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AI-enabled sales automation changing B2B sales work

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Introduction

- Today companies can automate the human interaction and trust building processes by utilizing automation into computer-to-computer or computer-to-user interactions (Hennart, 2014; Monaghan et al., 2020; Legner et al., 2017).
- Sales automation (SA) is beneficial for companies by helping salespeople to be more effective in their sales interactions and increasing cost effectiveness (Paschen et al., 2020; Schillewart et al., 2005; Syam & Sharma, 2018
- Current research lacks in-depth understanding of how AI facilitates previously human-centric B2B sales (Rapp & Beeler, 2021; Mattila et al., 2020; Järvinen & Taiminen, 2016). Further evidence-based investigation of renewed sales activities generated by sales automation and AI lacks (Singh et al., 2019; Moncrief, 2017).
- In this study we focus on AI-enabled SA, and we define it as "*the use of software, artificial intelligence and other digital tools to perform specific sales tasks and enhance the sales process".*

Purpose of the study

- This paper aims to identify and describe the changes sales automation produces in B2B sales work. This early-phase ongoing research seeks to answer the question: *How does AI-enabled sales automation systems change the B2B sales work?*
- With this abductive, qualitative inquiry we aim to offer understanding how the sales work has elaborated and what is the role of salesperson in different sales process phases

Literature review

- As a preliminary framework we used relationship selling and related sales tasks to it (e.g. Moncrief, Marshall, Lassk 2006; Moncrief & Marshall, 2005) and Dubinsky's (1983) sales process
- Scholars have portrayed the transformation of the traditional "seven steps of selling", suggested new sales tasks (Moncrief & Marshall, 2005; Moncrief, 2017) and changes COVID-19 has created to B2B sales process (Rangarajan et al., 2021).
- However, only few studies outline how B2B sales work has changed due to AI and automation based on salesforce data in practical level (Rangarajan et al., 2021; Paschen et al., 2020).

Data generation and analysis

- 2 data sets collected in 2019-2021:
  - CRM data and workflow automation charts from 15 sales student teams to get pre-understanding of different sales automation types and workflows.
  - 27 individual, semi-structured interviews with B2B sales and marketing professionals
  - Example questions: *What does sales automation mean in your company? What is the role of AI in your sales automation? What kind of sales tasks need human intervention? Which sales phases/tasks could be automated?*
- Interview and CRM data analysis by using theme analysis (Eriksson & Kovalainen, 2015)

Illustrative quotations from interview data

We can make guesses with AI or with our own lead scoring, but it's a salesperson, be it email or calling .. who qualifies" (#14).

…You get an automatic straight task for the next day to call a customer and make an appointment. When one thing is tapped as done, the next task is created." (# 8).

"Potential customers get a link to our blog or to other downloadable. They stay on our path until they either say "no" or they book a meeting with me" (# 10)

"My presence is born automatically, like in podcasts, in social media or in videos and potential customer is getting used to me..After following me for a long time, it becomes like reality. I believe with the automation you can do much as one customer said: Hey, I have been following you for many years." (# 11)

Preliminary findings

IDENTIFYING AND QUALIFYING		SOLVING PROBLEM	
Salesperson	*AI & automation*	*Salesperson*	*AI & automation*
• participates in planning marketing activities • inputs occasionally data into CRM • **confirms the AI-based qualification** (inside sales team or salesperson) • makes **final qualification** to leads by emails, phone calls, direct messages, social media posts • **builds trust** (in digital channels)	• assigns new deal to contact owner based on trigger (e.g. sales lead fills up contact form) • calculates closing probability before assigning the lead to salesperson • helps salespersons to optimize timing with customer interactions • answers customer's questions e.g. through chatbots	• responses customer-initiated conversations • receives automatically generated task list and acts accordingly • builds rapport, trust and credibility also in digital channels (LinkedIn, email, chats, video messages, phone calls, online meetings) • utilizes adaptable presentations in demonstrating solution	• collects data from various sources e.g. customer history, buyer organization and customer path • groups the data and generates summaries to salesperson • assigns customer responsibilities • generates task lists to salespersons • generates adaptable sales presentations during the meetings

Preliminary findings

CLOSING		FOLLOWING UP	
Salesperson	*AI & automation*	*Salesperson*	*AI & automation*
• communicates convincingly • builds trust also in digital channels • builds rapport also in online meetings • builds credibility also in digital channels	• helps in trust building digitally (e.g. personalized, customized messages) • generates dynamic pricing • generated adaptable presentation during the meetings • automates workflows (e.g.sends order confirmation)	• follows actively customer data • utilizes customer data for upselling and cross-selling • contacts existing customers whose loyalty has decreased • inquires customer's satisfaction • starts strategy, service and product development initials with the most loyal customers	• generates enhanced information from customer's touch points • stores new information on new and existing customers, • Produces automatic customer loyalty metrics • alarms contact owner e.g. if customer satisfaction is decreasing

Conclusion

- AI enabled SA can be utilized both in ***enhancing customer interaction*** and ***in internal processes of the sales organization.*** The latter has been less evident in previous literature.
- Based on the data we outlined the sales process comprising of 4 phases: **identifying and qualifying, solving problem, closing and following up.**
- The automation is used to **task assigning to salespeople** which reduces the time salesperson spends on work planning. Additionally, this may help in preventing the recognized problem of disappearing sales leads (e.g.Järvinen & Taiminen, 2016).
- SA **may shorten the closing phase** performed by salesperson as trust-building has been started earlier digitally.

Possible future direction

The process of re-framing the study is on-going.

Our data hints that **SA may enhance the job satisfaction of the salespeople** due to better timing and targeting of customer interaction.

- Possible RQ could be “How the transformed sales job (Churchill, Ford, Walker, 1974) itself affects on salesperson’s job satisfaction?

Other future research directions could be:

- How will AI-enabled SA impact salesperson efficiency?
- Which types of sellers would mostly benefit from AI-enabled SA?

Thank you!

Comments, questions, ideas?

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