

(Bourguignon *et al*., 2021). The following two quotes (from different participants) illustrate the

importance of flexibility within the required agility in the selling process:

> The lack of flexibility in our selling process has made us lose critical customers with a negative impact on revenue. (Agricultural Chemicals)

> We are having a negative impact on sales because we are not flexible due to our lack of strategy in supply chain management. COVID-19 has increased the pressure and we did not do our homework properly. (Beauty Products)

Following the matrix proposed by Bourguignon *et al*. (2021), the scenario created by the COVID-19 pandemic can be considered negative for both customers and suppliers, so the appropriate agile responsive role is what they name as "cooperate". In this sense, one participant indicated:

> We have worked closely with our clients, as we never did before, especially to increase the agility of the whole selling process. We were surprised to see how most of the applicable changes came from the suggestions and initiatives of our clients, which is having a positive impact on our revenue and on our client's performance. (Medical Equipment)

Finally, we find in this study that an important consequence of being agile in the selling process is building customer trust and commitment, which resonates with Kauffman and Pointer (2022), who posit that agility fosters closer buyer-supplier relationships. One of the participants expressed the following:

> The opportunity has been given to us because we have built a closer relationship with customers. We also realized that our clients need our support. That we must assure that we are going to satisfy all their needs, we will be quick, proactive, and create new ideas to give our customers the confidence that they can count on us. (Packaging Supplier)

4.1.3. Business customer engagement

Customer engagement refers to "the intensity of an individual's participation and connection with the organization's offerings and activities initiated by either the customer or the organization (Vivek *et al*., 2012, p. 133). It is characterized by having cognitive, emotional, behavioral, and social elements, and by involving a deep relationship with the supplier, that goes beyond business transactions, to mutual interactions that favors customer understanding as well as the development of trustworthy and loyal relationships (Vivek *et al*., 2012). Agnihotri (2020) argues that customer engagement creates relational value for both buyers and sellers, and a meta-analysis by Chandni and Rahman (2020) finds that some key consequences of customer engagement are customer

satisfaction, customer value, relationship quality, and trust, as well as supplier firms' performance, reputation, and affective commitment. From a service-dominant logic perspective, Hollebeek *et al.* (2019) propose a framework where customer engagement falls into the intersection among customer resource integration, customer knowledge sharing, and customer learning, to identify its foundational processes.

In this research, we look at customer engagement in B2B settings, and therefore we use the term *business customer engagement* (BCE). We adopt the definition by Vivek *et al.* (2012), but also expand the *customer* term to include all relevant buying center members, who can engage with a supplier in different and unique ways and in various roles, such as initiator, influencer, buyer, user, decision-maker, or gatekeeper (Hollebeek, 2019; Johnston and Bonoma, 1981). Also, we follow Ekman *et al*, (2021) in that the effectiveness of suppliers' engagement initiatives will depend on the customers' disposition to engage, as well as on the customers' connectedness with other actors in the business network.

One of the participants manifested:

> It has been hard to keep the relationship with key customers during pandemic, but we have given them priority as this is crucial to keep customer engagement with our company. (Beauty Products)

The creation of bonds based on reciprocal interests and emotional aspects is critical for customer engagement; however, COVID-19 threatens to weaken those bonds between suppliers and their business customers. In our study, we find that most companies feel that the lack of personal connection with customers due to COVID-19 restrictions could harm their business performance. As a senior manager expressed:

We redefined our business strategy from the very beginning of the virus outbreak and our priority was to keep customer engagement, as this is something strategic to secure profitability. (Corporate Services)

4.2. *The role of digitalization in influencing the drivers of B2B sales success*

The influence of digitalization in B2B sales span across multiple aspects of the sales strategies and processes, impacting the practice of sales executives, sales managers, the sales organization, other functional areas (e.g., Supply Chain, Marketing, Finance), the firm as a whole, and even external actors in the sales ecosystem (e.g., customers) (Alavi and Habel, 2021; Fischer *et al*., 2023; Wengler *et al*., 2021). In the first stage of this research, sales experts participating in the online focus group suggested that the most important role of digitalization in achieving sales success relies in how it can strengthen the impact of interfunctional coordination, agility in the selling process, and business customer engagement, on B2B sales success.

Digitalization and interfunctional coordination. Previous research has investigated digitalization as a driver of interfunctional coordination (Ruiz-Alba *et al*., 2020), having a positive effect through the provision of communication platforms and cloud tools for information exchange, but also having a negative effect by reducing the depth of cross-functional interaction due to fewer face-to-face encounters. More recently, Micallef *et al*. (2022) argue that digitalization, despite facilitating the coordination between salespeople and customers and other actors in the company, can produce interaction tension when the use of virtual communication technologies leads to reduced personal interaction.

One of the interviewees referred to the link between interfunctional coordination and digitalization in the following way:

Technology makes it easier to have a virtual team approach to the customer, which makes the key account manager's use of time more efficient and allows her to focus more on the strategic aspects of the relationship with the customer. (IT Solutions)

Yet, another one highlighted a dark side of cross-functional interaction through digital channels:

Yes, digital channels make the communication with people in other departments efficient, but it is hard to build trust and we often have some kind of conflict, typically because of a misunderstanding, which is less likely to happen when we all meet in the same room in our full bodies and spend some time before the meeting just chatting about anything and relaxing a bit. (Mining)

Digitalization and agility in the selling process. As mentioned before, agility selling is particularly necessary in contexts and times of turbulence, where the sales organization needs to be responsive to environmental changes or customers' demands (Bourguignon *et al*., 2021; Chonko and Jones, 2005). We posit that sales organizations with a high degree of digitalization will make agility selling more effective through technological tools for sensemaking and forecasting, which will help the sales team to anticipate changes and react to turbulence quickly. Likewise, given the boundary-spanner position of the sales function, it is expected that team efforts within the supplier firm to respond rapidly and adequately to the changing needs of customers will be more productive when digital communication and information sharing tools are in place.

A senior executive from our sample, involved in key account management, commented:

Digitalization is changing the customer interface. Social media is getting more and more important for KAM, so we need technological applications that help us analyze social media content accurately and in real time, so we can act quickly. (Food Producer)

Digitalization and business customer engagement. There is evidence that the B2B buying process and the ways customers engage with supplier firms have changed significantly, driven by the digital transformation, and accelerated by the COVID-19 pandemic. Today's customers have

greater access to information and prefer to advance on their own in the early stages of the buying process, depending less on sales executives from their suppliers (Bongers *et al*., 2021). Also, the pandemic crisis has increased the level of formalization of purchasing processes, while buying centers have become larger and more complex (Bonney *et al*., 2022). We argue that digitalization can shorten the time it takes customers to engage with suppliers throughout the buying process, with intelligent tools that help customers find, sort, and analyze industry and market information. Additionally, digital communication platforms may facilitate the engagement of all relevant members of the buying center, especially when strategic decisions need to be made and co-creation between the supplier and the customer takes place.

Our fieldwork suggests that digitalization could strengthen the positive effect of business customer engagement on B2B sales success. One of the participants manifested:

> Before the pandemic, we were using digital technologies, but the preponderance of notebooks, paper and other physical formats was evident. We have completely changed our habits and learned to work with customers only using digital formats, making our sales job more productive. (Pharmaceutical Company)

We also find that in companies with low level of digitalization, the impact of business customer engagement on sales performance has been low. One senior executive described this phenomenon:

> The COVID-19 caught us with the guard down. We had the intuition that we were not ready for the digital transformation and the pandemic has made it explicit and evident that we were lagging behind. The pandemic has forced us to adopt digitalization and we are sure that in the mid-term this will be beneficial but in the short-term I am sad to admit that in our company the way we involve customers is not helping our sales performance. (Mining)

Furthermore, with respect to the opportunities that digitalization brings, one participant indicated:

> A benefit that could be rescued from this pandemic is being able to connect with almost all members of the customer's decision-making unit, since when there were face-to-face meetings, due to time or location issues, it was not possible to count on all members. Even more, we can now reach senior managers in the buying company more easily. (Food Producer)

The identification of the drivers of sales success and the crucial role of digitalization allowed the fsQCA analysis to identify the pathways and to use digitalization as a moderator.

4.3. *The Fuzzy-Set Qualitative Comparative Analysis (fsQCA)*

In this section, we present the results of the fuzzy-set qualitative comparative analysis, which tests for necessary and sufficient conditions, and causal configurations for the drivers of B2B sales success, and for the moderating effect of the level of digitalization of supplier firms in those relationships. Figure 1 shows the conceptual framework:
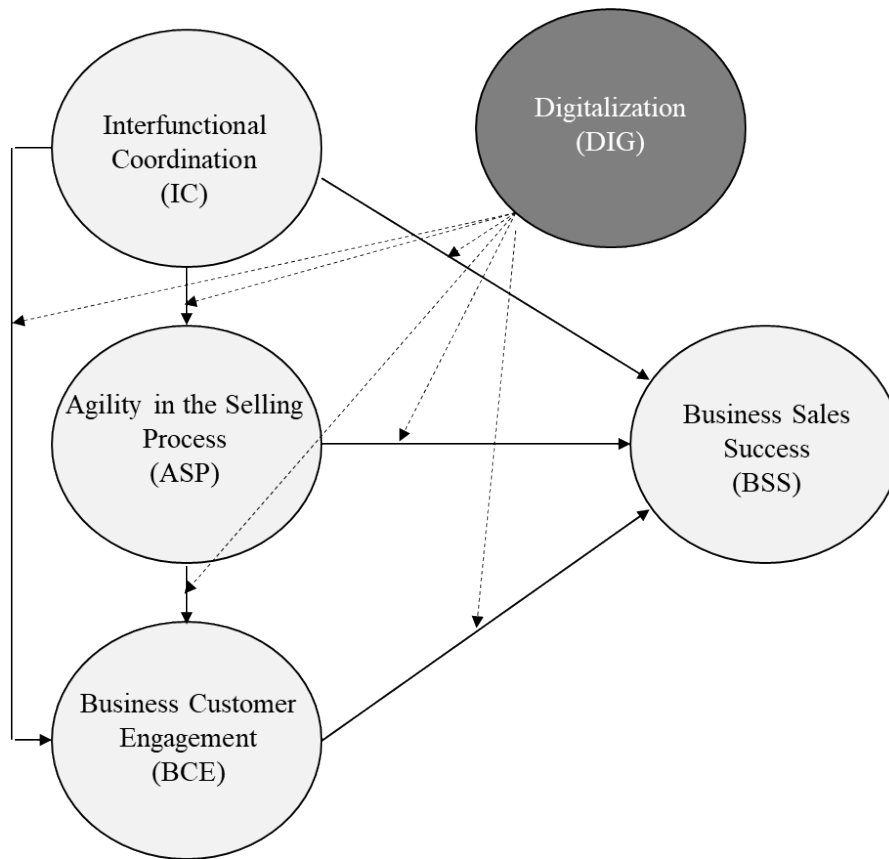
Figure 1 Conceptual framework: Drivers of B2B sales success and the moderating role of digitalization

4.3.1. *Data calibration process*

The first step in fsQCA requires transforming the raw variables scores into fuzzy-set membership scores. Calibrated variables are the input data for fsQCA. Fuzzy-set scores range from 0 to 1 and reflect the degree of membership to the target set. Thus, the three causal conditions (IC: interfunctional coordination, BCE: business customer engagement and ASP: agility in the selling process) and the outcome (BSS: B2B sales success) should be calibrated. For the calibration of qualitative data, we followed the six steps developed by Basurto and Speer (2012).

Following Ragin's (2008) recommendation, we used the direct method of calibration that requires the specification of three breakpoints or anchor points, which define the level of

membership in the fuzzy-set for each case. We used fuzzy values of 0.95 for full membership, 0.50 for the crossover point, and 0.05 for the full non-membership. To assign which values in our data set correspond to the three anchor points we fixed the calibration measures. For the calibration from qualitative data to fuzzy-set values we used the 6 steps technique developed by Basurto and Speer (2012), following the recommendations by Ordanini *et al.* (2014) and Pappas *et al.* (2016). Therefore, the full membership threshold was fixed at the rating of 6, the crossover point at 4, and the full non-membership threshold at 2.

Once we decide the thresholds, we proceed to the data calibration in fsQCA 2.0 free software. In fsQCA, the cases that are exactly at 0.50 are dropped from the analysis because it represents the point of maximum ambiguity (Ragin, 2008). To overcome this, Fiss (2011) suggests adding a constant of 0.001 to the causal conditions below full membership scores of 1. Once all variables have been calibrated, we proceed to identify which causal conditions are necessary and sufficient for Business Sales Success. We run necessity and sufficiency analysis for each of the two subsamples generated by the DIG variable (i.e., low digitalization and high digitalization subsamples with 20 and 15 cases respectively) to analyze the moderator effect of this variable.

4.3.2. *Necessity analysis*

The analysis of necessary conditions examines whether any of the three causal conditions (IC, BCE, and ASP) can be regarded as necessary for the outcome (BSS). A condition is necessary if the condition is present every time the outcome is present, i.e., the condition must be present for an outcome to occur. Empirically, a condition is necessary when its consistency and coverage values are above the 0.90 and 0.50 thresholds, respectively (Ragin, 2008). However, when a condition stands out above the rest and its consistency value is close to 0.90, it can be considered quasi-necessary (Schneider *et al*., 2010). Table 1 displays the results of the analysis of necessary conditions for each subsample. The results indicate that ASP is considered a necessary condition

for BSS in the low digitalization subsample, while BCE and ASP are considered necessary

conditions for BSS in the high digitalization subsample.

Table 1

Analysis of necessary conditions

Conditions tested	Subsample 1: Low Digitalization		Subsample 2: High Digitalization	
	Consistency	Coverage	Consistency	Coverage
IC	0.833	0.678	0.761	0.689
~IC	0.540	0.764	0.275	1.000
BCE	0.789	0.623	0.807	0.988
~BCE	0.488	0.732	0.319	1.000
ASP	0.895	0.796	0.948	0.977
~ASP	0.551	0.680	0.165	1.000

Outcome variable: BSS

4.3.3. *Sufficiency analysis*

A condition is considered sufficient if the outcome is present each time the condition is present.

Following Schneider and Wageman (2010), the analysis of sufficient conditions includes three

steps: creating a truth table, simplifying the truth table and obtaining the final solution. First,

fsQCA applies Boolean algebra rules to build a truth table which includes all logically possible

combinations of the causal conditions in rows (Ragin, 2008). In our case, the truth table for both

subsamples contains 8 rows ($= 2^k$, where k corresponds to the number of causal conditions

considered for the analysis). The frequency is also presented (i.e., the number of cases in our

subsamples that display each possible combination). Second, the truth table is simplified based on

frequency and consistency thresholds, to select the configurations of conditions that are relevant

and consistent with the outcome (BSS). We set the cut-off points for frequency at 2, capturing

more than 80% of cases. The minimum consistency threshold was set at 0.80 for both subsamples

(Fiss, 2011; Ragin, 2008). Finally, fsQCA evaluates which configurations of causal conditions or

pathways constantly lead to high levels of BSS, i.e., sufficient conditions. FsQCA software provides three solutions: complex, parsimonious, and intermediate solutions. Following Ragin's (2008) recommendation, we report the last one that is the most interpretable. Tables 2 and 3 display the intermediate solution for the analysis of sufficient conditions for low and high digitalization subsamples, respectively.We find that in subsample 1 (low level of digitalization) there are two ways to achieve BSS, confirming equifinality (Fiss, 2011). However, in subsample 2 (high level of digitalization) there is a unique pathway to reach BSS.

4.3.3.1.   Sufficient conditions for subsample 1: Low level of digitalization

The solution's overall consistency (= 0.864) and coverage (=0.813) presented in Table 2 surpass Ragin's (2008) thresholds; 0.740 and 0.450 for the consistency and coverage indicators, respectively.

Table 2

Sufficient configurations of conditions for BSS (Subsample 1: Low digitalization)

The configurations leading BSS	Raw coverage	Unique coverage	Consistency
IC * ASP	0.802	0.074	0.827
BCE * ASP	0.789	0.061	0.799

Solution coverage: 0.864

Solution consistency: 0.813

Note: IC = interfunctional coordination; BCE = business customer engagement; ASP = agility in the selling process

Regarding the solutions that lead to BSS, we find two pathways for the scenario of low level of digitalization: pathway 1: interfunctional coordination (IC) and agility in the selling process (ASP), and pathway 2: business customer engagement (BCE) and agility in the selling process (ASP).

(IC and ASP) or (BCE and ASP) => BSS

The first pathway is the most empirically relevant (raw coverage = 0.802, unique coverage = 0.074, consistency = 0.827). The second pathway presents slightly lower coverage and consistency indicators (raw coverage = 0.789, unique coverage = 0.061, consistency = 0.799).

4.3.3.2.   *Sufficient conditions for subsample 2: High level of digitalization*

When the level of digitalization is high (Table 3), the solution's overall consistency for positive BSS presence is 0.797 (> 0.740), and the overall solution coverage is 0.988 (> 0.450), both indicators above Ragin's (2008) recommended thresholds.

Table 3

Sufficient configurations of conditions for BSS (Subsample 2: High digitalization)

The configurations leading BSS	Raw coverage	Unique coverage	Consistency
BCE * ASP	0.797	0.797	0.988

Solution coverage: 0.797
Solution consistency: 0.988

Note: IC = interfunctional coordination; BCE = business customer engagement; ASP = agility in the selling process

For the scenario of high level of digitalization, we find a third pathway, which is business customer engagement (BCE) and agility in the selling process (ASP).

(BCE and ASP) => BSS

As there is a unique pathway for BSS, the coverage and consistency indicators of this pathway match those of the general solution (raw coverage = 0.797, unique coverage = 0.797, consistency = 0.988).

5. Discussion

5.1. Theoretical contributions

This research advances the understanding of the drivers of B2B sales success (Ohiomah *et al.*, 2020) in a disrupted post-COVID-19 context, by identifying and assessing the impact of agility in the selling process (ASP), interfunctional coordination (IC), and business customer engagement (BCE). Moreover, we find that digitalization has a moderating role in those relationships, presenting different paths to B2B sales success, depending on whether a company has a low or high level of digitalization. Institutional logic has been suggested (Flaherty and Schroeder, 2022) as a valid lens to understand this disruption in light of the concept of agility in the selling process and the required adaptability of sales professionals that are dealing with continuously changing unwritten rules and principles.

In fsQCA, the concept of equifinality refers to the fact that there is not a single way to achieve an outcome. As a result of our analysis, we have found that for the scenario of low digitalization, companies have two different pathways to achieve the outcome of B2B sales success: (1) interfunctional coordination and agility in the selling process, and (2) business customer engagement and agility in the selling process. As we can see, the agility in the selling process is a necessary condition, which means that sales managers need to assure agility in the selling process in order to achieve B2B sales success in both solutions or pathways. But it is important to note that both solutions are sufficient per se. Interestingly, for the scenario of high

digitalization there is only one solution or pathway: business customer engagement and agility in the selling process. This means that this combination of conditions is sufficient per se as a combination of both factors, but we also need to note that both conditions are necessary, which means that managers need to enhance both customer engagement and agility in the selling process. If we compare both scenarios of low and high digitalization, we see that the low digitalization scenario has two solutions, which gives more room for maneuver than the scenario of high digitalization, where there is only one solution to enhance B2B sales success. Finally, the second pathway (in low digitalization) is the same as the third one (in high digitalization): business customer engagement and agility in the selling process, so we can conclude that, in order to enhance B2B sales success, managers could invest in business customer engagement and agility in the selling process.

From a theoretical perspective, this paper sheds light on the two guiding research questions of this research. In relation to the main elements of B2B sales strategies, processes, structure, and outcomes being affected by COVID-19, this paper contributes with the identification of interfunctional coordination, business customer engagement and agility in the selling process as key drivers of business sales success. Another contribution is the finding that tells us that the pathway of agility in the selling process and business customer engagement is present in both scenarios of high and low digitalization.

Overall, our results contribute to the literature on digitalization in sales (e.g., Guenzi and Habel, 2020) by discovering a moderating role of digitalization in exploring the drivers of B2B sales success. Specifically, our study clarifies the role of digitalization – in the context of B2B relationships – in connection with ASP, IC, and BCE. We find that agility, a concept that has gained increasing attention from scholars (Kauffman and Pointer, 2022), becomes a necessary condition for achieving B2B sales success, as it has a significant presence in both paths determined

by the fsQCA analysis. Additionally, we find business customer engagement to be a critical driver of B2B sales success, and that, increasingly, vendors interact through digital channels with customers. Thus, we extend the work by Agnihotri (2020) on customer engagement, by providing new knowledge on the way digitalization relates to customer engagement.

This research also responds to a call for more research on customer engagement in B2B settings (Ekman *et al*., 2021; Nyadzayo *et al*., 2020), as well as the impact of digitalization on business relationships (Ritter and Pederson, 2020) in different contexts and perspectives. In this case, we study the Chilean context, through a two-stage qualitative study, and a fsQCA analysis, which constitutes a novel combination in this stream of research. Finally, we respond to several calls for research on sales force issues with data collected in emerging countries (Dugan *et al*., 2020; Panagopoulos *et al*., 2011; Schrock *et al*., 2018).

5.2.   *Managerial implications*

The findings of this study offer several recommendations to managers. Firstly, to support B2B sales success, vendor companies should develop interfunctional coordination within their teams, be agile in the selling process and promote customer engagement. To foster interfunctional coordination, supplier firms may request the support of senior management to align the different functional areas (Guesalaga, 2014) and use digitalization tools (Ruiz-Alba *et al*., 2020), such as planning and task management platforms, and communication devices. In addition, sales organizations must assess the extent to which they can operate effectively through digital communication with customers, by evaluating the need to establish personal bonds, and assessing the level of complexity, technicality, and duration of the sales cycle.

Secondly, from the fsQCA we provide very practical guidelines to supplier companies looking to increase B2B sales success, in that they should first assess their level of digitalization. If

low, they should focus on promoting agility in the selling process and interfunctional coordination; if high, they should still promote agility in the selling process, but instead of focusing on interfunctional coordination, they might switch efforts towards customer engagement. Therefore, managers can decide whether to focus on the first solution or on the second – as revealed from the fsQCA, as each of them independently will generate B2B sales success. They need to evaluate if their best option is to promote interfunctional coordination or customer engagement, but they cannot renounce to promote agility in the selling process.

Thirdly, managers who are not fully aware of the level of digitalization development in their organization or are in the middle of a transition in technology and digital tools adoption, could focus their energies on enhancing both the agility in the selling process and business customer engagement,as this pathway is present in both scenarios of high and low digitalization.

5.3.   *Limitations and future research*

This research has some limitations that the reader should be aware of. First, in terms of geography, the context of the study is Chile, a Latin American country which may differ from other countries - especially from a different continent - in the way the identified drivers of B2B sales success affect the outcome, or the role that digitalization has. A priori, interfunctional coordination could differ between cultures characterized by being individualistic vs those being more collectivistic (Hofstede, 2009); therefore, future research could replicate this study in other countries. A second limitation is that, with the conscious purpose of testing a model that is parsimonious and practical, we did not include other factors that could have had a relevant role in affecting B2B sales success, which could have appeared in the online focus group if the moderator had put some extra pressure to identify one or two extra drivers. A third limitation of this study is that key informants were all sales executives from supplier companies. It would be interesting to

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study the same phenomenon, but from the buyers' perspective. Relatedly, it could be that the moderating effect that we found for the level of the sales organization digitalization, changes depending on the level of digitalization of the customers of those suppliers. Future research could investigate these issues.

A fourth limitation comes from the fact that the scope of fsQCA is to study the role of single conditions producing an outcome but does not analyze their net effect, that is, the magnitude of the impact of those conditions on the outcome. Future research could investigate what is the net effect that the conditions (IC, ASP and BCE) that make up the different pathways found in this research to achieve Business Sales Success (BSS) have on this variable, both in the low digitalization scenario and in the high digitalization scenario. Finally, from a broader perspective, a recent article by Dugan *et al*. (2023) provides a framework on how the sales function should prepare for a sales crisis, beyond the pandemic crisis and in general terms. An avenue for future research could be to replicate the fsQCA with different types of sales crises, to check whether the drivers of B2B sales success or the role of digitalization differ from those found in this research. Due to the fact that the causal configuration of business customer engagement and agility in the selling process is present in both scenarios of low and high digitalization, it would also be relevant to investigate in the future how this casual configuration could be implemented.

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