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Digital Transformation of B2B Sales Processes: Exploring Technology Adoption and Sales Performance Through a Qualitative Study

Slim Belaid * and Marwa Ben Moallem

ESTA School of Business & Technology, ELLIADD Laboratory, 3 Rue du Dr Frery, 90000 Belfort, France; mbenmoallem@esta-groupe.fr

* Correspondence: sbelaid@esta-groupe.fr; Tel.: +33-766138240

Abstract

Digital transformation is reshaping business-to-business (B2B) sales processes through the growing use of customer relationship management systems, analytics dashboards, automation tools, digital communication channels, and predictive technologies. However, the performance effects of these tools remain insufficiently understood, particularly in complex B2B sales contexts where commercial work is relational, knowledge-intensive, and strongly dependent on organizational routines. Drawing on the Technology Acceptance Model, this study explores how B2B sales actors perceive, adopt, resist, and integrate digital tools into their daily commercial practices. Based on 18 semi-structured interviews with sales directors, sales managers, business development managers, and senior sales representatives, the study identifies a conditional process linking digital tool adoption to perceived sales performance. The findings show that adoption is mainly driven by perceived usefulness, while perceived ease of use depends less on interface simplicity than on compatibility with sales routines. Resistance emerges when tools create administrative duplication, threaten commercial autonomy, or remain poorly integrated into existing workflows. The study further shows that digital tools improve perceived sales performance indirectly, mainly through CRM integration, shared customer memory, data-driven prioritization, and follow-up discipline. Managerial mechanisms, including training, leadership use, digital champions, and phased rollout, play a decisive role in converting technical deployment into effective and sustained use. The study contributes to sales digital transformation research by proposing a mediated and performance-oriented extension of TAM in B2B sales contexts.

Keywords: digital transformation; B2B sales; Technology Acceptance Model; CRM integration; data-driven selling; perceived sales performance; qualitative study



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1. Introduction

Digital transformation has become a central concern for firms seeking to redesign processes, improve coordination, and sustain competitive advantage in increasingly data-rich environments. In the literature, digital transformation is not treated as the mere digitization of existing tasks; rather, it denotes a broader reconfiguration of organizational activities, value creation mechanisms, structures, and performance logics (Verhoef et al., 2021; Vial, 2019). In sales, this shift is visible in the growing use of customer relationship management systems, analytics dashboards, automation, digital communication channels,

and predictive tools. Yet, despite the diffusion of these technologies, research on sales transformation still notes limited guidance on how to manage digitalization effectively and why the productivity gains promised by such tools often remain elusive (Guenzi & Habel, 2020; Wengler et al., 2021).

This issue is particularly acute in business-to-business sales, where commercial processes are often complex, relational, and knowledge-intensive. In such contexts, digitalization rarely replaces human interaction outright; instead, firms selectively digitize stages of the sales process while continuing to rely on interpersonal judgment, tacit customer knowledge, and coordination across multiple actors. Research on complex B2B sales processes shows that digitalization is shaped by both enablers and obstacles, while work on the human side of sales transformation argues that the decisive challenges are often organizational and behavioral rather than exclusively technical (Alavi & Habel, 2021; Rodriguez et al., 2020). Accordingly, the key research problem is not simply whether sales teams possess digital tools, but under what conditions those tools are perceived as useful, accepted by sales actors, integrated into daily routines, and translated into performance-related outcomes. Recent research further shows that digital transformation affects the entire sales ecosystem, including sales roles, customer interactions, organizational capabilities, and the balance between human and technology-mediated selling (Badrinarayanan et al., 2022; Fischer et al., 2023).

A natural starting point for understanding this problem is the Technology Acceptance Model. Davis (1989) argues that user acceptance is shaped primarily by perceived usefulness and perceived ease of use, while later extensions show that these beliefs are influenced by social, cognitive, and organizational conditions (Venkatesh & Davis, 2000; Venkatesh & Bala, 2008). In sales settings, this logic has been applied to CRM and sales force technologies, with research showing that technology acceptance has identifiable antecedents and meaningful performance implications (Ahearne et al., 2007; Avlonitis & Panagopoulos, 2005). TAM therefore provides a parsimonious and well-established lens for explaining why sales actors adopt or resist digital tools. However, TAM by itself is less explicit about how technology use becomes embedded in broader sales routines, how resistance to change constrains adoption in complex organizational settings, and how implementation processes shape downstream commercial value.

At the same time, research in sales and relationship management suggests that the effect of digital tools on performance is indirect and contingent rather than automatic. CRM-based information technology can improve sales effectiveness by strengthening knowledge, targeting, sales presentation, and call productivity, while salesperson technology usage can affect performance through mediating mechanisms such as customer service, adaptability, and knowledge development (Ahearne et al., 2007, 2008). Related B2B work links CRM utilization and mobile CRM to collaboration and sales performance, and more recent studies on AI-based CRM, big data analytics, and predictive sales analytics show that CRM capability, leadership support, user perceptions, and implementation quality are critical in converting technical potential into organizational outcomes (Chatterjee et al., 2021; Chatterjee et al., 2022; Habel et al., 2023, 2024; Rodriguez & Boyer, 2020; Rodriguez & Honeycutt, 2011). Still, much of this literature focuses on specific tools, adoption antecedents, or post-adoption outcomes in ways that leave under-specified the broader qualitative process through which digitalization becomes meaningful in everyday B2B sales work.

Taken together, these streams point to a clear research gap. Existing studies show that digital tool adoption depends on usefulness, ease of use, and organizational support, and they also show that performance benefits often arise through intermediate mechanisms such as CRM capability, collaboration, and analytics-enabled prioritization. Yet the literature remains less clear on how these elements interact in complex B2B sales environments

when sales actors confront duplicate administration, workflow disruption, opacity of recommendations, and tensions between digital standardization and relational autonomy. This gap matters because recent work on the human side of sales digitalization and on predictive sales analytics emphasizes that mistrust, weak implementation, and poor fit can undermine otherwise promising technologies (Alavi & Habel, 2021; Habel et al., 2023, 2024; Wengler et al., 2021).

The present study addresses this gap by asking three related questions: How do B2B sales actors perceive and adopt digital tools in their everyday commercial work? Through which mechanisms do these tools become translated into perceived sales performance? And what managerial conditions facilitate or hinder that translation? To answer these questions, the article develops a conceptual model anchored in TAM but extended to better reflect the realities of digital transformation in sales. More specifically, the model proposes that perceived usefulness positively influences digital tool acceptance, adoption, and effective use (P1); perceived ease of use enhances perceived usefulness and acceptance, thereby facilitating adoption and effective use (P2); resistance to change constrains acceptance, adoption, and effective use (P3); adoption and effective use support CRM integration and data-driven selling (P4); CRM integration and data-driven selling improve perceived sales performance (P5); and managerial mechanisms such as training, leadership use, digital champions, and phased rollout strengthen the adoption-to-performance process (P6). This framing is consistent with foundational acceptance research and with recent sales studies highlighting implementation quality, leadership, and internal capability mobilization as key conditions of value creation (Davis, 1989; Venkatesh & Davis, 2000; Chatterjee et al., 2022; Tagscherer & Carbon, 2023; D'Angelo et al., 2024).

Empirically, the study draws on 18 semi-structured interviews with B2B sales actors and analyzes the material using thematic analysis. This design is appropriate because thematic analysis offers a flexible yet rigorous approach for identifying patterned meanings in qualitative data, especially when the research objective is to understand how participants interpret organizational change and everyday work practices (Braun & Clarke, 2006). By adopting this approach, the article contributes in three ways. First, it connects technology acceptance theory with the literature on sales digital transformation, showing that the path from digital tool availability to commercial value is mediated by organizational routines rather than exhausted by individual adoption beliefs. Second, it provides a qualitative, process-oriented explanation of how CRM integration and data-driven prioritization convert tool usage into perceived performance gains. Third, it identifies concrete managerial mechanisms—leadership signaling, peer support, digital champions, and phased implementation—that help explain why the same technology becomes productive in some sales teams and merely symbolic in others (Guenzi & Habel, 2020; Wengler et al., 2021).

The remainder of the paper is organized as follows. Section 2 develops the theoretical background and research propositions. Section 3 presents the qualitative methodology. Section 4 reports the findings from the thematic analysis. Section 5 discusses the results and their implications. Section 6 concludes by summarizing the study's contributions, limitations, and directions for future research.

2. Theoretical Framework

2.1. Digital Transformation of B2B Sales Processes

Digital transformation is no longer understood as the mere digitization of existing documents or the adoption of isolated technological tools. Rather, it refers to a broader process through which digital technologies generate significant changes in organizational processes, value creation mechanisms, business models, and managerial practices. Vial (2019) defines digital transformation as a process in which digital technologies trigger

strategic responses that alter value creation paths. Similarly, [Verhoef et al. \(2021\)](#) distinguish between digitization, digitalization, and digital transformation, emphasizing that the latter involves a deeper reconfiguration of organizational activities and business models. [Hanelt et al. \(2021\)](#) further argue that digital transformation requires simultaneous changes in strategy, organizational structure, processes, and culture.

In the specific context of B2B sales, digital transformation affects not only the tools used by sales teams but also the way commercial activities are structured, monitored, and evaluated. Salespeople increasingly rely on customer relationship management systems, sales force automation tools, analytics platforms, digital communication channels, and artificial intelligence-based solutions. These technologies reshape prospecting, lead qualification, customer follow-up, sales forecasting, coordination with marketing, and customer relationship management. B2B sales transformation is situated between human and digital dimensions, requiring greater attention to the human aspects of technological change ([Alavi & Habel, 2021](#); [Corsaro & Maggioni, 2021](#)). [Wengler et al. \(2021\)](#) also show that digital transformation in sales should be understood as an evolving process rather than a one-time technological project. Digital sales transformation also requires changes to established knowledge, behaviors, and professional routines. Salespeople may need to unlearn past successful practices while simultaneously developing new digital capabilities, which can generate additional resources and new job demands ([Guenzi & Nijssen, 2021](#); [Mattila et al., 2021](#)).

This perspective is particularly relevant in B2B markets, where sales processes are often complex, relational, and knowledge-intensive. [Rodríguez et al. \(2020\)](#) show that the digitalization of complex B2B sales processes depends on both organizational enablers and obstacles. In such settings, digital tools do not simply replace human interaction; they support, structure, and sometimes transform it. [Corsaro and Maggioni \(2021\)](#) describe B2B sales transformation as a process situated between the human and the digital, while [Alavi and Habel \(2021\)](#) call for greater attention to the human side of digital transformation in sales. Therefore, studying digital transformation in sales requires examining not only technological availability, but also adoption, perceived usefulness, resistance, managerial support, and performance outcomes.

For this study, digital transformation of B2B sales processes is defined as the progressive reconfiguration of commercial practices through digital tools, data-based systems, CRM integration, automation, and analytics, with the objective of improving sales coordination, decision-making, and performance. This definition is consistent with the empirical focus of the study, which examines how sales managers perceive the contribution of digital tools to sales team performance, while also considering barriers related to adoption and resistance to change.

2.2. Technology Acceptance and Digital Tool Adoption

To understand why digital tools are effectively adopted or resisted by sales teams, this study draws primarily on the Technology Acceptance Model. [Davis \(1989\)](#) argues that technology adoption is mainly explained by two beliefs: perceived usefulness and perceived ease of use. Perceived usefulness refers to the degree to which an individual believes that using a given technology will improve job performance. Perceived ease of use refers to the degree to which the technology is perceived as requiring limited effort. In this study, technology acceptance refers to a favorable evaluation of and willingness to use a digital tool, whereas adoption and effective use represent the behavioral translation of that acceptance into everyday sales practices. These two constructs are particularly relevant in sales contexts, where users tend to evaluate digital tools according to two practical

questions: whether the tool helps them sell more effectively and whether it simplifies or complicates their daily work.

Since then, the Technology Acceptance Model has been expanded to include additional factors of perceived usefulness and perceived ease of use. TAM2 emphasizes social influence and cognitive instrumental processes such as job relevance and output quality (Venkatesh & Davis, 2000) while TAM3 contains individual and implementation-related determinants of ease of use (Venkatesh & Bala, 2008). Therefore, the theoretical basis for this study is TAM, not UTAUT. The main TAM constructs are perceived usefulness and perceived ease of use, while the contextual extensions are resistance to change, CRM integration, data-driven selling and managerial mechanisms, related to B2B sales digital transformation.

Recent sales research has shown that technology is adopted by users if it has perceived practical value, is transparent, compatible with sales activities and conditions of implementation. Studies on AI-based feedback and sales forecasting analytics show that adoption depends on perceived usefulness, trust, explainability and the capacity to convert technological recommendations into concrete commercial actions (Gaczek et al., 2023; Habel et al., 2023, 2024; Hall et al., 2022).

These studies suggest that the relationship between digital tools and sales performance is not automatic. Digital tools can support performance only if they are perceived as useful, easy to use, and compatible with commercial routines. Therefore, this study considers perceived usefulness and perceived ease of use as two central mechanisms explaining the adoption of digital sales tools.

P1. The perceived usefulness of digital sales tools positively influences their acceptance, adoption, and effective use by B2B sales actors.

P2. The perceived ease of use of digital sales tools positively influences their perceived usefulness and acceptance, thereby facilitating their adoption and effective use.

2.3. Resistance to Change and Barriers to Digital Adoption

Although digital technologies are often presented as performance-enhancing tools, their implementation may generate resistance among employees. Resistance to change can emerge when users perceive digital tools as complex, time-consuming, unnecessary, threatening, or poorly aligned with existing work routines. In sales teams, resistance may be particularly strong when technologies are perceived as administrative constraints rather than commercial enablers.

The literature on sales digitalization shows that implementation barriers are not only technical. Rodríguez et al. (2020) identify several obstacles in complex B2B sales processes, including organizational inertia, lack of integration, insufficient competencies, and difficulty adapting digital tools to relational sales contexts. Wengler et al. (2021) similarly argue that sales digital transformation is an evolving process that requires managerial commitment, learning, and gradual adaptation. Chatterjee et al. (2021) show that AI-based CRM systems improve organizational performance only when implementation quality and employee capabilities are sufficiently developed. Recent studies also show that the introduction of digital sales channels may create uncertainty concerning sales roles, customer relationships, autonomy, information control, and coordination across organizational levels (Bongers et al., 2021; Micallef et al., 2024). Resistance may therefore reflect broader professional and organizational tensions rather than a simple reluctance to use technology.

Resistance to change can also be understood as a limitation of perceived usefulness and perceived ease of use. If salespeople do not clearly perceive the value of digital tools, or if they experience them as difficult to use, adoption may remain superficial. Habel et al. (2024) demonstrate that predictive sales analytics can generate resistance when users do

not understand how recommendations are produced or how they can be translated into sales actions. Thus, adoption depends not only on tool availability but also on the ability of the organization to reduce uncertainty, provide training, and build trust in digital systems.

P3. Resistance to change negatively influences the acceptance, adoption, and effective use of digital sales tools.

2.4. CRM Integration, Data-Driven Selling, and Sales Performance

The performance effects of digital tools are rarely direct. Rather, they operate through intermediate mechanisms such as information quality, customer knowledge, collaboration, sales adaptability, CRM integration, and data-driven decision-making. CRM systems are particularly important in this regard. Mobile CRM supports sales collaboration and sales performance when it is embedded in sales processes (Rodriguez & Boyer, 2020). These findings suggest that the central issue is not whether a firm possesses a CRM system, but whether the system is actually integrated into daily commercial routines, customer follow-up, and decision-making. Recent research confirms that the contribution of digital technologies to B2B sales performance depends on their integration into sales processes, internal coordination, and customer-facing activities (Biemans, 2023; Mukhopadhyay et al., 2025).

The growing importance of data-driven selling reinforces this logic. Data-driven sales processes rely on customer data, dashboards, forecasting tools, analytics, and predictive systems to support prioritization, prospecting, customer retention, and performance monitoring. Shahbaz et al. (2021) show that big data analytics positively affect sales performance, with CRM capabilities playing an important role. Chatterjee et al. (2022) similarly demonstrate that CRM capability mediates the relationship between big data analytics and strategic sales performance, while leadership support strengthens key relationships. These studies suggest that digital tools improve performance when they are transformed into organizational capabilities, especially CRM capability and data-driven decision-making.

Consequently, this study does not assume a direct link between digitalization and sales performance. Instead, it proposes that digital tool adoption contributes to performance through CRM integration and data-driven selling. This approach is consistent with the qualitative nature of the study, which seeks to understand how managers perceive the conversion of digital tools into performance-enhancing practices.

P4. The adoption and effective use of digital sales tools positively influence CRM integration and the development of data-driven selling practices.

P5. CRM integration and data-driven selling practices positively influence perceived sales performance.

2.5. Managerial Mechanisms for Successful Implementation

The final component of the theoretical framework concerns the managerial mechanisms that help transform technological implementation into effective adoption and performance. The literature suggests that training, leadership support, implementation strategy, and internal digital champions play a decisive role in digital transformation. Recent research emphasizes that training, managerial support, sales enablement, and implementation practices are central to converting digital technologies into effective sales routines and performance outcomes (Chatterjee et al., 2022; D'Angelo et al., 2024; Mukhopadhyay et al., 2025). Earlier sales technology research similarly identified training and organizational support as important conditions for converting technology adoption into salesperson performance (Ahearne et al., 2005).

Leadership support is also central. Chatterjee et al. (2022) show that leadership support strengthens the relationship between CRM capability and sales performance. Tagscherer and Carbon (2023) argue that successful digitalization requires leaders who are

visionary, customer-oriented, supportive of change, and able to empower employees. In B2B sales transformation, managers therefore act as facilitators of adoption by explaining the usefulness of digital tools, allocating resources, encouraging experimentation, and reducing resistance.

The concept of digital champions further enriches this perspective. D'Angelo et al. (2024) show that digital champions play an agentic role in mobilizing digital skills within incumbent organizations. These actors are not only technically competent; they also help translate digital transformation into concrete practices, support colleagues, and legitimize new ways of working. In sales teams, digital champions may facilitate adoption by demonstrating the practical value of tools, sharing good practices, and reducing uncertainty among less digitally confident users.

In this study, managerial mechanisms are therefore understood as implementation practices that facilitate the conversion of digital tools into effective use and perceived performance. These mechanisms include training, internal support, digital champions, and a structured deployment strategy.

P6. Managerial implementation mechanisms, including training, digital champions, and deployment strategy, strengthen the adoption of digital sales tools and their conversion into perceived sales performance.

2.6. Conceptual Research Model

Figure 1 presents the conceptual model developed from the theoretical framework. Perceived sales performance is the focal dependent variable. The model depicts a sequential and conditional process through which digital sales tools are translated into performance-related outcomes.

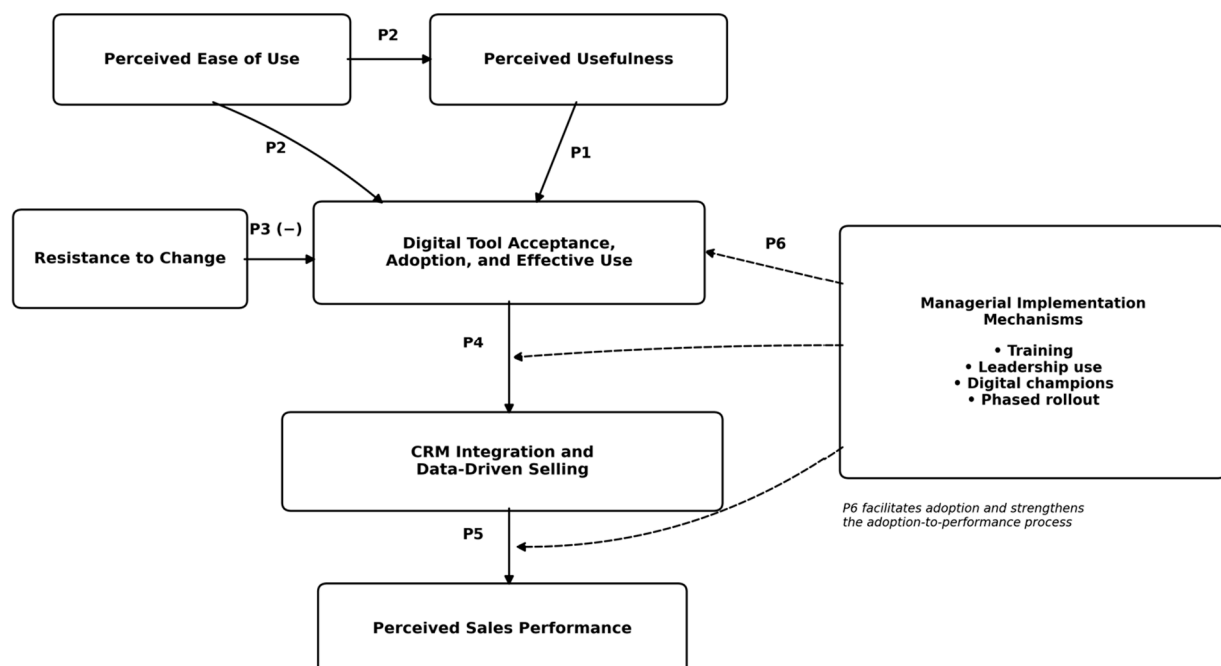


Figure 1. Conceptual model of digital tool adoption and perceived sales performance in B2B sales. Note: Solid arrows represent the relationships proposed in P1–P5. The facilitating role of managerial implementation mechanisms corresponds to P6. The negative sign indicates the constraining effect of resistance to change.

Perceived usefulness positively influences digital tool acceptance, adoption, and effective use (P1). Perceived ease of use strengthens perceived usefulness and acceptance,

thereby facilitating adoption and effective use (P2). In contrast, resistance to change constrains acceptance, adoption, and effective use (P3).

Adoption and effective use are not expected to affect perceived sales performance directly. Rather, they support CRM integration and the development of data-driven selling practices (P4), which in turn enhance perceived sales performance through improved customer information sharing, sales coordination, opportunity prioritization, customer continuity, and follow-up discipline (P5).

Finally, managerial implementation mechanisms, including training, leadership use, digital champions, and phased rollout, facilitate adoption and strengthen the conversion of effective digital tool use into perceived sales performance (P6).

3. Materials and Methods

3.1. Research Design

This study adopts a qualitative research design to explore how B2B sales actors perceive, adopt, and integrate digital tools into their commercial processes. A qualitative approach was considered appropriate because the objective was not to statistically test predefined causal relationships, but to understand how managers and sales professionals make sense of digital transformation in their everyday commercial practices. Qualitative research is particularly suitable when the phenomenon under investigation is complex, context-dependent, and embedded in organizational routines (Busetto et al., 2020).

Given the interpretivist and qualitative design, P1–P6 are formulated as research propositions rather than hypotheses. They serve as theoretically derived sensitizing expectations that guide data collection and analysis, and their empirical relevance is assessed through recurring patterns, contrasts, and relationships in the interviews rather than through statistical significance tests. In this research, digital transformation is therefore examined not only as a technological process, but also as a managerial and human process involving perceived usefulness, resistance to change, learning, and adaptation. The study is theoretically informed by the Technology Acceptance Model, particularly the concepts of perceived usefulness and perceived ease of use, while remaining open to themes emerging from the empirical material.

3.2. Sampling Strategy and Participant Profile

A purposive sampling strategy was used to select participants with direct experience of digital tools, CRM systems, or digital transformation initiatives in B2B sales environments. Purposeful sampling is appropriate when researchers seek information-rich cases that can provide detailed insights into a specific phenomenon (Campbell et al., 2020). Participants were selected because they were directly involved in commercial management, sales process optimization, or the implementation and use of digital sales tools.

The final empirical corpus consisted of 18 semi-structured interviews. The sample included sales directors, sales managers, business development managers, and senior sales representatives. The participants operated mainly in industrial, manufacturing, robotics, and technical B2B service contexts. This sectoral focus was retained because B2B sales processes in such environments are often complex, relational, and increasingly supported by CRM systems, digital communication tools, data analytics, and automation technologies.

The sample was composed as follows: eight sales directors, six sales managers, two business development managers, and two senior sales representatives (Table 1). This composition allowed the study to capture both strategic and operational perspectives on digital transformation in sales teams. The diversity of roles also made it possible to compare how different commercial actors perceive the usefulness, barriers, and performance effects of digital tools.

Table 1. Participant profile.

Position	Number of Participants	Main B2B Industries Represented
Sales Director	8	Industrial manufacturing, robotics, technical services
Sales Manager	6	Industrial equipment, automation, engineering services
Business Development Manager	2	Robotics and technical services
Senior Sales Representative	2	Industrial manufacturing and industrial components
Total	18	Multiple industrial and technical B2B sectors

Note: Broad professional and industry categories are reported to preserve participant and organizational anonymity.

Detailed demographic characteristics, including participants’ age, gender, and education level, were not systematically collected, as the sampling strategy focused primarily on professional roles and direct experience with digital transformation in B2B sales.

3.3. Data Collection

Data were collected through semi-structured interviews, an established qualitative method based on a predefined interview guide while allowing the researcher to ask follow-up and probing questions in response to participants’ accounts (Adeoye-Olatunde & Olenik, 2021). This format ensured comparability across participants while preserving sufficient flexibility to explore individual experiences and emerging issues in depth. Semi-structured interviews were particularly relevant for this study because they allowed participants to discuss concrete digital tools, implementation practices, adoption barriers, and perceived performance outcomes in their own words.

The interview guide was organized around six main themes: digital transformation of B2B sales processes; digital tools used by sales teams; perceived usefulness and ease of use of these tools; barriers to adoption and resistance to change; links between CRM integration, data use, and commercial performance; and managerial practices supporting successful implementation. These themes were consistent with the theoretical framework while leaving sufficient space for participants to introduce additional issues.

Interviews typically lasted between 40 and 50 min. Participants were invited to describe their experience with digital tools such as CRM systems, LinkedIn, sales automation tools, online communication platforms, dashboards, and data-based sales monitoring tools. They were also encouraged to provide examples of successful or unsuccessful implementation practices. This made it possible to collect rich empirical material on the conditions under which digital tools are perceived as useful and converted into performance-enhancing practices.

The same core interview guide was used across all participants to ensure comparability, while follow-up and probing questions were adapted to participants’ professional roles and responses. The complete core interview guide is provided in Appendix A.

3.4. Data Analysis

The data were analyzed using thematic analysis. Thematic analysis is a flexible and rigorous method for identifying, analyzing, and reporting patterns within qualitative data (Braun & Clarke, 2021; Byrne, 2022). It was selected because the purpose of the study was to organize recurring managerial meanings around digital adoption, CRM integration, resistance to change, and perceived sales performance.

The analysis followed the six phases proposed by Braun and Clarke (2006): familiarization with the data, generation of initial codes, search for candidate themes, review of themes, definition and naming of themes, and production of the final analytic narrative. The first stage of coding was inductive, with codes remaining close to the participants’

accounts. In the second stage, the analysis became more abductive, as the emerging codes were interpreted in relation to the Technology Acceptance Model and the literature on digital transformation in sales.

The same core interview guide was used for all participants to ensure consistency across interviews, while follow-up prompts were adapted to their professional responsibilities. For example, all participants were asked, “How have digital tools changed your sales activities?” and “What factors facilitate or hinder their adoption?” Sales directors and managers were then invited to elaborate on implementation strategy, leadership support, team adoption, and performance monitoring. Business development managers and senior sales representatives were prompted more specifically about daily tool use, usability, customer interactions, duplicate administrative work, and operational barriers.

The coding process led to the identification of four main themes: drivers of digital tool adoption, barriers to digital transformation, digital tools and sales performance, and managerial mechanisms for successful integration. The coding was conducted manually using a structured coding matrix rather than qualitative analysis software. The matrix connected each interview excerpt to its participant identifier, initial code, emerging theme, and analytical memo. Codes were progressively compared, merged, refined, or separated through repeated examination of the interview material. This procedure provided a transparent audit trail from the raw data to the final thematic structure.

3.5. Saturation and Trustworthiness

The adequacy of the sample was assessed through thematic saturation. Saturation is commonly understood as the point at which additional interviews no longer generate substantially new themes or change the structure of the analysis (Hennink & Kaiser, 2022; Saunders et al., 2018). In this study, saturation was reached around the sixteenth interview. The final two interviews confirmed the stability of the thematic structure and provided additional illustrative material, but did not substantially modify the codebook.

Several procedures were used to enhance the trustworthiness of the manual analysis. First, the structured coding matrix ensured traceability between interview excerpts, participant identifiers, codes, and final themes. Second, coding decisions were documented through analytical memos and revisited during successive rounds of comparison. Third, patterns were compared across the different respondent groups to identify both recurring and divergent perspectives. The coding process was iterative and involved several rounds of comparison between initial codes and emerging themes. Second, the analysis examined the difference in responses between different categories of participants: sales directors, managers, business development managers, and senior sales representatives. Third, analytical memos were used to document interpretative decisions and to maintain traceability between data, codes and themes. Fourth, the findings were systematically compared against the theoretical framework to ensure consistency between the empirical observations and the conceptual interpretation.

These procedures are consistent with qualitative quality criteria emphasizing credibility, transparency, and analytical rigor (Braun & Clarke, 2021; Busetto et al., 2020). Rather than relying on statistical reliability indicators, the study focused on the coherence of the analytical process, the clarity of the coding structure, and the plausibility of the interpretation.

4. Results

4.1. Overview of the Thematic Results

A thematic analysis resulted in a four-stage process that connects digitalization with perceived sales performance. First, the adoption of digital tools was driven less by the excitement of technology than by utilitarian benefits: time savings, better pipeline visibility,

and improved customer follow-up. Second, resistance arose when tools created duplication in administrative workloads, were poorly integrated or seemed to erode relational autonomy and commercial judgment. Third, performance improvements were described as indirect and conditional. Digital tools mainly improved sales outcomes when embedded in CRM routines and data-driven prioritization rather than sporadic use. Fourth, managerial mechanisms, notably training, leadership use, digital champions and phased rollout, were critical in transforming formal deployment into effective and sustained use.

Table 2 summarizes the four main themes derived from the interviews, their key dimensions, the respondent groups in which they were observed, and their principal implications for digital tool adoption and perceived sales performance.

Table 2. Summary of the thematic findings.

Main Theme	Key Dimensions Identified	Respondent Groups	Main Implications
Drivers of digital tool adoption	Perceived usefulness, time savings, pipeline visibility, customer continuity, ease of integration	All respondent groups	Greater willingness to adopt tools perceived as directly supporting sales activities
Barriers and resistance	Administrative duplication, limited training, weak system integration, opacity, loss of autonomy	Sales directors, sales managers, business development managers and sales representatives	Superficial use, workarounds and continued reliance on personal tools
CRM integration and perceived performance	Shared customer information, follow-up discipline, coordination and data-driven prioritization	Mainly sales directors and sales managers, supported by operational sales respondents	Fewer lost opportunities, improved customer continuity and more structured decision-making
Managerial implementation mechanisms	Leadership use, coaching, digital champions, phased rollout and simplification	All respondent groups	Conversion of formal deployment into sustained and effective use

Note: Respondent groups are reported at an aggregate level to preserve anonymity. The table summarizes recurring patterns, while the following subsections provide detailed interpretations and illustrative quotations.

4.2. Drivers of Adoption

The first theme shows that digital adoption in B2B sales was primarily utility-driven. Respondents did not describe digital tools as valuable merely because they were modern or innovative. Instead, they evaluated them against immediate commercial criteria: whether the tool reduced lost information, saved time, improved traceability, or made sales follow-up more reliable. In this sense, adoption began with a practical question: Does this tool help me sell better today? Participants most often mentioned CRM platforms, prospecting tools such as LinkedIn, dashboards, videoconferencing tools, and basic automation functions such as reminders, lead assignment, and standardized reporting.

“Organizing and sorting files is very relevant. It allows us to archive, keep data easily, and avoid losing information.” (SD1, Sales Director)

“Tools for internal communication are positive. They make internal communication faster, and we do not need to stand up to ask a quick question.” (SD1, Sales Director)

Three forms of usefulness recurred across the interviews. The first was time compression. Sales managers repeatedly explained that a useful tool shortened administrative cycles, reduced searching time, and made next actions more obvious. The second was commercial visibility. Respondents valued tools that made the pipeline easier to read, helped prioritize opportunities, and provided a clearer history of contact points. The third

was customer continuity. Digital tools were seen as beneficial when they allowed customer information to survive beyond individual memory and remain accessible to the wider team.

“Reporting is simpler. I think this motivated employees.” (SM1, Sales Manager)

“Videoconferencing tools made it possible to facilitate meetings, internally and externally, without physically bringing everyone together.” (SM1, Sales Manager)

Perceived ease of use also mattered, but usually as a threshold condition rather than a primary motive. Respondents rarely adopted a tool because it was easy; they adopted it because it was useful, and ease of use determined whether that usefulness was practically reachable. When the interface was perceived as intuitive and compatible with existing workflows, adoption accelerated.

“Something simple must be chosen, not a gas factory. It has to be intuitive.” (SD1, Sales Director)

“Tools must be usable offline, especially when we are doing demonstrations and there is no network.” (SM2, Regional Sales Manager)

Overall, these findings provide qualitative support for P1 and qualified support for P2. Perceived usefulness was the primary driver of acceptance and adoption, whereas perceived ease of use mattered mainly when tools were compatible with existing sales routines and field conditions.

4.3. Barriers and Resistance

The second theme concerns the conditions under which digitalization triggered resistance rather than adoption. Importantly, respondents did not present resistance as simple anti-digital ideology. In most interviews, resistance was described as a rational response to misfit—between the tool and the sales workflow, between managerial expectations and field realities, or between promised value and actual usability. Put differently, participants distinguished between resistance to technology itself and resistance to poorly implemented technology.

The most frequent barrier was administrative duplication. Several respondents explained that digital tools became counterproductive when salespeople still had to maintain parallel tracking systems, most often personal notes, Excel sheets, or email folders. Under these conditions, the CRM or dashboard was perceived as an additional reporting burden rather than as a working instrument.

“Sometimes there are too many communication channels, so we get lost and information gets lost.” (SD1, Sales Director)

“Some tools can be perceived as one more task. If it is not directly useful for the employee, it becomes difficult to use.” (SD1, Sales Director)

A second barrier concerned uneven digital skills and insufficient onboarding. Not all respondents described resistance as age-related or generational; however, several managers noted that the most acute difficulties appeared where established routines were highly personalized and where training remained limited to a technical launch demonstration. In those cases, employees understood how to click, but not why the system improved their work.

“It was the generation of senior people who did not use the tools; they did not have the time and they did not want to.” (BDM1, Business Development Manager)

“Several apprentices raised issues, but there was a lack of listening.” (BDM1, Business Development Manager)

A third barrier involved opacity and mistrust, particularly around analytics-based recommendations. Where systems generated scores, alerts, or prioritization suggestions without a clear explanation of how these outputs were produced, users tended to revert to personal judgment. In some accounts, this opacity was also associated with a fear that digital tools could standardize or flatten a fundamentally relational activity.

“Some employees rely too much on tools and forget the contact.” (SD2, Sales Director)

“Be careful not to lose business logic and commercial logic.” (SD2, Sales Director)

Overall, resistance was strongest when tools created extra work, remained weakly integrated, or challenged the salesperson’s sense of professional autonomy.

“Be careful not to implement with too much rupture, without explaining and supporting people.” (SM2, Regional Sales Manager)

These findings provide qualitative support for P3, as resistance reduced effective use when digital tools generated additional work, lacked transparency, or threatened salespeople’s professional autonomy.

4.4. From Adoption to CRM Integration and Performance

The third theme explains how digital adoption translated into perceived performance. The interviews did not support a naive “digitalization = better results” logic. Instead, respondents described performance gains as indirect, cumulative, and conditional. Tools were said to improve sales performance only when they were embedded in CRM routines, shared across the team, and used to guide commercial action rather than merely document it after the fact.

The most important mechanism was CRM integration as a shared customer memory. When customer information, next steps, previous interactions, and account status were consistently recorded, respondents reported fewer dropped leads, more reliable handovers, and better continuity across absences or role transitions. CRM therefore functioned not merely as a database, but as a coordination infrastructure.

“Tools are useful when they centralize information and make reporting easier.” (SM1, Sales Manager)

These findings provide qualitative support for P4 and P5. Effective adoption encouraged the integration of digital tools into CRM routines and data-based sales practices, while these mechanisms improved perceived performance through better coordination, customer continuity, opportunity prioritization, and follow-up discipline.

4.5. Managerial Mechanisms That Convert Deployment into Use

The fourth and final theme concerns the managerial work required to transform deployment into effective use. Across the interviews, the same tool could remain symbolic in one team and become performance-enabling in another. What explained this difference was not merely the technology itself, but the implementation environment created by managers.

The first mechanism was leadership signaling. Respondents consistently explained that adoption accelerated when managers themselves used the tool in forecasting meetings, coaching sessions, opportunity reviews, and follow-up discussions. In contrast, when managers requested digital adoption rhetorically but continued to rely on informal updates or personal spreadsheets, employees interpreted the new tool as optional or ceremonial.

“A real selection of tools must be made; otherwise, we get lost in daily use.” (SD1, Sales Director)

“We need to define clearly why we want the tools, create the right tools, choose them well, support people, inform them, train them, and give meaning to what we do.” (SM1, Sales Manager)

The second mechanism was coaching and peer support. Multiple interviews referred to the importance of hands-on accompaniment after deployment, especially during the first months of use. In practice, this took the form of short troubleshooting sessions, examples drawn from real accounts, and the presence of “digital champions” inside the team.

“Super users are needed, but it must be someone from the field and someone objective.” (SD2, Sales Director)

“Someone must be able to free up time. There must be a real link between business expertise and the tool.” (SD2, Sales Director)

The third mechanism was phased rollout and simplification. Respondents were skeptical of large, simultaneous deployments that introduced multiple functions at once. By contrast, they evaluated positively those implementations that started with a limited number of routines—pipeline hygiene, follow-up reminders, opportunity stages, meeting notes—and only later expanded toward automation, dashboards, or predictive tools.

“It was quite progressive and not brutal.” (SD2, Sales Director)

“A relatively long beta-test phase should be planned, even if it means doubling the work at the beginning for one or several employees.” (SD2, Sales Director)

These findings provide qualitative support for P6. Training, leadership use, digital champions, and phased implementation facilitated both sustained adoption and the conversion of digital tool use into perceived commercial value.

5. Discussion

The findings provide qualitative support for P1 and P3–P6, while P2 is supported in a qualified form. Perceived ease of use was relevant, but participants interpreted it primarily as compatibility with sales processes, low administrative friction, and continuity with customer-facing activities. The following sections discuss these findings in relation to the corresponding propositions.

5.1. Interpreting the Findings Through TAM (P1 and P2)

At a first level, the findings provide qualitative support for the core logic of TAM. Consistent with Davis (1989), participants evaluated digital sales tools primarily in terms of whether those tools improved job performance and whether they were sufficiently easy to use. In contemporary B2B sales settings, technology acceptance and adoption depend not only on expected commercial benefits, but also on users’ trust in digital recommendations and their ability to integrate these tools into concrete selling activities (Habel et al., 2023, 2024). Our data support that view, but also suggest a hierarchy between the two classic TAM beliefs. Perceived usefulness appeared more decisive than perceived ease of use. In practical terms, respondents were ready to tolerate some complexity when the commercial value of the tool was obvious, which is consistent with TAM extensions showing that usefulness is often the most proximal predictor of usage intentions in organizational settings.

At a second level, however, the findings nuance TAM by revealing that perceived ease of use in B2B sales cannot be narrowly understood as interface simplicity. What respondents stressed was more like convenience of integration into commercial routines. Tools were adopted as they fit the cadence of selling work, eliminated duplicate entry, and linked nicely to CRM processes and customer-facing activities. This is an important nuance, because it suggests that in B2B sales PEOU is partly relational and processual: a

tool is “easy” not only when it is simple to learn but when it does not interrupt the logic of customer management and team coordination. This interpretation is consistent with recent research showing that digital tools create value when they are embedded in sales and marketing processes, support cross-functional coordination, and facilitate the execution of daily commercial activities (Biemans, 2023; Mukhopadhyay et al., 2025).

The findings also extend TAM, by emphasizing resistance to change more than TAM traditionally does. In the classic model, resistance is usually inferred indirectly, through weak usefulness or weak ease of use. Resistance was more evident in our data. Some respondents did not merely voice skepticism about the usefulness of the tools but expressed concerns about increased reporting burdens, over-standardization or loss of autonomy, or turning relationship work into trackable administrative activity. In other words, it was social and identity-based, not merely cognitive. This matters in B2B sales because selling, even in a B2B sale, is deeply relational, improvisational, and status-sensitive. The findings therefore reinforce arguments from the sales transformation literature that the human side of digitalization needs to be theorized more explicitly, especially when new technologies are introduced into complex and high-discretion commercial environments.

5.2. A Mediated and Performance-Oriented TAM (P4 and P5)

The first contribution is to change the key dependent variable. The central issue in the classic TAM is acceptance or intention to use (Davis, 1989; Venkatesh & Davis, 2000). However, in the results of this study acceptance and adoption are not the end points of the explanation, but the entry points of a longer process leading to perceived commercial performance. This result is consistent with recent research on predictive sales analytics, which shows that acceptance represents only an initial stage and that effective implementation depends on how salespeople understand, appropriate, and integrate digital tools into their work (Habel et al., 2023, 2024). This interpretation is consistent with Chatterjee et al. (2022), who identify CRM capability as a mediator between analytics and strategic sales performance, and with Mukhopadhyay et al. (2025), who show that digital transformation improves B2B sales through sales enablement capabilities and the reconfiguration of sales processes. The theoretical contribution is thus a TAM mediated by commercial routines rather than a TAM oriented towards adoption only.

5.3. PEOU as Process Embeddedness: A Refinement of P2

The second contribution is to redefine perceived ease of use. In the results, ease of use is not first a matter of abstract ergonomics, but of compatibility with commercial work: low administrative friction, continuity with customer follow-up routines, absence of double entry, possible mobility in field situations. This finding extends the original TAM construct of perceived ease of use from the individual–system level to the system–process level. In B2B sales, a tool is “easy” when it fits into the cadence of selling, supports coordination, and does not break the relational logic. Our findings thus extend recent research showing that the value of digital tools depends on their integration into sales processes, their contribution to sales–marketing coordination, and their practical support for commercial activities rather than on their functional availability alone (Biemans, 2023; Mukhopadhyay et al., 2025).

5.4. Resistance as a Distinct Construct (P3)

The third contribution consists of treating resistance not as the simple reverse side of perceived usefulness or ease of use, but as an autonomous construct. Administrative duplication, skill gaps, opacity of recommendations, and the threat to autonomy show that resistance is also social, identity-related, and political. This point is important because it explains why formal compliance can coexist with symbolic or superficial use. This interpretation is supported by recent multilevel research showing that digital technology

can generate tensions related to autonomy, information, control, resources, and customer interaction, with consequences that differ across sales directors, managers, and salespeople (Micallef et al., 2024). These findings align with recent research showing that predictive sales technologies may generate resistance when users lack trust in their recommendations, do not understand how outputs are produced, or cannot translate them into concrete sales actions (Gaczek et al., 2023; Habel et al., 2023, 2024). Theoretically, this leads to opening up TAM: resistance should no longer be inferred indirectly, but explicitly integrated into adoption models in B2B sales.

5.5. Managerial Mechanisms as Conversion Mechanisms (P6)

The fourth contribution is to locate managerial mechanisms at the level of conversion mechanisms. These mechanisms are particularly important because digital transformation requires managers to support the abandonment of outdated routines, manage new job demands, and empower salespeople to operate across personal and digital sales channels (Bongers et al., 2021; Guenzi & Nijssen, 2021; Mattila et al., 2021). Our results show that leadership signaling, coaching/digital champions and phased rollout are not marginal conditions; they convert technical deployment into routinized use and then into commercial value. This reading expands on Guenzi and Habel (2020) and Zoltners et al. (2021), for whom commercial digitalization calls for structured managerial orchestration, and joins Chatterjee et al. (2021) and Chatterjee et al. (2022), who emphasize the role of leadership support. The most obvious contribution in this respect is to connect these mechanisms to CRM mediation: these are what enable the translation of adoption into shared customer memory, data-driven prioritization, and follow-up discipline. They link acceptance with routinization, and routinization with performance.

6. Conclusions

This study based on thematic analysis of 18 semi-structured interviews shows that digital transformation in B2B sales is a conditional chain rather than a direct performance effect. Digital tools were embraced when useful and practical in daily routines, resisted when they created duplicate work or jeopardized relational autonomy, and translated to perceived sales performance primarily when embedded in CRM discipline and data-driven prioritization.

6.1. Main Findings and Theoretical Implications

The theoretical implications of the study directly reflect the sequential structure of the conceptual model presented in Figure 1. First, consistent with P1 and P2, perceived usefulness and perceived ease of use act as antecedents of digital tool acceptance, adoption, and effective use. However, the findings refine the traditional TAM logic by showing that perceived usefulness is the primary driver, whereas perceived ease of use matters mainly when digital tools are compatible with sales routines, mobility requirements, customer-facing activities, and existing workflows.

Second, consistent with P3, resistance to change operates as a distinct organizational constraint rather than merely as the absence of usefulness or ease of use. Administrative duplication, limited transparency, threats to professional autonomy, and weak implementation support can prevent favorable perceptions from being translated into effective use. This finding extends TAM by explicitly incorporating the organizational and relational dimensions of resistance in B2B sales settings.

Third, P4 and P5 clarify the process through which digital tool use contributes to the focal dependent variable, perceived sales performance. Acceptance and adoption are not the final outcomes of the model. Rather, effective use supports CRM integration and

data-driven selling, which function as intermediate mechanisms linking digitalization to perceived performance. These mechanisms improve shared customer memory, sales coordination, opportunity prioritization, customer continuity, and follow-up discipline. The model therefore extends TAM from an adoption-oriented framework to a mediated and performance-oriented explanation of digital transformation in B2B sales.

Finally, consistent with P6, managerial implementation mechanisms facilitate the entire adoption-to-performance process. Training, leadership use, digital champions, and phased rollout help convert technical deployment into sustained use and reinforce the integration of digital tools into commercial routines. The study therefore shows that perceived sales performance depends not only on individual acceptance beliefs, but also on the organizational mechanisms through which digital technologies become embedded in sales processes.

6.2. Managerial Implications

The results of the study suggest that from the perspective of management, digital transformation should be seen as a process of organizational change rather than simply the implementation of technology. To successfully implement digital tools, sales managers should identify tools based on clear definitions of business-related problems, including lost customer data, lack of visibility and updates on sales opportunities, and poor communication in the process of sales activities. The new systems should be used instead of existing solutions and not as an extra layer of reports. It is important to introduce CRM into processes such as opportunity reviews, forecasting, coaching, and customer handover activities so that the tool will be used regularly in everyday work. Digital specialists based in the field will be able to offer support to others and assist in applying advanced technologies to the process of sales. It is essential for proper implementation and quick learning. Moreover, managers need to monitor not only the end results in terms of sales but also the intermediate indicators such as CRM completeness, frequency of follow-up, customers' data sharing, etc.

The practical value of the study therefore lies in providing managers with a sequence for implementation: identify a concrete sales need, select a compatible tool, simplify existing workflows, support adoption through leadership and peer assistance, embed usage into commercial routines, and evaluate whether the tool improves coordination and customer follow-up before expecting direct performance gains.

6.3. Limitations and Future Research

The limitations of the study are its qualitative, cross-sectional design, reliance on perceived instead of objective performance indicators, and its interview-based focus on a bounded set of B2B contexts. Although participants came from different industries, the study did not systematically compare sector-specific business processes or digital transformation trajectories. Future research could therefore examine how industry characteristics influence digital tool adoption, CRM integration, and sales performance. Future research could test P1–P6 with longitudinal or mixed-method designs and examine more explicitly how explainability, trust, and AI-driven analytics transform salesperson acceptance and use.

The absence of detailed demographic data also prevents the study from examining whether age, gender, or education level influenced participants' perceptions of digital tool adoption. Future research could explicitly incorporate these characteristics and compare their influence across different participant profiles.

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Appendix A. Core Semi-Structured Interview Guide

1. How has digital transformation changed B2B sales processes in your organization?
2. Which digital tools do you use in your sales activities, and how are they integrated into your daily work?
3. To what extent do you perceive these tools as useful and easy to use? Please provide concrete examples.
4. What difficulties, concerns, or forms of resistance have emerged during the adoption and use of these tools?
5. How, if at all, does the adoption of digital tools affect the use of CRM systems, customer information sharing, and data-driven sales practices?
6. In what ways, if any, do CRM integration and data-driven selling influence sales coordination, customer follow-up, opportunity prioritization, and perceived sales performance?
7. What managerial practices facilitate or hinder the acceptance, adoption, and effective use of digital sales tools?
8. Is there any other factor that you consider important for the successful digital transformation of B2B sales processes?

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