



KEY CRITICAL ASPECTS OF SMES IN B2B LEAD GENERATION: INSIGHTS FROM AN ITALIAN QUALITATIVE STUDY

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Abstract

Purpose. The aim of this study is to examine the key critical aspects of Lead generation (LG) that B2B SMEs must consider to successfully implement the process.

Design/methodology/approach. Given the complexity of the topic, the study relied on a qualitative abductive approach. Data collection combined 20 semi-structured interviews with selected experts, Italian B2B SMEs and marketing agencies, and the examination of secondary materials.

Findings. The results emerging from the analysis allow the identification of some key aspects of LG that B2B SMEs need to address for effective implementation. These aspects can be categorized into strategic and operational dimensions.

Practical implications. This study provides important managerial insights by highlighting the strategic and operational elements crucial for effective LG in B2B SMEs. By identifying these critical aspects, marketing managers gain a structured framework to enhance the strategic importance of LG initiatives and improve coordination with the sales function. Additionally, these insights offer practical guidance for SMEs, serving as a reference tool to evaluate organizational readiness and identify gaps before implementing LG processes. Overall, the findings support managers in making informed decisions, fostering alignment across functions, and ensuring that LG activities are both strategically grounded and operationally effective.

Originality of the study. The originality of this study lies in identifying three main strategic aspects (marketing strategy, lead-centric value creation, and digital culture) as key dimensions to be considered when adopting and developing an LG process. In addition, the research highlights three critical operational aspects (phygital marketing channel management, digital integration, and Marketing-Sales alignment) that emerge as essential for the effective execution of LG.

1. Introduction

In recent years, the rapid acceleration of digital transformation has reshaped business-to-business (B2B) contexts, exerting growing pressure on firms to adapt their strategies (Kyrrododa et al., 2025). Digital technologies are no longer peripheral tools but have become central enablers of competitive advantage and long-term relational exchange (Conti et al., 2023).

The academic literature offers several insights into the implications of digitalization in B2B environments. Digital transformation encourages firms to pursue innovation through the adoption of emerging technologies and the development of strategies aimed at enhancing operational performance (Shashi et al., 2025). Digital technologies improve information acquisition and analysis, enabling marketing managers to generate precise and actionable insights (Olan et al., 2025). Furthermore, new digital tools facilitate product design and customization (Beckers et al., 2018) and expand product functionalities (Wang, 2021). Additionally, the increasing shift toward online purchasing and the growing importance of digital touchpoints significantly shape the customer journey, moving it toward a cyber-physical environment and influencing marketing channel architecture as well as supplier integration (Bamberger et al., 2025; Kannan, 2017).

Although considerable attention has been devoted to the operational benefits of digital technologies, fewer studies have investigated their impact on relational development (Schepis & Kingshott, 2024). Recent contributions stress the importance of exploring how suppliers and customers perceive and engage with networks (Munksgaard et al., 2024). Technological innovations are seen as facilitators of long-term relationships and resource exchanges among network actors (Venetis & Ghauri, 2004), while also enabling new forms of interaction between buyers and suppliers (Hofacker et al., 2020).

At the same time, literature highlights several critical gaps. Research on Lead generation (LG) in B2B contexts indicates that few studies emphasize the need for a strategic approach. LG processes are still often treated primarily as sales-driven activities, despite evidence of the crucial role of Marketing in identifying and nurturing valuable leads (Pullins et al., 2017; Smith et al., 2006). The necessity of exploring the marketing function's contribution to LG also emerges from managerial evidence. Surveys reveal that most marketing experts consider LG essential (Digitalzone, 2024), while recent findings show that B2B companies prioritizing LG and lead management experienced significant revenue growth in 2024 (Demand Gen, 2024). Furthermore, firms increasingly aim to implement strategic plans centered on brand awareness and LG activities (Osservatorio B2B, 2023).

These gaps suggest a limited systemic understanding of the key challenges B2B companies face in increasingly digitalized markets when creat-

ing new relationships through effective LG strategies. This need for further exploration is particularly relevant for small and medium-sized enterprises (SMEs). While digital channels provide SMEs with significant opportunities for performance improvement, growth, and competitiveness (Liao et al., 2023; Taiminen & Karjaluoto, 2015), many continue to underutilize these technologies or struggle to fully leverage their potential (Escoz Baragan & Becker, 2025; Faiz et al., 2024).

Therefore, the purpose of this study is to examine the key critical aspects of LG that B2B SMEs must consider to successfully implement the process. Thus, the research question of this study is: How can the Lead generation process be implemented by B2B SMEs? We address this research question through an empirical study conducted within this context.

This paper is structured as follows. First, we introduce the literature on SMEs in the new B2B context and LG process; then, we outline the research methodology. Last, we present findings, discussions, and conclusions.

2. Literature review

2.1 Digital transformation: the key role of B2B relationships

Digital transformation has generated implications across multiple contexts, with new technologies reshaping and redefining the nature of interactions in the B2B domain (Kyrdoda et al., 2025). This environment is characterized by exchanges embedded in medium- to long-term relationships and involving complex goods and services.

The complexity of business relationships has been extensively analyzed by the IMP Group (Snehota & Håkansson, 1995). In the marketing discipline, the identification and recognition of buyer–seller relationships, as well as the concept of “networks” in business markets (i.e., “markets-as-network”), are among the most significant contributions of the IMP Group’s founders (Ford et al., 1998; Håkansson, 1982). These theoretical concepts explain a largely overlooked empirical phenomenon: suppliers and customers closely interact, mutually modifying their relationships, rather than basing all decisions solely on price (Håkansson, 1982). Each actor can be understood as a node within multiple relationships, inherently connected to other organizations and forming a network structure. Business markets are thus grounded in networks of actors who interact and exchange resources. These exchange systems (Prenekert & Hallen, 2006) are highly interconnected, as interactions within a single relationship inevitably influence all other interactions across the network (Snehota & Håkansson, 1995).

Recent literature highlights the importance of examining how suppli-

ers and customers perceive and engage with their surrounding networks (Munksgaard et al., 2024). Digital technologies hold the potential to fundamentally transform interaction mechanisms (Hofacker et al., 2020). They not only support the maintenance of long-term relationships but also enable the creation of new connections (Venetis & Ghauri, 2004). Academic contributions further suggest that technological innovations shape business relationships by raising new questions regarding their role in relationship development, the reorganization of activities, and the adoption of innovative tools that can support such changes within firms (Schepis & Kingshott, 2024). Lundin and Kindström (2023) underscore that new technologies increasingly facilitate relationships between suppliers and customers, strengthening the potential of customer management processes. They also emphasize the need to explore the various stages of customer–supplier interaction and identify potential obstacles along with corresponding strategic priorities. Nonetheless, Ohiomah et al. (2019) point out the persistent lack of academic research and practical guidance on the effective understanding, attraction, and management of leads.

In this context, B2B customer engagement requires firms not only to identify decision makers within external stakeholder networks but also to target the appropriate types of customers through prospecting efforts (Rodriguez & Peterson, 2012). While the business context has traditionally relied on relationships built through offline marketing channels such as face-to-face meetings, trade fairs, and on-site visits, B2B firms are increasingly compelled to attract and engage potential customers through digital marketing channels, including email campaigns, websites, and social media platforms (Isabella et al., 2025; Järvinen & Taiminen, 2016).

Scholars have investigated the adoption and management of digital marketing channels primarily in large or highly innovative firms (Cenamora et al., 2019), but research focusing on SMEs in traditional industries remains scarce (Soto-Acosta, 2020). Yet, digital marketing channels can provide SMEs with numerous benefits, including broader market reach, enhanced visibility, and improved customer engagement at relatively low costs (O'Dwyer et al., 2009). Despite these advantages, SMEs face significant challenges in channel integration. Resource constraints — financial, human, and informational — often hinder their ability to design and implement effective strategies. Managing both digital and traditional channels simultaneously can result in duplicated activities, inconsistent messaging, and inefficiencies (Yan & Pei, 2011). Moreover, SMEs frequently lack the managerial expertise and technical skills required to harmonize channels, while customers' seamless use of multiple touchpoints adds complexity to monitoring and coordination. Overcoming these difficulties requires employee commitment, continuous training, and adequate IT infrastructure, which are critical to ensuring effective implementation (Kolbe et al., 2022).

2.2 Lead generation

In recent years, an increasing number of studies have highlighted how many B2B companies have begun reconfiguring their Lead generation (LG) and management activities (Terho et al., 2023). LG represents the first phase of the demand generation process and is primarily focused on attracting and acquiring potential customer contacts (Hall, 2023; Isabella et al., 2025; Saeidi & Hollensen, 2024). Several scholarly contributions have sought to identify the specific activities that characterize this process (Cooper & Budd, 2007). LG is particularly significant as it enables the identification of high-value leads, which can subsequently be managed by Marketing and converted into actual customers by Sales (Pullins et al., 2017).

Data collected through LG processes primarily concerns firm characteristics such as demographics, sector, and employee numbers, and can be gathered directly or indirectly. Direct data collection occurs through both traditional channels (e.g., trade fairs, conferences, events, seminars) and digital channels (e.g., company websites, industry portals, online conferences, webinars, and social media). While traditional channels facilitate more personal and long-term relationships, digital tools allow for the rapid collection of detailed and updated information, making social media particularly relevant even in B2B contexts (Chelariu & Sangtani, 2009; D'Haen et al., 2016; Rodriguez & Peterson, 2012; Wilcox & Sussman, 2014).

Indirect data collection, by contrast, is based on the purchase of external databases from specialized providers (Ahmed & Kowalkowski, 2025; Mojir & Anbil, 2025). Although such datasets provide rapid access to large contact lists, they are often costly and of limited quality due to obsolescence, incompleteness, or poor alignment with the firm's target profile (D'Haen & Van den Poel, 2013; Dale Wilson, 2006). For this reason, firms increasingly prefer direct data collection, which, despite being time-intensive and yielding fewer contacts, provides more accurate and updated information derived from real interactions (D'Haen & Van den Poel, 2013).

These initial data represent the first step for engaging potential customers and identifying the most suitable customer profiles (Rodriguez & Peterson, 2012). However, relying on a single data source is increasingly rare and may prove problematic in lead acquisition (Baecke & Van den Poel, 2012). Marketing professionals must collect detailed information to better understand customer needs, buying influences, and decision-making processes (Rodriguez & Peterson, 2012). Yet, several studies show that a large proportion of collected contacts often remain unreachable by sales representatives (D'Haen & Van den Poel, 2013; Sabnis et al., 2013). Such inefficiencies typically arise when internal processes are poorly systematized, activities lack definition, or there is insufficient alignment between Marketing and Sales.

Overall, the literature reveals that customer acquisition remains a fragmented area, requiring further systemic investigation (D'Haen & Van den Poel, 2013; Saeidi & Hollensen, 2024).

Historically, LG has been examined primarily from a sales perspective, with early research focusing exclusively on sales activities in relation to established business practices (Smith et al., 2006), while overlooking several critical shortcomings. Delegating LG solely to Sales has been shown to be overly complex and risks losing potentially profitable contacts. More recent contributions have begun to emphasize the importance of Marketing and its central role in LG (Isabella et al., 2025). Indeed, according to Adamson (2022), digital technologies support the B2B customer buying process throughout all stages, and sellers cannot operate effectively in isolation. Suppliers must recognize that the real challenge today lies in providing the right information at the right time; therefore, the most advanced B2B companies are comprehensively overhauling their commercial operations to address contemporary needs more effectively. Thus, while some studies stress the growing operational significance of LG processes (Hall, 2023), their strategic importance remains underexplored (Pullins et al., 2017; Smith et al., 2006).

3. Methodology

The research aims to investigate the key critical aspects of LG that B2B SMEs must consider in order to successfully implement the process. This topic is particularly relevant in Italy and in other economies predominantly structured around SMEs. Italy represents a compelling context for this investigation, as SMEs account for 99% of all firms (Economy Up, 2025). In recent years, these firms have intensified their investments in digital technologies, with the majority of Italian SMEs (70.2%) having achieved at least a basic level of digital intensity (European Commission, 2025). Within this landscape, the mechanical industry has long been a strategic sector of Italian manufacturing, remaining one of the most traditional and B2B-oriented industries. In 2025, it continues to represent a cornerstone of the national economy, renowned for the quality, innovation, and competitiveness of "Made in Italy" (Ufficio Studi Confartigianato, 2025).

To address the main research question, how the LG process can be implemented by B2B SMEs, a qualitative approach was adopted.. This approach is consistent with the complexity of the topic that is analyzed as it is particularly relevant for the analysis of organizational practices across different settings, providing a comprehensive description of the main features that characterize them (Ichikawa, 2017). Through the exploration of complex and varied scenarios, qualitative research provides a comprehensive

understanding and in-depth insights into the contextual factors involved (Pettigrew, 2012). In addition, we applied an exploratory research strategy that enables the examination of a phenomenon that cannot be easily separated from its context (Yin, 2009).

The primary data collection method was the semi-structured interview, which offers flexibility in exploring the topic while ensuring that all key aspects and relevant concepts are addressed. Qualitative interviews are particularly effective for investigating social and cultural phenomena, emphasizing interpretation and are widely recognized as a crucial tool for exploring the B2B context (Andersson et al., 2024).

Between September 2024 and February 2025, 20 semi-structured interviews were conducted, averaging one hour each, either in person or via Microsoft Teams. All interviews were recorded and transcribed.

To explore the research topic, two samples within the Italian mechanical context were targeted: B2B SMEs and B2B marketing agencies. The first sample allowed for an internal perspective, examining how Italian SMEs manage the LG process in practice, including their strategies, operations, priorities, and internal challenges. The second sample provided an external perspective, offering a more holistic understanding of the critical factors that SMEs must consider to ensure successful implementation, based on the experience and insights gained through daily work with their B2B SMEs' clients. By combining these two complementary perspectives, the study captures both the practical realities and strategic imperatives of LG, ensuring a richer and more nuanced analysis that accounts for multiple viewpoints (Spiggle, 2003).

The 20 key informants were purposefully selected (Guest et al., 2006). A screening procedure was applied to potential informants to validate their relevant expertise, professional experience, and familiarity with the research topic, thereby guaranteeing their ability to provide trustworthy and meaningful insights (Palinkas et al., 2015; Alvesson & Ashcraft, 2012).

Concerning the first sample (Table 1), Italian B2B SMEs, the interviewees were selected from among the heads of the Marketing or Sales functions, or a member of the company's management team.. To ensure a sample characterized by heterogeneity in the implementation of the LG process and to conduct a comprehensive analysis of the topic, companies from different geographical areas were included.

Regarding the second sample, Italian B2B marketing agencies (Table 2), the interviewees were the individuals with the greatest visibility over the LG processes carried out for their B2B SMEs' clients. The selection of interviewees was primarily based on two criteria: professional experience and established knowledge of the subject under investigation. Similarly, to ensure heterogeneity in the implementation of LG processes and to conduct an in-depth analysis of the topic, agencies operating in different geographi-

cal areas were included.

Table 1. Selected Italian B2B mechanical SMEs

N	# Key informant	Description	Location	Role of key informant
1	KI 1	X-ray tubes and protective sheaths for radiology	Milan	Chief executive officer
2	KI 2	Production and sale of alloy wheels	Brescia	Marketing manager
3	KI 3	Mold production and sheet metal processing	Turin	Commercial director
4	KI 4	Sheet metal fabrication with robotic welding	Bergamo	Marketing manager
5	KI 5	Industrial components manufacturing	Como	Marketing manager
6	KI 6	Industrial textile sewing machines production	Verona	Marketing manager
7	KI 7	Production of industrial gaskets and components	Brescia	Chief executive officer
8	KI 8	Mechanical systems for industrial filtration	Treviso	Marketing manager
9	KI 9	Manufacturing dosing and packaging machines	Milan	Marketing manager
10	KI 10	Food equipment for confectionery industry	Bergamo	Marketing manager

Source: author's elaboration.

Table 2. Selected Italian B2B Marketing Agencies

N	# Key informant	Location	Role of the key informant	Years of experience
1	KI 11	Milan	Owner	40
2	KI 12	Milan	Marketing and Communications Director	30
3	KI 13	Milan	Marketing and Communications Director	30
4	KI 14	Milan	Project manager	23
5	KI 15	Rome	Project manager	20
6	KI 16	Milan	Head of digital	20
7	KI 17	Catania	Co-founder	20
8	KI 18	Arezzo	Sole Director	20
9	KI 19	Lecce	Chief executive officer - Head of digital	19
10	KI 20	Bergamo	Project manager	18

Source: author's elaboration.

To strengthen the rigor of the study, data triangulation was applied by combining evidence from multiple sources. Alongside semi-structured interviews, information was collected from corporate websites, archival materials, reports, and other organizational documents (Dubé & Paré, 2003).

The integration of these sources enhanced both the validity and robustness of the analysis. Data collection proceeded until thematic saturation was reached, namely the point at which no new themes or insights emerged from additional evidence (Guest et al., 2006).

To explore the LG process in Italian B2B SMEs, an abductive approach was employed (Dubois & Gadde, 2002). This method is particularly valuable for developing new theoretical insights grounded simultaneously in existing literature and in empirical evidence. Abduction enables a continuous interplay between theoretical constructs and practical observations (Dubois & Gadde, 2002).

Data analysis followed a manual coding process to support a multi-layered exploration of theoretical concepts (Saldaña, 2021). This approach fostered direct engagement with the data, enabling systematic comparison in line with Corbin and Strauss (2014), shifts in perspective, and the generation of diverse interpretative insights.

The coding process unfolded in three stages. First-order coding involved an inductive examination of empirical material to capture nuances and distinctive elements. In the second stage, data were grouped into more abstract categories informed by both empirical findings and existing literature, thereby linking specific observations to broader conceptual themes. The final stage established relationships among categories, integrating them into aggregate dimensions that reflected underlying patterns and interactions.

Data were analyzed iteratively, with emerging themes continuously compared with prior literature to ensure consistency, refinement, and theoretical grounding (Wolcott, 1994).

4. Findings

4.1. Reactive motivation toward LG implementation

Based on the interviews conducted across both samples, the analysis indicates that SMEs' willingness to implement a LG process typically arises from the perceived need to respond to competitors' actions.

"Sometimes companies do not have a clear objective, but feel the need to adapt to what their competitors are doing." (KI 13)

This reactive approach is often driven by the intention to adopt new channels without a clear understanding of the strategic objectives underlying LG. As a result, SMEs tend to focus on practical and immediate issues, responding to urgent short-term needs rather than developing a structured strategy for LG implementation. Instead, their attention is frequently directed toward tools and the necessity of enhancing brand awareness.

“We are focusing on increasing brand awareness to improve the visibility of the brand and products, and to reach and engage a larger B2B audience. This involves optimizing the corporate website to improve visibility and expanding content on blogs and social platforms such as LinkedIn and Meta (Facebook/Instagram).” (KI 10)

4.2. Perceived importance and actual investments in LG

The analysis of the collected data revealed that the LG process is marked by a discrepancy between the importance perceived by SMEs and the actual investments devoted to its implementation. In fact, on the one hand, SMEs perceive LG as a useful process to inform and establish an initial connection with potential customers, with the expectation of building long-term relationships.

“The main intangible goals are to strengthen our visibility and to reach potential clients seeking our solutions. This approach ensures that potential customers feel valued and informed, increasing the likelihood of them choosing us as a trusted partner.” (KI 6)

On the other hand, the findings suggest that SMEs rarely invest consistently and over the long term in LG. Instead, they tend to allocate minimal budgets to LG-related marketing activities, which are often interrupted when other priorities arise.

“Leadership tends to focus on urgent operational matters, to reap the benefits of the process, investments must not be interrupted, as results emerge in the long term.” (KI 19)

Furthermore, all SMEs emphasized that traditional channels remain central for meeting new potential customers.

“The main channel through which we meet potential customers is still direct contact, either by phone or at trade fairs.” (KI 5)

A major reason for the lack of sustained LG implementation lies in negative past experiences with external partners, which have fostered distrust toward new collaborators who might otherwise support them in developing LG strategies.

“There is little trust in marketing experts due to past experiences, and consequently the budget allocated is minimal.” (KI 11)

4.3. Misalignment between Marketing and Sales

Regarding the internal adoption of LG, SMEs reported significant challenges in strategically managing activities, primarily due to misalignment between Marketing and Sales. The analysis revealed that these two functions often pursue different objectives and lack equal recognition within

firms. Marketing is typically perceived as a support function—responsible for producing materials, managing call centers, and customer care—often delegated to junior staff with limited decision-making power and minimal digital expertise. By contrast, Sales is responsible not only for initial contact with potential customers but also for managing and closing deals, and it generally receives greater investment in training.

“It is the sales function that interacts directly with clients. For example, sales representatives meet customers and rely on marketing materials—such as presentations or videos—that support the sales process.” (KI 7)

SMEs are largely aware of this imbalance and acknowledge the need to improve internal communication to ensure that LG processes are more transparent and coordinated.

“It can help enhance internal communication across departments, ensuring that everyone works toward the same objectives and moves in a coordinated way.” (KI 2)

The analysis also revealed that communication issues extend beyond departments to the tools adopted internally.

“They have always used the same software or hardware, but these systems do not communicate with each other.” (KI 16)

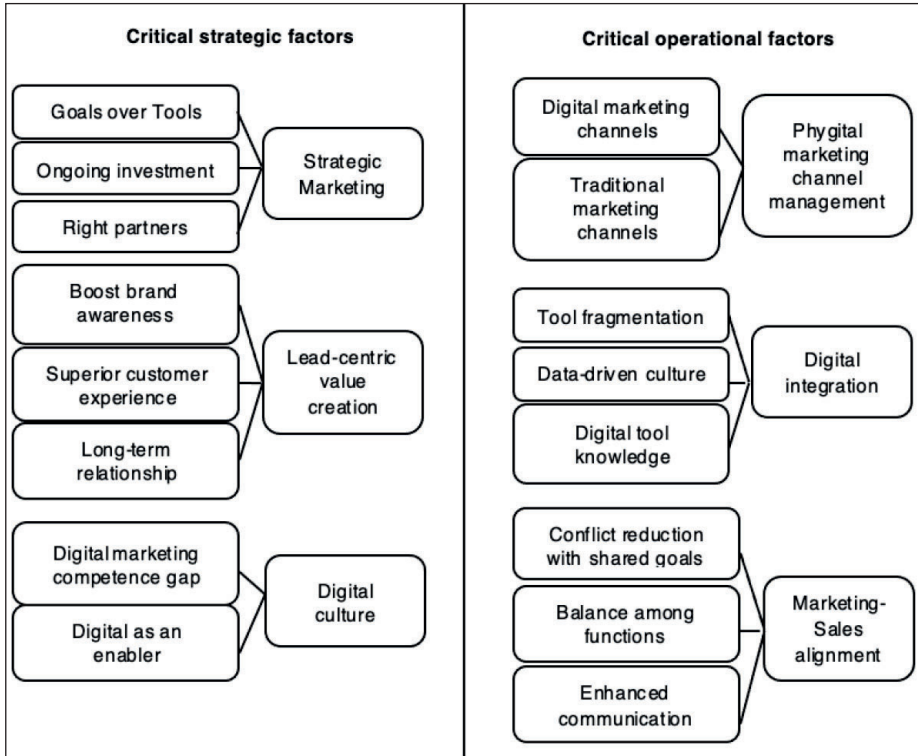
The main reasons identified for these challenges include limited knowledge of available tools and the low value attributed to data and its potential use.

“It is necessary to know which tools exist, how to use them, and how to prioritize them correctly. The utility of data is not understood.” (KI 14)

5. Discussions

The results emerging from the analysis allow the identification of several critical aspects of LG. In particular, these critical aspects represent the aggregate dimensions reflecting the abductive reasoning process. The analytical process did not follow a linear path; rather, it benefited from constant alignment and iterative refinement of the aggregate dimensions based on the empirical evidence obtained from interviews and secondary data. In detail, the critical aspects of LG that B2B SMEs must consider for successful implementation can be divided into strategic factors (“strategic marketing”, “lead-centric value creation”, and “digital culture”) and operational factors (“phygital marketing channel management”, “digital integration”, and “Marketing-Sales alignment”), as illustrated in Figure 1.

Figure 1. Critical strategic and operational aspects of LG



Source: author's elaboration.

5.1. Critical strategic aspects of LG

The first dimension is “strategic marketing”, which comprises three themes: “goal over tools”, “ongoing investment,” and “right partners”. A central challenge for SMEs in implementing LG lies in developing a goal-oriented rather than tool-oriented vision. Many firms approach the process reactively, focusing on tools or imitating competitors’ actions without a clear strategic rationale. This fragmented and short-term perspective prevents the establishment of coherent objectives and structured planning. Recent studies also emphasize the strategic importance of this initial phase (Isabella et al., 2025; Järvinen & Taiminen, 2016), even though it remains underexplored (Pullins et al., 2017; Smith et al., 2006). Evidence from our research further shows that SMEs have not yet fully grasped the strategic role of LG. Another key aspect concerns the need for ongoing investment. SMEs often activate LG initiatives only in response to immediate operational pressures, allocating minimal budgets that are quickly discontinued once urgent needs are met. This reactive allocation reflects the absence of

a marketing culture, as Marketing is frequently undervalued, treated as a support function, and excluded from strategic decision-making. Early research on B2B LG also highlighted this issue by focusing almost exclusively on sales activities within established business practices (Smith et al., 2006). Ensuring continuity and sustained commitment is therefore crucial, particularly in a digital environment that requires constant adaptation and updating. Finally, the selection of appropriate partners, both internal and external, emerges as a strategic priority. SMEs often lack clarity regarding the professional skills required to manage LG effectively and remain cautious toward external consultants due to past negative experiences. Such mistrust risks limiting investment and undermining collaborative strategies that could strengthen LG processes. This issue is particularly relevant in B2B contexts, where firms operate within networks of interdependent actors whose interactions and exchanges of resources create systemic effects (Prenekert & Hallen, 2006; Snehota & Håkansson, 1995).

The second dimension is “lead-centric value creation”, composed of “boost brand awareness”, “superior customer experience”, and “long-term relationships”. For SMEs, LG is closely tied to the creation of value centered on customer needs and relationships. A primary focus is on strengthening brand awareness and reputation, as visibility and recognition are essential for positioning firms as reliable and established actors. Enhancing brand awareness not only supports differentiation but also increases the likelihood of attracting potential customers actively seeking tailored solutions. This finding is consistent with prior studies highlighting the role of LG in identifying high-value leads (Pullins et al., 2017) and with research showing that new technologies allow SMEs to improve visibility and reputation (O’Dwyer et al., 2009). From a managerial perspective, many firms now aim to implement strategic plans explicitly focused on brand awareness and LG (Osservatorio B2B, 2023). Equally important is the customer experience. SMEs strive to ensure that interactions across multiple B2B channels are consistent, informative, and responsive to evolving customer expectations. Continuous improvement in systems and practices is seen as key to fostering satisfaction and signaling attentiveness to customer needs. Finally, cultivating long-term relationships is considered critical. Customer loyalty is perceived as a central outcome of successful LG, with durable partnerships enabling competitive advantage and sustained business growth. This aligns with the relational nature of B2B contexts, where inter-organizational networks are built on relationships that enhance customer management processes (Lundin & Kindström, 2023).

The last dimension is “digital culture”, which includes “digital marketing competence gap” and “digital as an enabler”. The findings reveal a significant gap in SMEs’ digital competences. Although marketing roles may exist, in-house expertise with digital tools is often limited or missing,

generating uncertainty and even resistance, particularly toward social media. This lack of skills prevents Marketing from integrating effectively with product specializations and represents a major barrier to the strategic use of technology in LG. At the same time, digitalization should increasingly be recognized as an enabler. Many firms already use business intelligence and data-tracking tools, but their application remains restricted to operational monitoring rather than strategic decision-making. Viewing digital technologies as enablers rather than mere tools is therefore essential. By embedding digital into organizational processes, SMEs can improve efficiency, support data-driven decision-making, and ultimately enhance LG effectiveness. These insights are supported by existing literature, which emphasizes that employee commitment, training, and adequate IT infrastructure are critical to overcoming such difficulties and ensuring effective implementation (Kolbe et al., 2022).

5.2. Critical operational aspects of LG

The first dimension is “phygital marketing channel management”, composed of “digital marketing channels” and “traditional marketing channels”. SMEs continue to rely heavily on physical channels for LG. Word-of-mouth remains the most powerful driver of new business, as satisfied customers frequently recommend solutions to peers or reconnect with suppliers when moving to new firms. Trade fairs also play a pivotal role, serving as hubs for networking, relationship building, and market visibility. Participation in national and international exhibitions enables firms to showcase products, strengthen positioning, and secure valuable contacts. Direct interactions — whether through phone calls, on-site visits, or demonstrations in dedicated showrooms — are still perceived as highly effective in fostering trust and generating business opportunities. Alongside these traditional practices, digital channels are increasingly used to enhance visibility and engagement. Corporate websites function as entry points for potential customers, while LinkedIn is viewed as the most effective social platform for awareness building. Email marketing, newsletters, and online publications further support communication, particularly when tailored with case studies or follow-ups after events. Recent literature confirms that B2B firms are compelled to attract and engage potential customers through digital marketing channels such as websites, emails, and social media (Isabella et al., 2025; Järvinen & Taiminen, 2016).

The second dimension is “digital integration”, composed of “tool fragmentation”, “data-driven culture”, and “digital tool knowledge”. A central challenge for SMEs lies in the fragmented use of digital tools. Companies often adopt multiple platforms for individual products or activities, yet

these remain disconnected and fail to communicate with each other. This lack of integration undermines efficiency and prevents the development of coherent LG processes. Integration across channels—not only among digital platforms but also between digital and traditional ones—has been identified as a critical challenge in literature. SMEs frequently lack managerial expertise and technical know-how to harmonize channels, and the seamless use of multiple channels by customers adds further complexity to monitoring and coordination. At the same time, relying on a single source for data collection is increasingly rare and may prove problematic in LG contexts (Baecke & Van den Poel, 2012). A closely related issue is the limited diffusion of a data-driven culture. Although data are potentially powerful, it is rarely collected systematically, and when tracking occurs, it is often incomplete or poorly configured. As a result, firms struggle to interpret data outputs and fail to exploit them for strategic decision-making. Finally, SMEs display insufficient knowledge of digital tools. Many are unaware of the range of solutions available, how to use them effectively, or how to prioritize them according to their needs. This lack of digital competence constrains the capacity to leverage technology as an enabler of LG.

The third dimension is “Marketing-Sales alignment”, composed of “conflict reduction with shared goals”, “balance among functions”, and “enhanced communication”. A critical aspect of LG in B2B SMEs is the coordination between Marketing and Sales. These functions often operate with different objectives and approaches, generating tensions and inefficiencies in managing potential customers. This issue is well documented in the literature, where research on B2B LG has historically focused primarily on sales activities and their relation to widely adopted business practices (Smith et al., 2006). More recent studies, however, emphasize that marketing experts need to collect detailed information on potential customers to better understand their needs, buying influences, and purchasing processes (Rodriguez & Peterson, 2012). Ensuring shared goals between Marketing and Sales is essential to reduce conflicts and foster collaboration, enabling both teams to work toward common outcomes. Achieving a balance in responsibilities and recognition is equally important. Marketing must not only provide content, insights, and communication materials to support sales activities, but also plan LG strategically at the organizational level. Sales representatives remain central as the primary actors interacting directly with potential customers, a role confirmed by prior research (Smith et al., 2006). Strengthening internal communication between Marketing and Sales enhances transparency and coordination across the firm. This integrated approach ensures synergy between the two functions, enabling a more seamless and efficient LG process, while improving the overall customer experience and organizational performance. Importantly,

such alignment can help prevent a large proportion of collected contacts from remaining unreachable by sales representatives (D'Haen et al., 2016; Sabnis et al., 2013).

6. Conclusions

This research aims to examine the critical aspects of LG that B2B SMEs must address to successfully implement the process. The originality of this study lies in identifying three main strategic aspects (marketing strategy, lead-centric value creation, and digital culture) as key dimensions to be considered when adopting and developing an LG process. In addition, the research highlights three critical operational aspects (phygital marketing channel management, digital integration, and Marketing-Sales alignment) that emerge as essential for the effective execution of LG.

This study contributes to filling some gaps in existing literature. First, only a few studies have investigated how digital marketing channels can be leveraged by firms to strengthen relationships with potential customers (Schepis & Kingshott, 2024). The literature remains scarce in terms of research exploring how suppliers and customers perceive and engage within networks (Munksgaard et al., 2024). The present study emphasizes that SMEs, at a strategic level, must foster a digital culture that supports the integrated management of digital technologies, overcoming tool fragmentation and the lack of coordination across both digital and traditional channels. Second, prior research has highlighted the lack of a strategic approach to LG in B2B contexts and the persistent misalignment between Marketing and Sales (Pullins et al., 2017; Smith et al., 2006). This study addresses this gap by underlining that the introduction of a marketing-driven strategic orientation is essential for the effective adoption of LG. At the operational level, moreover, alignment in terms of activities, communication, and role balance between Marketing and Sales has become indispensable.

The research also offers relevant managerial implications. The identification of both strategic and operational critical aspects provides marketing managers with a framework to elevate the strategic relevance of LG processes and to better balance power dynamics with the sales function. Furthermore, these aspects can serve as a practical checklist for SMEs, enabling them to assess their readiness to implement an LG process.

In addition to these contributions, the study acknowledges some limitations and directions for future research. The empirical focus is on the Italian context, suggesting that cross-country comparative studies could provide additional insights. Similarly, as the analysis is centered on the mechanical sector, future research could extend the investigation to other industries. Moreover, this study is based on qualitative interviews. Future investiga-

tions could expand the sample size and employ in-depth case studies to explore in greater detail the characteristics of the identified critical aspects and potentially uncover additional factors relevant for SMEs. Finally, this research does not consider the impact of specific emerging technologies such as Artificial Intelligence (AI). Future studies could explore how AI influences the overall process and, more specifically, the activities related to LG within the B2B context. Indeed, AI is considered a core competence for ensuring long-term competitive advantage (Sahoo et al., 2024), as it enables firms to process large datasets, generate insights into customer and partner behavior, eliminate operational inefficiencies, and mitigate risks (Mikalef et al., 2023). AI supports the alignment of partner needs with internal capabilities, facilitating improvements in reducing delivery times and enhancing responsiveness to market dynamics (Sahoo et al., 2024). Additionally, Generative AI (GenAI), a rapidly evolving application of AI, is transforming marketing and extending its influence across various sectors, enhancing organizational performance and providing strategic competitive advantages (Kumar et al., 2025).

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