



THE NEW DIGITAL SALES ENABLERS

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Abstract

Purpose: The global health emergency situation in 2020 has asked some companies to review the business model in a context characterized by a strong digital transformation. On this innovative drive, new digital players able to support the digital transformation of companies have emerged. This process is particularly relevant in Italy, where SMEs operating in B2B are increasingly approaching these technological solutions. The aim of the paper is therefore to understand what the main characteristics of the business model of the new B2B digital players are and what have been the main changes considering the crisis driven innovation perspective.

Design/methodology/approach: The methodology used in this study is based on a constructive multiple case research design.

Practical and Social implications: New digital actors are relevant for SMEs as they support companies in developing a digital strategy, coordinating the use of different platforms including marketplaces, to identify new customers or strengthen relationships with acquired customers. The combination of all these solutions leads to an increase in the global presence of the players belonging to the network, providing an international showcase. The new solutions proposed by digital players are data driven and the potential of technology can only be fully utilized by adopting a holistic approach, considering the possibility of co-creating value.

Originality of the study: Through the research, new digital players identified in digital sales enablers emerge. These actors support the digital transformation process of a company and its activities in a national and international context, providing and implementing their digital strategy.

1. Introduction

The pandemic that began in 2020 has led to the emergence of an unparalleled situation in health, economic and social terms. In this landscape, many critical issues and challenges have been faced by companies especially operating in the business-to-business context. In particular, the Covid-19 context led to the suspension of all face-to-face business meetings and trade fairs, leading to an increasing relevance of digital contents. This new trend in business context has required a better comprehension (Ritter and Pedersen, 2020).

A growing number of companies, adopting a forward-looking entrepreneurial vision (Bessant, 2020), have decided to respond to the new challenges by investing more in the new digital distribution and communication channels.

In this scenario, the main aim of this paper is to investigate the emerging of new players that support the process of channels' digitalization in B2B context and the evolution of their business model. A particular attention has been recognized to changes in innovative services provided by digital players to SMEs in order to sustain their digitalization strategy.

Digital innovation is now taking on a central role, not only in the B2C market but also in the business market, both for large corporations and for SMEs.

Taking into consideration the Italian business context characterized by the significant presence of SMEs, as evidenced by a NetComm research, "there are over 52% of Italian B2B companies, with a turnover of more than € 20 million, active in e-commerce sales with own website or with e-marketplaces, up 10% between January 2016 and September 2019. While there are about 75% of Italian business buyers, with turnover exceeding € 2 million, who use digital channels in some phases of the purchase, mainly to seek and evaluate new suppliers" (NetComm, 2020). The focus on digital in B2B market was strengthened in 2020, albeit with a slower path than B2C (Salesforce, 2021).

This evolution has also led to the emergence of new players, and their new services, that support companies in developing the digitalization of marketing channels. As highlighted by findings, the new digital sales enablers carry out strategic activities for client companies, allowing them to develop an effective digital strategy. The attention on Digital Sales has been also influenced by the development of digital servitization (Classen and Friedli, 2021) that has allowed client company to better understand what value digital services create (Hasselblatt et al., 2018). This allows a better identification of which is the most suitable support that can be provided by the digital sales enabler. In detail, digital enablers are those actors (i.e., web marketing agencies, technology business providers, etc.) who can provide different services to support commercial interaction between brand owners

and their customers. Digital sales enablers can support the interaction not only between the brand owners and their customers (through e-commerce platform) but also between the brand owners and e-marketplace. B2B e-marketplaces can be defined as those neutral internet-based places where it is possible to exchange information, products, services and payments between business buyers and suppliers virtually (Laudon and Laudon, 2000).

In order to better understand these dynamics and answer to the aim of this paper, the main research question is: *how can emerging new players support the process of channels' digitalization in a context of crisis –driven innovation?*

The article is organized as follows. The next section presents the theoretical background. Then, the methodology is presented followed by the analysis and discussion of two emblematic case studies. Finally, conclusion and managerial implications are provided.

2. Theoretical background

2.1 Crisis driven digital innovation

The extreme situations where there are urgent needs and limitations of available resources, lead to rethinking and recombining business activities in creative ways, by configuring a crucible for innovation trajectories (Dees, 2009). From this perspective crisis requires a turning point (Pedersen et al., 2020), a new way of doing business and extraordinary activities to handle the effects before a new “normal” stage.

In literature, the concept of “crisis driven innovation” (CDI) belongs to a broader field of research - i.e., the Crisis Management. When we talk about CDI, we generally mean the set of innovations that arise from new innovation trajectories and that potentially, in extreme cases, can become disruptive innovations, when they begin to challenge traditional dominant models (Christensen, 1997).

These innovations usually respond to new needs emerging in the market side and they could represent a simplification of an existing offer (Bessant et al., 2012).

In recent context, the crisis created by COVID-19 generated a broader impact of some business process with effects also in the new normal. Some research highlighted that most on CDIs related to the Covid-19 pandemic, originated in different industries, and covered a broad range of typologies (Dahlke et al., 2021), also considering the impact on business relationships.

In these years, business market has been mainly characterized by the acceleration of digital innovation related to marketing channels. In this vein, the innovative process of firm digitalization started before the pandemic period and has been pushed by the same. The pandemic period influenced

the value demonstration that concerns the ways in which organizations demonstrate customers the advantages of their value propositions. In traditional perspective value demonstrations mainly involve personal meetings, trade shows, face to face relationships (Anderson and Narus, 1998, Collis and Rukstad, 2008).

More specifically, the limitations due to pandemic period required firms to identify new channels in order to provide value to their customers. In B2B market, brand owner activated digital channels and more general digital touchpoints to maintain a long-term relationship with their customers.

In particular, the CDI shed light on the process related to the digitalization of touchpoints concerning the relationship between a firm and its customers and heterogeneous stakeholders. The combining of physical and digital touchpoints allowed the interaction between customer and company, with new direct and indirect contacts (Payne et al., 2017). Digitalization has also affected communication-related touchpoints, defined “an audience-driven business process of strategically managing stakeholders, content, channels, and results of brand communication programs” (Kliatchko, 2008, p. 140). The touchpoints are considered as episode of direct, or indirect, contact with the brand (Baxendale et al., 2015).

The digital innovation related to digital touchpoints very often require companies to activate relationships with digital players such as brokerage platforms - the so-called “e-marketplaces” - or new digital players that can support the activation of own digital touchpoints such as e-commerce.

These actors leveraged on the digital servitization process that influenced sales activities (Classen and Friedli, 2021). In fact, in recent years new companies (i.e., web marketing agencies, technology business providers, etc.) have introduced different services to support commercial interaction between brand owners, retailers/wholesalers and other intermediaries and their customers.

Over the last few years, also these players have innovated their business model to respond to the requests of companies increasingly attentive to developing a new digital strategy. In particular, numerous studies have considered the concept of business model with different interpretations. The business model has been associated with business activities (Ritter and Lettl, 2018), and with business process re-engineering. Other studies have investigated the archetypes of business models, defining the essential elements for developing the business (Osterwalder and Pigneur, 2010) and their interaction (Ritter and Pedersen, 2020). The business model describes “a rationale of how an organization creates, delivers and captures value” (Osterwalder and Pigneur, 2010, p. 14).

2.2 *New digital players*

The use of technology in B2B relationships is a topic that has been gaining increasing attention in recent years (Liu et al., 2020). This attention emerged both from the academic and the business world due to the evolution of customers' needs related to B2C and B2B market. In particular, digital marketing strategies (Salo, 2017) and the development of digital mediation have been analyzed, with a focus on the technologies used in marketing processes, as well as on how a technology influences processes and relationships (Yadav and Pavlou, 2017). Recently and especially following the 2020 pandemic, a series of players both traditional (such as B2B e-marketplaces) and new digital players are emerging. These latter emerge in support of companies by providing them with a series of activities in response to new needs that arises for companies forced to review their business strategies based on the constraints posed by the pandemic situation (Papagiannidis et al., 2020). The COVID-19 pandemic is probably one of the most significant crises that companies have experienced in the last 50 years, both in terms of its global reach and of its impact at numerous and different levels (Papagiannidis et al., 2020). Covid-19 has impacted how companies access services and how make use of activities from external suppliers (Soto-Acosta, 2020). Companies can take advantage of these actors as digital player can ensure internal flexibility managing creation and negotiation of contracts with stakeholders. In this way, companies can get on-demand access to external talent of digital players anywhere in the world without having to introduce specific internal skills from scratch. Digital players help brand owner and retailer to develop an omnichannel strategy by facilitating complex activities. Omnichannel was defined by Verhoef et al. (p. 176, 2015) as "the synergetic management of the numerous available channels and customer touchpoints, in such a way that the customer experience across channels and the performance over channels is optimized". Rigby (p. 9, 2011) defined omnichannel as "the perfect integration of the digital and the physical". Omnichannel requires companies to coordinate different communication and distribution channels to ensure the same customer experience, both in a B2C context and in a B2B context. This activity enhances the different points of contact with the customer (Picot-Coupey et al., 2016) to support buyer journey in B2B context. The decision between multi and omnichannel regarding which is the best strategy to be improved in companies has always been topic of discussion between both academic and practitioners (Ailawadi and Farris, 2017).

Omnichannel strategy differs from multichannel strategy (Berman and Thelen, 2018) even if both strategies enhance the presence of a multiplicity of channels. In fact, multichannel strategy is more focused on individual channels where each channel is managed separately with specific objec-

tives. Omnichannel strategy, instead, recognizes the centrality of the customer managing all channels in a coordinated manner and allowing customers to choose the channel according to specific needs and preferences.

In particular, digital servitization stressed the evolution of sales function (Classen and Friedli, 2021). For this reason, several new companies (i.e., web marketing agencies, technology business providers, etc.) affirm themselves as providers of different services to support commercial interaction between brand owners and their customers. The new digital players can therefore be considered as business partners for companies interested in developing an omnichannel strategy, facilitating interaction between buyers and sellers.

In this context, digital players provide specific support in terms of new activities and services to respond to a change that has emerged in the business environment in order to support the channels digitalization. This could be related to the launch of the own e-commerce platform and the creation of new relationship with e-marketplace. There are different types of digital players. Some may deal with specific service applications. These players integrate a series of additional services that can be used remotely in a private and secure way to a basic platform, such as a traditional B2B e-marketplace in a “pay-per-use” perspective. Other actors can make available e-sourcing activities, for examples tools to support the search for new suppliers, the definition of their status, online negotiation through electronic auctions, the request for proposals or the request for quotes (Balocco et al., 2010). There are actors who deal with e-catalogue activities, supporting the recursive purchasing process of products and services based on web catalogues when the commercial conditions have already been agreed. Other actors, on the other hand, guarantee supply chain execution, that is the cycle from order to payment including logistic and administrative activities, integrated and digitized (Petersen et al., 2007). Finally, some actors monitor and collaborate in the digital supply chain. This aspect refers to the collaboration activities between buyers and suppliers, including production and procurement planning, development of new products, monitoring and control of the supply chain (Kaplan and Sawhney, 2000). Attaran (2020), for example, provides a clear explanation of the impact of these new actors in the supply chain.

Focusing the attention on B2B e-marketplaces, we consider them as those neutral internet-based places, where it is possible to exchange information, products, services and payments between business buyers and suppliers virtually (Laudon and Laudon, 2000). B2B e-marketplaces are digital players that provides various “general” services to support commercial interaction between companies. They foster the relationship with different stakeholders, mainly suppliers and buyers (Albrecht et al., 2005; Kaplan and Sawhney, 2000; Swani et al., 2014). In particular, the advantag-

es of coming into contact with a B2B e-marketplace are different. Primarily, B2B e-marketplace can reduce unit cost by allowing buyers to aggregate demand and achieve better economies of scale, protect participating companies from the opportunistic behavior of others, reduce overall operating costs, reduce search costs by facilitating price comparison, products and services (Bakos, 1998; Kaplan and Sawhney, 2000), reduce marketing costs compared to traditional marketing channels and reduce the number of marketing personnel (Sculley and Woods, 2001). Secondly, B2B e-marketplaces can support interorganizational interaction and provide specific benefits to participating companies and their supply chains. Finally, B2B e-marketplaces increase the dissemination of knowledge. Buyers can access more information both on potential suppliers and on their products and services (Eng, 2004); while suppliers can make themselves known to a wider audience. They can be operational 24/7 and 365 days a year, facilitate their global presence by exploring new market segments, be interactive more effectively in terms of service marketing communication and improve relationships with customers. While the benefits are evident from one hand, on the other hand there are some critical issues that must be considered when talking about B2B e-marketplaces (Petersen et al., 2007). The critical mass of involved participants is a fundamental aspect for a B2B e-marketplace. In fact, the advantages realized by users increase as their number increases. However, as the number of participants increases, the e-marketplace is also in a better position to impose significant transfer costs, i.e., between the future price and the spot price of a good or service (Bakos, 1991). Digital players can be strategic especially for SMEs (Jiang et al., 2019). Indeed, while the main obstacles for SMEs are related to time/cost and limited skills, these actors provide a series of activities that fill the technological gaps that SMEs may have. Despite the benefits, the SMEs, predominant in Italy, are not fully aware of the opportunities that these actors can offer (Stockdale and Standing, 2004) and, alone, could have difficulty in activating an omnichannel strategy quickly (Chong et al., 2010). For these reasons, this research considers the Italian business context because characterized by significant presence of SMEs and the value network of e-commerce and digital retail that involve various players (NetComm, 2020). In fact, there are many different players as marketplaces, retailers and brand owners, online advertising platforms, companies specialized in offering customer care services and communication, marketing and digital consulting agencies. There are also web design and content management agencies, software houses, system integrators, and providers of innovative technological solutions for e-commerce. The other players involved include operators specialized in logistics, packaging and payment services. Marketplaces represent the sector characterized by the greatest growth both in terms of turnover (+ 26% average per year) and employees (+ 20.9% average per

year), followed by online retailers, brand owner and customer care activities. In this scenario, the important role of the new digital actors emerges, which are able to integrate some functions of the actors described above, supporting the digital strategy of SMEs (Jiang et al., 2019).

3. Research Methodology

The methodology used in this study is based on a constructive multiple case research design (Yin, 2018) for two main reasons. Firstly, it allows “an empirical inquiry that investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident; in which multiple sources of evidence are used” (Yin, 1984, p. 23). In fact, qualitative research method provides a deep understanding of a complex phenomenon (Narooz and Child, 2017). Secondly, this type of research allows to improve the solidity of a qualitative analysis (Herriott and Firestone, 1983), strengthen the validity of the discussion in terms of replicability (Yin, 2018) and is generally adopted to investigate the empirical implications of the literature of reference (Fawcett et al., 2014; Yin, 1989). The selected case studies, Brandon Group and Femar Consulting, respect some inclusion criteria, they are: a) characterized by a strong digital orientation; b) born to support the implementation of digital omnichannel strategies and activities of their customers; c) already existing in the pre-pandemic environment, these actors evolved their business model in order to answer to changes coming from their business clients; and d) working also on the Italian market through activities in support of Italian small and medium-sized enterprises.

Even if the two case studies present the previous common aspects, they are characterized by some divergences. Brandon is a Group, while Femar is a medium enterprise. In addition, Brandon provides a strategic consulting through a 360-degree analysis of its business clients, while Femar applied a more operating approach supplying specific products and services to its business clients.

The choice to focus attention on these case studies is given by the fact that, although SMEs operating in the B2B context do not generally recognize the implementation of omnichannel strategies, in recent years there has been an innovative push that has been consolidated and strengthened. following the Covid-19 health emergency. Furthermore, the selected cases are best practices that have continued to grow and develop in 2020, even in a crisis situation, proposing innovative solutions.

The data collection for this research was mainly conducted between May 2020 and October 2021 and consists of the integration of primary and secondary data. The secondary data consists of an in-depth desk analy-

sis through the study of scientific articles, specialized journals, conference proceedings, company presentations, organizational charts and market research in order to ensure the internal validity of the results. The primary data, on the other hand, consist of information collected through 5 interviews with the company representatives of the individual case studies analysed and 5 interviews developed with Industry specialists. In particular, the interviews focused on the business model of the new digital players and on the changes that occurred in the Covid period. From a crisis driven innovation perspective, the changes implemented in the business models of digital players were analysed. In addition, other topics involved the phygital perspective of marketing channels.

4. Case study

4.1 Brandon Group

4.1.1 Business Model

Brandon Group is an expert and online sales enabler for brands and retailers. Customers are mainly brands, whose catalogues are uploaded to a proprietary platform. Brandon supports companies in the digital sales process and optimizes their visibility on multi-brand e-commerce platforms.

The main activity of the group consists of end-to-end services for managing the online sales and post-sales process, thanks to the combination of intelligent software and strategic services for analysing data generated by online sales and traffic. In particular, the services concern the digitization of catalogues, the SEO description of the products, the definition of the online sales strategy. There are also services relating to logistics, dynamic pricing and feed management and big data analysis, customer care and the management of returns and after-sales.

Brandon's proprietary technology platforms automate the sales process and create a direct, real-time link between customer brand warehouses and e-commerce platforms. Through the analysis of internal Big Data, Brandon carries out the planning of the digital strategy of customers according to the emerging trends and the optimization of the positioning of the products offered in the online market.

In particular, the company focuses its business on the fashion, sport, home & living and beauty sectors. In 2019 Brandon achieved a strong increase in revenues, thanks to the activation of relationships with new business partners and the numerous references offered, on over 50 e-commerce platforms, in 35 countries. Most of the companies that turn to Brandon are companies interested in selling products in Italy and in an international context.

Over the years Brandon has also developed a B2B2C perspective, considering sales through active stores in the various marketplaces, management of brand-owned stores, and the management of a vertical site for cosmetics

4.1.2 Changes in 2020

Between January and May 2020, Brandon recorded a relevant growth in the B2B channel compared to 2019, especially considering the parapharmaceutical sector (which grew by more than 12 times compared to the same period last year). An increase was also recorded for the beauty & cosmetics sector.

In 2020 Brandon activated an eProcurement channel dedicated almost entirely to the parapharmaceutical sector, for the procurement of Covid-related products. The company has thus responded to a specific market need, considering that large Italian groups have taken steps to search for personal safety products by finding closed suppliers.

In the commercial sphere, various categories were also considered that required a reallocation of resources.

In this way, the platform has become an enabler of relationships that concern the entire value chain, starting from the relationship with customers (brand), up to the distribution platforms downstream of the supply chain, also considering the various business partners. Such relationships are important to facilitate the growth of SMEs, for example, by supporting international online sales.

In 2020, Brandon's diversification strategy was further strengthened, considering new markets and new channels.

The optimization of the sale takes place with proprietary tools integrated with the platform. The developed algorithms allow to optimize the pricing, the single shipment and the probability of return to guarantee sales and margins. The order, payment, logistics and return management are handled by Brandon.

In particular, Brandon supports client brands in reaching consumers through full price and discount sales channels. The distribution of the full price catalogue on the main generalist and vertical e-tailers is developed through dedicated online stores on marketplace platforms, uploading the catalogue to Brandon's proprietary online stores, wholesale sales with the main international e-commerce sites. The discount product catalogues are instead sold through flash sales campaigns on the main online private sales sites, in online stores, temporarily or until exhaustion and wholesale with the main international e-commerce sites.

4.2 Femar Consulting

4.2.1 Business Model

Femar Consulting supports the definition and development of its clients' omnichannel strategy. Since 2010, the company has focused its activities on iCatalogue, the Mobile Enterprise Catalog Management platform. iCatalogue is a service offered in cloud computing with a PaaS (Platform as a service) model. Femar as a service provider offers cloud-based access, where users can develop and manage applications while suppliers can provide the infrastructure. Users can also use a suite to develop, customize and test their applications. Businesses sign a contract to use the service.

The technological solution allows customers to make order management processes more efficient. The service is complemented by consultancy activities dedicated to the integration of the various systems and their use. A complementary service consists of consultancy for the launch and use of the platform.

Femar's main goal is to develop a digital system based on Made in Italy, through the offer of an omnichannel order management system.

Femar's customers belong to three main sectors: food & beverage, retail goods, fashion and clothing.

4.2.2 Changes in 2020

During 2020, and following the health emergency situation, the demand for the use of the platform to develop an omnichannel strategy has increased significantly, consolidating the growth seen in 2019.

Regarding the changes that the company's network of relationships has undergone, the indirect distribution and sales channel is developing. In fact, the difference compared to past years lies above all in the demand expressed by system integrators interested in adopting omnichannel integration solutions. System integrators come into contact with Femar indirectly (word of mouth from their customers) or directly (spontaneous searches).

The platform requires a medium level of access to its use and this discriminating factor leads to include above all SMEs structured from an IT point of view. Before 2020, these projects tended to be developed primarily by marketing, while now the two main players are IT and Sales. This change has also improved the integration dynamics that are at the basis of the emergence of this type of solution. The platform allows for integration with the customer's warehouse by knowing the available products in real time. The management of returns and customer care must also consider the language of the purchases. The platform guarantees the management of data integrated with data lake (a platform that puts different data into a system) and

allows for sophisticated analyses to be carried out with control and monitoring dashboards, generating inputs to improve the catalogue itself.

The platform makes it possible to manage sales by centralizing customer and product data while also maintaining constant alignment with sales agents who take orders and bid on the go, leading to significant savings in terms of time and resources.

The digital potential that the company sees mainly concern Italian companies that need innovative solutions accompanied by up-to-date skills in order to contain development costs on new markets and, at the same time, accelerate time to market by seizing business opportunities. The company intends to develop an internationalization strategy.

The image of the customer brand is optimized, based on the requirements of each marketplace. Each marketplace has its own rules, consider for example that in the Middle East area images cannot predict the presence of the human figure. Brandon also carries out the SEO optimization of the descriptions (language of the market-country of the client brand and SEO optimization previously not considered).

5. Analysis and Discussion

The main aim of this paper is to investigate the emerging of new players that can support the process of marketing channels' digitalization. In particular, the attention has been focused on digital business model of new sales enablers considering the key services provided to SMEs for their digitalization strategy.

As highlighted by the cases analysed, the emergency situation generated by the Covid-19 pandemic has led to the emergence of new digital players that facilitate the digitization process of client companies, especially brand owners improving the digital sales strategy.

5.1 New actors

Digital sales enablers are digital players that support business customers in the development of an omnichannel strategy. The new digital players support an omnichannel go to market model of brand owner, especially considering the centrality of the digital channel. The emergency context has limited physical touchpoints, interaction with customers, and the traditional sales process.

In particular, in B2B perspective, the digitalization of marketing channels improved the demand of business services from SMEs, in order to launch the e-commerce platform, or to activate a relationship with the marketplace. The demand for services is also generated by a greater awareness

of the importance of digital in B2B relations (also due to the cancellation of trade fairs, essential for creating contacts in the B2B context) and the need to access specialized players characterized by strategic digital skills. The new digital players carry out consultancy activities to support companies, especially SMEs, in the process of optimizing the digital offer (text management, images, functions to be considered, etc.). In addition to this, the demand for solutions provided by digital sales enablers has also increased, which support companies in accessing the marketplace and managing various types of sales channels in a coordinated manner.

From a B2B2C perspective, the use of the digital channel proves to be necessary to meet the new needs of business customers determined by the inherent changes in the consumer market and in the face of a crisis situation. In fact, on the one hand, the new habits of consumers, more likely to search for information online and to use e-commerce, are requiring B2B and B2C companies to enhance the digital channel, both in terms of integrated marketing communication and on the front of sales and distribution. On the other hand, the Covid-19 pandemic has led to a growing demand for digital services by companies that are interesting to enhance their omnichannel offer, from a Crisis Driven Innovation perspective.

5.2 A new digital sales support

The digital sales enablers, in turn, have modified the business model considering various changes faced in 2020. These latter have required brand owners to improve the sales digitalization.

These changes have determined the emergence of new services and activities offered by digital actors, more oriented to a digital sales strategy. Femar Consulting has created a new version of its platform containing several updates. Brandon has activated a new e-procurement service considering the products. These positive changes that have characterized the new digital players have emerged in the face of an adaptation of their business model nowadays more oriented to a holistic digitalization process.

In particular, digital sales enablers support the interaction between brands and marketplaces, the integration of systems and platforms, the optimization of the sales process and related business processes.

The business model of the new digital players therefore presents several key activities, including the consultancy provided to allow business customers to use the potential of the digital platform. Femar Consulting, for example, supports the process of introducing the “technological solution within business processes, promoting their dynamics and making the internal order management flow more efficient” (Chief Operating Officer, Femar Consulting).

Brandon offers a digital export management service that covers all stag-

es of the value chain from the definition of the sales plan by country and by channel to the digitization of catalogues, order management, payment, logistics and product delivery to the customer. These services are particularly useful for SMEs, often characterized by limited resources both in terms of investments in marketing and in the implementation of their presence abroad.

Other activities carried out by digital sales enablers concern support for marketing and sales activities. Considering the significant impact of the pandemic on traditional sales activities (face to face meetings, trade fairs, etc.), companies have started a process of reviewing the more digital-oriented business models. This allows, and at the same time requires, a data driven approach. Companies have therefore requested a service from new digital players who are able to optimize sales data and facilitate their integration in omnichannel logic. Femar iCatalogue, for example, “offers its customers a value-added service functional to the definition of the new omnichannel order management strategy, guaranteeing a high degree of openness to dialogue through microservices (Service Bridge)” (Chief Operating Officer, Femar Consulting).

In addition, Brandon allows customer brands to increase local traffic to their site.

Brandon has established relationships with various national and international marketplaces to allow client brands to identify new business opportunities

5.3 A new digital sales consulting

The new digital players make various resources available to customers. The innovative solution consists of the technological platform and the reference technological support. Furthermore, considering the digital sales enablers, electronic catalogues for the e-commerce of the client brand can be provided or the same can be supported in accessing heterogeneous marketplaces.

The key activities of the business model of digital actors have changed over the Covid period. Digital sales enablers offer data driven value added services. In addition, business customers can also make use of the financial services, logistics services and information services that digital sales enablers can offer in partnership with other companies. Procurement and logistics operations are often made available by digital players, favoring a reduction in costs in terms of lead time and time to market.

Digital actors provide a holistic service for managing the sales process.

Brandon is characterized by a thoroughness of pre-sales, during and after-sales activities. Brandon carries out the potential assessment (in-depth analysis of the customer’s positioning and catalogue), the sales plan by

channel, by marketplace and by country. Brandon directly digitizes or optimizes the catalogue.

Among the advantages there is also the possibility of providing a variable initial investment, the presence of a team of professionals able to devise and develop a strategy and a digital sales plan. This provides a single point of contact to manage all operational activities. "These are all particularly relevant activities. It is as if the brand was selling to the end customer. Brandon manages the marketing and advertising budget as if it were the brand" (Chief Executive Officer, Brandon). There is a learning curve effect for suspension management (e.g., legal issues). Small companies may encounter difficulties when entering large marketplaces, considering their exposure to a strong imbalance in bargaining power. "Before gaining an expertise on how to manage cases, it takes years, few companies have the possibility to wait. The field is undergoing strong evolution, those who are experts today may not necessarily be experts tomorrow" (Chief Executive Officer, Brandon).

Femar focuses its activity "on the implementation of the omnichannel platform in order to achieve the goal of making it a 100% Made in Italy Unified Commerce system" (Chief Operating Officer, Femar Consulting). Alongside this core activity, it offers its customers a value-added service functional to the definition of the new omnichannel order management strategy, through a dedicated department.

Among the advantages of using the services provided by the sales enabler, in order to decrease the time to market and the lead time of its business clients, Femar supports "this main activity with consulting services dedicated to support and integration with the various third-party business systems parts and technology governance training. The last section of services provides consulting days to optimize the launch of the platform and its adoption thanks to targeted marketing strategies on the digital channel" (Chief Operating Officer, Femar Consulting).

5.4 A new network of value

The Brandon ecosystem network includes brands, B2B operators - wholesalers, distributors, logistics operators, full price operators, discount operators, vertical marketplaces, generalist marketplaces, marketplaces - organized by country.

"The network allows you to seize opportunities. In particular, consider the importance of a diversified offer. It is necessary strategically and tactically to have diversification. In 2020 Brandon entered other categories and other markets." (CEO, Brandon).

The network helps strengthen Brandon's positioning. Compared to Digital Agencies, Brandon manages the operational part and customer care,

compared to traditional distributors it presents a digital channel innovation. E-commerce service providers are focused by product category and are usually brand specialists. Brandon, on the other hand, is oriented towards different channels.

Femar has seen a change in its network of actors. “The difference compared to past years lies above all in the demand expressed by System Integrators who come into contact with our solution indirectly (through their customers who talk about iCatalogue) or directly (by doing spontaneous research because they understand that they must equip themselves of an adequate solution for omni/multichannel order management) to offer a complete spectrum of solutions to its customers, increasing their loyalty” (Chief Operating Officer, Femar Consulting). In addition, there has also been an evolution by the type of decision makers involved in the purchasing process, in fact the sales enabler has an average level of access in terms of skills and projects the company towards more structured companies from an IT point of view. “Before Covid, the trend was that even these projects were approached by marketing, while now the two main players are IT and Sales (in addition to ownership that is ultimately involved). This change in dynamics has led to a greater definition of the perimeter within which the project must move, also improving the integration dynamics that are the basis of the success of this type of project” (Chief Operating Officer, Femar Consulting).

6. Conclusions and managerial implications

Over the last few years, increasing attention has been paid by different organizations, towards the theme of digital innovation, considered mainly with reference to the role of digital technology in innovation development process. Digital innovation uses digital technology to develop innovative processes (Lyytinen et al., 2016) through which the components physical and digital come to be combined with each other (Lyytinen et al., 2016).

In the pandemic period digital technologies have proved remarkable potential to allow companies to adapt their business to new demands of the market, considering the constraints imposed by Covid-19.

From this perspective, crisis driven digital innovation has been developed in order to maintain a long-term relationship between a firm and its customers also in business market. In particular, the digitalization process has led to the transformation of the marketing channels related to distribution, communication and sales (Dimitrova et al., 2020). Considering the indirect channel, which traditionally sees presence of retailers (short indirect), wholesalers (long indirect) and other intermediaries, digitalization led to the emergence of marketplaces. In a different way the direct channel

considers the growth of the own e-commerce platform. In order to manage the changes related to the marketing channels, brand owners, mainly SMEs, required to access to external resources and capabilities.

New digital players support the process of digitalization. In addition, in the Covid period, digital players have changed the business model to respond to the needs of different customers in a timely manner. The business model of digital players influences, and is influenced by, the business model of customers. Especially in the Covid period, companies were forced to review their value demonstration defined by Anderson et al. (2006) as how a company demonstrates the advantages of the value proposition. The limits placed on face-to-face sales have led to growing attention to other channels in favor of digital sales. As highlighted by some scholars (Claussen and Halbinger, 2020; Srinivasan and Venkatraman, 2018), digital platforms are emerging today. The development of these platforms is influenced not only by the availability of new technologies and new communication tools (Baldwin and von Hippel, 2011), but also by the increase in demand for digital services.

In this scenario, this paper investigated the emerging of new players that can support the process of channels' digitalization.

Through the research, new digital players identified in digital sales enablers emerge. These actors support the digital transformation process of a company and its activities in a national and international context. Digital sales enablers support companies in developing a digital strategy, coordinating the use of different platforms including marketplaces, to identify new customers or strengthen relationships with acquired customers. The combination of all these solutions leads to an increase in the global presence of the players belonging to the network, facilitating international business relationships.

Digital sales enablers allow client brands to develop a customer oriented omnichannel strategy. In particular, the new digital actors are relevant for SMEs as they support the internationalization process and help the companies themselves to manage the effects of the economic crisis.

The new solutions proposed by digital players are data driven. Sellers, customer brands, can obtain information to improve their offer system and internal processes. The integration and coordination of platforms allows operating in a data management process perspective, supporting CRM activities. The latter generate benefits for sellers and brand owners including cost savings, improvement of the marketing process, improvement of the effectiveness and efficiency of the sales management process.

The new digital players sustain SMEs in improving the ability to present the offer system, considering the skills and competences related to the management of the digital offer.

The potential of technology can only be fully utilized by adopting a holistic approach, considering the possibility of co-creating value. The projects developed by digital actors involve not only IT managers but also marketing managers and sales managers.

In particular, this interaction is relevant considering the new sales approach more oriented to a pull perspective. Sales managers, marketing managers and IT managers cooperated among them in order to share relevant data related to customers, to take strategic decisions oriented to customer needs and to create a value solution. The optimization of services provided by digital sales enablers is founded on this internal interaction.

Research has limitations. Some emblematic cases are considered. Further research may identify other actors by considering the dynamics of interconnected relationships in a network perspective. The next developments of the research will concern the extension of the number of cases analysed and the deepening of their evolutionary trajectory from the point of view of the structure and dynamics of the activated and developed networks. Even the level of involvement of marketing and sales managers in project developed by digital actors can be further explored, with a consequent analysis of exchanged skills. In addition, the benefits received by Italian SMEs that have transformed their commercial strategy by making use of these new players will be investigated.

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