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## B2B Customer Journey: Axioms and Actor Roles

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## **B2B Customer Journey: Axioms and Actor Roles**

### **Abstract:**

The customer journey has been identified as one of the most promising concepts in understanding business-to-business (B2B) buying and selling processes in modern digital environments. Although the B2B marketing literature has recognised the potential of the concept, it still lacks a perspective approaching the characteristics of B2B markets. This paper aims to build theory by bringing the customer journey to the B2B field. The paper systematically reviews the customer journey literature and reflects on it from the B2B perspective. It then proposes four axioms for B2B customer journeys and introduces four roles for both suppliers and customers through which the customer journey manifests. The paper hopes to inspire further B2B customer journey research by contributing to the B2B marketing literature through proposing the basis for considering B2B characteristics from the perspective of customer journeys.

*Keywords: Customer journey, Business-to-business, Customer experience*

*Track: Business-To-Business Marketing & Supply Chain Management*

## 1. Introduction of Paper

The marketing literature has recognised the customer journey as one of the critical concepts in current academic discussions. Shugan's Top 20 Marketing Meta-Journal<sup>1</sup> has identified Lemon and Verhoef's (2016) work on customer journeys as the most cited marketing paper in the last four years. In the business-to-business (B2B) setting the relevance of the customer journey is emphasised by purchase processes that are to a larger extent transitioning to online environments and requiring new conceptual tools (Steward., Narus, Roehm, and Ritz, 2019). While recognising the challenges posed by digitalised purchase processes (Lemon & Verhoef, 2016), the customer journey concept cannot yet deal with the complexity imposed by the B2B environment. B2B characteristics such as multi-actor decision-making, organisational structures (Hartmann, Wieland, and Vargo, 2018) and conflicting roles and preferences (Chandler & Johnston, 2012) have remained unexplored. In this paper, we aim to bring the customer journey concept to the B2B field by integrating the current knowledge on customer journeys and characteristics of the B2B environment.

Customer journey is a multidisciplinary concept which crosscuts multiple streams of the marketing literature. In addition to buying and selling processes (Steward et al., 2019) and customer experience (Lemon & Verhoef, 2016), the concept has been discussed in relation to value creation (Boyd & Koles, 2019), brand value (García, Galindo, and Suárez, 2018) and social media (Diba, Vella, and Abratt., 2019). The holistic conceptual background of the customer journey concept provides both academics and B2B practitioners promising possibilities to understand the sales and marketing processes as part of a wider scope of value creation.

The customer journey literature has almost exclusively focused on consumer markets. The B2B literature has recognised the importance of the concept (Steward et al., 2019; Zolkiewski et al., 2017) but lacks a holistic view on how to account for B2B characteristics. Consumer-centric research and numerous viewpoints within the literature do not provide sufficient background for academic endeavours in the industrial and B2B setting, nor do they give B2B practitioners tools to manage their customers' journeys. This paper aims to bring the concept of the customer journey to the B2B setting. To reach our aim we started by pursuing for a deep understanding of the customer journey concept by answering the question: How is the customer journey conceptualised in the marketing literature? To answer this question, we systematically reviewed the customer journey literature to integrate and structure the knowledge on the concept. After the systematic review, we aimed for further theory building by integrating the

<sup>1</sup> Shugan's Top20 Marketing Meta Journal ranks latest high-impact articles across all marketing journals in four-year window.

findings with the literature on B2B sales, marketing and value creation. In this paper, we present the results of this integration. The study intends to contribute to the literature on B2B marketing, selling and buying by creating a seminal understanding of the contemporary concept of the customer journey in B2B settings. As its main contribution, the paper presents four axioms for B2B customer journeys and eight roles through which customer journeys manifest in the market.

## **2. Methodology**

The research process began with the identification and collection of as many relevant research articles on the topic as possible. We conducted a systematic literature search via two databases: Scopus and Web of Science. Our search included articles that were published by 1<sup>st</sup> of April 2020. The selected databases offer a solid representation of different journals as well as tools to manage the search results. We focused our search on peer-reviewed journals and conference publications and searched for articles in which the title, keywords or abstract mentioned the terms "customer journey", "customer process", "buying journey", "buying process", "purchase journey" or "purchase process".

After the initial search, the process continued to the elimination phase, in which the goal was to exclude articles that did not represent the focus of this paper. We started the elimination by focusing the search on the category of management and business. This resulted in 742 hits on Scopus and 403 on the Web of Science.

We continued the elimination by reading the titles and abstracts of the articles. If it was clear from the title and abstract that the focus of the article was not related to customer journeys, the article was excluded from further examination. In cases where it was impossible to make the decision based on the title and abstract, the article was skimmed through before the decision on elimination was made. After the elimination phase, we had a total of 67 articles to be included for further analysis. The selected 67 papers included only four B2B focused articles, which further illustrates the gap in B2B focused customer journey research. In this study, we do not refer to all of these papers but give examples from some of them on which we base our observations.

We conducted a structured content analysis of the 67 selected papers in terms of their topics, key drivers, contexts, use of the customer journey concept and other emerging issues. Content analysis allows for minimal researcher interference regarding the phenomenon studied, simultaneously enabling the examination of large volumes of data (Krippendorff, 1980). We

continued by using typologies as a tool for theory building (Jaakkola, 2020). This allowed us to describe complex inter-organisational phenomena, with ideal types (Doty & Glick, 1994) affecting the reality in which the customer journey occurs. The ideal types that we identified were: 1) intertwined value creation and value capture, 2) agency and 3) digital technology. These types were further explored in relation to the B2B literature on sales, marketing and value creation. Based on this, we proposed four axioms for the B2B customer journey. These are presented in the next section.

### **3. Approaching the Customer Journey from the B2B Perspective**

In this section we propose four axioms for the B2B customer journey:

- 1) Customer journey conceptualises two different elements of value: the customer's value creation and the provider's value capture.
- 2) Value propositions are not static but develop and are realised during the customer journey.
- 3) Institutional alignments take place in all phases of the customer journey.
- 4) Digital technology has two purposes: It acts as an environment for interactions and works as a tool for analysing, guiding and designing customers' actions in the environment.

#### *3.1 Customer journey conceptualises two different elements of value: the customer's value creation and the provider's value capture*

While the concept of customer journey highlights the perspective of the customer, the literature on the topic simultaneously emphasises provider processes such as designing (Edelman & Singer, 2015) and analysing (Järvinen & Karjaluoto, 2015) the journey, activities related to guiding the customer (Boyd & Koles, 2019) and getting the customer to engage in the journey (Willems, Brengman, and Van Kerrebroeck, 2019). From the customer perspective, the journey emphasises the customer's decision-making role in the value-creation process of identifying and finding solutions (e.g., Su, 2008). From the provider's perspective, the customer journey conceptualises sales and marketing processes that are important for the provider's value capture logic. For instance, phases preceding the purchase are typically given much more attention than phases following the purchase, which are typically condensed under the title 'after purchase phase'. Due to the dualistic nature of the concept, which simultaneously explains the value creation logic of the customer and the value capture logic of the provider, we formulate the first axiom as follows:

*A1: Customer journey conceptualises two different elements of value: the customer's value creation and the provider's value capture*

The dualistic nature of the concept allows for a holistic understanding of value-creating interactions as well as exchanges related to those interactions. However, this necessitates careful and explicit determining of the perspective the customer journey is discussed. The touchpoints relevant to the provider's value capture processes are not inherently relevant to the customer's value creation processes. Failures in implementing this observation might result in touchpoints that are irrelevant from the customer's perspective and are experienced as lost time and resources.

### *3.2 Value propositions are not static but develop and are realised during the customer journey*

The literature on B2B value creation has highlighted the emergent nature of value propositions during the purchase processes (e.g., Aarikka-Stenroos & Jaakkola, 2012; Rustholkkarhu, Hautamaki, and Aarikka-Stenroos, 2020). B2B situations can include complex processes in which customer and provider engage in joint problem-solving, where the customer's needs and the final form of the proposed solution are co-founded and co-developed (Aarikka-Stenroos & Jaakkola, 2012). The discussion on the customer journey in the literature does not fully account for the fluidity nested in B2B value propositions but treats them as static. To capture the complexity of B2B value propositions, we formulate the second axiom as follows:

*A2: Value propositions are not static but develop and are realised during the customer journey*

In Table 1, we identify four key roles for both the customer and the supplier during the B2B customer journey. Each role is accompanied by an example study. Customer journeys manifest through the roles identified in Table 1.

<b>Actor</b>	<b>Role</b>	<b>Theoretical background</b>	<b>Example study</b>
Supplier	Analyser	Supplier builds understanding on the journey of the customer	Organisations need to understand the reasoning behind the chosen metrics, the processing of metrics data and the organisational context to use marketing metrics systems (Järvinen & Karjaluoto, 2015)
	Guide	Supplier aims to help the customer find the next step in the customer journey	Boyd and Koles (2019) propose that especially in B2B situations with higher task, social and knowledge complexity, virtual reality channels can enhance buyer-supplier coordination as well as asset management in the after purchase stages of the customer journey

	Designer	Supplier aims to design marketing strategies to facilitate the environment where different stages of the customer's journey can take place	Companies need to treat customer journeys like products, which are designed, built and supported by cross-functional teams and led by managers responsible for business performance. Automation, proactive personalisation, contextual interaction and journey innovation are key capabilities in building the most effective journeys (Edelman & Singer, 2015)
	Engager	Supplier aims to get the customer engaged in the journey	Various media generate different levels of customer engagement. Virtual reality content scores highest in both interactivity and vividness, constituting higher consumer perception of telepresence and positively affecting purchase intentions (Willems et al., 2019)
Customer	Leader	Customers control, evaluate and lead the journey by deciding the next step	The decision-making styles of individual customers affect the outcomes of the decision-making process. Customers with a low level of product knowledge engage in a decision-making process with a higher number of cycles and a longer duration than consumers with a high level of product knowledge. They also compare a higher number of alternatives and use more criteria (Karimi, Papamichail, and Holland, 2015)
	Seeker	Customers actively search for information on possible solutions, compare alternatives and look for convenience. They strive to satisfy emotional and social needs	In retailing, customers typically face three types of research costs: 1) the cost of locating an appropriate seller, 2) the cost of obtaining pricing information and 3) the cost of obtaining product information (Su, 2008)
	Customiser	Customers customise the journey and provided offers to fit their preferences	Personal attachment to smartphones, smartphone self-efficacy and providers' mobile-specific innovativeness positively affect consumers' willingness to disclose personal data in return for personalised mobile marketing. Users' information privacy concerns negatively affect this willingness (Wozniak, Schaffner, Stanoevska-Slabeva, and Lenz-Kesekamp, 2018)
	Evaluator	Customers evaluate the value in each touchpoint of their journey	Customers' perceptions of the usefulness of the company website affect their satisfaction with the ordering process, contributing to their intention to continue using the website (Liao, Palvia, and Lin, 2010)

Table 1. Roles in the B2B customer journey

### 3.3 Institutional alignments take place in all phases of the customer journey

In the B2B setting actors participating in the journey in the roles presented in Table 1 are not individual buyers or sellers, but organisational bodies constituting multiple “agencing entities” in the form of departments, teams and individual persons (Rustholllkarhu et al., 2020). These different and sometimes even conflicting entities within buying organisations and their



effects on decision-making at the organisational level are acknowledged in B2B sales discussions (e.g., Chandler & Johnston, 2012). However, they are not yet addressed by the consumer-centric customer journey literature. To capture this B2B characteristic we propose the following axiom:

*A3: Institutional alignments take place in all phases of the customer journey*

In this context, we refer to institutional alignment as changes in organisational processes that serve the purpose of enabling different intra- and inter-organisational bodies to work together. We propose that in multi-actor organisational settings, institutional alignments take place in all phases of the customer journey. This includes not only after-purchase implementation but also earlier stages in the decision-making process of a customer. As an increasing number of inter-organisational actors outside the buyer-provider dyad are participating in B2B sales processes (Hartmann et al., 2018), it is evident that institutional alignments are not limited to the relationship between the customer and the provider but exist from the perspective of a wider business ecosystem.

*3.4 Digital technology has two purposes: it acts as an environment for interactions and works as a tool for analysing, guiding and designing customers' actions in the environment*

The rise of digital technologies is a crucial factor shaping B2B buying and selling as well as the business environment in general (Syam & Sharma, 2018). It has also played an important role in the emergence of the concept of the customer journey (Steward et al., 2019). The journey literature emphasises the digital environments in which the activities of customers and providers take place (e.g., Lee, 2010) but also sees technology as a provider's tool with which to manage the roles proposed in Table 1. To capture the purpose of technology within the B2B customer journey, we propose the following axiom:

*A4: Digital technology has two purposes: it acts as an environment for interactions and works as a tool for analysing, guiding and designing customers' actions in the environment*

For the different purposes of technology see Vázquez et al. (2014) for analysing, Schröder and Zaharia (2008) for guiding, Stickdorn, Frischhut, and Schmid (2014) for designing and Liao et al. (2010) for environment.

#### **4. Conclusions**

In this paper, we have presented four axioms for the B2B customer journey as well as four roles for both customers and providers through which the customer journey manifests. As a

contribution to theory and practice, the paper continues the discussion on the B2B customer journey. The B2B marketing and sales literature has acknowledged the importance of the customer journey concept in the contexts of buying and selling (Steward et al., 2019) and the B2B customer experience (Zolkiewski et al., 2017) but has so far lacked conceptualisations that take B2B characteristics into account. We hope that the axioms and actor roles proposed in this paper will provide a beneficial conceptual background to inspire further contributions elaborating on customer journeys in B2B settings. For B2B practitioners the roles in Table 1 through which customer journeys manifest provide a holistic managerial framework to plan activities for managing the journeys of customers.

The conceptual nature of this paper is both a limitation as well as an opening for future research areas. We believe that each axiom as well as the interlinkages between axioms reveal potential areas for subsequent empirical and conceptual elaboration. Potential research dilemmas include elaborating on the processes through which value propositions, value capture mechanisms and B2B agencies intertwine, as well as exploring the importance of different customer journey roles and digital technologies in those processes.

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