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**SOCIAL SELLING:  
TOWARDS A CONCEPTUALIZATION IN B2B  
MARKETS**

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**TABLE OF CONTENTS**

- 1. INTRODUCTION ..... 9
  - 1.1. Context of the study and research gap..... 9
  - 1.2. Research purpose and research questions..... 12
  - 1.3. Research design and structure of the dissertation..... 14
  
- 2. POSITIONING THE STUDY WITHIN THE SALES AND DIGITAL MARKETING LITERATURE ..... 19
  - 2.1. The evolution of personal selling: from transactional to strategic sales ..... 21
    - 2.1.1. Key research approaches in the traditional sales literature..... 21
    - 2.1.2. The changing sales environment: challenges and opportunities for selling and sales research ..... 32
  - 2.2. Digital marketing research in the B2B context ..... 36
  - 2.3. Changing buying behaviors and customer journey mapping ..... 43
  - 2.4. Concluding remarks..... 47
  
- 3. THE EXTANT VIEW ON SOCIAL SELLING ..... 49
  - 3.1. The systematic literature review methodology: rationale and process..... 49
  - 3.2. Descriptive and content analysis of the relevant literature..... 56
    - 3.2.1. An overview of the publications..... 57
    - 3.2.2. In-depth content analysis of the social selling research..... 71
  - 3.3. Key concepts to study social selling in B2B research ..... 74
    - 3.3.1. Social Selling at the Individual Salesperson Level..... 74
    - 3.3.2. Social Selling at the Organizational level..... 78
  - 3.4. Antecedents of B2B social selling ..... 85
  - 3.5. Outcomes of B2B social selling ..... 90
  - 3.6. A definition of social selling based on the extant literature ..... 94
  
- 4. A FIELD-BASED VIEW ON SOCIAL SELLING..... 99
  - 4.1. Field study methodology and data analysis ..... 100

4.2. Field study 1: delineating the conceptual domain of social selling.....	103
4.2.1. Data collection for the field study 1 .....	103
4.2.2. Towards a conceptualization of social selling in B2B: the key activities facets .....	107
4.2.3. An operational definition of B2B social selling .....	117
4.2.4. Potential outcomes of social selling .....	119
4.2.5. Organizational aspects of social selling.....	123
4.3. Field study 2: comparing the social selling conceptualization with frontline sales practices .....	135
4.3.1. Data collection for the field study 2 .....	135
4.3.2. Findings of the field study 2: the frontline view on social selling.....	138
4.4. Summary of the findings: complementing the extant view with the field-based view .....	146
5. CONCLUSIONS.....	149
5.1. Theoretical implications .....	150
5.2. Managerial implications .....	155
5.3. Limitations and future research directions .....	157
REFERENCES .....	161
APPENDIX – INTERVIEW PROTOCOLS .....	175

## **LIST OF FIGURES**

Figure 1. Research design: a discovery-oriented, theories-in-use approach.....	14
Figure 2. Positioning the study .....	19
Figure 3. Customer journey and customer experience .....	46
Figure 4. The systematic literature review process followed in this study.....	51
Figure 5. Publication trend in the time frame 2001-2018.....	67
Figure 6. Extant research on B2B social selling.....	73
Figure 7. Grounded theory coding for data analysis.....	101
Figure 8. The social selling concept and its nomological network.....	134

## **LIST OF TABLES**

Table 1. Evolution of the personal selling research.....	25
Table 2. Inclusion and exclusion criteria in the systematic literature review.....	53
Table 3. Database search process and results .....	55
Table 4. Descriptive and Content analysis.....	58
Table 5. Publication outlets for the reviewed articles.....	68
Table 6. Methodology of the reviewed articles .....	69
Table 7. Theoretical background of the reviewed articles.....	71
Table 8. Qualitative field studies .....	99
Table 9. Profiles of thought-leading social selling experts.....	105
Table 10. Perceived relevance of social selling-related technologies .....	131
Table 11. Profile of frontline sales professionals participating in the study.....	137





## 1. INTRODUCTION

### 1.1. Context of the study and research gap

Business markets have been undergoing a significant transformation due to the increasingly global marketplace, growing pressures from customers and competitors and the advent of new technologies (Moncrief 2017; Wiersema 2013). These environmental changes require sales organizations to adjust their marketing and sales strategies (Moncrief 2017). Notably, the recent digitalization trend has entailed considerable changes in customers' buying behaviors by shifting the role of salespeople and channels in customers' decision-making processes (Moncrief, Marshall and Rudd 2015; Wiersema 2013). Traditionally, salespeople have played a dominant role in the buyer-seller relationship, starting and leading most sales negotiations and contracts. Yet, customers are becoming more empowered and less reliant on traditional selling approaches (Fidelman 2012; Giamanco and Gregoire 2012; Minsky and Quesenberry 2016; Wiersema 2013). The customer's journey is becoming more complex and fragmented across multiple touchpoints. Today's customers typically complete most of their purchasing journeys before having any contact with salespeople, being far more informed about alternatives than ever before (Giamanco and Gregoire 2012; Wiese 2017). Moreover, empowered buyers are increasingly relying on digital resources and social media during their purchasing journeys (Fidelman 2012;

Giamanco and Gregoire 2012; Wiese 2017). A recent B2B buyer survey found that 53% of the participants acknowledged the role of social media when making a final purchase and 82% of the buyers noted that sellers' social content has an impact on their buying decision (Minsky and Quesenberry 2016). Likewise, anecdotal evidence from industry leading firms such as Adobe, IBM and Maersk Line shows that social media and digital channels can be used in selling to effectively interact with buyers, even in industries not usually considered to be 'social' (Kovac 2016). Therefore, the ongoing evolution of the B2B environment has created new challenges and opportunities for traditional sales organizations and academic sales research (Moncrief 2017).

In this scenario, both practitioners and academics have started to emphasize social selling as a contemporary selling approach to tackle current challenges and exploit new opportunities. Practitioners describe social selling as "the strategy of adding social media into the to the sales professional's toolbox [...] to research, prospect, and network by sharing educational content and answering questions" (Minsky and Quesenberry 2016, p. 2). Simultaneously, scholars discuss social selling as a professional selling approach "predicated on the strength of social media allies within a social enterprise" (Agnihotri, Kothandaraman, Kashyap and Singh 2012, p. 341) and highlight salespeople' use of social platforms for content creation and networking.

Overall, the number of articles on social media and its impact in sales is steadily growing, yet these studies tend to cover very narrow applications (Moncrief 2017). The academic research on social selling is still early and fails to provide an in-depth knowledge on this phenomenon. Studies in this area widely focus on how social media is adopted rather than how salespeople use social media in selling practices (Nunan, Sibai, Schivinski and Christodoulides 2018). The current research scenario remains highly fragmented, and a generally agreed understanding on what constitutes social selling is missing.

Notably, the extant empirical research on social media in B2B sales has focused on the general degree of social media use, its antecedents and outcomes (e.g. Agnihotri, Dingus, Hu and Krush 2016, Guesalaga 2016; Hansen and Levin 2016; Itani, Agnihotri and Dingus 2017; Ogilvie, Agnihotri, Rapp and Trainor 2018; Schultz, Schwepker and Good 2012). Salespeople's use of social media seems to require specific capabilities and motivations (e.g. Hansen and Levin 2016; Rodriguez, Ajjan and Peterson, 2016) and to result from customers' and colleagues' social influence (see Guesalaga 2016; Schultz et al. 2012). Furthermore, research shows that social media usage in sales is likely to positively influence customer knowledge, sales capabilities and even selling performance (e.g. Itani et al. 2017; Rodriguez et al. 2016). Few recent studies have investigated more deeply social selling activities. However, they are focused on highly diverse areas of social selling and use very specific perspectives, thereby remaining

relatively disconnected from one another (e.g. Bocconcelli, Cioppi and Pagano 2017; Lacoste 2016). Accordingly, further research on social media and its relationship with the sales organization and the salesforce is urgently needed; particularly some questions concerning how salespeople implement social media and how these platforms change the way salespeople are selling need deeper investigation (Moncrief 2017).

Therefore, whilst the extant literature provides some insights into the topic, we lack a thorough understanding of what social selling represents in practice and which are its critical aspects in B2B sales. Highly heterogeneous constructs have been employed thus far and a generally agreed and empirically-rooted definition of social selling is missing. This generates an interesting gap for research development.

## **1.2. Research purpose and research questions**

Academic research has shown a growing interest in investigating the general social media usage among B2B salespeople and has so far largely examined its antecedents and outcomes. Yet, extant research falls surprisingly short of providing deep insights into the topic of social selling and only scarce and fragmented knowledge exists on the key constituents of social selling. Surprisingly, despite the novelty of the topic, most articles concerning salespeople's use of social media are quantitative, whilst qualitative studies well-

suitable to understand social selling practices among salespeople remain scant. To date, very little is known about *how* B2B salespeople use social media (c.f. Moncrief 2017). Arguably, research in this area is hindered by the lack of established definitions and high-quality constructs.

Accordingly, this study strives to address this gap by investigating and deepening the current understanding of B2B social selling. This general purpose is thereby divided into two more specific aims: to delineate the domain of the social selling concept and provide an operational definition; to compare the social selling conceptualization with the implementation of social selling in frontline sales practices. We address these two purposes by answering the following questions:

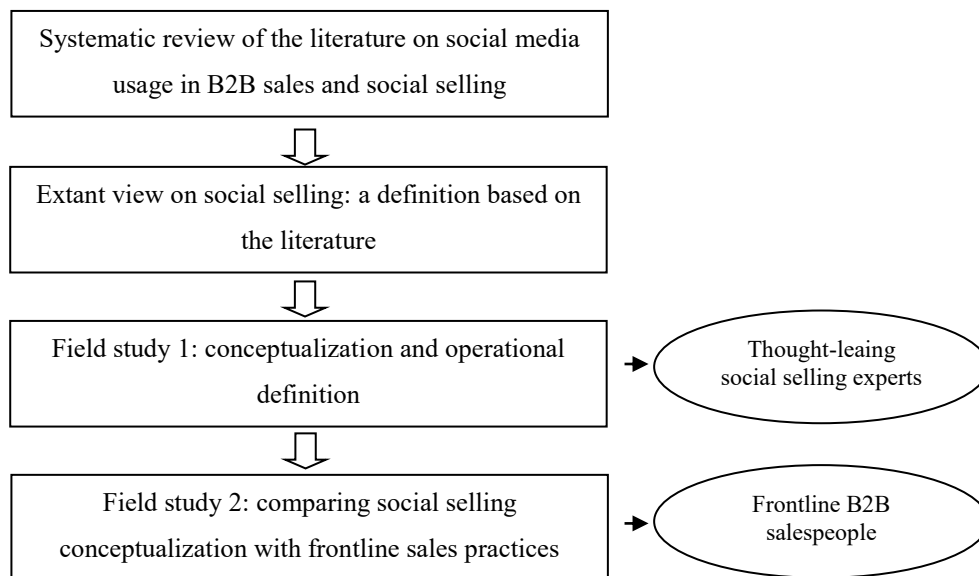
1. *how can we define and conceptualize social selling?*
2. *how do frontline sales professionals practice social selling in their work?*

Importantly, this dissertation does not aim at building or extending any specific marketing theory, still this study develops the body of marketing research and theory through conceptual development. In doing so, we hope to provide a theoretically meaningful picture to broaden the research perspective beyond the narrow focus on the general degree of social media usage to include social selling as a contemporary selling approach implementing the principles of digital marketing at the sales force level.

### 1.3. Research design and structure of the dissertation

This study adopts a qualitative approach to explore a phenomenon where limited understanding exists. Specifically, given the sparse and fragmented literature on social selling, we used a discovery-oriented, theories-in-use approach to achieve a thorough understanding of the social selling concept (e.g. Kohli and Jaworski 1990; Tuli, Kohli and Bharadwaj 2007; Zaltman, LeMasters and Heffring 1982) (see Figure 1).

**Figure 1. Research design: a discovery-oriented, theories-in-use approach**



As outlined in the first paragraph of this introduction, research on social selling is still in its infancy and studies lack a thorough understanding of the social selling key constituents. Therefore, there is a need for research that contrasts and

complements early research findings and empirically-based insights on social selling. To this end, this study adopts the systematic literature review as a methodology for gathering and synthesizing the extant knowledge on social selling and social media use in B2B selling. Indeed, by providing a synthesis of piecemeal findings, systematic reviews allow to comprehensively understand specific phenomena (Palmatier, Houston and Hulland 2018). In many ways, a comprehensive analysis of the relevant literature encourages researchers to draw away from their individual “trees” to assess the entire “forest” of knowledge within a discipline (Williams and Plouffe 2007).

In this dissertation, the systematic review on social selling and social media use in sales helps to develop a definition of social selling entirely based on the extant literature. This definition is complemented with a qualitative field study among thought-leading social selling experts to identify the key facets of social selling and answer the first research question of *how we can define and conceptualize social selling*. Then, we conduct a second qualitative field study aiming at comparing the conceptualization with the frontline implementation of social selling among salespeople and sales managers, thereby answering the second research question of *how frontline sales professionals practice social selling in their work*.

The purpose of this dissertation is to form an operational definition of social selling and closely understand current social selling practices among B2B sales

professionals. To this end, this dissertation comprises five sections. After this first introduction, Chapter 2 summarizes some of the key research trends in the personal selling, digital marketing and buying behavior literature to position the study within its broader marketing discipline. Subsequently, Chapter 3 lays the conceptual foundation of the study by reviewing the relevant academic knowledge on social selling and social media use in B2B sales. The literature review shows that the extant academic research widely adopts a narrow view on the topic and lacks a generally-accepted definition of social selling. Surprisingly, despite the increasing attention that has been devoted to this research area, studies have largely focused on the general ‘social media use in B2B sales’ and its antecedents and outcomes. Few conceptual articles have discussed the social selling concept to a certain degree, however extant definitions appear broad and abstract. Therefore, grounding on the extant empirical studies, we develop a definition of social selling based on the literature by following the approach of the classic works (e.g. Kohli and Jaworski 1990). In Chapter 4, we contrast and complement this ‘received view’ from the literature with the field-based insights presenting the findings of a qualitative study conducted among thought-leading social selling experts. We describe in detail the methodology employed in this research and conceptualize social selling by forming an operational definition. Afterwards, we compare this conceptualization with further insights into the sales practices of frontline salespeople and sales managers.



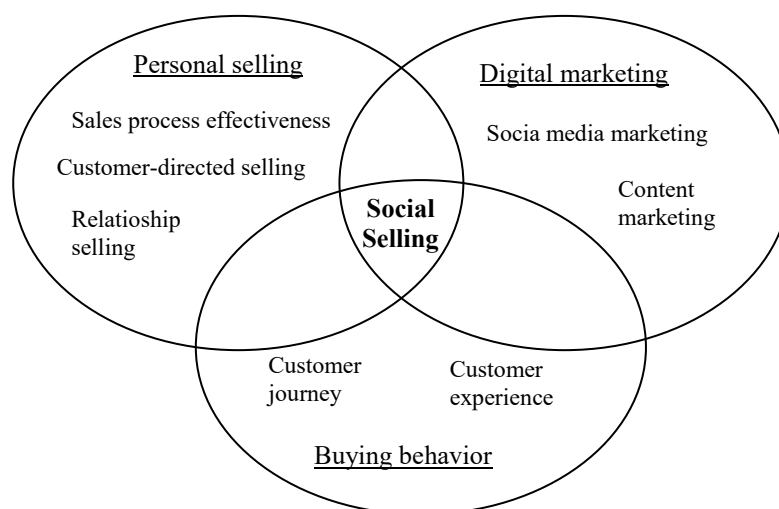
Finally, the theoretical and managerial contributions of the research are discussed together with study limitations and future research directions.



## 2. POSITIONING THE STUDY WITHIN THE SALES AND DIGITAL MARKETING LITERATURE

This second chapter introduces the main research developments in the personal selling, digital marketing and buying behavior literature. This dissertation grounds on and contributes to these three research areas (see Figure 2). Importantly, this chapter does not illustrate in depth the specific concepts, rather it describes major research streams pertaining to each research area on a general level.

**Figure 2. Positioning the study**



Firstly, we review seminal contributions in the personal selling literature to describe the fundamental changes that the selling function has been undertaking over the years. Various selling approaches have been studied to understand which behaviors are likely to affect sales performance. Notably, scholars have focused

on hard selling approaches (c.f. Chu, Gerstner and Hess 1995), customer-directed approaches (c.f. Saxe and Weitz 1982; Spiro and Weitz 1990), sales service behaviors (c.f. Aeharne, Jones and Jelinek 2007), relationship selling behaviors (c.f. Crosby, Evans and Cowles 1990; Jolson 1997), consultative selling behaviors (c.f. Liu and Leach 2001), selling skills (c.f. Rentz, Shepherd, Tashchian, Dobholkar and Ladd 2002), and value-based selling behaviors (c.f. Terho, Haas, Eggert and Ulaga 2012) among others. For the sake of clarity, we illustrate major established research approaches by including those sales perspectives that are applicable in longer cycle, relationship-oriented, consultative sales contexts, which can be associated with B2B (see also Plouffe et al. 2009). Thus, we outline the cumulative evolution of sales from a sales-oriented approach, to customer-oriented selling approaches, to relationship selling and partnering. We also emphasize how recent changes in B2B sales have triggered the growth of new research topics relating to the alignment of the sales process to contemporary digitalized business markets.

Secondly, we highlight major research streams in the B2B digital marketing literature. The extant research on social media marketing in the B2B context mainly focuses on the antecedents of social media adoption, the level of usage, its benefits and barriers. Likewise, studies investigate to some extent corporate practices and message strategies of B2B companies, while a growing body of

research is devoting attention to “pull” approaches, such as content marketing and social selling.

Thirdly, we review the literature on buying behavior, which helps us to depict major changes on the customer side. Particularly, we highlight the debate on customer journey which appears significant to understand the role of social selling as a new way to tackle contemporary customer-related challenges and opportunities.

## **2.1. The evolution of personal selling: from transactional to strategic sales**

### *2.1.1. Key research approaches in the traditional sales literature*

The nature of personal selling has radically evolved over time (Arli, Bauer and Palmatier 2018; Marcos-Cuevas 2018; Weitz and Bradford 1999; Wotruba 1991). Personal selling has been undergoing a profound transformation related to the composition of the offerings that suppliers provide to customers, to the nature of the buyer-seller relationships, as well as to the configuration of the selling organization and the selling roles (Marcos-Cuevas 2018). Basically, business markets are witnessing the rise in products and services bundles that provide customers with more integrated solutions and value propositions. In this scenario, salespeople need to broaden their knowledge beyond the company’s products and services to become expert in the customer business and cope with more complex buyer-seller relationships. The evolution of personal selling has also echoed in the

development of the academic research suggesting that salespeople may play different roles in implementing the firm's strategy: the production role, the sales role, the marketing role and the partnering role (Weitz and Bradford 1999).

Notably, the historic perspective on sales, dominating the sales research from mid-1970s until the early 1980s, adopts a narrow view on sales as a tactically-oriented area of marketing. In the production role, salespeople are product "providers", involved in informing the buyer about the firm's available offering, taking orders and supplying the product (Weitz and Bradford 1999, Wotruba 1991). In doing so, they are focused on short-term sales for satisfying a given demand from the customer side (Weitz and Bradford 1999). Differently, in the sales role, salespeople are considered "persuaders", responsible for promoting products or services and for convincing customers to buy (Weitz and Bradford 1999, Wotruba 1991). Notably, the rationale behind this role is the conviction that customers are passive recipients of salespeople's selling tactics and reluctant to buy, albeit they do need the product. This sales-oriented approach focuses primarily on pursuing sales efficiency and cost reduction. Sales professionals are not concerned about understanding customers' needs or tailoring selling activities to customers' expectations. Conversely, salespeople aimed at satisfying the company's needs and achieving short-term results, typically using "hard selling" techniques (Weitz and Bradford 1999). In this regard, sales-related knowledge focused on either the seven step of the sales process and their overall effectiveness

(c.f. Dubinsky 1980 - 1981) or the salesperson motivation and its effect on performance (c.f. Walker, Churchill and Ford 1977). As shown by recent assessment of the sales literature, these “classic” salesforce issues have received a great deal of attention in academic research (c.f. Williams and Plouffe 2007).

The seven steps of selling is one of the most commonly accepted paradigms in the sales discipline, widely dominating sales books and periodicals (Moncrief and Marshall 2005). According to Dubinski (1980-1981) the personal selling process comprises a set of steps a salesperson experience when making a sale (i.e. prospecting, preapproach, approach, sales presentation, handling objections and post-sales follow up). The author further investigates various selling techniques that salespeople might perform at each stage of the selling approach and the underlying factors (e.g. the prospecting techniques of cold canvassing and personal observation are synthesized under one factor, namely “personal contact”). Moreover, studies have focused on theories and practices designed to better understand salespeople’s goal attainment, retention and satisfaction (Williams and Plouffe 2007). In this regard, studying the effectiveness of salespeople, Walker, Churchill and Ford (1977) developed the first comprehensive model of sales performance’s antecedents. This model hypothesizes that sales performance depends on three basic factors related to salespeople’s expectations, i.e. the level of motivation on performing their job-related tasks and activities, the sales aptitude or ability, and the perceptions of

their role's demands within and outside the organization. They also indicate that each of the three drivers of performance is in turn influenced by individual, interpersonal, organizational, and environmental variables, whereas the consequences of performance are rewards and satisfaction. The developed classification scheme for the sales' determinants represents a cornerstone in the sales research, which has shaped the sales management literature in following years. For instance, grounding on this conceptual model, Churchill, Ford, Hartley and Walker's (1985) meta-analytic study ranked six predictors of sales performance: role perceptions, skills levels, aptitude, motivation, personal characteristics and organizational/environmental variables. Scholars thus far predominantly focus on the individual salesperson as a unit of analysis and his dominant role in buyer-seller relationships (Weitz and Bradford 1999). Table 1 below summarizes the evolution of personal selling and academic sales knowledge.



**Table 1. Evolution of the personal selling research**

<b>Era</b>	Production	Sales	Marketing	Partnering
<b>Salesperson role</b>	Provider	Persuader	Problem solver	Value creator
<b>Sales objective</b>	Making sales	Making sales	Satisfying customer needs	Building relationships
<b>Critical Tasks</b>	Informing customers, taking orders, supplying products	Convincing the customer to buy	Matching available offerings to buyer needs	Creating new alternatives by matching buyer needs with seller capabilities
<b>Research focus</b>	Sales process effectiveness Determinants of salesperson's performance		Customer-directed behaviors Salespeople abilities	Relationship selling
<b>Unit of analysis</b>	Individual salesperson			Sales teams

Source: based on Weitz and Bradford (1999).

The involvement of more buying influences within the customer organization and subsequent increased complexity of selling ensued an increased sophistication in the purchasing process and a new role of the salesperson as a “problem-solver” (Weitz and Bradford 1999; Wotruba 1991). Salespeople in this position fulfill a marketing role, conducting a true diagnosis of those customer’s needs and challenges that fit the selling organization’s offerings (Weitz and Bradford 1999). Accordingly, academic literature started to examine salespeople’ behaviors

beyond the firm boundaries. Particularly, two customer-directed perspectives have been at the heart of prominent sale research to oppose the prevalent selling orientation of many salespeople. One research stream focuses on customer-oriented sales (e.g. Homburg, Müller and Klarmann 2011a; Franke and Park 2006; Plouffe, Hulland and Wachner 2009; Saxe and Weitz 1982), while the other one studies adaptive selling behaviors (e.g. Franke and Park 2006; McFarland, Challagalla and Shervani 2006; Plouffe et al. 2009; Spiro and Weitz 1990). Whilst previous research largely emphasized two major factors influencing sales performance, namely the salespeople's role perceptions and motivation (c.f. Walker et al. 1977), the customer-directed perspectives suggest investigating the impact of salespeople abilities and behaviors on sales performance.

While developing the selling orientation-customer orientation (SOCO) scale, Saxe and Weitz (1982) argue that salespeople's selling behaviors might exhibit high customer orientation (i.e., customer-oriented selling) and low customer orientation (i.e., selling orientation). Customer-oriented selling can be defined as "the degree to which salespeople practice the marketing concept by trying to help their customers make purchase decisions that will satisfy customer needs" (Saxe and Weitz 1982, p. 344). From a theoretical standpoint, customer orientation (hereinafter CO) relates to salespeople's behaviors of caring for customers, find appropriate solutions to their problems and selling product offerings that directly address their needs. The central contention of this conceptualization is that highly

customer-oriented salespeople emphasize customer's best interest rather than short-term sales. The original conceptualization and measures have been largely debated among academics, who have criticized the concept of CO as somewhat vague and imprecise. For instance, according to Schwepker (2003) the SOCO scale is focused on communication behaviors. In doing so, according to the author, it reduces customer orientation to a simple sales presentation approach, rather than explaining salespeople's concrete actions to achieve customer satisfaction. Along this line, most recent conceptualizations of customer orientation highlight a multidimensional nature of the construct and distinguish between attitudes and behaviors (c.f. Stock and Hoyer 2005) or between task-related behaviors (i.e. "functional customer orientation") and relationship-oriented behaviors (i.e. "relational customer orientation") (c.f. Homburg et al. 2011a). For instance, Homburg et al. (2011a) highlight how recent developments towards sustainable long-term business relationships require to consider behaviors that customers are likely to expect from the businessperson (i.e. functional) as well as behaviors for establishing personal relationships with the customers beyond the professional sphere (i.e. relational).

Within this research stream, some evidence exists on the positive impact of CO on salesperson's selling performance (e.g. Boles, Babin, Brashear and Brooks 2001; Keillor, Parker and Pettijohn 2000; Martin and Bush 2006; Saxe and Weitz 1982), firm's sales performance (e.g. Papatoidamis and Guenzi 2009), customer

satisfaction (e.g. Stock and Hoyer 2005) and customer loyalty (Homburg et al. 2011a). Yet, scholars have largely questioned the universal efficacy of CO and its impact on salespeople's performance (c.f. Franke and Park 2006; Homburg et al. 2011a; Plouffe et al. 2009). For instance, Franke and Park's (2006) meta-analysis shows that CO enhances only self-rated performance, whereas there is no clear effect of customer-oriented selling on objective performance. Additionally, according to Homburg, Müller and Klarman (2011b) there is an optimum level of customer orientation with regard to sales performance due to a non-linear, inverted U-shaped relationship between customer-orientation and sales performance outcomes. Furthermore, researchers have contended that the effects of CO should not be studied independently of contingency factors and have deepened the understanding of the constructs, by investigating moderating influences. For instance, studies have shown the moderating effects of salesperson characteristics, i.e. empathy, expertise, reliability, and situational factors, i.e. restriction in job autonomy (c.f. Stock and Hoyer 2005), purchasing situation, i.e. customers' task orientation and interaction orientation (c.f. Homburg et al. 2011a), product characteristics (c.f. Homburg et al. 2011a, 2011b) as well as of supplier's price positioning and competitive intensity (c.f. Homburg et al. 2011b).

During the 1980s, academics introduced the concept of adaptive selling (Spiro and Weitz 1990; Weitz, Sujon and Sujon 1986), which has been at the forefront of the marketing literature for over two decades. In this regard, adaptive selling

behavior (hereinafter ASB) is defined as the “altering of sales behaviors during a customer interaction or across customer interactions based on perceived information about the nature of the selling situation” (Weitz et al. 1986, p. 175). According to this practice, salespeople tailor the interaction and the sales style to fit individual customers’ needs and preferences. The central tenet is that sales performance largely depends on the salesperson’s ability to create and modify messages through interactive communications with customers. Building on this conceptualization, Spiro and Weitz’s (1990) seminal study developed the adaptive selling scale (ADAPTS) consisting of six facets and tested its nomological validity. Since then, theory-testing studies have reported mixed results (Robinson, Marshall, Moncrief and Lassk 2002). However, various studies have given support to the positive relationship between ASB and salesperson’s sales performance (e.g. Boorum, Goolsby and Ramsey, 1998; Franke and Park 2006; Park and Holloway 2003; Plouffe et al. 2009; Verbeke, Dietz and Verwaal 2011) and firm’s sales performance (e.g. Pappas and Guenzi 2009). Likewise, ASB has also been found to be significant mediators between customer orientation and performance (e.g. Goad and Jaramillo 2014). The original ADAPTS scale has also been subjected to criticism and revision. For instance, Robinson et al. (2002) form a shortened version of the scale consisting of five items which represent four of the facets formerly identified by Spiro and Weitz (1990). Overall, customer-oriented sales and adaptive selling are milestones in the

personal selling literature and have fostered the development of large bulks of literature. Customer-oriented behaviors have been definitely considered important for building lasting buyer-seller relationships and recognized as a key aspect of relational selling behaviors (c.f. Homburg et al. 2011b; Keillor et al. 2000; Palmatier, Scheer, and Steenkamp 2007). Yet, Weitz and Bradford (1999) note that although these customer-directed behaviors consider customer needs, salespeople fulfilling the marketing role still pursue the primary objective of making the sales rather than increasing customers profitability. Indeed, most of the customer-oriented research considered the salesperson and the selling firm to control the relationship, thereby neglecting the examination of the customer's standpoint in the buyer-seller dyad. Differently, the partnering role emphasizes the development and maintenance of relational exchanges, whereby buyers and sellers work together to "expanding the pie" rather than "dividing the pie" (Weitz and Bradford 1999). In this scenario, relationship selling and partnering behaviors have been at the forefront of academic research (e.g. Crosby et al. 1990; Jolson 1997; Weitz and Bradford 1999). The conceptualization of relationship selling focuses on behaviors aimed at building trust and satisfaction, such as high interaction intensity, mutual information disclosure, and cooperative intentions (Crosby et al. 1990). In a relational sales setting, contact intensity represents the frequency of trust-building communications between the buyer and the seller for both personal and business reasons. According to Crosby et al. (1990) information

disclosure can lead to trust only if it is conceived as a reciprocal concept. For instance, customer disclosure about personal and organizational information is critical for the relational salesperson, who is often involved in solving complex problems. The third dimension of relational selling behaviors is the customer perception of the salesperson's cooperative selling style to gain respect and trust from the buyer. A relational approach requires a focus shift from short-term outcomes for the selling party towards long-term results for the relationship (Crosby et al. 1990). In this regard, studies have empirically demonstrated that relationship selling behaviors can influence a salesperson's sales performance (e.g. Boles, Brashear, Bellenger and Barksdale 2000). Likewise, salespeople adopting a partnering behavior become "value creators", working in close collaboration with the customer to develop solutions that increase the profits of both firms (Weitz and Bradford 1999). The value creators (or procreators) create a market offering tailor-made to specific customer needs, regardless of the selling firm's standard offering (Wotruba 1991). Since developing partnerships usually involves multiple actors in the buying and selling firms with different knowledge, researchers began to devote attention to the selling team as a unit of analysis, such as selling centers (e.g. Moon and Gupta 1997) and key account management (e.g. Homburg, Workman and Jensen 2002). To summarize, three major differences between the partnering role and the other roles: managing conflict, instead of influencing the purchase decision; building and maintaining customer relationships, rather than

adopting a short-sighted approach; analyzing sales teams versus individual salespeople (Weitz and Bradford 1999).

Building on this research background, the next paragraph highlights the changing role of sales due to major shifts in business markets.

### *2.1.2. The changing sales environment: challenges and opportunities for selling and sales research*

The B2B sales scenario has been undergoing major transformation due to changing buying behaviors, increasing competition, “servitization” and growing technological development (Hunter and Perrault 2007; Moncrief and Marshall 2005; Seth and Sharma 2008). Nowadays, as customers become more sophisticated and better-informed (Moncrief and Marshall 2005; Moncrief 2017), the buyer-seller dyad is no longer dominated by the sales force and the selling process is much more about creating a relationship. Sheth and Sharma (2008) suggest two main directions in the sales evolution: the growth of more customer-focused sales organization and the effects of technological developments in reducing some traditional sales functions and even face-to-face contact.

Contemporary sales contexts are increasingly characterized by protracted times frames, higher complexity and relationship quality (Marcos-Cuevas 2018). Accordingly, there has been a shift from product to service (or solution) approaches in business-to-business interactions, characterized by increased



understanding, collaboration and customer-centric sales (Marcos-Cuevas 2018). In this scenario, the salesperson becomes a knowledge broker and a consultant supporting buyers, selling firms and other actors in better understanding problems and potential solutions for mutual benefits (Sheth and Sharma 2008; Verbeke, et al. 2011). According to Liu and Leach (2001) consultative selling involves providing information in a professional way to help customers in achieving their business objectives. Salespeople become value advisors perceived by customers as experts in their field.

The service-centered view entails a shift from the exchange of tangible goods towards the exchange of intangibles, specialized skills, knowledge and processes, whereby goods and services are integrated with one another (Vargo and Lusch 2004). This logic implies that value is co-created with the customers and manifested as value-in-use throughout consumption in a customers' value-generating process rather than embedded in a tangible output as value-in-exchange (Grönroos 2008). Sales organizations respond to these changes by employing customer-oriented and relational strategies to offer opportunities for joint collaboration and innovation in order to co-create value with the customer (Sheth and Sharma 2008). In this regard, sales is shifting its focus from an operational function to a more strategic one (Arli et al. 2018; Greiger and Guenzi 2009; Storbacka, Ryals, Davies and Nenonen 2009), thereby playing a pivotal role in creating value in business relationships. Accordingly, scholars have

emphasized the importance of seller-customer interactions for effective co-creation of value (Haas, Snehota and Corsaro 2012) and highlighted a specific salesperson behavior, i.e. value-based selling, implementing the firm's customer-value orientation at the sales force level (Terho et al. 2012). Notably, value-based selling is defined as "the degree to which the salesperson works with the customer to craft a market offering in such a way that benefits are translated into monetary terms, based on an in-depth understanding of the customer's business model, thereby convincingly demonstrating their contribution to customers' profitability" (Terho et al. 2012, p. 178). There are three key dimensions: understanding the customer's business model, crafting the value proposition, and communicating the value. Therefore, a mutual orientation and demonstrating the value-in-use potential of the offering for the customer are at the heart of this concept.

This evolved sales process will modify the traditional selling steps towards problem identification, presentation of solution and ongoing customer support (Sheth and Sharma 2008). However, different stages of the purchasing evolution in the buying unit might require distinct sales strategies by the selling firms including transactional relationships as well as structural and social linkages (Paesbrugghe, Rangarajan, Sharma, Syam and Jha 2017). Hence, scholars argue that modern sales requires multiple approaches ranging from transactional to consultative and strategic selling in order to pursue short-term outcomes and customer development at the same time (Marcos-Cuevas 2018).

The contemporary changes in buying behaviors and decision-making process pose new challenges and opportunities for sales and sales research (Geiger and Guenzi 2009; Moncrief 2017). The sales process focus appears to be under transition by moving from a linear sales process, centered on the buyer-seller dyad, towards multiperson and multipoint engagements between multiple actors (Dixon and Tanner 2012; Moncrief and Marshall 2005). There is common agreement that the ubiquity of information and digital platforms have changed the way interactions take place (Rapp and Panagopoulos 2012). In this regard, new research areas have been growing steadily during the last years, where scholars have devoted increasing attention to the digital context surrounding the sales organization and selling job. Particularly, editorials and research articles have strongly encouraged research in the area of social media and B2B sales (c.f. Avlonitis and Panagopoulos 2010; Nunan et al. 2018; Rapp and Panagopoulos 2012). Social media is believed to usher a new paradigm of how firms interact with customers and boundary-spanning employees alike in value co-creation (Rapp and Panagopoulos 2012). Therefore, this study contributes to the emerging selling literature, by investigating and deepening the current understanding of B2B social selling.

## **2.2. Digital marketing research in the B2B context**

Digital marketing represents a key transformation in the marketing scenario (Leeflang, Verhoef, Dahlström and Freundt 2014; Müller, Pommeranz, Weisser and Voigt 2018). This transformation is also occurring within the B2B context as a consequence of an ongoing change in the customer buying behavior (Wiersema 2013). The digital disruption has its major implications for B2B buying behaviors, resulting from the ready access to information and subsequent customer empowerment as well as from the gradual shift towards digital sources.

Against this background, scholars have devoted increasing attention to the impact of digital marketing within the B2B context. The bulk of this literature includes research on performance measurement of digital marketing (e.g. Järvinen and Karjaluoto 2015), social media marketing (e.g. Lacka and Chong 2016; Siamagka, Christodoulides, Michaelidou and Valvi 2015), content marketing (e.g. Holliman and Rowley 2014), and social media in sales (e.g. Agnihotri, Dingus, Hu and Krush 2016; Andzulis, Panagopoulos and Rapp 2012). Yet, extant research has focused on the tactics, rather than the strategic use (Salo 2017).

The academic literature examine to a somewhat extent the digital marketing performance measurement. A recent study by Järvinen and Karjaluoto (2015) focused on the use of web analytics in B2B, namely tools that track the source of website traffic (e.g. e-mail, search engines, display ads, social links) and visitors' online behaviors (i.e. navigation path and page views) through clickstream data.

They show that even companies characterized by complex and long selling processes can harness web analytics. Furthermore, their findings emphasize that organization's content, process and context influence the digital marketing performance measurement. Particularly, the authors highlight the importance of designing a manageable metrics system that demonstrates the progress towards marketing objectives, establishing a process that promotes the effective use of metrics data within the organization, and ensuring that the organizational context supports the use of the metrics system.

Social media marketing focuses on corporate communications towards large audiences (De Vries, Gensler and Leeflang 2012; Kaplan and Haenlein 2010). Corporate users accounts represent an extension for traditional communication channels to communicate company or industry related content at a companywide level (Huotari, Ulkuniemi, Saraniemi and Mäläskä 2015). Notably, various contributions exist on the adoption, barriers and current practices of social media marketing in B2B contexts. The extant literature has tried to understand which factors drive the adoption of social media sites in the B2B context, widely using the Technology Acceptance Model (TAM) and extended versions. In this regard, perceived usefulness (Lacka and Chong 2016; Siamagka et al. 2015) and perceived ease of use (Lacka and Chong 2016) seem to drive social media adoption. By doing so, these studies have primarily investigated social media as the adoption of a new technology in the same way as sales force automation tools

(e.g. Jones, Sundaram and Chin 2002) and customer relationship management systems (e.g. Avlonitis and Panagopoulos 2005). Most recently, Brink (2017) unveils two antecedents to overcome the gap between perceived usefulness of social media and its actual limited application, namely the integration of central and distributed leadership and open collaborative business model innovation. Scholars also cast light on the potential barriers, suggesting that B2B firms' adoption of social media is hindered by the perception of these tools as not important within the industry as well as by their employees' lack of knowledge and familiarity with these tools (Michaelidou, Siamagka and Christodoulides 2011). Furthermore, B2B companies appear uncertain about the usefulness of social media (Järvinen, Tollinen, Karjaluoto and Jayawardhena 2012; Michaelidou et al. 2011) and dread to jeopardize their competitive advantages damaging the confidentiality which characterize business relationships (Karjaluoto, Mustonen and Ulkuniemi 2015).

Some studies have investigated current practices among firms, especially with regard to their objectives and message strategies. Companies appear to use social media for attracting new customers, cultivating relationships (Karjaluoto et al. 2015; Michaelidou et al. 2011) and increasing brand awareness (Järvinen et al. 2012; Karjaluoto et al. 2015; Michaelidou et al. 2011). For instance, Lipiäinen and Karjaluoto (2015) show that branding in the digital age requires strong internal communication and consistent external communication as well as positioning the

brand in topical conversation. Scholars have also investigated whether differences between business and consumer markets justify the use of distinct social media message strategies. The existing evidence suggests that B2B Facebook posts are more effective in promoting word-of-mouth if they include brand names and avoid “hard sell” or explicitly commercial statements (Swani, Milne, Brown, Assaf and Donthu 2016; Swani, Brown and Milne 2014; Swani, Milne and Brown 2013). Apparently, the audience of B2B content associates itself with corporate brand names and try to express its identities and attachment to corporate brands by liking messages containing corporate brands (Swani et al. 2016). Additionally, B2B companies tend to use more links and cues for information search (Swani et al. 2014), which indeed increases the post popularity more than in B2C social media-related messages (Swani et al. 2016).

Alongside the adoption of company’s social media marketing, there has been growing interest in the potential of “pull” or “inbound”<sup>1</sup> approaches in which customers and prospects actively seek out brands that provides valuable and relevant content (Halligan and Shah 2010). In that sense, generating content highly tailored to the needs of potential buyers is a key component of the inbound marketing thinking. According to Holliman and Rowley “B2B digital content

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<sup>1</sup> According to Halligan and Shah (2010) inbound marketing is a “pull”-type approach that involves “getting found” by customers instead of interrupting people in the target market (c.f. outbound) through valuable and relevant content. The rationale behind the inbound thinking lies in customers and prospects actively seeking out brand in search engines and social media.

marketing involves creating, distributing and sharing relevant, compelling and timely content to engage customers at the appropriate point in their buying consideration processes, such that it encourages them to convert to a business building outcome” (Holliman and Rowley 2014, p. 285). Content is the key element and consists of information through which marketers can help customers and build relationships. Therefore, content marketing requires a shift from a one-way product-based selling communication, which interrupts the recipients in their online activities, to compelling and relevant messages, aiming at engaging customers and prospects during their buying cycle. Indeed, overt selling content is easy discernible by customers, thereby diminishing the perceived value of the content itself (Holliman and Rowley 2014). Content marketing is closely related to social media marketing in that their business objective (i.e. lead generation and organizational brand awareness) are largely aligned and the notion of storytelling rather than promotional communications is central to both concept (e.g. Holliman and Rowley 2015; Karjaluo et al. 2015; Michaelidou et al. 2011). Järvinen and Taiminen (2016) show that content marketing might benefit of an integration with marketing automation systems which can be harnessed for behavioral targeting to tailor content to specific buyers’ needs based on their recent online behaviors. This integration allows to coordinate marketing and sales efforts in generating high-quality leads and increase efficiency levels by overcoming a cumbersome prospecting phase of the selling process. Indeed, content marketing has emerged



as an approach that has the potential of developing the role of marketing in B2B firms in a way that makes marketing and sales better aligned (Wang, Malthouse, Calder and Uzunglu 2017). Particularly, Wang and colleagues show that the number of sales leads and won opportunities from salespeople are positively affected by the frequency of an account's employees attending digital events and consuming digital content.

In this regard, the debate on sales and marketing alignment is not new to the academic as well as managerial-oriented literature (e.g. Guenzi and Troilo 2007; Kotler, Racham and Krishnaswamy 2006; Strahle, Spiro and Acito 1996; Viswanathan and Olson, 1992; Wiersema 2013). Interestingly, according to Homburg et al. (2000) "primary marketing coordinators increasingly reside in the sales rather than the marketing organization" (p. 475). Although the relationship between the two functions has not always been friendly and effective (Strahle et al. 1996; Wiersema 2013), today, more than ever, the lines between the two departments are blurring. Salespeople's tasks and responsibilities are broadening and blurring to include those usually associated with other roles (Hughes, Le Bon and Malshe 2012; Rapp, Bachrach, Flaherty, Douglas et al. 2017). According to Wiersema (2013) the increasing demands the marketing function is facing and its growing involvement in strategic decisions require a closer relationship with sales. Likewise, the changes in sales make this function increasingly dependent on marketing's input and collaboration. Improvements in the relationship between

sales and marketing seems to be beneficial to help serving the customers better and improving business performance (Kotler et al. 2006). In this regard, Guenzi and Troilo (2007) found that the existence of an effective relationship between marketing and sales has a positive impact on superior customer value creation, which in turn affects market performance. This means that both departments need to work in close collaboration across all the selling stages. Marketing can help sales beyond lead generation in developing value propositions, in providing case study material and success stories to help customers decision (Kotler et al. 2006). In this scenario, the integration of social media is also a catalyst for selling organizations wishing to embrace a customer-oriented “pull” marketing approach (Rapp and Panagopoulos 2012). While a recent review article on the deployment of social media in B2B marketing noted that sales represents an important area for leveraging social media (Salo 2017), it merely considered selling as one facet of social media usage in marketing context. Rather, B2B social selling can be seen as an independent area of broader digital marketing (see Järvinen and Karjaluoto 2015; Leeflang et al. 2014). alongside content marketing, web analytics and social media marketing. In this regard, all relevant contributions concerning social media use in B2B sales are discussed in detail in Chapter 3. This study contributes to the digital marketing literature by investigating social selling as the application of digital marketing principles at the salesperson level.

### **2.3. Changing buying behaviors and customer journey mapping**

Various major trends have changed the way customers buy products and services in contemporary business markets and what they effectively expect from sales organizations (Müller, Pommeran, Weisser and Voigt 2018; Ulaga and Kohli 2018; Wiersema 2013). Overall, the purchasing function has been undergoing a shift to a more strategic role and an increased professionalization of its professionals (Sheth and Sharma 2008). This evolution of the purchasing function has led sales organizations to redefine how they interact with customers (Jones, Brown, Zoltners and Weitz 2005; Lassk, Ingram, Kraus and Di Mascio 2012). In the last decades sales representatives have developed their skills in discovering customers' needs and selling solutions as complex combinations of products and services (Adamson, Dixon and Toman 2012). Nowadays, procurement departments have become less reliant on the traditional role of the sales force and increasingly sophisticated and knowledgeable in defining solutions for themselves. Changes in the marketplace are shifting the role of salespeople as the sole information conduit to other channels more readily managed by marketing, such as website and digital media (Wiersema 2013). The amount of information available online for prospective customers has disjointed buying cycles from selling cycles (Kovac 2016).

The increasing digitalization has fragmented the touchpoints, whereby firms and customer interact, into a plethora of channels and media; thus, making the customer journey a more complex and nonlinear path to purchase. Touchpoints are instances of direct or indirect contact either with the product or service itself or with representations of it by the company or some third party (Meyer and Schwager 2007). According to the managerial-oriented literature, to cope with customers' changes, firms need to profoundly understand the customer's journey, identify the most important challenges at each stage, provide salespeople with tools to overtake these challenges, and track the customer's progress in order to be able to intervene at any moment (c.f. Toman, Adamson and Gomez 2017).

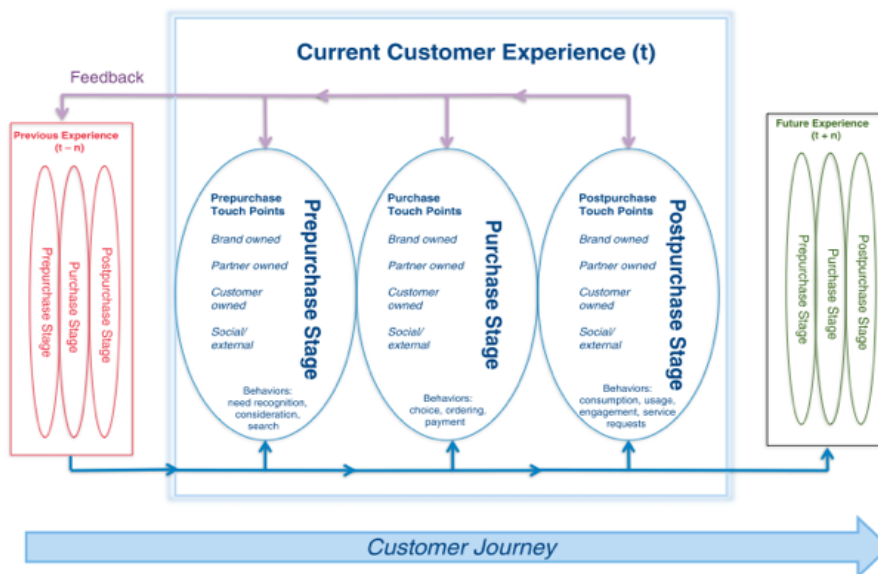
Scholars have strongly tied the idea of customer journey to the well-established concept of customer experience (c.f. Lemon and Verhoef 2016). Customer experience represents the customer's subjective responses to any direct or indirect contact with the company throughout the whole customer journey (Lemon and Verhoef 2016; Meyer and Schwager 2007). Direct contacts are usually initiated by the customers and occur during purchase, use and service, whereas indirect contacts generally involve unplanned encounters with representations of a company's products, service or brand (Meyer and Schwager 2007). The central tenet is that the customer experience is created across the customer journey (Lemon and Verhoef 2016; Meyer and Schwager 2007) and the ability to manage

increasingly complex journeys is a key area for customer experience management (Lemon and Verhoef 2016; Homburg, Jozić and Kuehnl 2017).

In this regard, the customer journey analysis can help to examine customer experiences during the journey as well as to model the effects of various touchpoints on the customer's experience (Lemon and Verhoef 2016). Conventional journey maps usually comprise four steps: awareness, consideration, preference and purchase, visualized as a funnel ending with the sales of the supplier's solution (Toman et al. 2017). In addition, former references to approaches for designing customer journeys might be found in consumer and service management literature. For instance, Homburg, et al. (2017) identify four firm capabilities for renewing customer experiences, namely touchpoint journey design, touchpoint journey prioritization, touchpoint journey monitoring and touchpoint journey adaptation. Homburg and colleagues note that firms should be able to design the journey across multiple touchpoints, building on a firm's own capabilities as well as working in alliances. Within the service management literature, the service blueprinting methodology has been developed to map out the entire service delivery process from back-office internal processes to front-facing customer interactions (Bitner, Ostrom and Morgan 2008). Yet, Bitner and colleagues cast doubts on the potential lack of customer focus in the service blueprinting methodology, which, building on employees' insights, might reflect solely the company's perspective. Differently, Lemon and Verhoef (2016)

identify three phases within the customer journey (see Figure 3): pre-purchase, purchase and post-purchase. In each stage, customers encounter various touchpoints, which affect the overall customer experience and are only partially controlled by the company. Hence, in a customer journey analysis, firms focus on how customers interact with multiple touchpoints, moving from consideration, search, and purchase to post-purchase.

**Figure 3. Customer journey and customer experience**



Source: Lemon and Verhoef (2016), p. 77.

In this regard, sales departments possess high knowledge about the customer's processes and are increasingly involved in mapping the customer journey, by working collaboratively across function and with customers to create a

comprehensive and clear map (Tomen et al. 2017). This is a significant issue in B2B sales, as salespeople struggle to influence customers in the early phases of their journey even in solution and value-based sales (c.f. Adamson et al. 2012; Terho, Eggert, Ulaga, Haas and Böhm 2017). Therefore, sales teams must play a role in the development of customer experience by performing a touchpoints analysis to translate present patterns of customer experience into action plans (Meyer and Schwager 2007). Given the increasing complexity of the customer journey, social selling might represent a way to tackle these changing behaviors and relate to contemporary customers' decision journeys across multiple touchpoints.

#### **2.4. Concluding remarks**

This positioning chapter aims at laying the foundations of the dissertation within the broader literature. Therefore, we briefly analyze some of the seminal contributions in the areas of personal selling, digital marketing and buying behavior.

Specifically, the personal selling literature has developed over time in parallel with the major changes that the selling role has been undergoing during years. We show how research attention has shifted from the selling process effectiveness and the determinants of sales performance to customer-directed selling approaches to relationship-oriented sales. The changes in buying behaviors, the “servitization”

as well as the ongoing technological development have entailed a tremendous transformation in the B2B sales environment. Against this background, scholars have devoted growing attention to the digitalization of sales and particularly to the use of social media in B2B sales.

Within the digital marketing domain, customer-oriented “pull” marketing approaches, such as inbound and content marketing, have lately raised growing interest. Likewise, B2B social selling can be seen as an independent area of broader digital marketing. Therefore, this dissertation provides novel insights into the implementation of the digital marketing principles in the context of selling at the sales force level.

The recent changes in buying behaviors have led academics to investigate the customer journey and related customer experience in the marketing and service management literature. In this scenario, given the fragmentation of the customer journey into a plethora of different touchpoints, social selling emerges as a way to tackle customer challenges and opportunities throughout the journey and provides new insights into how changes in buying behaviors affect the role of sales in business markets.

Overall, this dissertation contributes to the personal selling, digital marketing and buying behavior literature, by investigating and deepening the social selling phenomenon.



### 3. THE EXTANT VIEW ON SOCIAL SELLING

#### 3.1. The systematic literature review methodology: rationale and process

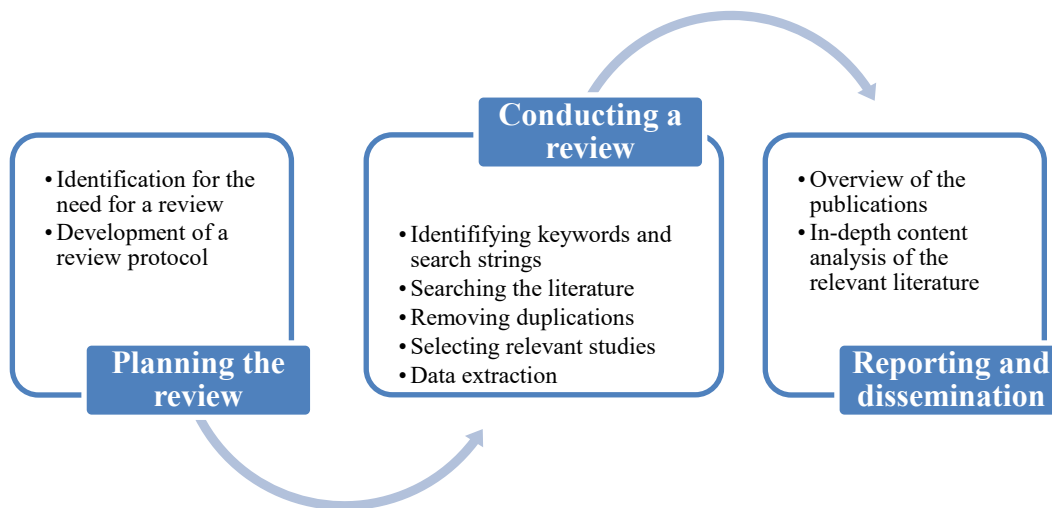
Traditionally, literature reviews in the business and management fields have presented previous research findings in a descriptive or “narrative” way (Denyer and Neely 2004). A traditional literature review builds on those sources which are considered as the most interesting or most relevant by the researcher (Easterby-Smith, Thorpe and Jackson 2015, p. 15). Therefore, descriptive reviews have been faulted for lacking critical assessment (Tranfield, Denyer and Smart 2003). Moreover, scholars adopting this “narrative” approach might avoid discussing the methodological process and criteria leading to article inclusion and evaluation (Barczak 2017). In doing so, traditional reviews can be biased at the identification, selection, synthesis and analysis steps of the review process (Booth, Papaioannou and Sutton 2012, p. 18).

Conversely, one of the main characteristics of the systematic literature review is to guarantee a “focus” and collect almost all the available evidence concerning a specific research topic (Torphe, Holt, Macpherson, Pittaway et al. 2005). Furthermore, since each step of the research process is recorded and the criteria for identifying relevant studies are explicit, this methodology ensures a replicable procedure (Littell, Corcoran and Pillai 2008, p.1; Tranfield et al. 2003). Such a characteristic guarantees transparency and clarity (Littell et al. 2008, p.1; Thorpe,

Holt, Macpherson and Pittaway 2005), allowing to overcome some of the limitations of the traditional “narrative” review (Briner and Walshe 2014; Littell et al. 2008, p.1). Notably, this methodology ensures equality and broad coverage as the use of well-defined research strings allows the ability to cover a great amount of studies, even from different research fields (Thorpe et al. 2005).

Therefore, to collect and analyze the relevant literature about social selling and social media use in B2B selling, this dissertation employs a systematic methodology. Consistently with the approach of other researchers in the marketing and management fields (e.g. Crossan and Apaydin 2010; Hüttinger, Schiele and Veldman 2012), this systematic process follows a three-stage procedure adapted from Tranfield *et al.* (2003): (1) planning, (2) conducting, (3) reporting and dissemination (see Figure 4). We start below by describing each step of the review process.

**Figure 4. The systematic literature review process followed in this study**



Source: based on Tranfield et al. (2003).

In this first phase, according to Tranfield et al. (2003), the researcher identifies the need for a review and conducts scoping studies to assess the relevance of the literature and to delimit the topic under review. The outcome of this process is a review protocol, which ensures the objectivity of the whole process, by explicitly describing its different stages (see also Littell et al. 2008, p. 21). Such a protocol includes information on the specific research questions and the whole search strategy as well as the criteria of relevance to assess the inclusion or exclusion of studies. However, the review protocol should be also embedded in a flexible approach so that it might be modified if necessary (Tranfield et al. 2003).

Hence, during the planning phase, we identified the objective of the literature review and the key data sources. We aimed at synthesizing and creating an overall picture of the extant research on social selling and social media usage in sales. First, we defined inclusion and exclusion criteria for guiding the literature review process (see Table 2) (c.f. Littell et al. 2008; Tranfield et al. 2003). Clear inclusion and exclusion criteria help the reader to define the scope of the review and to understand why particular articles are excluded (Booth et al. 2012, p. 23). Notably, due to the study focus, we select only articles that deal with social media rather than articles concerned with other selling-related technologies, such as sales force automation (SFA) or customer relationship management (CRM), unless they are regarded as the integration of these technologies with social media in sales. In addition, we decided to focus only on articles dealing with social media in selling either in B2B or generally (B2B and B2C) and to exclude studies that discuss social media in B2C sales or in the context of the broader B2B marketing. Finally, the search was limited to blind-reviewed journal articles and book chapters.

**Table 2. Inclusion and exclusion criteria in the systematic literature review**

<b>Criteria</b>	<b>Inclusion</b>	<b>Exclusion</b>
<b>Technology:</b>	Social media	SFA, website or other technologies
<b>Context:</b>	B2B selling + General selling	B2B marketing, B2C selling
<b>Publication:</b>	Journal articles + book chapters	Conference articles

Second, we used databases to identify the relevant literature, since they offer broad coverage of scientific publications and provide direct access to them. Three Internet-based research databases (Scopus, Emerald and Web of Science) were selected, as they are largely comprehensive of high-quality scientific business research outlets and allow to use build-in search functions to make the search process adequately precise.

While conducting the review, the researcher performs all the key steps listed in the review protocol to identify the relevant literature. According to Tranfield et al. (2003), a systematic search process starts with the identification of keywords and search strings built from the scoping study. The output of the database search should be a full listing of articles, among which, only those studies that meet all the inclusion criteria specified in the review protocol are included into the review. In this study, the second phase of the systematic review process comprises five stages: (1) identifying keywords and search strings; (2) searching the literature;

(3) removing duplications; (4) selection of relevant studies; (5) data extraction.

First, the following two search strings were entered in the three databases:

- a. “social media” AND (sales OR selling OR seller OR salespeople OR “sales force” OR “sales process”) AND (B2B OR “B-to-B” OR “business-to-business” OR industrial);
- b. “social selling” AND (B2B OR “B-to-B” OR “business-to-business” OR industrial)<sup>2</sup>.

The databases were queried for keywords in either the title, abstract and the keywords list and when this option was not available (i.e. Emerald database), each field was searched separately. Nonetheless, for the sake of replicability, the search is restricted to English-language publications only (Hüttinger et al. 2012).

The review encompasses the time frame 2001-2018, to cover the whole period of social media growth. Overall, this process returned 109 results within the three databases (see Table 3). Subsequently, 41 articles were removed as duplications due to the presence of the articles in more than one database.

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<sup>2</sup> The use of quotation marks allows to search for an exact phrase, whilst using parenthesis gives priority to Boolean operators.

**Table 3. Database search process and results**

<b>Database / Search phase</b>	<b>Keywords-based hits</b>	<b>Duplicate entries</b>	<b>Exclusion based on text analysis</b>	<b>Selected studies</b>
<b>Database search</b>	<b>109</b>	<b>-41</b>	<b>-53</b>	<b>15</b>
a. <b>Scopus</b>	44	-2	-28	
b. <b>Web of Science</b>	52	-29	-23	
c. <b>Emerald</b>	13	-10	-2	
<b>Backward search</b>				<b>7</b>
<b>Forward search</b>				<b>7</b>
<b>Included articles total</b>				<b>29</b>

The title and abstract of each remaining article was read for assessing its relevance to the review, by using the aforementioned inclusion and exclusion criteria. When the abstract was unclear, the entire article was read. After this process, 53 articles were excluded because they did not meet the above criteria. For instance, the following articles were removed from consideration:

- articles dealing with the general use of social media and digital channels in B2B marketing. These articles address different topics such as the use of web analytics in B2B marketing, the role of social media in B2B innovation, or innovation-related benefits of social media in B2B;
- articles dealing with mobile marketing, big data and social media, or privacy concerns in social media;
- articles analyzing the use of social media from a user perspective or in B2C contexts and examining specific topics such as cultural differences

among Facebook users, the role of user-generated reviews on social media, and so forth.

Finally, for ensuring full coverage of the review we conducted backward and forward searches (see Webster and Watson 2002) for the included relevant articles in respective databases. The backward search led to the inclusion of 7 articles, and the forward search added 7 other results. In this regard, the reason behind the considerable number of studies resulting from backward and forward searches lies in the second inclusion criterion which broadened the search to non B2B-specific articles. As shown in Table 3, the entire process yielded a total of 29 publications.

Afterwards, search results were classified and recorded in a Microsoft Excel file for data extraction (see Booth et al. 2012, p. 238; Tranfield et al. 2003), by selecting the following information: title, author(s), publication year, journal, typology (empirical or conceptual); methodology, notes on emerging themes. The data extraction step was preparatory to the reporting phase of the review process.

### **3.2. Descriptive and content analysis of the relevant literature**

Once the list of relevant articles is identified, the researcher describes and interprets the results. According to Tranfield et al. (2003) this phase entails a two-stage report. First, a ‘descriptive analysis’ of the field with the help of extraction forms, by using a simple set of categories, such as the authors, countries, age profile of the articles, and so forth. Second, the researcher needs to perform a



‘thematic analysis’, by outlining key emerging themes and linking these themes across the various core contributions.

### *3.2.1. An overview of the publications*

To the purpose of this study, articles were first ordered chronologically and read from the beginning to achieve a basic understanding of the different topics (c.f. Mustak, Jaakkola, Halinen and Kaartemo 2016; Mustak, Jaakkola and Halinen 2013). Then, a ‘descriptive analysis’ was conducted by analyzing the key contents of each article as summarized in Table 4 (c.f. Tranfield et al., 2003). Based on this, we provide a descriptive snapshot of the extant research, including the patterns that have characterized its development over the years. This initial descriptive analysis phase serves as a basis for a content analysis of the reviewed articles.

**Table 4. Descriptive and Content analysis**

N.	Author(s), Year & Journal	Key concept(s) under study	Theoretical Basis	Methodology and data	Contribution
1	Agnihotri et al. (2012) <i>Journal of Personal Selling &amp; Sales Management</i>	How social media tools can help salespeople in performing service behaviors leading to value creation	Task-Technology Fit Theory	Conceptual	<p>A framework of social media use and value creation outlining how both the salesperson and the customer benefit from social media through learning, sharing content, establishing relationship and exploiting networking opportunities.</p> <p>Social media is likely to allow value creation (salesperson-perceived value and customer-perceived value) by enabling salespeople's service behaviors.</p> <p>Social selling strategy: goal delineation, information exchange, competitive intelligence, performance metrics.</p>
2	Agnihotri et al. (2016) <i>Industrial Marketing Management</i>	The impact of social media usage on salesperson-perceived value and customer-perceived value	-	Quantitative Survey data N=111, USA	The mere use of social media does not ensure to enhance customer satisfaction and salesperson's responsiveness. It requires the salesperson's use of social media to convey critical information and knowledge that is important to the customer (full mediation).
3	Agnihotri et al. (2017) <i>Journal of Business Research</i>	The effects of sales-based CRM on sale service behaviors and the role of social media as moderator	Task-Technology Fit Theory Salesperson service behavior perspective	Quantitative Survey data N=162 salesperson-customer dyads, India	<p>Sales-based CRM positively affects post-sale service behaviors (Information communication, Empathy and Sportsmanship). A positive effect on Diligence and Inducements is not supported.</p> <p>Social media positively moderates the relationship between CRM and Inducements, Empathy and Sportsmanship. A moderating effect between CRM and Diligence and between CRM and Information communication is not supported.</p>

4	Andzulis et al. (2012) <i>Journal of Personal Selling &amp; Sales Management</i>	The influence of social media on salesperson's behaviors, the selling process and sales management practices	-	Conceptual	Social selling strategy is a dynamic process of four steps: establishing a presence, driving customers, including social media as an additional sales channel and actively employing social media in sales activities.  The integration of social media in the traditional selling process.
5	Bocconcelli et al. (2017) <i>Journal of Business &amp; Industrial Marketing</i>	The role of social media in the selling process and selling practices of a small firm	IMP approach 4R model	Qualitative Longitudinal case study  7 interviews, Italy	The organization provides content to share on social media platforms (e.g. YouTube video showing the functioning of products).  Social media plays a key role in establishing contact and start business relationships with customers, distributors, producers of complementary products, architects and experts, whereas the sales negotiation process follows more "traditional" patterns, even if visual social media may effectively support the process.  Social media allows to increase the visibility and enter into new markets.  Social media enables networking opportunities since business relationships with customers, distributors and business partners are established after a first contact and first interactions on social media.
6	Guesalaga (2016) <i>Industrial Marketing Management</i>	Antecedents of social media usage in sales	Interactional psychology theory	Quantitative Survey data  N=220 (response rate 43.7%),  USA	Organizational competence, customer's use, individual commitment and organizational commitment are predictors of social media usage.  The effect of individual commitment on social media usage will be higher when the individual competence is higher.  The effect of customer's use is partially mediated by organizational and individual factors.

7	Hansen and Levin (2016) <i>Journal of Business Research</i>	The impact of motivation in affecting intention to use social media and outcomes of behavioral usage	Motivational model	Quantitative Survey data N=210 (response rate 30%), USA	Extrinsic, intrinsic and apathetic motivation affect behavioral intention to use social media, which in turn affects behavioral usage.  The apathetic motivation negatively moderates the relationship between intrinsic and extrinsic motivation and behavioral intention.  The relationship between intention to use and actual use is amplified for marketing/sales job roles (moderating effect).
8	Itani et al. (2017) <i>Industrial Marketing Management</i>	Antecedents and outcomes of social media usage in sales	Theory of Reasoned Action	Quantitative Survey data N=120 salesperson-supervisor dyads, India	No relationship between attitude towards social media usefulness and social media use was found. However, learning orientation interacts with a salespeople's attitude towards social media usefulness to impact their social media use.  Social media use will affect the performance of salespeople through affecting their skills, knowledge and behaviors (i.e. adaptive selling behavior and competitive collection).
9	Lacoste (2016) <i>Industrial Marketing Management</i>	Benefits and challenges of social media usage in key account managers' perspective	-	Qualitative Grounded theory 22 interviews, France	Key account managers use social media to unveil professional identity, build reputation/credibility, connect to potential customers, build customer retention. However, when it comes to engage customers they shift to face-to-face relationships.  Focus on LinkedIn and Viadeo
10	Levin et al. (2012) <i>Journal of Personal Selling &amp; Sales Management</i>	Motivations driving the adoption of social media and outcomes of its usage	Motivational model	Quantitative Survey data N=194 (response rate 68.5%), USA	Extrinsic, intrinsic and apathetic motivation affect behavioral intention to use social media, which in turn affects behavioral usage (moderator: voluntary).  Behavioral use positively impacts on a result-oriented outcome (moderator: past performance) and a perception-oriented outcome linked to increased knowledge and skills.

11	Marshall et al. (2012) <i>Journal of Personal Selling &amp; Sales Management</i>	The positive and negative effects of social media on the sales job and sales people	-	Qualitative 4 focus group, Cross-country	The effects of social media on salespeople, sales management and sales strategy: -Sales force connectivity (daily routine, 24/7) -Relationship (face-to-face vs. virtual) -Selling Tools (7 steps of selling are condensing) -Generational differences -Global nature of sales -Sales/Marketing interface
12	Meire et al. (2017) <i>Decision Support Systems</i>	The value of data mining of Facebook data in the customer acquisition process	-	Quantitative Real-life experiment, USA	Automatic handling of Facebook pages improves the qualification prediction of prospects into leads worth pursuing and reduces the time needed to screen the pages. Social media data add value over website and commercial data.
13	Moncrief et al. (2015) <i>Business Horizons</i>	The impact of social media on sales force management and sales performance	Expectancy theory	Conceptual	The use of social media requires an alignment of sales management functions: supervision, selection, training, compensation and deployment.  The use of social media influences also the sales role, sales aptitudes, skills and motivation.
14	Moncrief (2017) <i>Journal of Personal Selling &amp; Sales Management</i>	Historical examination of the sales research and future research avenues	-	Conceptual	Social media is triggering a transformation in the world of B2B sales. Notably, these changes affect the salesperson and the sales department, the buyer and the buying center, the interface between marketing and sales and the methods of selling. Consequently, this evolution elicits new research opportunities for sales researchers.

15	Moore et al. (2013) <i>Journal of Internet Commerce</i>	Differences in social media usage among B2B and B2C sales personnel and among salespeople and managers	Social networking theory	Qualitative Survey data N=395, USA	The use of social media by B2B salespeople is greater than their B2C counterparts.  B2B salespeople tend to make more use of professional networking sites (e.g. LinkedIn), blogs, webinar, presentations sharing sites (e.g. Slideshare)  Salespeople use social media for prospecting, initiate contact and post-sale follow-up, but B2B salespeople use social media for prospecting, handling objections and follow-up to a greater extent.
16	Moore et al. (2015) <i>Journal of Marketing Theory and Practice</i>	The use of social media in B2B and B2C sales	-	Quantitative Survey data N=395 (response rate 21.2%), USA	The use of social CRM is prevalent in B2B. In both B2B and B2C contexts, managers use social CRM more than sales reps. There is no difference in social media usage in the seven steps of the sales process, but B2B managers appear to use social CRM more frequently than other sales professionals in some stages.
17	Niedermeier et al. (2016) <i>Journal of Research in Interactive Marketing</i>	The role of social media in creating and strengthening <i>guanxi</i> relationships	-	Mixed 3 interviews Survey data N=42, China	Use of specific platforms (e.g. WeChat, QQ, etc.) and frequency of adoption with current and potential customers.  A conceptual framework is advanced regarding social media activities that help to influence and increase <i>guanxi</i> elements, which in turn impact on operational and economic performance.

18	Ogilvie et al. (2018) <i>Industrial Marketing Management</i>	The effects of social media use on individual behaviors and characteristics, the moderating role of training and the impact on performance	-	Quantitative Survey data N= 389 (response rate 32.4%) N= 192 (response rate 24%) USA	Salesperson's use of social media has a positive effect on product information communication and adaptability. The effect on diligence and knowledge is not supported.  Training positively moderates the relationships between SMT and all four behaviors and characteristics.  A linear relationship between behaviors and characteristics and performance exists, except for product communication and sales performance.
19	Rapp et al. (2013) <i>Journal of the Academy of Marketing Science</i>	The contagion effect of social media use across business suppliers, retailers and consumers and the outcomes of social media use throughout a distribution channel	Contagion theory	Quantitative Multilevel survey data N=28 salespeople (response rate 100%) N=144 retailers (response rate 47.4%) N=445 consumers (4.45% response rate), USA	There is a direct effect of social media usage from the supplier to the retailer and from the retailer to the consumer (i.e. contagion effect across retailers and end-consumers). This effect is moderated by brand reputation and service ambidexterity.  Social media use positively contributes to supplier brand performance (total sales of the brand in the retailer outlet), retailer store performance (total store sales) and consumer-retailer loyalty.

20	Rodriguez and Peterson (2012) <i>International Journal of Internet Marketing and Advertising</i>	The integration of traditional and social CRM	-	Conceptual	Best practices advancement of social CRM and case study examples.
21	Rodriguez et al. (2012) <i>Journal of Personal Selling &amp; Sales Management</i>	The impact of social media on the sales process and the sales performance	Social capital theory	Quantitative Survey data N=1,699 (response rate 11.2%), Cross-country	Social media usage has a positive relationship with sales processes (creating opportunities and relationship management) and relationship sales performance.  Relationship performance mediates the relationship between social media usage and outcome-based sales performance. Although social media usage does not directly influence the outcome-based sales performance, there is an indirect influence through the enhancement of the sales processes.
22	Rodriguez et al. (2014) <i>Journal of Marketing Development and Competitiveness</i>	The way CRM and social media impact on sales performance through customer orientation	-	Quantitative Survey data N=1,699 (response rate 11.2%), Country not specified	Both CRM and social media use positively impact on customer-orientation, which in turn has a positive relationship with sales performance.
23	Rodriguez et al. (2016) <i>Journal of Marketing Theory and Practice</i>	Antecedents and outcomes of social media usage in large firms	Resource-based view	Quantitative Survey data N=184, Cross-country	Sales personnel capability and upper management support are key drivers of social media use.  Sales process capability moderates the relationship between social media usage and relationship performance  Relationship performance mediates the relationship between social media use and sales performance.

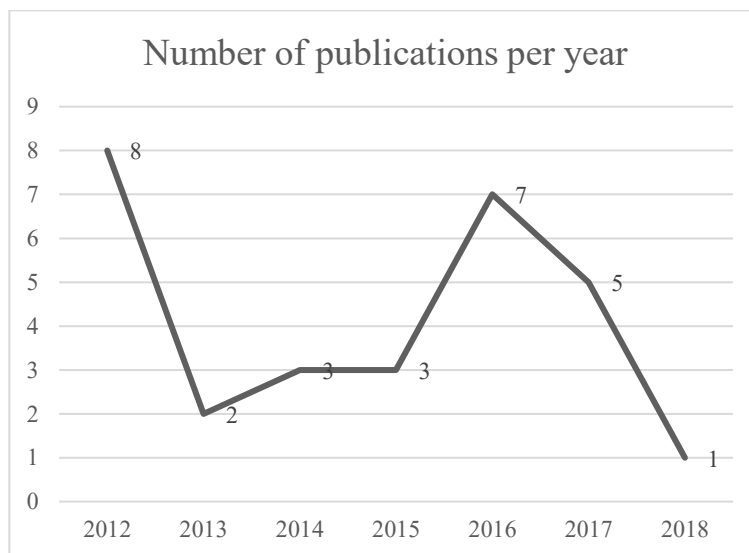


24	Rollins et al. (2014) <i>Industrial Marketing Management</i>	The impact of social media on salespeople's overall learning	Social learning theory	Qualitative Netnography 200 personal blogs, Country not specified	Blogging can be a helpful learning and training tool, in terms of information searching, learning about customers, avoiding ineffective practices, drawing inspiration from peers, reflecting on the own weaknesses, reevaluating own skills and discovering gaps. Blogging affects self-efficacy and performance expectancy.
25	Schuldt and Totten (2015) <i>Academy of Marketing Studies Journal</i>	The integration of social media in the various steps of the sales process	-	Quantitative Survey data N=57, USA	The use of social media is greater in the earlier stages of the selling process. The focus seems to be on monitoring customer comments and sharing company news.
26	Schultz et al. (2012) <i>American Journal of Business</i>	Antecedents and outcomes of social media usage	-	Quantitative Survey data N=273, USA	Age and social media norms are predictors of social media usage. Social media usage positively impacts on outcome performance. Customer-oriented selling is not a significant predictor, but it impacts on outcome performance.
27	Trainor (2012) <i>Journal of Personal Selling &amp; Sales Management</i>	The integration of traditional and social CRM	Resource-based view Capability-based perspective	Conceptual	A conceptual model that links the sales-and-marketing centric technology (e.g. SFA) and customer-centric technology (i.e. social media) to CRM capabilities and processes (e.g. relational information processing, social selling, social innovation) that impact on performance outcomes (e.g. customer-based profit performance, customer-based relational performance).

28	Trainor et al. (2014) <i>Journal of Business Research</i>	Social CRM impacts on firm outcomes	Resource-based view Capability-based perspective	Quantitative Survey data N= 308 (response rate 25.7%), USA	Social media use as a resource positively influences customer relationship performance via firm-level capabilities. Interaction effect of social media and customer-centric management systems on social CRM capabilities. Complementarity exists between CRM systems and emerging technologies like SM.
29	Wang et al. (2016) <i>Industrial Marketing Management</i>	Factors that motivate sellers to engage in co-innovation with customers in B2B online communities and outcome of co-innovation in terms of brand awareness	Social influence theory	Quantitative Survey data N=190 (response rate 23.75%), Country not specified	Sellers' social identity and social comparison are key facilitators for participating in co-innovation practices within online communities. Co-innovation activities increase brand awareness among potential customers.

The articles were analyzed in terms of publication year and publication outlet to examine the relevance and extent of B2B social selling research over time (see Mustak et al. 2013). Although the time frame under review comprises sixteen years, the first articles dealing with the topic date back to 2012, showing that social media usage in B2B selling is a fairly recent research area (see Figure 5).

**Figure 5. Publication trend in the time frame 2001-2018**



Looking at the publication sources, *Industrial Marketing Management* and *Journal of Personal Selling & Sales Management* count the highest number of publications, each including seven articles in this area (see more in Table 5). The journal outlets are therefore aligned with the topic under review.

**Table 5. Publication outlets for the reviewed articles**

<b>Journal</b>	<b>Number</b>	<b>Percent</b>
Industrial Marketing Management	7	24 %
Journal of Personal Selling & Sales Management	7	24 %
Journal of Business Research	3	10 %
Journal of Marketing Theory and Practice	2	7 %
American Journal of Business	1	3 %
Academy of Marketing Studies Journal	1	3 %
Business Horizons	1	3 %
Decision Support Systems	1	3 %
International Journal of Internet Marketing and Advertising	1	3 %
Journal of the Academy of Marketing Science	1	3 %
Journal of Internet Commerce	1	3 %
Journal of Business & Industrial Marketing	1	3 %
Journal of Marketing Development and Competitiveness	1	3 %
Journal of Research in Interactive Marketing	1	3 %
<b>Total</b>	<b>29</b>	<b>100 %</b>

From a methodological perspective, six out of 29 studies are conceptual, whereas the vast majority are empirical (23 in total). A quantitative approach dominates among the empirical articles: most studies employ quantitative methods (19), whilst four articles adopt a qualitative approach and one article uses a mixed method (see Table 6). This methodological orientation is surprising considering the novelty of this research area. Most studies have been conducted in the U.S (12), whilst the rest are based in other countries (e.g. India, France, China, Italy) and three studies are cross-national.

**Table 6. Methodology of the reviewed articles**

<b>Methodology</b>	<b>Number</b>	<b>Percent</b>
Conceptual papers	6	20 %
Empirical: Qualitative methods	4	13 %
Empirical: Quantitative methods	18	63 %
Empirical: Mixed methods	1	3 %
<b>Total</b>	29	100 %

Ultimately, Table 7 below summarizes the theoretical basis adopted in the articles under review. A look at the theoretical background unveils that a common theoretical basis in this research domain is largely missing. For instance, studies dealing with the antecedents of social media use various theoretical underpinning, such as the interaction psychology theory (see Guesalaga 2016), the motivation model (see Hansen and Levin 2016; Levin, Hansen and Laverie 2012), the theory of reasoned action (see Itani, Agnihotri and Dingus 2017) and the contagion theory (see Rapp, Beitelspacher Grewal and Hughes 2013). Some scholars use the resource-based view (see Rodriguez et al. 2016) and the capability-based perspective as theoretical backgrounds (see Trainor, Andzulis, Rapp and Agnihotri (2014), Trainor 2012). Other studies are based on the IMP perspective and the 4R model (see Bocconcelli, Cioppi and Pagano 2017), the task technology-fit theory (see Agnihotri, Trainor, Itani and Rodriguez 2017), combined with the value creation lens (see Agnihotri et al. 2012), the expectancy theory (see Moncrief, Marshall and Rudd 2015), the social learning theory (see Rollins, Nickell and Wei 2014) and the social influence theory (see Wang, Hsiao,

Yang and Hajli 2016). The study by Rodriguez, Peterson and Krishnan (2012) grounds on the social capital theory, while Moore, Hopkins and Raymond (2013) use the networking theory as a theoretical underpinning. Several articles were also descriptive (see Moore, Raymond and Hopkins 2015; Niedermeier, Wang and Zhang 2016; Schuldt and Totten 2015) or exploratory (see Lacoste 2016; Marshall, Moncrief, Rudd and Lee 2012), thereby lacking a clear theoretical basis. The high number of differing theories highlights that this research area is novel and widely practice-driven, and that scholars are currently striving to find relevant theoretical lenses to understand this challenging topic. Yet, the research remains highly fragmented in its nature due to the lacking theoretical basis.

**Table 7. Theoretical background of the reviewed articles**

<b>Theoretical background</b>	<b>Author(s)</b>
Contagion theory	Rapp, Beitelspacher, Grewal and Hughes (2013)
Expectancy Theory	Moncrief, Marshall and Rudd (2015)
IMP approach and 4R model	Bocconcelli, Cioppi and Pagano (2017)
Interactional psychology theory	Guesalaga (2016)
Motivational model	Hansen and Levin (2016) Levin, Hansen and Laverie (2012)
Networking theory	Moore, Hopkins and Raymond (2013)
Resource-based view	Rodriguez, Aijan and Peterson (2016)
Resource-based view/ Capability-based perspective	Trainor, Andzulis, Rapp and Agnihotri (2014) Trainor (2012)
Social capital theory	Rodriguez, Peterson and Krishnan (2012)
Social influence theory	Wang, Hsiao, Yang and Hajli (2016)
Social learning theory	Rollins, Nickell and Wei (2014)
Task-technology fit theory (TFF)	Agnihotri, Trainor, Itani and Rodriguez (2017)
Task-technology fit theory (TFF) Value creation lens	Agnihotri, Kothandaraman, Kashyap and Singh (2012)
Theory of Reasoned Action	Itani, Agnihotri and Dingus (2017)

### *3.2.2. In-depth content analysis of the social selling research*

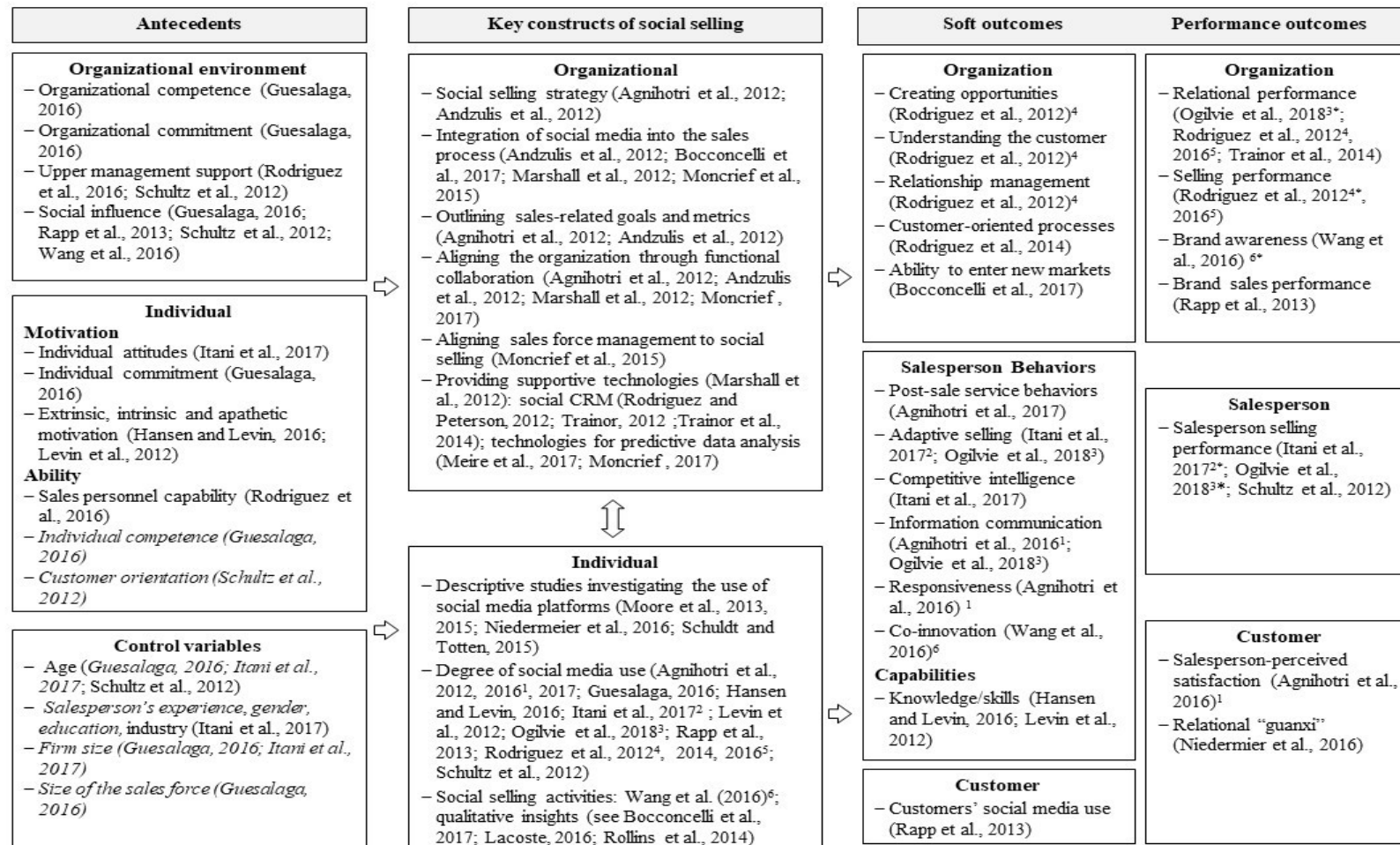
An initial reading and the following more systematic content analysis concerning the theoretical basis, key concepts under study, methodology, and the contribution of the articles revealed notable heterogeneity among the studies (see Table 4).

Notwithstanding the limited number of articles, studies focus on diverse specific aspects of social media in sales and often apply different constructs, making the research highly fragmented. To cope with this heterogeneity, a more systematic data synthesis was needed (Tranfield et al. 2003). In this regard, we

adopted a “concept centric” approach aimed at grouping the articles according to the concepts and major themes addressed as opposed to an “author centric” approach, which basically reports a summary of the relevant literature (c.f. Webster and Watson 2002). Notably, Webster and Watson (2002) highlight that an “author centric” approach fails to synthesize the extant research on a certain topic. Therefore, the articles’ content was analyzed more closely in three areas: 1) studied social selling construct(s) in each article, 2) their antecedents, and 3) outcomes. Afterwards, following an inductive grouping procedure we built a visual summary of the extant research on B2B social selling research (see Figure 6). Notably, this synthesizing framework allows to unify the fragmented research findings and it is particularly helpful to show the general trends in social selling research, by displaying major research areas and patterns in study findings. In the next paragraphs, we discuss the contents of the review by following the data synthesis scheme: key constructs of social selling, its antecedents and outcomes.



Figure 6. Extant research on B2B social selling<sup>3</sup>



<sup>3</sup> Studied relationships can be traced base on dual author codes [e.g. Guesalaga 2016 (Individual commitment)→Guesalaga 2016 (Degree of SM use)]; Italics: non-significant antecedents; Variables with superscripted number: mediating effects [e.g. Agnihotri et al., 2016<sup>1</sup> (Social media use)→Agnihotri et al., 2016<sup>1</sup> (Information communication)→Agnihotri et al., 2016<sup>1</sup> (Responsiveness; Satisfaction)]; Variables with asterisk\*: indirect mediating effect only.

### **3.3. Key concepts to study social selling in B2B research**

#### *3.3.1. Social Selling at the Individual Salesperson Level*

We identify three different approaches to study social media in B2B selling at the salesperson level (see Figure 6):

- descriptive studies investigating the use of social media platforms;
- studies that highlight the degree of social media use in selling;
- studies that focus on the activities of social selling.

The first approach refers to a group of *descriptive studies exploring the use of specific social media platforms* (see Moore et al. 2013, 2015; Niedermeier et al., 2016; Schuldt and Totten 2015). The literature analyzed the extent to which social media is used among salespeople and which platforms are more widespread in B2B sales contexts. According to Moore et al. (2015), B2B salespeople use social media technologies even more than sales personnel in the consumer industry. Some social platforms, such as professional networking tools and instant messaging applications are more common among B2B salespeople (Moore et al. 2013, 2015; Niedermeier et al. 2016). Notably, studies show that B2B salespeople tend to use blogs, professional networking sites (e.g. LinkedIn), live interactive broadcasting, webinar tools and presentation sharing sites (e.g. Slideshare) to a greater extent than their B2C counterparts (Moore et al. 2013).

Studies in this group have also addressed the use of social media at specific stages of the sales process (i.e. prospecting, initial contact, communicating with customers, sales presentation, handling objections, closing the sale and after sales service), finding that these platforms are far more used in the early phases (see Moore et al. 2013, 2015; Schuldt and Totten 2015). Overall, these studies remain largely descriptive, using practice-focused rather than theoretical constructs.

The second group of studies focus on *the degree of social media use in selling* (see Agnihotri et al. 2012, 2016, 2017; Guesalaga 2016; Hansen and Levin 2016; Itani et al. 2017; Levin et al. 2012; Ogilvie et al. 2018; Rodriguez et al. 2012, 2016; Rapp et al. 2013; Schultz et al. 2012). In this regard, scholars do not focus on social selling activities, rather they study the intensity of social media use in sales or the overall integration of social media in the sales job. For instance, Rodriguez et al. (2012, 2016) measure the increase in the use of social media over time to identify business opportunities and key decision makers. Other studies adapt scales from the technology usage literature reflecting the helpfulness of social media in performing sales job activities and its integration in the daily work (Agnihotri et al. 2016, 2017; Itani et al. 2017). Ogilvie et al. (2018) measure social media usage as a latent construct representing both frequency and intensity of use. Differently, Rapp et al. (2013) measure social media use, by including social networking activities and

behaviors, such as monitoring competitors, providing information to customers, keeping track on events and developments in the industry. In doing so, this group of studies mainly focuses on the overall use of social media technologies in sales and gives limited insights on how salespeople employ social media in their everyday sales practices. Notwithstanding an increasing trend towards measuring the overall degree of social media use in selling (see Agnihotri et al. 2016, 2017; Itani et al. 2017), most studies still use different constructs and measures with a strong theoretical basis are largely missing. Yet, these studies showed interesting results on the antecedent and outcome side of social media usage in sales (see Figure 6).

Finally, researchers have provided some insights on how salespeople use social media in their job and the *social selling activities* (see Bocconcelli et al. 2017; Lacoste 2016; Rollins et al. 2014; Wang et al. 2016). Salespeople seem to use social media for collecting information and better understanding the customer (Lacoste, 2016). Salespeople might use social media to search for the right contact as well as obtain various kind of information about potential customers, such as their network, their experience and interests, which can be useful to prepare the relationship initiation. Furthermore, social media allows salespeople to actively pursue networking opportunities with targeted customers and relevant customer stakeholders (Bocconcelli et al. 2017; Lacoste 2016). Developing a strong network through social

media enables salespeople to find prospective customers through existing mutual connections, thus leveraging a sense of trust. In this regard, Bocconcelli et al. (2017) show that social media allows to make a first contact with potential business partners, provide the relevant information in a less formal way (e.g. YouTube videos) and leverage word-of-mouth. Social media offers indeed the possibility to gather information even beyond the seller-customer relationship, leveraging both internal (within the customer organization) and external networking (i.e. with suppliers, competitors, etc.) (Lacoste 2016).

Studies also highlight that salespeople try to build their reputation while interacting within business communities, sharing posts or blogging (Lacoste 2016; Rollins et al. 2014), or through social influence in online communities (Wang et al. 2016). By sharing valuable content on social media salespeople might build their professional identity and reputation and position themselves as perceived thought leaders to facilitate the first contact with potential customers (Lacoste 2016). By building relationships and strategically listening for the right moment to join the conversation, salespeople might reach out to buyers with relevant information when and where they are looking for it and engage them in fruitful dialogues. Likewise, Rollins et al. (2014) find that writing and reading blogs may represent a useful experience for salespeople to network with colleagues, thereby increasing the

customer understanding, analyzing ineffective sales practices as well as personal weaknesses and skills in order to acquire job confidence and be able to correctly set performance expectancies. Yet, although extant research has provided some insights into the possible social selling activities, studies highlight diverse aspects of social selling and mostly focus on specific contexts at a time, such as KAM (see Lacoste 2016). Therefore, research still lacks properly developed constructs and a commonly shared, empirically-rooted, and theoretically rigorous definition of social selling

### *3.3.2. Social Selling at the Organizational level*

A significant amount of studies in this research domain emphasizes the organizational aspects of social selling. Notably, we include in this category all the articles that specifically address the firm-level deployment of social media-enabled sales, whereas other broader factors, such as organizational capabilities or management attitudes relating to general use of social media were classified as antecedents related to the organizational environment. The content analysis unveils six major organizational aspects of social selling, namely social selling strategy, integration of social media into the sales process, outlining sales-related goals and metrics, aligning the organization through functional collaboration, aligning sales force management to social selling and providing supportive technologies (see Figure 6).

First, the literature extensively stresses the importance of developing and communicating a clear *social selling strategy*, that is, a firm-level policy on how to do social selling (see Agnihotri et al. 2012; Andzulis et al. 2012). Notably, defining a social selling strategy goes beyond the mere social media presence or disjointed practitioners' tactics. For instance, Andzulis et al. (2012) depict the social media strategy as a dynamic process of four phases leading to a full integration of these tools within the sales strategy, gradually shifting from a one-way communication to a two-way communication. According to the Andzulis and colleagues, today's companies first establish a social media presence to subsequently integrate these tools as a sales channel and develop their strategies as much as firms did during the '90s entering the Internet with single informational web pages and then shifting into a more structured approach. Moreover, Agnihotri et al. (2012) discuss a social media strategy comprising goal delineation, information exchange, competitive intelligence, performance metrics and relative challenges. The authors identify that generally speaking social media helps fulfilling two basic purposes, that is acquiring new customers and serving existing customers as well as relationship building. Agnihotri and colleagues further emphasize that social media offers new opportunities in information communication and competitive intelligences. However, they also highlight some challenges that might be related to social media activities, such as

technology reluctance, sales process interruption, undisciplined participation and unrealistic metrics.

Furthermore, social media seems to influence the selling organization's ability to both create opportunities and manage relationships; therefore, firms should carefully consider a systematic *integration to established selling processes* (Andzulis et al., 2012; Bocconcelli et al. 2017; Marshall et al., 2012; Moncrief et al., 2015). Indeed, social media might have the potential to affect each step of the sales process ranging from understanding the customers, to approaching the customer and needs discovery, to presentation, close and follow-up (Andzulis et al. 2012; Marshall et al. 2012; Moncrief et al. 2015). Scholars even argue that the traditional seven steps of selling are changing and somehow condensing due to social media (Marshall et al. 2012). In this regard, social platforms might help sales professionals when prospecting for clients to gather detailed background data about potential customers, identify risks and buying situations and generating qualified leads. Accordingly, social platforms enhance "social listening", by simply monitoring customers conversations and interactions (Andzulis et al. 2012). Social media allows to approach the customers in a nonintrusive way, by meeting their need without the perception of a "hard sell" (Agnihotri et al. 2012; Andzulis et al. 2012). An effective use of social media potentially help to reduce the amount of questioning necessary to understand the



specific needs of a customer, thus avoiding fact-finding initial sales calls. Findings from this information search via social media might be used to customize a sales presentation, showing a valuable solution to the client's real problem. In addition, sales professionals can nowadays handle presentation and ongoing contact with customers by leveraging social media and web pages, such as YouTube (Bocconcelli et al., 2017; Moncrief et al., 2015). In this regard, according to Andzulis et al. (2012) both salespeople and customers within social media play an active role in determining the appropriate solution within a co-creation process. Scholars further argue that by enriching and adding value to earlier stages of the process, social media might support in closing the deals (Andzulis et al. 2012). The closing step might benefit of the customer knowledge and collaboration on the product, service or value proposition. Likewise, social media can be of great help through the gathering of references from previous deals. Moncrief et al. (2015) argue that sales may even occur without an actual call due to the empowered and digitally-oriented customer. Finally, social media can be useful for a continuous follow-up and customer service (Andzulis et al. 2012; Moncrief et al. 2015). Salespeople may no longer be phoning to ask whether there are problems; phone calls may be replaced by real-time feedback through social media and digital technologies. Notably, preliminary evidence suggests that social media elements seem to be particularly valuable in the earlier

stages of the selling process for making the initial contact and generating leads (Bocconcelli et al. 2017; Lacoste, 2016; Moore et al., 2015, 2013).

Strategy-related articles also highlight the need to outline *sales goals and performance metrics* to ensure an organization-wide internalization of this thinking (Agnihotri et al., 2012; Andzulis et al., 2012). Companies and salespeople social media-related goals can differ depending on the industry, product or service and situational context. Furthermore, it seems difficult to evaluate efforts and results connected to social media (Agnihotri et al., 2012; Andzulis et al., 2012). There are various metrics and tools to measure social media efforts, which vary across diverse types of social media. Yet, depending on their purposes, firms need to build their own metrics and sales managers should consider both objective performance and subjective performance to assess individual salesperson efforts and outcomes (Agnihotri et al. 2012). Customized metrics return actionable data for decision-making processes related to social media activities, otherwise companies might damage the brand and lose the opportunity to revise the future social media strategy and tactics.

Scholars argue that the management has to align the whole organization, by encouraging *close functional collaboration* (Agnihotri et al. 2012; Andzulis et al. 2012; Marshall et al. 2012; Moncrief 2017). Commitment, resources and seamless

integration should not be limited to the sales department but are needed across all departments and with the company's overall strategy (Andzulis et al. 2012). Importantly, the responsibility should also be ascribed to customer support employees and marketing employees (Agnihotri et al. 2012). Especially, the interaction and collaboration between marketing and sales are even more critical because social media becomes a primary tool for the two departments (Moncrief 2017), as both salespeople and marketers can potentially convey messages, which would benefit from a coordinated approach. Although no "one-size-fits all" approach exists, an integrative structure, whereby sales and marketing departments collaborate in managing social media, can be very effective (Andzulis et al 2012). These areas know the customer best and should split social media-related responsibilities considering the activities associated with each department (Andzulis et al. 2012; Marshall et al. 2012).

Some scholars also discuss the impact of social selling on *adapting firms' sales management practices*, such as selection, training, supervision, compensation and deployment of the sales force (Moncrief et al. 2015). Social media has the potential to affect the supervision practices that may no longer require face-to-face contact (Moncrief et al. 2015). Moncrief and colleagues further argue that these platforms provide more and better-quality candidate information for recruitment and allow to

personalize training programs and compensation systems. Moreover, with the advent of social media in sales, it is likely that sales managers have to motivate the young sales representatives in making more face-to-face contacts and the eldest salespeople in using these tools (Moncrief et al. 2015).

A firm should provide *technological tools* for supporting salespeople selling effectiveness (Marshall et al. 2012). In this regard, studies emphasize that organizations can help salespeople to network with customers through the recently introduced possibility to integrate traditional customer-facing IT systems and technologies with social media (e.g. social CRM) (Rodriguez and Peterson 2012; Trainor 2012; Trainor et al. 2014) as well as through the development of predictive data analysis techniques based on data mining (Meire, Ballings and Van den Poel 2017) or artificial intelligence (Moncrief 2017). Social media pages are indeed highly informative data sources to qualify prospects and once combined with other sources can substantially improve the qualifying stage of the sales process. In this regard, the automatic handling of social media pages can make the sales process more efficient, by providing salespeople with a list of leads that are really worth pursuing as well as drastically reducing the time necessary to screen these pages (Meire et al. 2017). Social CRM systems concern “the integration of traditional customer-facing activities including processes, systems, and technologies with emergent social media

applications” (Trainor 2012, p. 319). Hence, social CRM represents an extension of and not a replacement for traditional CRM (Rodriguez and Peterson 2012; Trainor 2012). Whilst CRM is more focused on transaction, social CRM is driven by customer engagement and has brought a shift in companies’ communications with actual and potential customers (Rodriguez and Peterson, 2012). Trainor (2012) further discuss how social CRM changes traditional sales processes and allows to acquire a more complete knowledge on the customers and the networks. According to the author these transformations have raised the necessity to develop a social selling capability. Empirical evidence exists that the interaction between sales-based technology and social media has a positive effect on post-sale service behaviors (Agnihotri et al. 2017) and customer relationship performance (Trainor et al. 2014).

### **3.4. Antecedents of B2B social selling**

Although most empirical studies focus on the general use of social media in B2B sales, they provide interesting findings on its antecedents and outcomes. In particular, we identify three types of antecedents based on the content analysis and the inductive grouping of the reviewed articles: antecedents related to the organizational environment, individual antecedents and control variables (see Figure 6). The

individual antecedents can be further classified into two groups, namely individual salespeople motivations and abilities.

Among the factors driving social media usage in B2B selling, **organizational environment-related antecedents** emerge clearly. Social media use is driven by organizational knowledge about social media and management attitudes. Guesalaga (2016) show that the higher the *organizational competence* and *organizational commitment* towards social media, the more the sales department is willing to use these platforms in selling activities. If managers are knowledgeable and active in using social media, they are likely to support social media initiatives within the sales organization. Similarly, since the managers represent behavioral models, *management support* to the sales team has been found to positively influence social media use (Rodriguez et al. 2016; Schultz et al. 2012).

Interestingly, alongside with the hierarchical pressure from managers, other *social influences* play an important role for social media adoption in sales. Salespeople are encouraged to use social media in selling when suppliers, customers and competitors are active on these platforms. These groups can influence salespeople's behaviors, due to their direct and indirect relationship with them. Hence, when customers actively use these platforms, it is more likely that salespeople communicate through the same channel (Guesalaga 2016; Schultz et al. 2012). Similarly, the concern of

being less effective than competitors and the knowledge that other salespeople are able to successfully apply social media might encourage social media usage (Schultz et al. 2012). Furthermore, a salesperson is more likely to embrace these tools if his or her peers demonstrate a successful use of social media in finding new prospects or in performing other sales behaviors (Schultz et al. 2012). In this regard, the social pressure from colleagues and the desire to keep up with them may encourage salespeople in adopting and using social media. Conversely, when peers are prevented towards social media, it is more likely that salespeople are discouraged in using these platforms. Some studies also find that an imitative effect related to the social media usage can occur along the entire supply chain (Rapp et al. 2013). The imitative behavior originates from organizations exchanging information and communicating on a frequent basis within a given network. If suppliers develop strategies to promote the brand and these strategies involve social media initiatives, retailers may attempt to mimic this approach to increase their own success. Particularly, Rapp et al. (2013) find that social media usage strengthens the relationships between suppliers and retailers when suppliers are ambidextrous (i.e. striving for service quality and innovation for improvement) and when their brands have a strong reputation. It is not just the comparison with customers and competitors

that influences the sellers' use of social media; the sense of belonging with specific virtual communities might play an important role as well (Wang et al. 2016).

With regard to the **individual's antecedents**, salesperson's *motivations* lead social media usage in sales. Individual commitment may affect its use; the more salespeople are engaged in social media, the higher its usage (Guesalaga 2016). Furthermore, Itani et al. (2017) show that salespeople's learning goal orientation strengthens the relationship between attitudes towards social media usefulness and social media usage in selling. Intrinsic, extrinsic and apathetic motivations seem to drive social media use in sales (Hansen and Levin 2016; Levin et al. 2012). Performing an activity to gain a reward or avoid a punishment (i.e. extrinsic motivation) or for the inherent enjoyment and satisfaction (i.e. intrinsic motivation) have a positive effect on the intention to use social media. Conversely, the authors highlight that the lack of interest in performing a specific task (i.e. apathetic motivation) negatively affects the intention to use these platforms.

Moreover, among the individual factors, scholars largely investigate *salespeople's abilities*, whereby research results have been mixed. Apparently, broad customer-oriented selling has not been found not to affect social media use in sales (Schultz et al. 2012). Yet, other studies show that selling capabilities drive social media usage (Rodriguez et al. 2016). In this regard, sales professionals who are expert about



products and services, knowledgeable about customers' needs and effective at selling seem to be more willing to use social media for sales. Moreover, Guesalaga (2016) shows that individual salespeople's competence does not directly increase the use of social media in selling. However, the author finds that individual competence has an indirect influence, by boosting the link between commitment towards social media and social media use. Overall, salespeople appear to use social platforms when they are actively committed to these tools, they have positive attitudes towards social media, they are motivated to achieve specific results, or they enjoy using it per se.

The last category of antecedents encompasses "non-theoretical" constructs or *control variables*. In this regard, scholars mostly find that factors such as age, salesperson's experience, gender and education (Itani et al., 2017), firm's size and the size of the sales force (Guesalaga 2016) do not influence social media use in sales. Interestingly, some studies demonstrate that salespeople's age is negatively related to the use of social media in selling (Schultz et al. (2012). In this regard, older salespeople seem to be uncomfortable with new technologies and more likely to continue using those technological tools that are familiar and reliable. Furthermore, some studies show that social media usage in selling is more widespread in the service industry (Itani et al., 2017) which might be related to the differences in customers' social media presence between industries.

### 3.5. Outcomes of B2B social selling

The content analysis of the review articles identifies two different categories of outcomes, labeled as soft outcomes and performance outcomes (see Figure 6). We further divide these categories into three levels: organizational, salesperson and customer outcomes. First, we discuss the soft outcomes at each level, then we move into summarizing the analysis of the performance outcomes.

Although scholars widely note that social selling does not directly influence financial goals, there is consensus on the effectiveness of social media use in terms of **soft outcomes**. At the *organization level*, the investments in social media have been found to *enhance sales processes*, especially those involving opportunity creation and relationships management (Rodriguez et al. 2012) and customer-oriented processes, such as understanding customers and adapting to their needs (Rodriguez, Ajjan and Peterson 2014). Salespeople might use social media to qualify leads in the early phases of the sales cycle and manage customer relationships, by leveraging the potential of buyer-seller interactions. Moreover, Bocconcelli et al. (2017) show that the use of social media positively contributes to the organizational ability to *tap into new markets* and develop customer relationships abroad.

At the *salesperson level*, scholars have largely found that the use of social media positively influences various *salesperson's behaviors*. In this regard, scholars have

found that social media use allows information communication (Agnihotri et al. 2016; Ogilvie et al. 2018) and competitive intelligence collection (Itani et al. 2017). In turn, using social media to communicate relevant and useful information helps salespeople to be responsive (Agnihotri et al. 2016). In addition, salespeople using social media for work-related reasons are able to better perform post-sales service behaviors (Agnihotri et al. 2017; see also Agnihotri et al. 2012). Notably, Agnihotri et al. (2017) found a significant interactive effect between social media use and sales-based CRM on the relationship with inducements, empathy, and sportsmanship, providing evidence that sales technology can help salespeople engaging with customers after sales. By integrating CRM systems and social media salespeople improve their ability to learn about customers at personal level and remember customers personal events; to express interest for customers and to collect less-than-ideal feedbacks and critics from customers. Scholars also highlight that social media enhances salespeople's adaptive selling behavior, i.e. ability to adjust their behavior to changes in the selling situation (Itani et al. 2017; Ogilvie et al. 2018). Moreover, studies show that the impact of social media use on individual behaviors and characteristics is strengthened by user training (Ogilvie et al. 2018). Finally, salespeople's social media use seems to help in developing co-innovation behaviors within online communities (Wang et al. 2016). The way individuals perceive social influence produces a higher incentive to

contribute in online communities, which in turn enhances co-innovation performance. Similarly, sellers' use of social media has been found to improve some of their *capabilities*, such as knowledge and skills development (Hansen and Levin 2016; Levin et al. 2012). Interestingly, salespeople's social selling efforts can also influence customers' behaviors.

At the *customer level*, Rapp et al. (2013) highlight an imitative effect across the supply chain, whereby the use of social media by upstream salespeople leads to increased use of social media by customers. Indeed, social media is useful for two-way communications both downstream and upstream. Therefore, social media usage by downstream members can be altered or augmented by upstream channel members interactions on social media.

B2B social selling has also been connected to various **performance outcomes**. At the *organization level*, the use of social media has been found to enhance relational performance outcomes (Ogilvie et al. 2018; Rodriguez et al. 2012, 2016; Trainor et al. 2014). For instance, the integration of traditional CRM and social media facilitates the development of capabilities that allow firms to better meet customer's needs and influence customer satisfaction, loyalty and retention (Trainor et al. 2014). Yet, Ogilvie et al. (2018) show that an indirect effect exists between social media use and relationship performance through adaptive selling and information communication.

Furthermore, social media use indirectly affects the firm's selling performance via sales processes enhancement, i.e. creating opportunities, understanding customer and relationship management (Rodriguez et al. 2012) and relationship performance (Rodriguez et al. 2016, 2012). In this regard, Rodriguez et al. (2016) further show that the sales process capability positively moderates the relationship between social media usage and relationship performance. Therefore, the more the sales process is clearly defined, the more social media has the positive results managers expect in this investment. In addition, salespeople's social media use can increase brand awareness (Wang et al. 2016) and brand sales performance (Rapp et al. 2013). Particularly, developing co-innovation behaviors in social media, such as opening firm boundaries and identity convergence around products, has a positive effect on brand awareness (Wang et al. 2016).

At the *salesperson's level*, Schultz et al. (2012) find that social media use has a direct positive impact on the salesperson selling performance. Yet, several studies have shown that the mere use of social media may not directly guarantee such an outcome. Instead social selling efforts affect selling performance indirectly by improving salespeople's skills and behaviors (see Itani et al. 2017; Ogilvie et al. 2018). Overall, scholars have hitherto studied the performance links mostly by using subjective self-assessed selling performance measures (see Rodriguez et al. 2016,

2012; Schultz et al. 2012; Wang et al. 2016). However, few exceptions exist, for instance Itani et al.'s (2017) study uses manager-assessed selling performance evaluations and Rapp et al. (2013) employ the realized sales of the brand.

Finally, at the *customer level*, salespeople's social media use in B2B seems to be positively connected to customer performance, such as satisfaction (Agnihotri et al. 2016) and relational "guanxi" (Niedermeier et al. 2016). Still, studies found that the use of social media as such does not ensure the enhancement of customer satisfaction; this relationship is mediated by information communication (Agnihotri et al. 2016). In this regard, relying critical information to customers is pivotal to attain the value of social media and influence customer satisfaction (Agnihotri et al. 2016).

### **3.6. A definition of social selling based on the extant literature**

This literature review reflects the piecemeal and widely practice-driven nature of most academic knowledge on social media use in B2B sales. Interestingly, albeit conceptual articles have provided some insights on the concept of social selling (see Agnihotri et al. 2012; Andzulis et al. 2012; Trainor 2012), extant definitions rest on an abstract level. For instance, Agnihotri et al. (2012) define social selling as a professional selling approach "predicated on the strength of social media allies within a social enterprise" (Agnihotri et al. 2012, p. 341). Furthermore, Trainor (2012)

defines the social selling capability as “the ability to use knowledge about customers and the network of customer relationships to effectively navigate the firm’s sales cycle” (Trainor 2012, p. 324). Simultaneously, current empirical research largely focuses on the general degree of social media usage in sales. Therefore, building on the extant empirical studies on social media usage in B2B sales, we form a definition drawing on the view that is dominant in the extant as a basis for the conceptualization of social selling. Thus, we define social selling as “*the systematic integration of social media technologies into the selling process for enhancing salespeople’s behaviors and capabilities and ultimately influencing sales performance*”. We discuss next the rationale behind the definition.

Interestingly academic research has devoted most of its attention to the salespeople’s use of specific social media technologies and platforms in their sales-related work. Given the lack of a high-quality construct and a sound scale for social selling, scholars have largely considered the use of social media in sales as *the integration of social media technologies into the selling process*, mirroring the measurement of technology usage within the sales literature (c.f. Agnihotri, Rapp and Trainor 2009; Jones, Sundaram and Chin 2002). Social media usages might help salespeople in the various stages of the selling process from opportunity creation to relationship management. Alternatively, researchers focus on the intensity and

frequency of social media usage in sales (e.g. Guesalaga 2016; Ogilvie et al. 2018) and this lead us suggest that social selling efforts should be *systematic*. In this regard, some authors also stressed that the use of social media to identify new business opportunities should increase over time (c.f. Rodriguez et al. 2012, 2016). There seems to be agreement in literature that the use of social media in B2B sales allows a better performance in terms of enhanced *salespeople behaviors and capabilities*. In fact, scholars have thus far empirically studied the social selling concept only indirectly and partially, by investigating salesperson's behaviors and capabilities and their mediating effect in the relationship between general social media usage and performance. Social media use in sales seems to positively influence the development of business knowledge and skills. Particularly, salespeople's use of social media seems to improve information communication behaviors (Agnihotri et al. 2016), salespeople' responsiveness (Agnihotri et al. 2016), competitive intelligence collection and adaptive selling behaviors (Itani et al. 2017). The use of social media is likely to be helpful for salespeople in providing customers with relevant insights about potential solutions, timely reliable answers, and superior customer support. Finally, social selling ultimately contributes to the enhancement of the *sales performance* via the salesperson's behaviors. Relatively few studies to date have been able to robustly link studied aspects of social selling to "objective" performance



outcomes at salesperson, organizational, or customer levels. Yet, several articles have found that the performance outcomes of social media usage are mediated by the effects on salesperson's behaviors such as adaptive selling (Itani et al. 2017) and information communication (Agnihotri et al. 2016).

This definition of social selling is entirely based on the literature on social media usage in B2B sales and therefore still reflects the "business philosophy", which can differ from its implementation through activities and behaviors (see Kohli and Jaworski 1990). Furthermore, this definition remains rather abstract and unclear regarding the specific activities of social selling. As such, it is of limited practical value in studying individual practices, which might be different from the theory. Therefore, in line with Kohli and Jaworski (1990), we argue that an operational definition is needed for studying this phenomenon empirically and translating the "philosophy" into practice. To this purpose, we conduct two qualitative field studies for obtaining an empirically-grounded view of social selling to complement the extant theory-based view. The next chapter describes these studies and their findings and offers an operational definition of social selling.



#### 4. A FIELD-BASED VIEW ON SOCIAL SELLING

As the extant knowledge about *how* salespeople use social media in practice is limited and highly fragmented, this study adopts an exploratory research approach to generate a deeper understanding of the phenomenon. Similar to Kohli and Jaworski (1990), Tuli et al. (2007), we use a discovery-oriented, theories-in-use approach (e.g. Zaltman et al. 1982). Accordingly, we contrast and complement the view that is dominant in the literature described in Chapter 3 with insights gathered among practitioners by conducting two separate field studies (see Table 8 below).

**Table 8. Qualitative field studies**

<b>Field study</b>	<b>Research aim</b>	<b>RQ</b>	<b>Sample</b>
<b>Field study 1</b>	Delineating the domain of the social selling concept and provide an operational definition	<i>How can we define and conceptualize social selling?</i>	Thought-leading social selling experts
<b>Field study 2</b>	Comparing the social selling conceptualization with implementation of social selling in frontline practices	<i>How do frontline sales professionals practice social selling in their work?</i>	Frontline salespeople and managers

Since we follow the same principles in the analysis of the interviews, we first describe the methodology and procedure for data analysis. Afterwards, we present the findings of the two field studies. The chapter ends with concluding remarks.

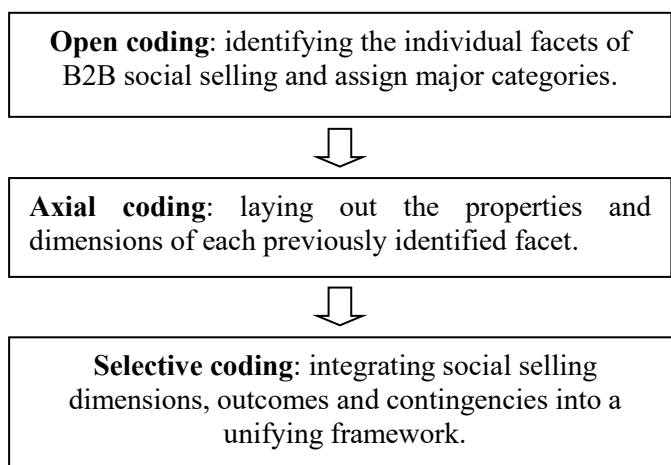
#### **4.1. Field study methodology and data analysis**

This study aims at investigating and deepening the current understanding of social selling practices. Thus far, the developed definition might solely represent an ideal statement and it is likely that salespeople's practices diverge from the "received view" in the academic literature (c.f. Kohli and Jaworski 1990). As suggested by Kohli and Jaworski (1990) an empirical field study may offer a significantly clearer idea of the construct's domain and provide a more precise definition. Following this approach, we conducted two qualitative field studies to acquire a field-based perspective to be contrasted and complemented with the extant literature. Therefore, the purpose of this chapter is to form an operational and empirically-rooted definition and achieve a deeper understanding of social selling activities that translate the philosophy into practice.

In line with Strauss and Corbin (1998), we employed the grounded theory coding, involving open, axial and selective coding to analyze our data. This scheme is largely used in marketing and sales research (e.g. Homburg et al. 2017; Malshe and Sohi 2009; Terho et al. 2012; Ulaga and Reinartz 2011). In fact, following the principles of the grounded theory has been recognized as a methodologically rigorous approach in the analysis of qualitative data (see Gioia, Corely and Hamilton 2012). Despite the

iterative nature of the coding phases (Strauss and Corbin 1998), we describe them as a sequential series of stages for the sake of clarity (see Figure 7).

**Figure 7. Grounded theory coding for data analysis**



The first phase is the *open coding* process to identify the individual facets of B2B social selling mentioned by the participants and assign major categories. During the open coding, we examined the transcribed text paragraph-by-paragraph and analyzed the data to categorize the individual facets of the social selling concept. Any facet of social selling that emerged during the analysis was labeled with in-vivo or descriptive codes (Strauss and Corbin 1998). After screening the codes, we developed a preliminary coding plan for defining social selling that (1) listed the facets of social selling, (2) provided a label and a definition for the facets, (3) specified their

respective properties and (4) reported an example to illustrate their meaning and content. Notably, we relied on three criteria in deciding whether to include specific facets or not (e.g. Tuli et al. 2007; Ulaga and Reinartz 2011): (1) the facet is applicable beyond a specific context (e.g. firm or industry); (2) multiple participants mention the idea and (3) the facet goes beyond the obvious to provide useful conclusions. In the second phase, we performed the *axial coding* to lay out the properties and dimensions of each social selling facet previously identified. During this stage, we also investigated relationships between facets. The final coding phase consists of *selective coding*, which serves as the main vehicle for integrating all the selling dimensions, outcomes and contingencies coded during the research procedure into a unifying conceptual framework. In this step, we also reviewed the scheme for the internal consistency of the constructs, refined the wording of the definitions and selected illustrative examples. In the next paragraph, we report the findings of the two field studies.

## **4.2. Field study 1: delineating the conceptual domain of social selling**

### *4.2.1. Data collection for the field study 1*

The first qualitative field study aims at delineating the concept domain and answering the first research question of *how we can define and conceptualize social selling*. To this end, we collected data among thought-leading social selling experts (i.e. consultants, sales managers and salespeople) across different countries to conceptualize social selling and thoroughly understand its key constituents as well as its nomological network.

To select participants, we employ a theoretical sampling technique (Eisenhard and Graebner 2007). Theoretical sampling involves selecting informants with intimate and extensive knowledge relevant to the research question (Strauss and Corbin 1998). The sample was carefully elaborated to obtain as much variety as possible in terms of industry and job role. To uncover the various facets of social selling, we aimed at ensuring diversity among participants. Moreover, we also aimed at selecting participants who possess significant experience in social selling in order to generate meaningful insights on the construct's domain. Therefore, we collected data among thought-leading experts on social selling, based on the recent "2016 - Social Selling

Top 100 Influencers” list published by Onalytica<sup>4</sup>. The list is built according to a PageRank Methodology considering tweets mentioning keywords, such as “social selling” OR “socialselling” OR “socialsales” OR “social sales”, taking into account the number and quality of contextual references that a user receives. The list includes prominent social selling-focused consultants, sales managers and salespeople; thus, it appears well suited for gaining a rich set of ideas and insights on social selling.

We personally contacted all members of the top-100 list. We explained the aim of the research and offered managerial summaries of the study findings for motivating the participation. We guaranteed for anonymity to all participants, thus no individual responses can be identified from the study findings. In total, 21 consultants, sales managers and salespeople agreed to participate in the study. The participants had extensive experience in sales and represented a wide variety of job roles, industries and countries (see Table 9 for further details).

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<sup>4</sup> <http://www.onalytica.com/wp-content/uploads/2016/02/Onalytica-Social-Selling-2016-Top-100-Influencers-and-Brands.pdf>



**Table 9. Profiles of thought-leading social selling experts**

Participants	Primary Job Role*	Job Title	Industry	Sales Exp**	Country
Alpha	CO	Social Selling practitioner	Consulting	40	Belgium
Beta	MA	Sales Director	ICT	32	UK
Gamma	CO	Consultant, Sales	Consulting	35	UK
Delta	CO	Sales Trainer and Professor	Sales training	10	Canada
Epsilon	CO	Social Selling Program Manager	Consulting	16	Netherlands
Zeta	CO	CEO	Training	30	USA
Eta	MA	Global Head of Social Selling	ICT	10	Canada
Theta	CO	Chief Sales Officer	Consulting	35	USA
Iota	CO, MA	Business Founder & Social Selling Specialist	Sales training	25	Netherlands
Kappa	CO	Business Founder	Dig. Marketing	7	UK
Lambda	MA	Senior VP of Sales	Technology	20	USA
Mu	CO	Google Expert	Marketing	-	UK
Nu	CO, SA	CEO	Marketing	24	USA
Xsi	CO	Managing Partner	ICT	30	USA
Omicron	MA	Manager, Content Marketing & Social Media	Legal services	16	Canada
Pi	CO	Business Founder	Sales training	22	USA
Rho	CO, MA, SA	Director	Consulting	15	Netherlands
Sigma	CO	Consultant	Intern. Marketing	27	USA
Tau	CO	CEO	Sales training	12	Finland
Upsilon	MA	Director	Technology	18	Ireland
Phi	CO	Director	Sales consulting	45	Australia

\*- CO= Consultant; MA=Manager; SA=Salesperson / \*\* experience: years in sales

Although the interview themes were built on the extant literature about social selling, the aim was to obtain as much information as possible concerning social selling practices. We therefore adopted an explorative approach and used open-ended

questions in data collection. After a brief description of the research project, we covered the following five themes to achieve a thorough understanding of the social selling concept and its nomological network (see Appendix):

- First, participants were asked about the core elements of social selling. This theme aimed at clarifying the concepts and its core dimensions and it is therefore strictly connected to the key concept of social selling at the individual salesperson level.
- The second theme dealt with the organizational aspects of social selling to understand the key areas of the organizational strategy and its role for social selling. These questions are linked to the organizational key concepts of social selling.
- The third theme focused on the perceived social selling-related goals and outcomes.
- The fourth theme was connected to the perceived contingencies of social selling.
- The fifth theme aimed at understanding the future trends as well as potential research directions in this area.
- Lastly, participants were asked to provide some background information.

The researcher aims at facilitating the emergence of key insights, therefore questions were carefully phrased in an unobtrusive way to avoid the potential pitfalls of “active listening” (McCracken 1988, p. 21). The information obtained from these participants elicit novel insights into the key facets of social selling, organizational aspects and potential social selling-related outcomes.

#### *4.2.2. Towards a conceptualization of social selling in B2B: the key activities facets*

The common themes recurring in top of mind responses highlight that social selling is an approach to relate to today’s empowered customers in those touchpoints that are relevant for their decision-making process (see Fidelman 2012; Giamanco and Gregoire 2012; Wiese 2017). Social selling entails being active and relevant at the right time and in the right place when customers are looking for information to face their business problems. This increasingly requires leveraging social media for being effectively able to relate to the empowered and information savvy customers, particularly in the early phases of the customers’ buying processes. However, although social media represents an important channel to engage customers, participants highlight the importance of using it closely with other relevant channels so that the connections can be moved beyond social channels.

Overall, social selling was systematically seen as a “soft” selling approach, which regardless its direct sales implications, implements the digital marketing principles, including the content marketing thinking (Holliman and Rowley 2014; Wang, Malthouse, Calder and Uzunoglu 2017) and social media marketing (Salo 2017) among salespeople. In the words of the participants:

*Epsilon: “B2B customer buying process has changed and the role of sales must change as well. Sales has always been social, social selling is adding a new way to engaging with customers.”*

*Eta: “Social Selling is about changing the way that sales reps engage with buyers. Sales, particularly complex B2B sale, has always been about relationships, and most likely always will be about relationships. Social media is just another avenue to engage and build those relationships.”*

*Beta: “Buyers have more real time information at their fingertips on any device at any time, about you, your product, your company, your market, your competitors and your customers opinions than ever before in history. For this reason, opening the initial discussion from cold is harder than ever before. Social selling is a methodology, not a tool or product, that empowers you to gain insights on your prospective customer, to listen, to connect and to engage to earn the right to turn a social connection into a real-world sales engagement, where typically you then divert into a more traditional selling process.”*

*Acquisition of deep customer insights.* Data analysis showed that the acquisition of deep insights on prospective and existing customers through social media represents a key facet of social selling. This activity consists of salespeople’s efforts to gather

customer information helpful for the sales process and for meeting the customers' needs in a relevant and timely way.

Specifically, study participants highlighted the role of social media in identifying relevant firms and individuals that fit the “ideal” customer profile. This is particularly useful for generating high quality leads and effectively steering the sales process. In other words, acquiring deep customer insights involves screening potential customers' social media profiles and “listening” customers and competitors. This is consistent with the literature emphasizing that social media can be used to gather information about potential customer's key stakeholders, such as common connections, interests and past experiences (see Agnihotri et al. 2012; Andzulis et al. 2012; Lacoste 2016). Social media-related information are also useful for understanding potential customers buying journey and the customer organization's buying center structure, which usually includes different key decision makers and stakeholders within and outside the customer organization (c.f. Adamson et al. 2012; Üstüner and Godes 2006).

*Alpha: “Identifying people and companies online that fit your ideal client [...]”*

*Tau: “One of the key elements in social selling is ‘social listening’, where salespeople use social channels to find the right decision makers, influencers and engage with them through, many times, in private conversations.*

*Upsilon: “Social selling requires gathering insights about the individual and the company they represents before reaching out.”*

*Delta: “Using social media to learn about your customers that can deepen relationships or build rapport quicker on calls/emails. For example, I spend three minutes to find three relationship or rapport-building items on a prospect’s LinkedIn or other social channels before I “cold call” or email them. For example, common connections, causes, schools, interests, etc.”*

Furthermore, participants have emphasized that acquiring customer insights can help in customer value creation, by allowing a thorough understanding of the individual needs and challenges of both prospective and existing customers. Similar ideas have been presented in the past literature, which has discussed the opportunity of using social media to improve the process of needs discovery (see Agnihotri et al. 2012; Andzulis et al. 2012; Lacoste 2016; Trainor 2012). Notably, the timing aspect clearly surfaces in this dimension, as strategically “listening” to customers’ content in social media allows salespeople to develop a better understanding of the customers’ situation in terms of current needs and problems in their business. These insights can be extremely useful for approaching today’s ever more knowledgeable customer with targeted initiatives and address effectively their needs.

*Nu: “Understanding what your customers truly need and solving problems that they have via thoughtful content.”*

*Pi: “There are two sides of social selling. First, listening to the social world for triggers we can use to engage with prospects*

*directly based on their needs. Second, building your own personal brand and trying to become a thought leader in your space by sharing relevant and useful knowledge.”*

*Xsi: “Social selling practices are similar to many of the customer intelligence activities we did in developing market development plans when we planned out our sales activities. The benefit should be more knowledge before engaging clients.”*

*Gamma: “An understanding of what potential clients want from us via social media. What information do they find the most valuable? What helps to build trust? How do they decide if and how they will contact a potential supplier they have spotted through social media activity?”*

*Zeta: “Using social and business intelligence tools, a salesperson can better understand pain points, competitive threats, business trends that a buyer would benefit from knowing about.”*

*In sum, we define the acquisition of deep customer insights as the salesperson activity of understanding the value of the customer, its buying center structure as well as customers current business situation for helping establish a mutually beneficial relationship.*

*Connecting to customers.* The second dimension of social selling regards the salesperson activity of *connecting to potential and existing customers through networking and consistent dialogue in relevant touchpoints.* Participants indicated that this facet entails building a relational network by establishing new professional

connections to prospective and existing customers as well as developing consistent dialogues by interacting with potential customers in social media. This resonates with the central tenets of social media, that is creating and maintaining a network of relevant personal contacts within various platforms (see Hennig-Thurau, Malthouse, Friege, Gensler, Lobschat and Rangaswamy 2010; Kaplan and Haenlein 2010).

*Pi: “[...] following and engaging with top executives at target accounts; connecting with different people and building a strong professional network; adding value to prospective clients without looking for anything in return.”*

*Omicron: “Social selling is first and foremost not selling through social media channels. It is a way of leveraging social media channels to gather a core audience of clients, industry peers, potential clients (prospects) in order to lay the foundation of trust through thought leadership and mutual common interest.”*

*Theta: “Social selling is about starting more sales conversations with more qualified buyers. There are two primary activities for doing this: the outbound prospecting and the inbound marketing. Outbound prospecting involves the networking part of social selling. Inbound marketing involves sharing content to attract buyers.”*

Furthermore, data analysis pointed out the importance of developing a consistent dialogue with prospects and customers through commenting, questioning or answering relevant questions. Rather than focusing only on one-way communications, social media can facilitate interactive conversations between



salespeople and customers (see Andzulis et al. 2012; Bocconcelli et al. 2017; Trainor 2012). Participants noted that social media represents a critical touchpoint for timely conversations throughout the customer journey. Although these interactions on social media may not directly result into short-term sales, systematic and consistent efforts in social communication with customers can facilitate customer-initiated sales contacts and relationship building in the long term. Considering the following quotes:

*Kappa: “My business was built on social media. I spent insane amounts of time responding to everybody. My website has only recently launched after nearly two years[...] I’ve never advertised my services. Yet, I have received a healthy number of leads and enquires every week from LinkedIn and Twitter, while building strong revenue streams.”*

*Upsilon: “Social Selling is starting a conversation with insights about the individual decision makers and the company they represent. Social Sellers add value to their prospect from the first conversation.”*

*Gamma: “True social selling involves the sharing and gathering of news, views and ideas using social media channels. The idea is to create interest and start online conversations that can then be developed into sales prospects.”*

*Zeta: “To engage today’s modern buyer, increase networks, prospects, build pipeline and generate revenue, sellers must combine consultative selling methods, relevant business insights and the use of social channels as a way to connect with buyers at the right time and with the right message.”*

*Lambda: “Consistency, just doing it and consistency. And not overthinking it, if you overthink it, you’re done. And if you’re not doing it, you’re done. [...] it’s just what we just talked about, consistency and efforts, just getting the work done.”*

To summarize, *connecting through networking and dialogue refers to the salesperson activity of establishing relevant professional connections and building consistent conversations with both prospective and existing customers for converting contacts into long-term relationships.*

*Engaging through valuable content.* The second connecting facet of social selling focuses on building consistent dialogue with potential and existing customers, whereas the third facet regards the quality of the dialogue with customers. This dimension relates to the engagement of prospects and extant customers through valuable content. Data analysis largely pointed out the need to engage with current and potential customers by leveraging customer insights for building trusting relationships with buyers in the long-term.

*Mu: “Building a community through trust. Rather than sell to people, you should engage, share, educate and help others and then in return the social selling happens naturally.”*

*Sigma: “Too many think it’s enough to just have an account and send out canned tweets. It’s always more about quality than quantity and, in this case, “quality” means relevant, personal, consistent and valuable.”*

*Beta: "Social Selling needs a change in mindset, an understanding of how social works and how to leverage it in a natural feeling approach to engage not push away prospects. Too many salespeople are not getting it and are using it as a blast approach, send an invite to connect, followed immediately by a sales pitch proposition. This is not social selling! Social selling is a subtle blended approach that need patience and understanding to utilize."*

*Lambda: "I think what gets lost in social selling is the actual engagement. Social selling to me isn't having a profile, liking thing or connecting with people, or sending InMails. In fact, I think that InMails from LinkedIn are more 'spammy' than emails now. It's just a new spam, but what I look out is what is the engagement people are doing, with the articles that are on this channel."*

Participants widely emphasized that successful engagement strictly depends on the relevance and value of the content provided to the customers. Instead of focusing on the company's products or services, salespeople should prove how they can help customers to solve their business problems for gaining the attention of today's informed and empowered buyers (see Agnihotri et al. 2012; Bocconcelli et al. 2017). Many participants indicated that salespeople should try to increase the reliability of the content by using well-documented white papers, references and content from reputable external sources.

*Epsilon: "Social selling is about engaging with relevant content, which is thought provoking, inspires and informs the customer about something he was not aware before."*

*Mu: “Don’t sell, sell, sell, but be helpful, informative, and open minded. Post perhaps 20% sales and the rest be informative, up to date in your industry, include white papers.”*

*Zeta: “What I would clarify is the use of content that should have value to the buyer. Often, salespeople are simply using the content that marketing created which very often still looks like product and services pitches. The content should focus on and speak to the issues that the targeted buyer will care about. [...]Salespeople should also be on the lookout for external content created by reputable sources that can be used to engage buyers in conversations because buyers only care about what you can do for them not what you want to sell them.”*

This third dimension highly resonate with recent studies on content marketing, which emphasize the importance of delivering relevant, compelling and timely content based on customer needs (Holliman and Rowley 2014; Järvinen and Taiminen 2016). However, social selling focuses on personal one-to-one dialogues between the salesperson and the customer, differently from the broader corporate level perspective of social media marketing (see De Vries et al. 2012; Kaplan and Haenlein 2010).

To summarize, *engaging the customers through valuable content refers to the salesperson’s activity of nurturing dialogues by providing prospects and customers with relevant and customer-oriented insights to build up a professional brand and establish long-term relationships.*

#### *4.2.3. An operational definition of B2B social selling*

Social selling consists of three distinct, yet related facets: (1) acquiring deep insights of prospective and existing customers; (2) connecting to customers through network and dialogue; and (3) engaging customers through valuable content. These key activities aim at converting “social connections” into business outcomes in the long term. Although social media represents an important channel to engage the customers, social selling entails the use of social media together with other relevant channels to convert these connections beyond the social channel. Notably, we define social selling as “*a selling approach, which leverages social media besides other channels, for acquiring deep insights of prospective and existing customers, connecting to customers in relevant touchpoint through networking and consistent dialogue, as well as engaging customers through valuable content, for converting these connections beyond social media into business outcomes in the long-term*”. The quotes below illustrate the construct and its key facets:

*Tau: “Social Selling is an approach where salespeople use digital and social channels to get insights and develop relationship with potential prospects and current clients by sharing valuable content and maintaining active dialogue with the relevant people through social channels.”*

*Iota: “[...] sales professionals leverage relevant social media channels for collecting deep customer insights on prospective and existing buyers, connecting to prospective buyers through active*

*engagement with relevant content delivered within the appropriate context and converting those connections into valuable business relationships typically by moving the relationship beyond social media.”*

*Epsilon: “Building a professional and consistent online presence, both at a corporate and employee level, thereby leveraging social media platforms to obtain customer and prospect intelligence with regard to pain points and challenges; grow professional B2B network, both at account and contact level, by expanding the decision making unit; build ongoing relationships by sharing relevant and engaging content early on in customer journey; accelerate funnel conversion, from forecasted opportunity to booking to loyalty.”*

Field interviews further emphasized that social selling alone does not allow to attain the expected outcomes. Social selling effectiveness is likely to be contingent on the supportive use of customer-oriented selling approaches, such as consultative (c.f. Liu and Leach 2001) or value-based selling (c.f. Terho et al. 2017) (see Figure 8).

*Zeta: “Thinking that the use of social media is a short-cut to sales success. It can open the door when emails and phone calls are blocked but if the basics are consultative selling are not there, pipeline and revenue challenges will continue to be a problem.”*

Salespeople involved in social selling can connect and engage customers early in the purchasing journey, build trust, or develop their professional brand as value advisors. However, it is likely that salespeople should prove these activities through concrete customer-oriented selling actions. To sum up, the proposed definition

suggests that social selling focuses on leveraging social media to perform three activities actively aiming at converting the connections beyond social media towards business outcomes in the long-term. Finally, participants also noted that although social selling is an individual salesperson level selling approach, the selling organization plays a pivotal role for an organization-wide and effective deployment of social selling. Next, we discuss the potential outcomes of social selling.

#### *4.2.4. Potential outcomes of social selling*

Study participants indicated a broad set of social selling-related outcomes including salesperson level soft outcomes and sales performance, relationship and customer outcomes, as well as organizational outcomes.

First, participants systematically stressed the development of a strong *personal brand* as one of the key outcomes of social selling activities. Specifically, social selling efforts help to establish a high-trust, thought-leadership position with the target customers. Previous studies have shown that using social media to build a professional credibility can streamline the first contact request to potential customers (see Lacoste 2016). Yet, participants emphasized the broader role of the personal brand in facilitating customers' spontaneous contact to the salesperson in buying situations.

*Gamma: "Building their 'personal brand' and positioning them as a thought leader in their industry. Traditional selling pushes people away, social selling attracts people to you."*

*Eta: "Social selling is not about connecting for an aggressive sales methodology, it is about building your reputation as a trusted advisor and/or subject matter expert, so that in the long term, your customer come to you."*

Furthermore, social selling can help salespeople to demonstrate *sales service behaviors*, by adding social media to the resource intensive traditional channels in communication. The critical role of social media in helping performing sales service behaviors is also reflected in the literature (see Agnihotri et al. 2012, 2017).

*Lambda: "However, I do believe the one place that social is not being looked at very heavily is on the customer success side of the world. So, after their sign the contract, after they are gone to the process, people forget about their customer. So, I am very passionate about making sure that you still connect to your customer, you're still sending them all over content. This is not just for the front end of the funnel."*

Second, according to participants, social selling might affect *salesperson selling performance*. Data analysis highlights three main performance areas: lead performance, sales process performance, and revenue. In this regard, social selling seems to be particularly useful on the front-end of the selling cycle by helping salespeople to generate a higher number of better-quality leads, as well as reaching higher closing ratios and shortening sales cycles. Indeed, studies have casted doubts



on the effectiveness of traditional prospecting techniques, such as cold canvassing, in contemporary business environments (see Moncrief and Marshall 2005). In contrast to many traditional approaches, participants emphasize social selling as an effective approach to address leads and prospects in a less invasive and more personal way (see Agnihotri et al. 2012; Rodriguez et al. 2012; Ogilvie et al. 2018). These front-end outcomes should have an impact on salesperson revenue performance in the long term.

*Zeta: “Quality and quantity of sales opportunities.”*

*Gamma: “Done right social selling will improve sales numbers and conversion ratio, but that should not be your focus. Focus on the right activities and the results take care of themselves.”*

*Delta: “For sales, its closing ratio, lead generation, and revenue.”*

*Eta: “Deal size, sales acceleration rates, decreased deal loss, increased inbound sales [...].”*

*Upsilon: “Selling outcomes are higher close rates, shorter sales cycles and bigger deal sizes. This comes at the cost of more preparation time. You may reach out to fewer prospects, but close more deals.”*

Third, participants highlighted that social selling should ultimately *benefit customers*. Notably, social selling can influence customer satisfaction. Indeed, the

gathering of customers knowledge on the buying process, consistent and meaningful interactions and the provision of relevant content help salespeople to build trust in the relationships. Furthermore, many participants also emphasized the role of social selling in facilitating customer referral behavior through engagement and sellers' personal brand effects (see Van Doorn, Lemon, Mittal, Nass et al. 2010).

*Sigma: "And if you don't look at customer outcomes that ignores the whole 'social' aspect all together, doesn't it?"*

*Upsilon: "Social selling done right should have a positive impact on sales results, while at the same time increase buyer's satisfaction with the buying process."*

*Lambda: "[...] customer advocacy, so the customer really believes in your brand and product."*

*Iota: "Conversions create happy customers that can be leveraged for the acquisition of new customers [...] when they meet someone that has an interest in your product, service, or expertise they will refer them to you."*

Finally, data shows that a systematic implementation of social selling among the sales force has the potential to influence *firm performance* in the long-term through combined effects of salesperson- and customer-related outcomes. Notably, participants highlight that social selling can affect two key areas of organizational performance, that is brand awareness and organizational selling performance.

*Beta: “Brand awareness will be impacted to a degree, but this typically is founded in social advocacy - having influencers and others sharing organizational level content to their audiences.”*

*Eta: “Overall brand or reputation of the company, selling performance, ROI”*

*Iota: “Brand awareness and selling performance are indeed the most important organizational level goals in social selling.”*

#### *4.2.5. Organizational aspects of social selling*

Participants emphasized that social selling is strongly related to the individual salesperson level. Yet, data analysis indicates that the organization is pivotal for an effective firm-wide implementation of social selling (c.f. Agnihotri et al. 2012; Andzulis et al. 2012; Itani et al. 2017; Ogilvie et al. 2018). Notably, seven different, but connected facets of organizational social selling strategy emerged from data analysis. Although the empirical findings largely resonate with conceptual studies in this area, they also highlight novel elements and deepen the current understanding at the organizational level. For the sake of clarity, we discuss only the strategy aspects which specifically refer to social selling, excluding general management topics widely mentioned by participants, such as top-management support, change management, or training.

Participants highlighted the need of clearly defining and communicating a *social media policy for social selling*. Firms should identify the right people to manage social tools, allow employees to use social media and delineate guidelines to ensure its proper use.

*Delta: "Before implementing social selling, proper online etiquette needs to be established."*

*Zeta: "Have we created and clearly communicated social communication guidelines to our salespeople?"*

*Iota: "Start with a social media policy; and for every 'do not', also include a 'do'."*

*Mu: "Relevant platforms to the brand. Create and build a community at the outset. [...] People buy from people so choose the right person to manage your social media."*

Furthermore, the critical role of *customer buying behavior-based segmentation and targeting in social selling* emerged as an additional key element of the organizational social selling strategy. This idea was reflected in the participants' view of identifying the ideal client profile to understand whether social media represents a relevant channel and how to attract this target customer. Therefore, firms should assist salespeople in understanding who the ideal customers are, what types of channels they engage in, what are their typical organizational needs, which

stakeholders are normally involved in buying, and which are the different buyers' challenges.

*Zeta: "Who is our target audience and what do they care about? What social channels are our prospects likely to be engaging in?"*

*Iota: "Sales professionals need to fully grasp the buying journey of their customers. They need to know where their customers are online, what platforms they use. They need to understand the etiquettes of those platforms."*

*Lambda: "I think you have to understand your buyer. So, one thing that people don't do a good job at is understanding where their buyer 'lives'. Before we do anything, whether is any sales process, social selling, whatever it is, you have to know who your ideal client profile is. I think the biggest problem people have in the sales world is not knowing who their buyer is, who's going to buy from them. It doesn't matter if it's social, calling, marketing; if you're marketing to the wrong person, you can't get their attention, they're never going to buy from you[...] So, what the strategy really is, is based on the business you're selling to and who your ideal client profile is, and I think you build the strategy around that, it's all about the attention."*

*Pi: "You need to be clear on the ideal customer profile and the target personas within those accounts, so you know where they 'live socially'."*

In this regard, delineating detailed buyer profiles helps salespeople in the process of lead qualification and allows to create personalized content for handling the communication in a more effective way.

Participants also highlight that the organizational social selling strategy should systematically *integrate social selling activities into selling processes*. A programmatic approach for social selling ensures the integration of individual social selling efforts into daily sales activities and broader corporate objectives. The findings are consistent with studies that have noted different roles of social media in various steps of the traditional selling process (Andzulis et al. 2012; Marshall et al. 2012; Moncrief et al. 2015). Participants widely highlighted that social selling alone as a sales tool is not enough; rather it necessitates integration into a wider selling process and approaches for keeping the promises made in social channels.

*Epsilon: "A programmatic approach is needed."*

*Lambda: "I think the thing that is missing is the entire lifecycle of the client needs to be taken into account in social selling [...] I think just integrating, having an integrated process for social selling is important."*

*Pi: "There needs to be structure to what reps do on social and how they do it but allow them to still show their own voice. It also needs to be aligned with KPIs and objectively measured to show the positive impact on revenue and prove the value."*

Social selling strategy should also include specific *goals and metrics*. Many participants stressed the difficulty in identifying the direct short-term outcomes of social selling activities. For this reason, managers should pay attention to long-term organizational goal setting and carefully tailor the used KPIs and metrics, taking into

account the nature and purpose of social selling initiatives (c.f. Agnihotri et al. 2012). Participants largely emphasized specific activity-focused metrics for evaluating salespeople' performance, such as the number of leads, shared content, number of face-to-face meetings, or demonstrations achieved through social selling practices, among others. The measures should not simply focus on the quantity but also address the quality of the activities for best results.

*Omicron: “[...] establishing long term goals. Maintaining a good level of engagement with those putting social selling into practice is key, since in some industries, the benefits of social selling are not immediate.”*

*Tau: “Everything that can be measured should be measured and get implemented into the sales process in order to avoid social selling activities getting left out of daily sales activities. [...] Companies should then implement some kind of program or test period and start measuring the KPI's: lead sources; number of contents posted or shared; content engagement; the number of meetings, leads, deals through social channels.”*

*Phi: “Primary objective is to get face to face with a qualified customer with the minimal amount of effort and time. So, all measurements need to be related to that. Number of qualified leads generated. Number of face-to-face meeting achieved.”*

*Zeta: “Sales leadership is a roadblock. They often still insist on measuring number of phone calls made or email sent but the quality of the messaging is overlooked. More isn't better. If the activity isn't leading to sales outcomes like more sales calls being held, the*

*problem is in the messaging and lack of relevance and personalization.”*

The *organizational alignment* is a central aspect of the social selling strategy. Notably, participants have emphasized that social selling is not limited to sales and should involve other departments. Participants largely stated that especially sales and marketing should work together with distinct roles for effective management of online and offline conversations with prospects and customers (c.f. Agnihotri et al. 2012; Marshall et al. 2012; Moncrief 2017).

*Zeta: “Strategy that includes sales and marketing, which define clear hand off points, and who does what?”*

*Pi: “[...] And then develop a strategy that surrounds them from a marketing standpoint as well as a rep standpoint leveraging social to gain insights and engage when appropriate. There should be a clear distinction between the company brand and the rep brand to ensure it doesn’t all sound the same.”*

*Omicron: “I believe that it's a mistake to only focus on that small group of an organization. Every employee has a chance, an opportunity to partake in social selling. They are the best advocate an organization has.”*

Specifically, one primary area of functional collaboration concerns the *organizational creation and sharing of content* (c.f. Bocconcelli et al. 2017). Participants stressed that social selling efforts benefit of wide “social media advocacy” among employees and the organizations should think how to inspire non-



sales individuals to become active in social content sharing. In this regard, participants stressed the need for flexibility and a supportive, rather than dominant role of marketing in helping salespeople to engage customers with content.

*Beta: "To get success from social selling in an organization it requires [...] the business to support the sales team with strong engaging ongoing new content."*

*Upsilon: "The marketing team needs to support with content and should have an integrated approach of marketing activity and social selling outreach by the sales force."*

*Lambda: "It's not just sales, it's got to be the organization. I think, engineering should be doing social selling and not in the traditional social selling space, they should be sharing out stuff, because they never know who's looking at their profile."*

*Gamma: "As stated previously social selling is not done by firms, it is done by individual salespeople. Company social media channels should share their peoples' posts not the other way around."*

Finally, the participants systematically noted that firms should carefully consider *providing technological tools* for supporting their salespeople's social selling efforts. Clearly, firms are increasingly employing digital marketing and sales-related technologies. In this regard, to the best of our knowledge an up-to-date list of potential applicable technologies in this area does not exist. Accordingly, we developed a list of six potential groups of technologies related to social selling based on sales software-focused commercial websites and practitioner discussions (see

Table 10). After the open inductive data collection, we asked participants to further rate the perceived relevance of the identified list of sales-related technologies. Interestingly, the participants rated salesperson-focused supportive technologies higher, including social CRM, social media management, and sales enablement software. These tools focus on assisting users to leverage social media and content in their work. This view is consistent with earlier studies that have noted the positive effects of social CRM on salespeople' selling behaviors and customer relationship performance (see Agnihotri et al. 2017; Trainor et al. 2014). The participants gave lower scores to management and marketing as well as automation-focused technologies such as sales force automation, business intelligence, and marketing automation software.

**Table 10. Perceived relevance of social selling-related technologies<sup>5</sup>**

Supportive technology	not relevant	somewhat relevant	relevant	highly relevant	Mean (N=21)
<b>Social CRM systems:</b> CRM systems with integrated social media features to better manage customer relationships by synchronizing social media data into customer profiles, tracking and monitoring customer interaction and communication also across social media. E.g. Salesforce, Netsuite, SAP, Nimble	0	3	5	13	3.5
	0%	14%	24%	62%	
<b>Social media management software:</b> Software for content management and social listening and monitoring, that allows to schedule and handle the activity of all social channels, identify key prospects and influencers and foster engagement through social media. E.g. Hootsuite, Sprout, Buffer, IFTTT, Meltwater, Cision	0	1	9	11	3.5
	0%	5%	43%	52%	
<b>Sales enablement software:</b> Tools to help salespeople to both find marketing generated content and create content by themselves, submit it to prospects, and track prospects' engagement with the content throughout the sales cycle. E.g. Brainshark, Octiv, Bloomfire, ClearSlide, Seismic, Showpad, Guru, DocSend, Highspot, App Data Room, GetAccept, CloudApp	0	1	11	9	3.4
	0%	5%	52%	43%	
<b>Sales force automation CRM systems:</b> Systems that automate sales and administrative activities related to e.g. information sharing, inventories, contact management, sales calls logging, quoting, order processing and tracking, workflow management, sales forecasting and performance measurement. E.g. Salesforce, Pipedrive	1	3	10	7	3.1
	5%	14%	48%	33%	
<b>Business intelligence systems:</b> Analytics software helping to retrieve, analyze and transform customer buying related raw data (big data) into reports to help decision making. Their features include deal insights, profitability analysis, modeling and forecasting and performance measurement. E.g. Oracle BI, Tableau, GoodData, LiveHive, Sisense, Birst	0	5	9	7	3.1
	0%	24%	43%	33%	
<b>Marketing automation systems:</b> These systems automate and monitor marketing activities and workflow based on behavioral customer data. They can include digital campaigns, e-mail marketing, social media marketing, content management and lead management. Software helps to qualify leads for the sales team. E.g. Hubspot, Marketo, Oracle Eloqua, ToutApp, Mindmatrix	0	4	12	5	3.0
	0%	19%	57%	24%	
<b>Total</b>	1%	13%	44%	41%	3.3

<sup>5</sup> Descriptions present key aspects of identified social selling related technologies. In practice, software may have functionalities from many categories. Grey background color highlights above average means.

Importantly, data analysis largely indicated that a trade-off exists between the use of technologies and a personal approach in social selling activities. The availability of different tools at its worst can overwhelm salespeople and reduce the required customer focus in social selling.

*Iota: “However, the essence of social selling is hyper-personalization as opposed to increased automation. This is where many organizations go wrong and hence claim that social selling doesn't work. Any tools offered should help the sales professional increase the level of personal contact with existing and prospective buyers. If it doesn't do that, don't burden the sales professionals with those tools.”*

*Lambda: “I do believe you have to give people tools, because salespeople are lazy. So, I think you do need to give them tools, I just think you have to be cautious and balanced, because if you give them too many tools, they don't do anything.”*

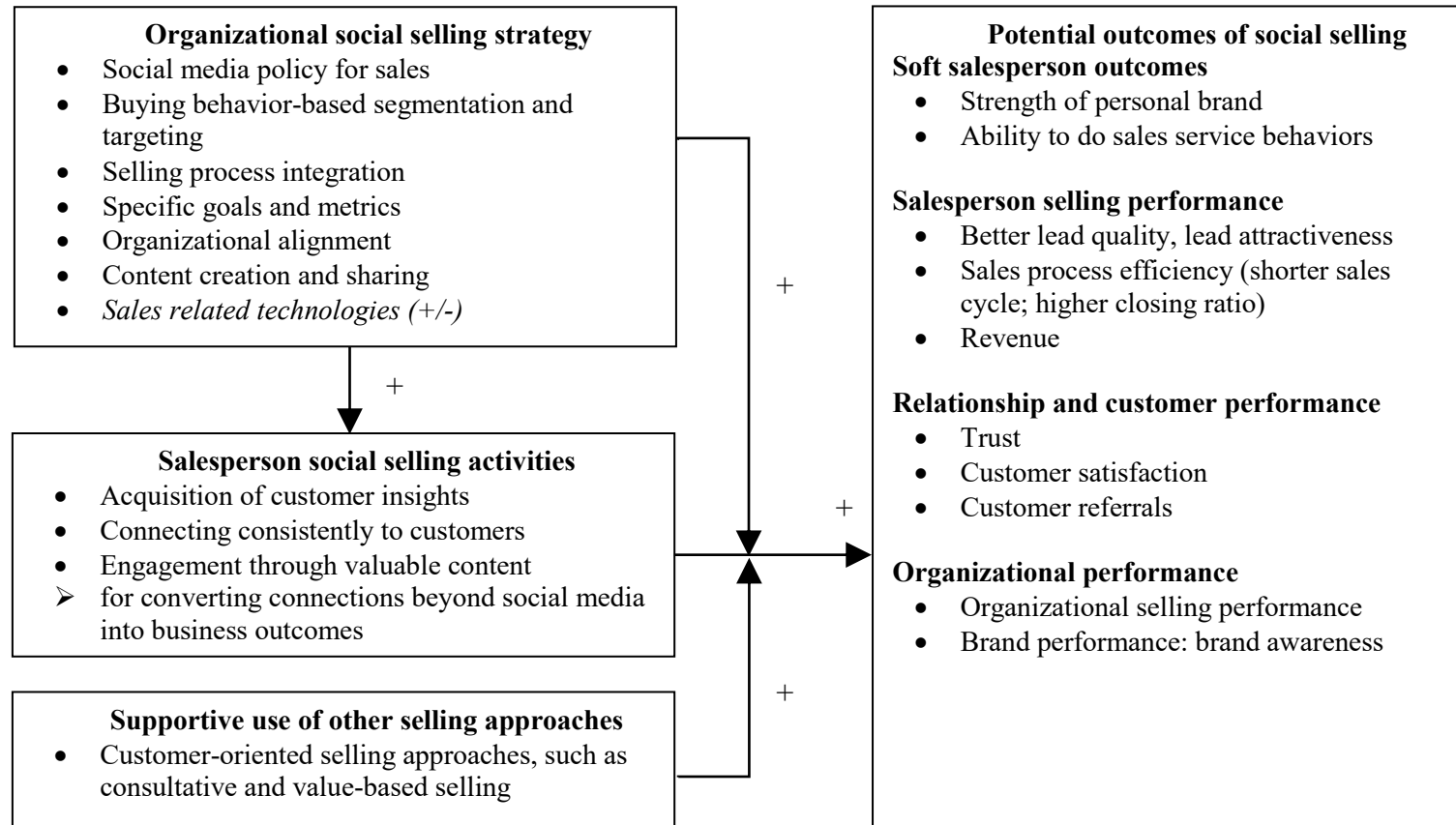
*Gamma: “Social selling is not snooping. Great social selling keeps things simple. Share great content and prospects will gravitate to you. There is too much automation used in social selling. Social selling is done by humans, not robots.”*

*Pi: “Selecting the least number of tools that complement each other, and you can build into a process without too much overlap. There needs to be structure to what reps do on social and how they do it but allow them still to show their own voice. It also needs to be aligned with KPIs and objectively measured to show the positive impact on revenue and prove the value.”*

We conclude that supportive salesperson-focused technologies are likely to be beneficial for social selling but can be counterproductive when applied in a too

technology driven way. Figure 8 below synthesizes the conceptualization of social selling as well as its nomological network.

**Figure 8. The social selling concept and its nomological network<sup>6</sup>**



<sup>6</sup> Italics indicate a possible negative moderating effect.

### **4.3. Field study 2: comparing the social selling conceptualization with frontline sales practices**

#### *4.3.1. Data collection for the field study 2*

The first field study among thought-leading experts led to the conceptualization of social selling and allows to answer the first research question. Yet, to deepen the current understanding of social selling, we conducted a second qualitative field study aiming at comparing the social selling conceptualization with everyday sales practices to confirm the key construct's dimension and obtain an in-depth view on how social selling is effectively manifested among frontline sales managers as well as identify possible differences among thought-leading experts and frontline sales professionals. Hence, the second field study allows to answer the second research question of *how frontline sales professionals currently practice social selling in their daily work*.

To this purpose, data were collected through in-depth interviews with sales managers and salespeople operating in B2B markets. We used a purposive or “theoretical” sampling procedure (Eisenhard and Graebner 2007). As the purpose of the study was theory building, it was pivotal to include diverse experiences and perspectives during data collection. Specifically, we selected participants who 1) belong to various industries for ensuring rich information about the focal phenomenon, 2) are known to have an active presence on social media and to have

put efforts into social selling practices. The sampling process ceased at saturation, as indicated by information redundancy.

We recruited 13 salespeople and managers relying on personal contacts and offered managerial summaries of the study findings for motivating the participation. This approach is indeed quite common among studies in the sales area to obtain an adequate number of participants needed to reach theoretical saturation (c.f. Johnson 2015). The key informants' characteristics displayed in Table 8 show that participants represent companies operating in various industries, including Information and Communication Technologies, Digital Marketing, HR consulting and Construction sector.



**Table 11. Profile of frontline sales professionals participating in the study**

<b>Participants</b>	<b>Job Role*</b>	<b>Job Title</b>	<b>Industry</b>	<b>Sales Exp**</b>	<b>Country</b>
P1	SA	Account Manager & DM Specialist	ICT	9	Italy
P2	SA	Business Founder	Dig. Marketing	9	Italy
P3	SA	Business Founder	Dig. Marketing	5	Italy
P4	SA	Account Manager	Technology	11	Italy
P5	SA	Business Developer	Construction	6	Italy
P6	MA	Sales Manager	HR consulting	5	Italy
P7	SA	Sales Account & Business Developer	ICT	7	Italy
P8	MA	Sales Director & Channel Manager	ICT	20	Italy
P9	SA	Account Manager	ICT	10	Italy
P10	MA	Sales Manager	ICT	-	Italy
P11	MA	Business Developer Manager	ICT	16	Italy
P12	MA	National Sales Manager	ICT	5	Italy
P13	SA	Business Founder and project manager	Dig. Marketing	3	Italy

\*- MA=Manager; SA=Salesperson / \*\* experience: years in sales

We developed a semi-structured interview protocol relying on open-ended questions. To facilitate the emergence of key insights, grounded in the participants' own language, we worded the questions to elicit participants' responses in a nondirective way to avoid "active listening" (McCracken 1988). We covered the following four themes to achieve a deep understanding on how sales professional are currently practicing social selling (see Appendix).

Firstly, we invited the interviewees to describe their company background and their role as well as how social media influences the company's business and their

selling activities to obtain first dimensions on social selling. Secondly, we asked to explain the key activities of social selling. Thirdly, we focused on the drivers, barriers and contingencies. Finally, we investigate the potential outcomes of social selling. During the interview, we constantly asked the participants to refer to concrete situations and provide real-life examples to illustrate and describe how social selling is manifested in their work.

#### *4.3.2. Findings of the field study 2: the frontline view on social selling*

Data gathered conducting the second round of interviews allows to confirm the three social selling facets that emerged in the first field study. Social selling is perceived as a new way of relating to customers in the current business environment, rather than strictly selling products or services over social media platforms. Thus, social selling represents as a contemporary selling approach, going beyond the mere technological aspects of the phenomenon. Yet, participants highlighted that the social selling principles should not be delimited to the use of social media. Instead, salespeople should include most relevant channels and touchpoints including face-to-face interactions and other more traditional communication channels (c.f. Bocconcelli et al., 2017; Lacoste, 2016; see also Wang etl a. 2017). In this regard, the relationship oftentimes develops and grows outside social media, with a subsequent integration of social media-related activities with more traditional sales practices. In the words of a sales manager:

*P1: “For example, before going to a trade fair, searching for who controls a company I’m interested in and who decides can be useful to approach people in that fair already knowing that Mario Rossi is responsible for the staff, Lucio Bianchi is responsible for purchases and so on. It becomes a way to present yourself having with a minimum of information. [...] social media can be both preparatory and retrospective to the face-to-face encounter. In the second case, it can be a way to revitalize contacts made in the past.”*

Firstly, salespeople and sales managers were consistent in the view that social selling regards acquiring deep insights about prospects and actual customers on social media. Sales professionals widely use social media as a “database” of potential customers to draw both “static” and “dynamic” information. Therefore, social media are effectively employed for identifying individuals in target firms as well as for acquiring knowledge on customers’ needs and challenges. This resonates with the literature discussing the potential of social media in helping information collection about customers and relevant stakeholders (see Agnihotri et al., 2012; Andzulis et al., 2012; Lacoste, 2016) and those studies highlighting the role of social media in discovering customers’ needs (see Agnihotri et al., 2012; Andzulis et al., 2012; Lacoste, 2016; Trainor, 2012).

*P2: “Social media give us the opportunity to immediately understand both static information, such as who is that person, his/her role within the company, because our target is made up of marketing managers, trade managers and export managers, if we talk to the technical office, this is not our buyer persona. So, it gives us static information and information that we can call dynamics, which help us understand their needs.”*

*P8: “Then there is another strong theme for us as sellers that is the knowledge of the market and accounts. Even on this, LinkedIn is very important because you are able to look for new counterparts, understand the people that schedule an appointment, what kind of people they are, understand their role in the company, understand their technological or business preferences, also based on what they share in social media.[...]In the fashion industry, companies use social media to advertise their brands, so there are fashion shows, collections. This allows you to enter the client company’s context. Then, when you have a connection with someone, you realize that he or she only publishes topics related to a specific technology, or topic always inherent to the marketing of the company, therefore, you draw a picture of the person you faces from a certain point of view.”*

*P7: “So many times LinkedIn represents a database. It might happen that we cannot find a reference person for a company, and by searching on LinkedIn, we find him or her.”*

Overall this information seems to be particularly useful in assisting salespeople before and during the first contact with a potential customer to identify the right person to approach (thereby bypassing possible “gatekeepers”, such as front office staff and secretaries), and find triggers for more targeted conversations. Particularly, frontline salespeople stressed the idea that social media-related information should not be used for aggressive sales proposals. Conversely, salespeople need to invest time in developing customer knowledge, cultivating the contact and approaching the customer effectively.

*P11: “Social media allows a direct contact and to verify people’s profile, which kind of competences they have, what is*

*their activity in the company and based on these competences target the right people [...] The first thing that I do whenever I get in touch with a company or I'm interested in contacting a company is going on LinkedIn and open the company page to understand which kind of company I'm dealing with."*

*P7: "We search for people, obviously after we selected the companies by turnover, size, territory, then based on the inputs we have and based on the needs they may have, we get in touch in a personal way, presenting ourselves. [...] The positive impact can be manifested if that person share certain content, to know that in advance. So, knowing already his or her interest, which can be even different from those of the company [...] You can gain grounds a bit."*

*P1: "Now the hot topic in our field is the electronic invoicing. The company creates various content such as events, informative posts on electronic invoicing. If I see someone who expressed interest, by liking or commenting the post, I check if he or she is already a customer or not and if not, I establish a conversation on the topic."*

*P9: "Let's say I identify the functional area of my interest. Clearly, when it comes to social the first contact is always within the platform. So, only after a while, after having commented his or her posts, I send a message and ask for scheduling an appointment. These activities that need their time."*

Secondly, sales professionals widely noted the possibility to connect with customers and prospects by leveraging the professional network and by establishing meaningful conversations via social platforms. Social media represents nowadays a relevant touchpoint (see Lemon and Verhoef 2016) to interact with contemporary decision makers that otherwise would be difficult to

approach. In this regard, study participants largely highlight that the development of a well-qualified and wide enough network becomes pivotal to foster consistent dialogue with relevant stakeholders.

*P8: "There is certainly the personal networking and the ability to have a qualified network, because the network is the receiver of your messages on LinkedIn. Therefore, you need a qualified network to get information, but above all to give information. [...] Surely broaden the network with companies or people in the industry is important and therefore a part of the activity must also be "cold."*

*P11: "I also use social media to keep open and ongoing relationships with people I'm already connected with [...] because we met at conferences, events, where I created connections, optimizing my network [...] every time I know a new person, because we scheduled an appointment, we met during a conference, people introduce he or she to me, I always try to create a connection on LinkedIn for example."*

*P3: "In social selling the work is to create interest or seek to interact with other users. For example, we got an important client thanks to a third party's comment. I joined the conversation and one thing leads to another and the conversation developed, then the lead and finally the selling proposal. The approach of social selling is like this, either joining conversations or triggering conversations on your profile or in groups."*

Thirdly, the data confirmed the importance of engaging customer and prospects with valuable content. Salespeople need to provide relevant and tailored content for meeting the needs of today's empowered buyers at different stages in the customer journey (see Holliman and Rowley 2014), rather than simply praising

the value of the company's product or services to support a hard-selling approach. Hence, creating and sharing valuable content is pivotal to develop trust and long-term relationship with customers.

*P11: "Depending on the topic I have at hand, I try to engage the people of my network that I think may be interested in this topic, trying to create interest and connection."*

*P4: "Clearly you don't create content randomly. This content is created upon customers' needs and stage in the purchasing journey and also in alignment with a specific marketing plan studies at the beginning of the year. [...] Acquiring information helps me in building a meaningful conversation with the customer."*

Frontline sales professionals largely confirmed that social selling might contribute to the achievement of various outcomes. Importantly, as the interviews progressed it became clear that social selling activities allow to establish a strong professional brand. In this regard, according to participants, the use of deep insights for creating valuable content is pivotal for the development of a thought-leading position within the market.

*P12: "Social media becomes very important for the nurturing phase. Perhaps, I went to a customer and presented my offering, yet the customer has not subscribed to my offer. In this case, social media allows to lead him more and more towards me. Social media enables to create and to show myself as a respected professional, so that the distrust or the distance with my brand slowly gets thinner. He can say 'this person knows what he does and what they produce.'"*

*P8: “Surely being recognized within your market. If someone uses social media, he or she may run into one of my posts, or anyway when I contact him/her, I'm not unknown; this is an incredible advantage compared to five, ten years ago.”*

*P11: “What I expect is to uphold my professionalism, to show that on the other side there is a person who knows what he's talking about. So, someone is interested in what we do, he or she can find this aspect.”*

Data analysis further pointed out that social selling activities are extremely useful for generating and qualifying leads (see Marshall et al. 2012; Rodriguez et al. 2012). In this regard, study participants largely noted the potential of saving time when looking (and finding) the right person to approach and quickly recognize those people who are not really interested in a business relationship. Sales professionals also emphasized that social selling might streamline the overall sales process. For instance, the use of social media can help salespeople in discovering business opportunities and scheduling a face-to-face appointment. Consider the quotes below:

*P2: “Social media work a lot in the attraction phase and a bit in the contact conversion phase [...] if I think of a social media activity without thinking about the conversion, or how many leads generate my activity on social networks and how many leads are profiled, I miss a big piece of the overall work.”*

*P5: “There have been increases both in terms of revenue and in terms of business opportunities. For potential customer, we generate interest and demand via social networks.”*



*P7: "Many times, we have opened beautiful negotiations from LinkedIn."*

*P8: "Social media has accelerated the process of mutual choice. So it's important to be well qualified in social media. In this way, when someone checks who is this person who wants an appointment with me, what he does, what he is looking for, this person already qualifies himself and overcomes knowledge barriers there were before."*

As already noted in the first field study, social selling might contribute to customer-related outcomes and firm performance outcomes. For instance, frontline salespeople and sales managers identify positive consequences of social selling activities in terms of customer satisfaction, customer referral behavior and increased brand performance at a corporate level.

*P8: "There is a part of ambassador and brand awareness. Let's say you try to publish something on weekly basis, to propose something that is inherent to the products and services we do."*

*P9: "Speaking of prospects, branding for us is essential because we are not so well known. So, if you do branding using customer references, ask current customers the permission to use their name, certainly that could bring a significant incentive. And this certainly on social online."*

Frontline salespeople also highlight that social selling effectiveness might depend on the use of other selling behaviors, as emphasized by thought-leading social selling expert (see Figure 8). Phrasing the participants:

*P7: "Clearly it cannot be just social media; social selling will not replace the market knowledge, the technical and sales competence. [...] It must always be integrated with all*

*traditional business development activities. [...] I mean it must be a win to win. If I'll call you to sell you something and so it's just me wanting to make money with you, it won't ever work."*

*P6: "When we can combine speed, quantity and quality, the most customer-oriented salesperson makes the difference [...] as information is available for everybody, you have to challenge your skills, otherwise someone else will surely win [...] then, your competence and your motivation make the difference. In my opinion, the key to sell does not come from social media, but it comes from the individual, its professionalism and what he or she can add to the relationship."*

#### **4.4. Summary of the findings: complementing the extant view with the field-based view**

The view of social selling emerging from the fieldwork differs to a somewhat extent from the "received view" in the literature. Based on the dominant view within the literature, social selling can be defined as "*the systematic integration of social media technologies into the selling process for enhancing salespeople's behaviors and capabilities and ultimately influencing sales performance*". According to this view, social selling is focused on salespeople's efforts of adopting and integrating a new technology into the sales process. Studies have to date indirectly, and partially, dealt with the key social selling facets by studying the positive effects of social media technologies usage on different salesperson's behaviors and capabilities (e.g. Agnihotri et al., 2016; Itani et al., 2017; Ogilvie et al., 2018). Differently, the concept's meaning surfacing from the field is an

operational view of social selling centered on the social selling key components. Rather than focusing on the general integration of social media technologies in the selling process, this study complements the extant literature by shedding light on *how* salespeople employ social media in practice. In this regard, the integration of social media into the selling process emerges as an organizational aspect, whereby a structured approach should ensure that individual practices are included into sales activities and corporate objectives. However, the field-based findings suggest that social selling is *a selling approach* consisting of three distinct, but related activities, i.e. *acquiring deep insights of prospective and existing customers, connecting to customers in relevant touchpoint through networking and consistent dialogue, and engaging customers through valuable content*, with the ultimate purpose of *converting these connections beyond social media into business outcomes in the long-term*. As such, social selling appears to go beyond the mere technology-driven social media usage (c.f. Bocconcelli et al. 2017; Lacoste 2016; Wang et al. 2017) to be seen as the implementation of the digital marketing principles at the sales force level.



## 5. CONCLUSIONS

Contemporary buyers are becoming more empowered and less reliant on traditional sellers' initiatives. Simultaneously, they are increasingly relying on digital resources during their purchasing journeys. Practitioners and academics alike have largely emphasized the concept of 'social selling' as a potential way to tackle current customer challenges and exploit new opportunities in contemporary business environments. The topic of social selling represents an important and fairly novel research area. So far, the academic research has approached social selling narrowly by devoting most of its attention to the general degree of salespeople's social media usage. In doing so, scholars have mainly investigated the antecedents and outcomes of social media use (e.g. Agnihotri et al., Guesalaga 2016; Hansen and Levin 2016; Itani et al. 2017; Ogilvie et al. 2018; Schultz et al. 2012). Still, extant research is highly fragmented, and the implementation of social selling remains largely underexplored. In other words, extant research neglects to deeply investigate salespeople's current practices. This major deficiency is surprising as the topic is of high relevance for both selling organizations and academics.

The purpose of this study is to investigate and deepen the current understanding of B2B social selling. This general purpose is divided into two more specific aims: to delineate the domain of the social selling concept and provide an operational definition; to compare the social selling conceptualization

with the implementation of social selling in frontline sales practices. Therefore, this study strives to answer the following research questions to generate a deeper understanding of the social selling construct: 1) *how can we define and conceptualize social selling?* 2) *how do frontline sales professionals practice social selling in their work?*

This dissertation grounds on the personal selling, digital marketing and buying behavior literature. Adopting a discovery-oriented, theories-in-use approach, we first create a social selling definition based on the relevant literature gathered through a systematic process. This view is contrasted and complemented with field-based insights to form an operational definition of social selling and identify the key constituents of social selling. Next, we discuss the theoretical and managerial implications as well as limitations and future research directions.

### **5.1. Theoretical implications**

This study offers three main contributions to personal selling and digital marketing research in business marketing. Furthermore, this dissertation illustrates how the changes in buying behavior influence the role of sales in contemporary business markets.

Firstly, this dissertation shows that extant research has approached social selling narrowly, by studying the use of social media technologies in B2B sales (see Agnihotri et al. 2016; Itani et al. 2017; Ogilvie et al. 2018; Rapp et al. 2013;

Rodriguez et al. 2016). In doing so, scholars have almost completely overlooked the key activities of social selling. Most empirical studies have thus far used diverse and disconnected perspectives, leaving the area highly fragmented. This dissertation provides an integrated perspective of the fragmented social selling research field and advances this area by showing that social selling represents a contemporary selling approach, which applies the digital marketing principles, such as content marketing (see Holliman and Rowley 2014; Wang et al. 2017) and social media marketing (see De Vries et al. 2012; Kaplan and Haenlein 2010) at the sales force level. In this regard, the currently emphasized social media usage in sales represents only a narrower subset of a deeper phenomenon. Social selling is seen as a broader concept that focuses on relating effectively to today's empowered customers in those touchpoints that are relevant in their purchasing journey (see Fidelman 2012; Giamanco and Gregoire 2012; Wiese 2017).

Secondly, the most significant theoretical contribution of this dissertation is the *conceptualization* of social selling. Sales research lacks a commonly-agreed and empirically-rooted definition of social selling. This results in the use of heterogeneous constructs to investigate social media use in sales (see Itani et al. 2017; Rapp et al. 2013; Rodriguez et al. 2012) and in a high fragmentation of extant research. Against this background, we first create a definition of social selling based on the extant literature as “*the systematic integration of social media technologies into the selling process for enhancing salespeople behaviors and*

*capabilities and ultimately influencing sales performance.*” Yet, this definition remains rather abstract and of limited practical value for studying social selling. Since it is fully grounded in the theory, it might not reflect salespeople’s actual practices. We therefore conducted an empirical study to form an operational definition.

The operational definition allows to clarify the specific and concrete activities that translate the theory into practice. The study findings cast light on a major difference between the “philosophical” level and the business practice. Social selling is not limited to the systematic adoption and deployment of social media technologies in the selling process, rather it is better understood as a selling approach to relate to contemporary customers in those touchpoints that are relevant for their decision-making process. Therefore, we operationally define social selling as *“a selling approach, which leverages social media besides other channels, for acquiring deep insights of prospective and existing customers, connecting to customers in relevant touchpoint through networking and consistent dialogue, as well as engaging customers through valuable content, for converting these connections beyond social media into business outcomes in the long-term.”* Hence, there are three key constituents of the social selling concept: the acquisition of deep customer insights, the connection through networking and consistent dialogue and the engagement through valuable content. Scholars have thus far dealt with the key social selling facets mainly indirectly and partially, by



investigating the mediating effect of salesperson behaviors and capabilities in the relationship between the use of social media technologies and performance (see Agnihotri et al. 2016; Itani et al. 2017; Ogilvie et al. 2018). This empirically-grounded conceptualization broadens the social selling concept beyond the mere technology-driven social media usage to explain *how* salespeople can effectively relate to empowered buyers. In doing so, we cast light on the key dimensions of the social selling concept and we argue that future studies in this research field should adopt a broader perspective in studying social selling.

Furthermore, future theory-testing research should also build high quality measures for social selling. Indeed, although studies have to date addressed disconnected aspects of social selling and delimited their analysis to some specific contexts (see Lacoste, 2016), our study provides an integrated view on social selling.

Thirdly, this dissertation extends current knowledge by providing novel exploratory insights relating to the nomological network of the social selling concept. Many quantitative studies have dealt with the antecedents and outcomes of social media technologies use in sales (see Agnihotri et al. 2016; Guesalaga, 2016; Itani et al. 2016). However, scholars have mainly employed broad performance scales consisting of different outcomes. For instance, the relationship performance scale includes diverse items going from lead acquisition and qualification to customer retention (see Rodriguez et al. 2012, 2016). This calls

for stronger research designs using solid and thorough performance scales and measures. In this regard, the study findings help to clarify the specific outcomes of social selling on which to focus research attention.

Notably, we identify central potential areas of social selling performance ranging from soft salesperson outcomes, such as strength of the personal brand, to salesperson selling performance such as lead quality, selling process efficiency and revenues, to customer outcomes such as satisfaction, commitment and referral behaviors as well as to firm performance. Yet, the findings indicate that social selling alone does not allow to attain the expected business outcomes. We suggest that customer-oriented selling behaviors might positively moderate the relationship between social selling and business performance. Indeed, as previous studies showed, selling approaches might be highly intertwined and context-specific (see Plouffe, Hullah, & Wachner, 2009). At the organizational level, studies have so far discussed some organizational aspects of social selling, yet extant research remains largely conceptual (see Agnihotri et al., 2012; Andzulis et al., 2012; Moncrief et al. 2015; Trainor 2012). We further present integrative and empirical findings on the key social selling strategy elements that are likely to drive the adoption and effectiveness of salespeople social selling practices. The study findings build a solid foundation for the future research, discussed closer in the future research directions.

## **5.2. Managerial implications**

This study delineates the conceptual domain of the social selling construct, but also provides managerial guidelines for implementing social selling both at the salesperson and organizational levels. Our integrative study can help firms to understand more thoroughly the social selling concept in B2B selling. Specifically, the conceptualization of social selling identifies its key elements and offers valuable insights on the key areas that should be taken into consideration when developing social selling within the organization.

Study findings indicate that social selling represents a strategic investment for B2B firm, rather than being understood as the mere deployment of a new technology. The approach helps salespeople to relate and engage today's ever more informed and empowered customers often at the early, challenging phases of the selling process.

This study provides an in-depth understanding of the social selling concept and its key activities: acquisition of deep insights on prospective and existing customers, connecting to customers in relevant touchpoints through networking and consistent dialogue, as well as engaging customers through valuable content. The approach requires close customer focus and an integration with customer-oriented approaches since a narrower view on social selling is likely to result in a "modern spam". Notably, the study findings can be employed as a benchmark for extant social selling practices.

At the organizational level, we argue that systematic, firm-wide social selling represents an equivalent of digital and content marketing in the area of sales. Against this background, the social selling represents a strategic investment for firms to tackle the changed buying behavior in B2B markets. The conceptualization of social selling identifies its key elements and offers valuable insights on the key areas that should be taken into consideration when developing social selling within the organization. In this regard, findings indicate that firms should consider investing into a social selling strategy, including a clear social media policy for sales, buying behavior-based segmentation and targeting, selling process integration, social selling goals and metrics, organizational alignment, content creation and sharing, and provision of technological sales tools. Finally, this study provides further insights on the specific outcomes of social selling. Instead of setting large short-term expectations, managers should recognize that constant interactions with prospects and customers may not directly lead to sales in the short run, but could enhance buyer-seller relationships, which ultimately contribute to the sales performance in the long run. Importantly, the list of potential outcomes of social selling should further help in developing the goals and KPIs for social selling for both salespersons and organization.

### **5.3. Limitations and future research directions**

This dissertation strives to advance this research area through the developed conceptualization of social selling and qualitative insights on its nomological network. However, as any other research, this study is subject to limitations, some of which can offer fruitful opportunities for future research. To the best of our knowledge, this study represents one of the first academic efforts to thoroughly investigate the conceptual domain of social selling and build a foundation for activity-focused social selling B2B research. However, although we carefully elaborated our theoretical samples to comprise various industries and form a social selling definition that might be applicable to different B2B contexts, the study is explorative in nature and relies on qualitative data.

Therefore, developing and empirically testing a reliable measure for the social selling constructs and explore its nomological network, including outcomes, drivers and contingencies, would help in advancing the research further. In this regard, most scholars have to date investigated salespeople's general use of social media technologies in B2B sales. To truly move forward the research in this area future studies should shift the focus from this technology-oriented view towards the social selling key dimensions. For instance, field interviews highlight that social selling as a selling approach differs from other customer-oriented approaches that might even play a supporting role for its effectiveness. Therefore, a closer examination of the relationship between social selling and consultative

selling or value-based selling would be of great interest. Moreover, since most studies have employed broad performance scales comprising different items from lead acquisition to customer retention, the field studies findings highlight a set of expected outcomes related to social selling. In this regard, another avenue for future research would be to examine closely these identified social selling specific outcomes. Future studies investigating the impact of social selling on sales performance outcomes should also provide more objective measurement scales.

Furthermore, the study also indicates that the organization plays a pivotal role in the implementation and effectiveness of social selling practices. Hence, we encourage future research to focus more closely on the interface between organizational social selling strategies and sales force level practices. Studies might examine how firms can help in organization-wide implementation of social selling or whether they can support social selling effectiveness. For instance, it would be interesting to study the link between B2B social selling and other digital marketing approaches, such as content marketing. At the organizational level, research would benefit from studies exploring the role of technologies for social selling. The technology can be challenging, as it can help social selling efforts but at the same time can even be counterproductive if prevails on the salesperson's activities. For instance, study participants indicate the development of artificial intelligence raises questions on how to integrate the increasing automation into social selling as salespeople might feel overwhelmed. Future research might

address these aspects and advance current research providing further knowledge on the relationship between social selling and new tools and technologies.

Furthermore, we collected data among consultants, sales managers and salespeople in different selling organizations. Scholars may further contribute to the current body of knowledge using research designs that investigate social selling practices from a customer perspective. We also encourage academics to investigate the relevance of social selling in different contexts ranging from product sales, to long-term relationships, and complex customer solutions.





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## APPENDIX – INTERVIEW PROTOCOLS

### **INTERVIEW GUIDE - FIELD STUDY 1**

- 1. Core elements of social selling. Please describe shortly in your own words what social selling is all about.**
- 2. What are the key salesperson level goals in social selling?**  
*e.g. from capability development (e.g. customer knowledge), to sales outcomes (such as closing ratio, sales volume, profitability, cross-sales) or customer outcomes (such as satisfaction, shares, commitment)*
- 3. Do you think that firms should have a social selling strategy? If yes, what elements should it include?**
- 4. Below you find a list of organizational activities related to social selling. Please assess their relevance for social selling (*not relevant, somewhat relevant, relevant, highly relevant*):**
  - Integrating social selling into the firm's selling process
  - Establishing clear goals and measures for social selling
  - Aligning other departments practices to social selling
  - Aligning sales management practices to social selling
  - Establishing tools and technologies for salespersons' social selling efforts
  - Organizational support in generating, using and sharing content across channels
- 5. Please feel free to comment the above elements. Is the list missing something central?**
- 6. Below you find a list of tools and technologies that might be used in social selling. Please assess their relevance for social selling (*not relevant, somewhat relevant, relevant, highly relevant*) - (note: some system features may overlap in practice):**
  - **Business intelligence systems:** Analytics software helping to retrieve, analyze and transform customer buying related raw data (big data) into reports to help decision making. Their features include deal insights, profitability analysis, modeling and forecasting and performance

measurement. E.g. Oracle BI, Tableau, GoodData, LiveHive, Sisense, Birst

- **Email tracking software:** Enables tracking of emails and their analytics for improved sales communications. E.g. Velocity, Cirrus Insight, Nimble, ClearSlide, Riva CRM Integration
- **Marketing automation systems:** These systems automate and monitor marketing activities and workflow based on behavioral customer data. They can include digital campaigns, e-mail marketing, social media marketing, content management and lead management. Software helps to qualify leads for the sales team. E.g. Hubspot, Marketo, Oracle Eloqua, ToutApp, Mindmatrix
- **Sales enablement software:** Tools to help salespersons to both find marketing generated content and create content themselves, submit it to prospects, and track prospects' engagement with the content throughout the sales cycle. E.g. Brainshark, Octiv, Bloomfire, ClearSlide, Seismic, Showpad, Guru, DocSend, Highspot, App Data Room, GetAccept, CloudApp
- **Sales force automation CRM systems:** Systems that automate sales and administrative activities related to e.g. information sharing, inventories, contact management, sales calls logging, quoting, order processing and tracking, workflow management, sales forecasting and performance measurement. E.g. Salesforce, Pipedrive
- **Social CRM systems:** CRM systems with integrated social media features to better manage customer relationships by synchronizing social media data into customer profiles, tracking and monitoring customer interaction and communication also across social media. E.g. Salesforce, Netsuite, SAP, Nimble
- **Social media management software:** Software for content management and social listening and monitoring, that allows to schedule and handle the activity of all social channels, identify key prospects and influencers and foster engagement through social media. E.g. Hootsuite, Sprout, Buffer, IFTTT, Meltwater, Cision

**7. Please feel free to comment the above technologies. Is the list missing something central?**

**8. In your opinion, what are the most central organizational level goals in social selling?**

*e.g. brand awareness, selling performance (closing ratio, sales volume, profitability, cross-sales), customer outcomes (satisfaction, shares, commitment), etc.*



9. What are the potential key future trends in social selling during the next year(s)?
10. In your experience, what factors are needed to make social selling a success?
11. In your experience, what are the key challenges or roadblocks for social selling?
12. Research priorities: What knowledge sales professionals need about social selling based on your experience? What are the burning questions that need to be answered about social selling?

### **Background information & contact details for results**

### **INTERVIEW GUIDE - FIELD STUDY 2**

#### **Background information:**

- Inform the interviewed about the confidentiality / use of voice recorder
- Explain briefly the topic and the aim at a general level
- Ask the interviewee the name and the job title
  
- Please describe shortly your company's business
- Tell us a few words about your job and your customers

#### **Opening – top of the mind issues:**

*Transition with the participant to the topic of social selling. Do not mention directly the notion of 'social selling' itself. Instead ask the participants indirectly about these issues. During the interview: "Please tell more...", "Can you explain this in detail...", "Can you tell this with other words...", etc.*

Many people in business argue nowadays that social media affects notably the nature of sales work - even in B2B business.

- Is this issue somehow visible in your firm's business or your job?
- Do you think that social media is important for your job? Why and how social media affects your job or selling process in practice?
- Tell us a bit more how you leverage social media in your work. Can you point out the key ways how you leverage social media in sales? Which are the key benefits of using social media in your work?

*In this section we collect critical “top of mind” dimensions. In next section ask first more about the here mentioned areas. As a follow-up, investigate those dimensions not mentioned spontaneously.*

### **Social selling activities:**

You mentioned 1,2,3,4, can you please describe this further? *And when not mentioned:* How about 1,2,3,4 – is this a relevant topic for you?

1. Acquiring information about customers and prospects
2. Content generation & sharing to customers and prospects
3. Interacting with customers and prospects
4. Other mentioned issues
  - What does this activity mean in practice in your work? What are the key aspects of this activity in your work? - Please give an example(s)?
  - Do you have any concrete goals here? (*i.e. what do you try to achieve with this activity?*)
  - What factors helps you to do this activity? What do you require to be effective in this?
  - What are the main challenges you face in this area?

*When you hear interesting answers related to above activities, ask for more details – you mentioned xxx, tell me more about that.*

### **Relationship with other selling activities**

- Tell us more how your “use of social media in selling” relates to your other sales activities? (*i.e. the relationship between social media and other ways to communicate and interact with customers. E.g. face-to-face meeting, email, etc.*)

### **Drivers, Barriers, Contingencies & Outcomes**

*Start by asking for possible antecedents/ moderators:*

- Does your firm have strategy, concrete goals or policies related to the use of social media? How does this affect you?
- Does your firm somehow promote / support you in using social media? How?
- How does your firm’s management see the use of social media? How does this affect you?

- How do your colleagues perceive the use of social media in your firm? How does this affect you?
- What have been the key drivers for you to start leveraging social media in your sales work? (*e.g. skills and capabilities, attitudes, internal factors or external factors, etc.*)
- What factors have you faced that prevent or hinder you from succeeding in social selling (*i.e. barriers or challenges; risks, internal or external factors*)? - Please give concrete examples -
  - Is there anything that you can do from your side to overcome these challenges?
  - Is there anything that the organization can do to overcome these challenges?
- Do you think that social selling is equally important in all situations? Or is it more effective in certain situations or settings? Could you please give an example? (*e.g. prospect vs. extant customer / stage or nature of customer relationship*)

*Then, potential outcomes:*

- What kind of positive or negative consequences has the use of social media had to you?
  - Sales performance related (*e.g. better targeting, higher sales and profits, percentage of revenue from social selling activities, attaining goals, etc.*)
  - Other “soft” work related consequences (*e.g. skills, competencies and abilities, etc.*)
  - How about customer side? (*e.g. customer satisfaction, etc.*)

Ending: thank you and ask is it possible to ask more questions with email if needed.