Enhancing the B2B Selling Process Through Social Media

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Abstract

This study provides insights into understanding social media utilization in the B2B selling process. More specifically, this research details how the different functional blocks of social media are leveraged to benefit the various stages of the selling process. This study adopts a multiple case study design, including six cases from technology-related Canadian firms. Overall, findings show that the functional blocks of social media are mostly leveraged in the prospecting and preapproach stages of the selling process. Furthermore, the marketing strategy of the seller firm seems to influence which functional blocks are leveraged in the process. At last, findings also show that social media should be complemented by analytical tools and traditional media to optimize the selling process with higher lead quality and to facilitate trust-building with potential and existing customers.

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1. Introduction

Social media has been an emerging trend in the marketing and sales literature and is becoming increasingly important for a firm's marketing communication (Andersson and Wikstrom, 2017). Research shows that social media is an essential facilitator of customer relationships (Agnihotri et al., 2012), that firms benefit from using it to build relationships (Andersson and Wikstrom, 2017) and that its use positively affect sales performances (Rodriguez et al. 2012). However, despite extensive research in the B2C context, much less is known about its use in B2B settings (Keinanen and Kuivalainen, 2015; Lashgari et al., 2018). Among recent studies centered on social media in the B2B context, Moore et al. (2013) examined the extent to which salespeople use social media tools in B2C and B2B environments. The latter revealed that B2C and B2B salespeople do not use the same categories of social media and, thus, do not leverage this novel technology the same way. Subsequently, Moore et al. (2015) provided more details in regards to social media usage in the B2B selling process and validated that salespeople do use them to a substantial extent. Moreover, Diba et al. (2019) provided a better understanding of the various interactions that social media can have over the organizational buying process to ultimately find that social media is relevant in each stage of the process. Given the interrelated nature of the B2B buying and selling processes as well as evidence from Moore et al. that salespeople do use social media, this study aims to address the gap that exists in regards to social media use in different stages of the B2B the selling process.

The purpose of this research is to **explore how social media can enhance the B2B selling process in Canadian selling firms**. Accordingly, this research adopts three research objectives: (1) Investigate which steps of the selling process benefit the most from social media

use; (2) Explore how social media is integrated in the marketing and sales strategies of B2B sellers and; (3) Explore how social media are leveraged to benefit the selling process.

This research will help several key groups of people from the academic, sales, and marketing domains. First, researchers engaged in social media and sales research will benefit from the theoretical contributions. In fact, the findings of this study deepen our current understanding of how social media enhances specific stages of the selling process. Oppositely to what had been suggested previously, this study found that social media platforms and applications are not directly used in every step of the selling process. Also, the findings show that the marketing strategy of the firms influence which social media functional blocks are leveraged in the different stages of the selling process. Second, managers from seller firms and salespeople will benefit from the managerial contributions of this study. It provides new insights regarding the complementary elements that increase the potential benefits of social media to selling practices. More specifically, this study suggests that social media activities should be complemented with analytical tools in the early stages and then replaced by traditional media in the later stages of the selling process. Different tools are now available for managers to track the content they produce and the users that interact with it to increase the overall quality of the leads they generate. Then, the multiple cases on which this study is based suggest that salespeople should maintain relationships with their clients using traditional media such as phone calls and face-to-face meetings.

This research adopted a multiple case study approach based on eight interviews from six companies, which we refer to as cases in this study. Each case was built around a Canadian technology firm selected based on several inclusion criteria. The cases were built on

in-depth interviews with key individuals involved in the social media activities and selling process of their firm.

The thesis is organized as follows. It starts with a literature review of social media, the B2B selling process, and buyer-seller relationships. The literature review is followed by a detailed description of the methodology used in this thesis. The next section presents the analysis and findings, which introduces the insights observed from the cases. The thesis concludes by discussing the theoretical and managerial implications of the results, the limitations of the study, and suggests topics for further research.

2. Literature review

2.1 The functional blocks of social media

A recent study by Kietzmann et al. (2011) introduced the seven functional building blocks of social media (i.e., identity, conversation, sharing, presence, relationships, reputation, and groups) via the social media honeycomb model. With this model, the authors introduced the fundamental implications of each block to B2C firms. Eight years later, Diba et al. (2019) proposed an updated version of the honeycomb model explaining "the functional traits of different SM activities to B2B executives" (Diba et al., 2019, p. 1483). In this section, the seven functional blocks of social media will be reviewed along with their implications for B2B firms as proposed by Diba et al. Before diving in on each functional block, it should be noted that the blocks are not mutually exclusive and do not all have to be present in a given social media activity (Kietzmann et al., 2011). The building blocks are constructs that allow managers and researchers to "understand how different social media functionalities can be configured" (Kietzmann et al., 2012, p.110).

Identity represents the extent to which users reveal themselves on the platform (Kietzmann et al., 2011). It can include disclosing identifying information such as name, age, gender, profession, and location (Kietzmann et al., 2011). In a B2B context, *identity* can refer to corporate identity or brand identity (Diba et al., 2019). B2B firms can use social media to create their own identity and gradually build a following upon the latter (Diba et al., 2019).

Conversation refers to the extent to which users communicate with each other in a social media setting (Kietzmann et al., 2011). Many social media are designed to facilitate conversations among groups and individuals and therefore allow users to meet new people and to be aware of new ideas (Kietzmann et al., 2011). Conversation on social media can result in a variety of outcomes. Some conversations result in the synchronous exchange of short and ephemeral messages (e.g., Twitter) while others are more about rich and lengthy discussions that can be traced back (e.g., blogs). In a B2B environment, communication is networked and involves multiple intra-business and inter-business interactions (Diba et al., 2019). Diba et al. (2019) suggest that *conversations* include various topics such as: "discussions around needs for specific solutions, product training, online product demonstrations and comparative positioning of one offering versus its competition." B2B marketers use conversations on social media to connect with their target audiences and attract the attention of potential suppliers and customers (Diba et al., 2019).

Sharing is the extent to which users exchange, distribute, and receive content (Kietzmann et al., 2011). This block is tightly related to the *conversation* block, and as suggested by Diba et al. (2019), it relates to the content that is shared rather than the users sharing it. In the B2B context, *sharing* mostly occurs among parties involved in an existing relationship.

Presence represents the extent to which users know if others are accessible (Kietzmann et al., 2011). It includes knowing about a user's location and availability. An implication of *presence* is that it is directly related to *conversation* and *relationships*. Higher levels of social *presence* are likely to make *conversations* more influential (Kietzmann et al., 2011). Diba et al. (2019) reported from Hassanein and Head (2007) that B2B firms create a sense of perceived social presence by being on social media, which positively impacts consumer attitudes, the perceived responsiveness to consumer issues and trust.

Relationship refers to the extent to which users can be related to other users (Kietzmann et al., 2011). In other words, it is about the association that connects them. Some social media platforms are designed for formal and structured relationships to determine what and how much information is to be shared between parties. Oppositely, other platforms such as blogs allow users that are unknown to each other to share without any formal arrangement. In a B2B setting, firms strongly focus on building relationships with their suppliers and customers to "create a web of users throughout the SM platform they are able to leverage" (Diba et al., 2019, p.1484).

Reputation is the extent to which users can identify the standing of others. As argued by Kietzmann et al. (2011), reputation is often a matter of trust. However, since information technologies are not yet able to assess such qualitative criteria, social media rely on other tools that aggregate user-generated content to determine trustworthiness. Implications are that firms must choose appropriate metrics and also chose the proper evaluation tools to establish a reputation. Strength (i.e., number of mentions) and sentiment (i.e., ratio of positive mentions against negative ones) are examples of metrics used to assess the reputation of a person. In a

B2B context, a firm's reputation reflects its goodwill, brand equity, and trustworthiness (Diba et al., 2019).

Groups is the extent to which users can form communities. Social media offer tools to help people manage their relationships. Firms can use social media to reach specific groups with messages intended explicitly for them. Firms can also use social media to support a particular group most effectively (Diba et al., 2019). In the B2B context, groups are often used for crowdsourcing to receive new ideas, feedback, and solutions for improving their products and services (Diba et al. 2019).

It is essential for firms using social media to understand these seven functional blocks and to assess which ones are the most important for the social media they are using. This statement is justified by the following citation from Singaraju et al. (2016): "In using these social media functions offered by social media platforms, customers and firms are more seamlessly able to integrate their own resources for the mutual benefit of all participants in service exchanges" (Singaraju et al., 2016).

2.2 Social media categories

As the literature regarding social media keeps expanding, many definitions are attributed to the concept in an attempt to define its complex essence concisely. Because the term *social media* covers a wide variety of tools and platforms and is featured in many different pieces of literature, it can be looked at from several perspectives. Kaplan and Haenlein (2010) define social media as "a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0 and that allow the creation and exchange of User Generated Content." This study adopts this definition as it is the dominant one in the Marketing and Sales literature.

Moore et al. (2013) report from Ellonen and Kosonen (2010) that there are two modes of social media mediated interactions between buyers and sellers. The first mode is described as follows: "a relationship-oriented mode emphasizes reciprocal and bilateral communication with regard to buyer-seller collaboration and reflects relationship marketing and selling." (Moore et al., 2013, p.50.) The second mode is described as transaction-focused and to be centered on one-way company controlled communications. As B2B buyer-seller relationships are known to be fundamentally driven by relational exchanges rather than transactional exchanges (Rajamma et al., 2011), this study adopts the delineation of relationship-oriented social media similarly to Moore et al. (2013).

As social media is continuously evolving, various aggregate lists of social media sites and applications exist to classify them. Moore et al. (2013) proposed a complete list of social media sites and apps based on their examination of nine other aggregate lists published online. They used the list to classify the different social media categories that are used in B2B and B2C sales and limited it to: "social media that are relationship-oriented, facilitate conversation-like exchanges, and are adaptable for use by sales practitioners and organizations." (Moore et al., 2013, p.56-57)

The following aggregate list of social media categories and definitions is based off the list suggested by Moore et al. (2013), but it is also limited to the social media platforms and applications that were mentioned across the six cases on which this study is based (See Table 1.1). All definitions were reported by Moore et al. (2013), following their literature review. Of the fifteen categories suggested initially, only seven were discussed in the interviews conducted for this study.

Table 1.1: Social Media Categories and Definitions

Category	Definition	Reference(s)
Blog	Journals on a variety of subjects with entries arranged in reverse chronological order.	Cox et al. 2008; Moore et al. 2013
Micro-blog	Allows users to exchange small elements of information, such as short sentences, individual images, or video links	Kaplan and Haenlein (2011); Moore et al. 2013
Instant messaging (IM)	Enables conversation-like data exchange on a variety of devices.	Dennis et al. (2010); Moore et al. 2013
Video hosting/Sharing (VHS)	Permits distribution of video clips to web pages and a variety of devices.	Huang et al. (2010); Moore et al. 2013
Social and professional networking (SPN)	Permits users to exchange data with others for bonding or career-related networking purposes.	Kaplan and Haenlein (2010); Moore et al. 2013
Online conferencing (OC)	Real-time meetings, training, or presentations via the Internet.	Fillicaro (2002); Moore et al. 2013
Moderated web community (MWC)	Virtual community organized around specific subject matter or interests. Require membership approval and pre-screening of contributions by a moderator	Moore et al. 2013; Moran and Gossieaux (2010)

2.3 The B2B Selling process

The traditional selling process has been identified to be perhaps the oldest paradigm in the sales discipline (Moncrief and Marshall, 2005). Moncrief and Marshall argued that the steps of the selling process had remained virtually the same since the 1920s, to the exception of the follow-up stage. The latter was added later on with the emergence of relationship selling. However, the traditional selling process has now evolved due to many factors, such as technological advances (Moncrief and Marshall, 2005; Moore et al., 2015). For example, social media has been identified to be a dominant new selling tool (Marshall et al., 2012). This is justified by the fact that sales relationships are now driven by a need for immediate and open access to information, which technologies like social media can allow (Marshall and al., 2012). Accordingly, various scholars have proposed evolved selling processes in the last 15 years (Andzulis et al., 2012; Moncrief and Marshall, 2005; Moore et al., 2013). Nonetheless, as consensus does not seem to have been reached regarding the selling process using social media, the researchers of this study suggest, in section 5.2, an adaptation of the process inspired by the variation from Moore et al. (2013).

The seven steps of the traditional selling process are as follows: prospecting, preapproach, approach, presentation, handling objections, closing, and follow-up. A brief description of each step follows.

The *prospecting* stage is when salespeople search for new customers and aims to expand their firm's customer base (Moncrief and Marshall, 2005). This is also the stage during which sales leads are gathered and screened, resulting in the qualification of prospects (Moore et al., 2015).

The *preapproach* stage occurs after prospects have been identified (Moore et al. 2015). It includes all activities that occur after the prospecting stage up until the first contact with the candidate (Moncrief and Marshall, 2005). During this stage, salespeople are doing their research on the prospects to familiarize themselves with the customers, their needs and their buying process (Moncrief and Marshall, 2005).

The *approach* stage occurs when the first contact is established with the prospect. According to Moore et al. (2015), salespeople's objective during the approach stage should be to gain the prospect's attention, make a favorable first impression and to establish a rapport that is likely to lead to a relationship and sales.

The *presentation* stage is the main body of the sale. It may include a single presentation or multiple ones over time (Moncrief and Marshall, 2005). In the case of first-time buyers, the salespeople must provide them sufficient information so that they understand the product's benefits (Moncrief and Marshall, 2005). Accordingly, presentations may be facilitated by demonstrations.

Even though *handling objections* may be necessary at any point following the first contact, it is traditionally established to be the fifth stage of the selling process (Moore et al., 2015). This stage occurs when salespeople respond to questions and hesitancies about the product or the firm (Moncrief and Marshall, 2005).

The *Closing* stage is the point in the sale where the salesperson successfully obtains the commitment of the prospect (Moore et al., 2015). It represents the successful completion of the sales presentation (Moncrief and Marshall., 2005).

Lastly, the *follow-up* stage assumes that the sales are successfully made and occurs after the clients made their orders. This stage aims to ensure that they are happy with the

product or service (Moncrief and Marshall, 2005). During this stage, salespeople ensure customer satisfaction and look for future business opportunities with the clients (Moore et al., 2015).

2.4 Social media and marketing strategies

Agnihotri et al. (2012) describe salespeople's strategies aimed at routing customers' access to information using social media as "push" and "pull" strategies.

In push strategies, "salespeople push information to customers through social media that facilitate the creation and rapid deployments of networks" (Agnihotri et al., 2012, p. 336). Social media that facilitate push strategies are referred to as *network enablers* and mostly include social and professional networking platforms such as Facebook and LinkedIn (Agnihotri et al., 2012). Truong and Simmons (2010) suggest that push communications follow a more scripted flow within a one-to-many model.

In pull strategies, salespeople pull customers toward salespeople-generated content by using *content enablers*. Content enablers are social media platforms that make it easier for customers to share information and provide them with control over the information (Agnihotri et al., 2012). Blogs and microblogs are good examples of content enablers. Truong and Simmons (2010) describe pull strategies as empowering customers by allowing them to pull from a free flow and exchange of information. They also suggest that pull communications are two-ways and on a one-to-one basis or many-to-many basis.

As highlighted by Jarvinen and Taiminen (2016), content marketing is an increasingly popular pull marketing tactic in the B2B sector. Holliman and Rowley (2014, p.285) define content marketing as follows: "B2B digital content marketing involves creating, distributing and sharing relevant, compelling and timely content to engage customers at the

appropriate point in their buying consideration processes, such that it encourages them to convert to a business building outcome." Accordingly, firms use this tactic in their pull strategies to generate valuable content based on the needs of their potential buyers (Halligan & Shah, 2010; Jarvinen and Taiminen, 2016). Content marketing can be used in various formats. The most common ones are e-books, white papers, podcasts, webinars, infographics, blog texts, and social media posts (Chaffey and Smith, 2013).

When publishing content, it is not every document that will be public. Lashgari et al. (2018) revealed that firms use different approaches in communicating their technical information. As part of their communication strategy, firms can share a combination of public and gated content. More specifically, some firms will require their audience to go through a *gated process* to access high-end knowledge. Firms can adopt closer communication points with their audience to receive "tangible and measurable results, leading to the completion of goals, such as lead generation" with this gated process (Lashgari et al., 2018, p.739). The gated process will require users to share information such as their name and company name. This process provides the firms with more control over the content that is distributed and may lead to better feedback responses (Lashgari et al., 2018).

2.5 Buyer-Seller relationships

The buyer-seller relationships literature has embraced the relational exchange perspective over the discrete transactional one in the 1980s (Dwyer and al., 1987). The relational exchange perspective defines exchanges as the ongoing transfer of value between independent channel members (Frazier, 1999). In this regard, relationships are characterized as long-term, ongoing, interpersonal, social, and cooperative (Rajamma et al., 2011). Accordingly, face-to-face

contact represents a traditional relation element, given its interpersonal nature (Crosby et al., 1990; Marshall et al., 2012).

Among the multiple variables that influence whether long-term relationships are thriving, trust is a significant one (Doney and Cannon, 1997; Wilson, 1995). Trust involves a belief that one relationship partner will act in the best interest of the other, desire coordination, fulfill its obligation, and pull its weight in the relationship (Dwyer et al. 1987). Trust is also an excellent fit for the relational perspective because it enables them to focus on the long-term benefits. Trust in a supplier or supplier's salesperson also increases the likelihood that buyers anticipate doing business with the supplier firm in the future (Doney and Cannon, 1997). However, Doney and Cannon (1997) suggest that, in the context of supplier selection, trust should be qualified for "order qualifier" rather than "order winner." In other words, trust is needed for a supplier even to be considered as a potential partner, but it is not sufficient to compensate for better prices and reliable delivery.

There are many ways in which a supplier can build trust with a buyer. Here are a few examples suggested by Doney and Cannon (1997): willingness to customize or adapt to the buyer, engage in longer relationships, expertise and power of the salesperson, and stronger social bonds. However, these only apply to trust-building among current partners. When assessing the trustworthiness of an unknown partner, the reputation of the latter will be used as a proxy to assess trust as the other factors cannot be estimated accurately (Wilson, 1995). In relational selling context, contact intensity, is also known to influence trust (Crosby et al., 1990). Contact intensity refers to the frequency at which the salesperson communicates with the customer, either face-to-face or indirectly (Crosby et al., 1990).

Concerning that, it is not clear whether face-to-face interactions are necessary for buyer-seller relationship success. On one end, it was established that these interactions have been core to selling for years and that they facilitate trust-building by fostering the creation of personal bonds. However, higher contact intensity is easier to achieve using technologies such as social media, which could make it easier for salespeople to stay in touch because social media allows them to communicate more efficiently and to provide feedback at minimal costs (Bhimani and al., 2018). Furthermore, Marshall et al. (2012) found that face-to-face contact is being used less often by salespeople to build and maintain client relationships. According to their research, this is the case because society at large is increasingly using social media, and pressure is placed on organizations to be more cost-effective and efficient.

2.6 Summary of the literature on social media in sales

To conclude the literature review, the researchers put together a summary of the main articles that focus on social media in the B2B sales process (See Table 2.1). This summary reports the primary purpose of each article, along with the key findings. It also provides a brief description of the methodology adopted in each study.

Table 2.1: Summary of the articles on social media in B2B sales

Authors	Main purpose	Description	Key takeaway
Agnihotri et al. 2012	To explain the mechanisms through which salespeople's use of social media operates to create value	Conceptual, literature review	Salespeople's social media use can have a positive influence on service behaviors that influence value creation for customers as well as for salespeople
Andersson and Wikstrom 2017	To explore why and how (B2B) companies use social media and which users and stakeholders they communicate with.	Empirical, multiple case study; 3 cases; Within- and across-case analysis	B2B firms use social media as communication tools to enhance customer relationships, support sales, and build their brands. They also use social media as a recruiting tool, a seeking tool, and a product information tool.
Andzulis et al. 2012	To review the role of social media in the sales force and the sales process	Conceptual, literature review	Explanations of the sales process with regards to social media.
Itani et al. 2017	To examine the use of social media by B2B salespeople to assist them in their job functions.	Empirical, Mixed methodology: quantitative survey – 240 respondents; qualitative – 6 interviews	Firms can use social media to gather market intelligence and value opportunities for their customers. Social media is not predominantly used by salespeople.
Jarvinen and Taiminen 2016	To investigate the organizational processes for	Empirical, Single case study,	Marketing automation can be used to generate high quality

	developing valuable and timely content to meet customer needs and for integrating content marketing with B2B selling processes	Three-step thematization analysis	sales leads through behavioral targeting and content personalization
Marshall and al. 2012	To explore the breadth of technology usage by sales managers and salespeople	Empirical, Qualitative study (focus groups); Total of 4 focus groups	Social media has the potential to create an "always-on" negative effect on salespeople. Also, focused on social media used in relationship-building.
Moore et al. 2013	Understanding the use of the different social media categories among B2C and B2B sales professionals	Empirical, Quantitative (survey); 395 respondents	B2B practitioners tend to use media targeted at professionals whereas their B2C counterparts tend to utilize more sites targeted to the general public
Moore et al. 2015	Compares B2C and B2B to identify differences in how they use social media for job-related tasks.	Empirical, Quantitative (survey); 395 respondents	B2C and B2B salespeople use social media categories to different extent. Sales personnel also use social media to different extent across job titles. Then, social media are used to different extent during the different stages of the selling process.
Rodriguez et al. 2012	To empirically test whether social media affect the sales process and B2B sales	Empirical, Quantitative (survey); 1699	Social media positively impacts sales performance.

	performance	respondents	

3. Research design and methodology

The following section justifies the reasons that led this research to adopt the current research design as well as how the cases were selected and recruited. Also, it provides detailed information regarding the methods used in the analysis to ensure the quality of this study.

3.1 Qualitative research rationale

This research aims to shed light on the role of social media in the B2B sales process. It seeks to contribute to theory development and managerial practices that revolve around this topic. A qualitative approach is appropriate given the exploratory nature of the study, which intends to address the underwhelming literature regarding social media in the B2B selling process. While the current literature suggests a basis to understand the various functional blocks of social media (Kietzmann et al., 2011), we have yet to develop a deeper understanding of how social media can be leveraged in the B2B selling process. An exploratory research design is ideal in this situation as it can clarify ambiguities, explore nuances, provide practical insights, or lead to the discovery of potential business opportunities (Zikmund et al., 2012). Qualitative methods can also provide insights that could help to develop new or modified concepts and theories and are particularly suitable for investigating complex issues and emerging phenomena that are not adequately captured by quantitative studies.

3.2 Research design

This study employs a multiple case study design to explore the role of social media in the B2B selling process. According to Eisenhardt and Graebner (2007), multiple case studies designs tend to generate more robust insights than single case ones because the propositions are anchored in varied empirical evidence. It is also argued that multiple cases ensure consideration of the critical dimensions of the focal issue (Gupta et al. 2019; Homburg et al. 2012). Also, multiple cases enable researchers to assess if their findings extend beyond specific cases (Miles and Huberman, 1994).

3.3 Case selection

Purposive sampling was used to collect data from people involved in the selling process of B2B firms. This approach entailed identifying knowledgeable and experienced individuals who can serve as key informants, to provide deep insights into our study. Key informants are widely used in qualitative research because their inputs can help researchers achieve data saturation, theoretical saturation, or informational redundancy (Gupta et al. 2019). Potential organizations and respondents for this study were recruited using the following inclusion criteria.

1. The firms must be selling products or services to a B2B clientele.

2. Small-sized and large-sized firms from three technology-related industries (i.e., Technology—services, Technology—software, and IT consulting) were selected for this research. Firms operating in technology-related sectors were chosen because they are expected to have the resources and capabilities to use innovative technologies such as social media.

3. The firms should be using at least one category of social media across their sales process. This criterion was evaluated by an assessment of the firm's presence on either of the social media platforms: LinkedIn, Facebook, Twitter, and YouTube;

4. The respondents must be knowledgeable and experienced with their firm's social media activities as well as with the firm's selling process. Respondents must be either sales or marketing directors, managers, or salespeople. These people represent key informants because they are involved in the selling process, use social media, and are aware of their firm's social media-related practices and objectives.

Having established the above criteria, the researchers developed a list of potential firms that qualify for the study. The researchers used their professional networks to develop a list of names of potential participants from these companies. The researchers complemented this list by conducting web searches using LinkedIn and the companies' websites. The verification to make sure that each candidate firm complied with the selection criteria of this study consisted of three steps. The first step consisted of a review of the firms' official websites to gather as much information as possible to assess their compliance with the first two criteria. We also verified with the respondents that their organization met our inclusion criteria.

The second step consisted of a research of the firms' social media presence on four social media platforms: LinkedIn, Facebook, Twitter, and YouTube. The firm had to be present on at least one of these platforms as they were only required to use one social media to qualify. These platforms were specifically chosen based on Moore et al. (2013), who found that these social media platforms are widely used in the B2B context. Additionally, these platforms are easily accessible, and this allows the researcher to quickly assess whether a candidate firm is active on these platforms.

The third step consisted of contacting the potential respondents by email to confirm whether they are involved in the sales process of their firms, the extent to which they are knowledgeable about their firm's social media activities, and their willingness to participate in the study.

3.4 Data collection

Data for this study was gathered through in-depth interviews. The interviews were conducted in English, audio-recorded, and subsequently transcribed. Four interviews were conducted face-to-face, and three were conducted by telephone at the request of participants. The phone interview for Case #3 (C3) included two interviewees. The interviews lasted between 45 minutes to an hour. A semi-structured interview protocol was used to gather data. Follow-up questions for clarification purposes were asked by phone or email. Respondents were sales team leaders, account managers, digital marketing managers, and executives. All respondents indicated that they had prior employment experience in marketing and sales jobs at other organizations and have varying levels of experience with social media in sales and marketing. During the interviews, the researchers used probing questions to gather considerable insights from each interviewee regarding their use and understanding of social media in both professional and personal use.

We built six cases with a total of eight participants. This is consistent with the argument of Yin (1994) that six to ten cases for multiple-case studies design are usually sufficient to "provide compelling support for the initial set of proposition" to reach saturation (Zach, 2006; Zahay et al., 2018). In our study, we observed saturation after five interviews, but we conducted one additional interview to ensure that the trends and patterns we observe in the responses were identifiable, and there were no new significant findings.

Interviews were conducted using a semi-structured interview protocol. The interview protocol focuses on questions pertaining to (1) the general background of companies and respondents; (2) the social media platforms they use; (3) the intensity of social media use; (4) the reasons that motivate them to use each social media platforms (5) how social media are used across the seven steps of the selling process; (5) the benefits and challenges associated with their social media use and (6) the influence of social media on their client's behavior. To give the interviewees enough time to read and study the questions, the researchers emailed them the questionnaire along with the consent form ahead of the scheduled interview. At the beginning of the interviews, respondents were asked if they needed clarification on any aspect of the questionnaire. The data collection phase took place over the four weeks of February 2020.

3.5 Data analysis

Interview outcomes were used in two types of analysis: within-case and cross-case. During the within-case analysis, each firm is treated as a separate case to recognize patterns of relationships among constructs in the preliminary model (Eisenhardt and Graebner, 2007). The within-case analysis also allowed the identification of the important factors emerging from each interview. The interviews were transcribed and then coded according to the main themes that rose from each case. The coding process was informed by the recommendation of Eisenhardt and Graebner (2007), who noted that multiple cases could be considered as discrete experiments that serve as replications, contrasts, and extensions to the emerging theory. Accordingly, the cross-case analysis highlighted similarities and differences among the cases in an attempt to validate the findings while increasing their transferability (Miles and Huberman, 1994).

3.6 Quality of the research design

This section will go over the various actions taken by the researchers to ensure the quality of the research. The quality of the research is assessed using the four criteria of trustworthiness, as suggested by Guba (1981). Trustworthiness in qualitative research, which aims to ensure the rigor of the study (Morse, 2015), is evaluated through four criteria: credibility, dependability, confirmability, and transferability (Guba, 1981).

Credibility is the confidence in the truth of the findings (Guba 1981) and therefore represents the qualitative context's substitute to the quantitative approach's internal validity (Lincoln and Guba, 1985). To increase the probability that credible findings will be produced, the researchers of this study use the technique of triangulation, as suggested by Lincoln and Guba (1985). Two different modes of triangulation were used for this research. First, multiple and different sources were used to collect the data. Multiple copies of one type of source were used, meaning that multiple interviewees compose the 6 cases of this study. Also, different sources were used as secondary data, and existing literature were used to validate the information gathered in the interviews. The second mode of triangulation used for this research is multiple investigators, as the interviews were conducted by two researchers. Indeed, Lincoln and Guba (1985) argue that it is "perfectly possible to use multiple investigators as part of a team, with provisions being made for sufficient intrateam communication to keep all members moving together." (p.307). To ensure that both investigators were moving together, they made sure to follow the interview protocol. They also consulted each other and listened to the audio recording of each interview before going into another one.

Dependability lies in the consistency of the findings meaning that the findings of the study would be repeated if the inquiry were repeated with the same subjects in the same

context (Lincoln, Guba 1985). To ensure stability in the data collection, the researchers made certain to stick to the interview protocol across the interviews. Also, all the interviews were conducted within five weeks to make sure that the research context was similar across all the interviews. Then, Lincoln and Guba make the argument that there is no credibility without dependability, and therefore "a demonstration of the former is sufficient to establish the latter" (Lincoln and Guba, 1985, p.316).

Confirmability represents the extent to which the findings are shaped by the respondents rather than the researcher's bias (Lincoln, Guba 1985). To optimize this study's confirmability, the researchers avoided any leading questions. Instead, they opted for probing questions and allowed the respondents to talk without interjecting. Following their responses, the researchers asked the respondents for clarification and elaboration whenever necessary. Furthermore, to ensure that the data collected reflected what the interviewees meant, follow-up questions were asked for more clarifications whenever the researchers had any doubts regarding what the participants meant.

Transferability determines whether the findings of this study apply to other contexts (Lincoln, Guba 1985). Lincoln and Guba (1985) argue that researchers cannot provide the external validity of a qualitative inquiry. Therefore, transferability is reached by providing a thick description of the study to allow other researches to assess whether transfer could be a possibility to their research. To ensure transferability, the within-case analysis provides clear and extensive details on each case, which will enable other researchers to have sufficient information to judge whether or not the findings of this study are relevant to their research. Furthermore, the cross-case analysis establishes the transferability of the findings. We believe that our analysis establishes the extent of the transferability of the study's findings to other contexts.

4. Within case analysis

4.1 Introduction to the cases

Six cases involving Canadian technology-based firms were studied. All six cases were engaged in B2B selling. Moreover, the selling process of each case involved social media activities. This section first describes each case in term of firm size; the product or service sold by the firm; the type of clients (i.e., B2C, B2B and B2G); an approximate number of years for which the firm has been using social media for marketing purposes according to each interviewee and; the number of social media platforms and applications used in the firms B2B selling process.

Table 4.1: Case descriptions

Case	Size	Product/Service	Clients/Market	Firm social media use (app. years)	# of SM platforms/apps
1	Small	SaaS	B2B/ International	8	7
2	Large	Computer software	B2B;B2C;B2G/ International	5	3
3	Small	SaaS	B2G/ National	3	5
4	Small	SaaS	B2B/ International	5	7
5	Small	IT Consulting & Training	B2B/ National	7	3

6	Large	SaaS	B2B/ International	8	1*

Small = Less than 50 employees; Large = greater than 249 employees
*Limited to the business development function of the firm

Similarly to what has been done by Marshall et al. (2012), the researchers reviewed the interview transcripts and categorized each theme based on the similarity of focus to identify key themes. This process aimed to reduce the transcription content into a manageable set of categories that allowed the researchers to capture the main insights. Five themes emerged from the categorization: Strategy, Stages, Value, Categories, and Functions.

The *strategy* item relates to the description of salespeople's strategies by Agnihotri et al. (2012). This item allows the researcher to summarize *how* each firm uses multiple social media platforms to benefit its selling process. It outlines the social media strategy used by the firm to get customers in their sales funnel along with the complementary elements that enable such strategies. While the marketing literature generally refers to pull and push strategies, many interviewees instead identified them as inbound and outbound strategies, respectively. The *stage* item allows the researchers to highlight *when* social media is used across the selling process. It highlights the stages of the traditional sales process in which social media are used. The *value* items aim to provide further insights into *why* social media is used in the selling process. It describes how the use of social media in the sales process is beneficial to salespeople. The *categories* item is centered on the *what* of social media. It presents the different social media categories used in the sales process, along with the different platforms for each category. Lastly, the *function* item provides this study with a strong basis to further investigate how each firm leverages the known functions of social media. It describes which functional blocks of social media, as suggested by Kietzmann et al. (2011), are leveraged along the sales

process. Altogether, these items enable this study to contribute to the current marketing and sales literature by providing a deep understanding of how, when, why, and what social media is used in technology-intensive Canadian firms. A summary of the five themes is presented in Table 4.2.

Table 4.2: Case analysis

Case	Strategy	Stages	Value	Categories*	Functions	
1	Pull	Prospecting; Preapproach; Presentation	Brand awareness; Reduce costs; Increase reach; Save time; Lead generation;	SPN; Blogs; Microblogs; OC; IM	ID	X
					CON	X
					SHA	X
					REL	-
					PRE	X
					REP	X
					GRP	X
2	Push	Prospecting; Preapproach	Knowledge acquisition; Increased reach; Enhance internal comm; Lead generation;	SPN; OC; IM;	ID	-
					CON	X
					SHA	X
					REL	-
					PRE	X
					REP	X
					GRP	-
3	Mixed	Prospecting; Preapproach; Presentation; Follow-up	Knowledge acquisition; Credibility; Brand awareness; Structure	SPN; Blogs; OC; IM;	ID	X
					CON	-
					SHA	X
					REL	-
					PRE	-
					REP	X
					GRP	-

4	Pull	Prospecting; Preapproach; Presentation	Knowledge acquisition; Brand awareness; Save time; Enhance internal comm; Training	SPN; Blogs; Microblogs; OC; IM; VHS;	ID	X
					CON	X
					SHA	X
					REL	X
					PRE	-
					REP	X
					GRP	X
5	Push	Prospecting; Preapproach	Reduce cost; Assess market size;	SPN; Microblog; VHS;	ID	X
					CON	X
					SHA	-
					REL	-
					PRE	-
					REP	X
					GRP	X
6	Push	Preapproach	Knowledge acquisition; Lead generation;	SPN;	ID	-
					CON	-
					SHA	-
					REL	X
					PRE	-
					REP	-
					GRP	-

*Refer to Table 1.1 for coded categories name

4.2 Introduction to the key respondents

As presented in the methodology, key informants were selected as respondents to conduct this qualitative study. A summary table (See table 4.3) is given to offer the following information in regards to each interviewee: The code used to refer to them; the case to which

they are associated; their function or job title and; the intensity of their social media use for personal and business purposes. The intensity variables are based on the self-assessment of each interviewee and testify to the interviewees' compliance with the research criterion according to which they must be knowledgeable and experienced with their firm's social media activities. The intensity variables are based on two considerations: the average daily time spent on any social media platform or application and the number of different platforms and applications used.

Table 4.3: Interviewees profiles

Interviewee	Case	Function	Personal use	Business use
I1	C1	Marketing campaign coordinator	Low	Heavy
I2	C1	Sales team leader	Heavy	Heavy
I3	C2	Named account manager	Low	Heavy
I4	C3	Vice-President	Heavy	Medium
I5	C3	Business Development and Marketing manager	Heavy	Heavy
I6	C4	Digital Marketing Manager	Heavy	Heavy
I7	C5	CEO	Heavy	Heavy
I8	C6	Business development representative	Heavy	Heavy

4.3 Case #1

The following case is based on two interviews (see table 4.3 Interviewee Profile) with the two interviewees involved in different stages of C1's selling process. The first interviewee was very knowledgeable about the firm's marketing activities and everything that revolves around lead generation. The second interviewee was mostly involved in the actual

selling. Thus, the latter was very knowledgeable about the firm's practices that take place from the moment when a lead is identified up to the end of the selling process.

    Strategy: The small-sized technology firm researched in the first case mostly used a pull strategy to attract new clients.

    I2: There is a lot of marketing efforts put toward the inbound ways of generating leads. A lot of content creation from top of the funnel to the bottom of the funnel.

They use a combination of social media and blog posts to share lead-generating content. There are two ways by which this content may reach their audience:

    I1: We try to maximize all our content with SEO strategies. So we try to be the first search results on Google or Bing, and that would be for the organic part. I would say the rest would be social media ads.

This content is expected to be helpful to their target clients and therefore lead them to interact with it:

    I1: "we try to put educational content that would help any decision-maker in the sales process. That is more top of the funnel type of content. We have been big on blog posts, white papers, and e-books."

Their content strategy relies on producing a variety of content that aims to assess how close the potential client is to the intention of buying. To implement this strategy, they use a combination of public and gated content.

    I1: we have blog posts that are public, and we have a few e-books that are gated, so you need to give more information to access it. As you get closer to an intention to buy, the content reflects how close you are to being interested in the

product because we have high-level stuff about social media marketing, we write blog posts, but it has nothing to do with the software itself, and it is very specific. It does not even talk about management. We try to push people down that funnel of content and having them closer to something that talks about the product and picks their curiosity.

This combination of gated and public content helps the marketing and sales team at C1 to assess where the potential buyer is in their buying process. Gated content is especially useful in C1's selling process as it allows them to gather identifying information on potential leads to which they can then send personalized content through automated emails and targeted advertising on social media. Using analytical tools, C1 will then collect information on potential customers relative to how they interact with the content that is sent to them. This will allow them a more precise assessment of how close they are to a buying intention. Once they evaluate that the potential customer has the potential to be turned into a lead, this information is moved from the marketing team to the demand generation team, which will approach prospects.

I2: As people are interacting with the content, different triggers take place. If it is more top of the funnel, we will not necessarily engage with them, but as they trickle down the funnel, we might have a demand generation or a sales development rep reach out to the prospect.

As for the first contact, the sales development representative will most commonly approach the prospect using traditional media (i.e., phone call or email). I2 argues that those are chosen over social media because:

I2: The telephone is the best way to get a hold of someone. Most people that run golf courses are in the older generations. They are not big on social media, and they are usually busy at golf courses.

It would seem like phone calls are the best way to reach their specific audience (i.e., golf managers). This first contact is very transactional and aims to schedule another meeting with a salesperson, which will present and demonstrate the software. Once the potential client agrees to a scheduled meeting, social media are then used for the presentation and demonstration, but not elsewhere in the selling process.

Stages: Social media are used to a different extent in three steps of C1's selling process. To identify qualifying customers in the prospecting stage, C1 is posting on LinkedIn, Facebook, Instagram, and Twitter. These posts are made in combination with advertising using Facebook Ads and Google Ads to promote the posts and enhance the enterprise's reach. Because C1 can target people that have already interacted with their content, they can leverage the variety of lead-generating content they are producing and attract the prospects in their funnel by pulling them from the higher level content toward the gated-content. During the preapproach stage, social media are used as they are the source of information. As for the approach stage, prospects that are more promising in terms of their potential to buy are then contacted using traditional media, as described earlier. Prospects that agree to schedule a second conversation will be engaged by a salesperson using Zoom. Zoom is a videoconference platform that allows the salesperson to share their screen with the lead and provide a demonstration of their software. Following the presentation stage, social media are not used during the rest of the selling process. The quote and pricing will be sent by emails following the presentation, and all other interactions will be done over the phone. Phone is prioritized over social media once again because it is

perceived to be more effective to reach C1's audience, which consists of very busy people of the "older generation."

Value: I1 mentioned that social media were most beneficial for C1 in terms of brand awareness.

I1: (Social media) is very useful for brand awareness, so people knowing who we are and what we do. For us, social media is the best way to do that.

This is in line with their strategy which relies on attracting prospects using social media. The second interviewee from C1 also suggested that social media are great for brand awareness.

I2: I think (social media) is most beneficial in the initial stage of the process in terms of creating your brand image and getting people to talk.

Also, the use of a videoconference tool for the presentation stage is perceived as greatly beneficial as it carries most of the benefits of a face-to-face meeting without the disadvantages. It allows for a rich transfer of information while being cheaper than face-to-face, not limited by physical distances, and less time-consuming. Accordingly, I2 informed the researcher that videoconference tools are heavily used to conduct the sales:

I2: most of our sales and by most I mean probably like 98 % are all done over video call

Categories: C1 uses five different categories of relationship-oriented social media concerning its selling process (See Table 4.2). Social networks, blogs, and microblogs are used for the same purpose: brand awareness. Blog posts are produced using WordPress and then shared on Facebook, LinkedIn, Twitter, and Instagram. I1 argued during the interview that this

method is a good way for the marketing team to start the conversation with their clients as it usually gets the clients to give feedback on the content and how it has been beneficial:

> *I1: When we put out some content, sometimes people put in comments and sometimes they just send us back emails, so we get a bit of feedback, but most of the feedback we receive is when they will talk to us in person when they see us at trade shows or visit the office. (…)most of the comments we receive is that our content is actually actionable and usable.*

We can infer that C1 can strengthen its relationships with its clients by enabling the conversation with them through social media. The extent and quality of bi-directional information exchange (i.e., mutual confiding) is known to be an important factor of tie-strength in buyer-seller relationships (Stanko et al., 2007). Stronger ties between the buyer and the seller are positively correlated to the commitment of the parties and, thus, greatly contribute to the success of the relationship (Wilson, 1995).

Online conferencing application Zoom is only used for demonstrations. Instant messaging is used in concert with the other categories of social media as it allows the different teams at C1 to collaborate. It is used to share knowledge and coordinate the different teams involved in the selling process (i.e., marketing, demand generation, and sales).

Functions: The identity function of social media is very important for C1's selling process. Their whole strategy relies on building their corporate brand online and expressing it to prospects. This is intimately tied to the reputation and sharing function as they build credibility for themselves to reinforce their brand image by sharing valuable content to their audience. For example, as their target market is centered around golf, their reality greatly changes according to the seasons. Thus, C1 will consider the latter when producing content:

I1: So we create a lot of material that follows the same life cycle a golf course has during the year where it is very cyclical, very seasonal, so you have content that is very actionable for certain times of the year. We try to match that content with this seasonality so that people could actually enjoy and use the same day or week the content that we are putting in front of them.

This aspect is crucial for C1 to acquire new clients as reputation is often used as a proxy for trust when a firm wants to engage with an unknown partner (Doney and Cannon, 1997). Thus, by being credible and nurturing their reputation, C1 has better chances to be considered as a trustworthy partner.

The group and conversation functions are also jointly leveraged as C1 maintains a closed group of golf operators on Facebook. Those selected members of the group are all potential and current customers for their product. C1 engages with them in conversations about strategies, news, and trends of the market. This group provides C1 with insights on its target market and opportunities to improve its service based on knowledge acquired from users. At last, C1 leverages the presence function of social media by ensuring its social presence on rating sites that compare the players of their market such as Capterra. They make sure to secure good ratings on these platforms by incentivizing their customers to get more reviews. This online presence allows them to stay competitive while also increasing their credibility once again, which is said to be of the utmost importance as their service represents a high-involvement purchase.

I1: when we onboard a person who is a satisfied customer, we ask them to put a review on Capterra. We kind of build this trust through our very strong clients because we know word-of-mouth is very important, especially for a high involvement purchase such as software, so that works very well for us.

4.4 Case #2

The following case is based on a single interview (See Table 4.3). The interviewee was involved and, therefore, very knowledgeable about the whole B2B sales process of their firm. It should be noted that this firm operates in several markets and engages in B2C activities. Therefore, even though C2 is present on other social media platforms that were not included in our analysis (See Table 4.2) such as Facebook and Twitter, those social media activities will not be considered in our analysis as they are B2C-oriented

Strategy: This large-sized firm uses a push strategy to acquire new B2B clients. C2's salespeople are focused on selling yearly access to their software to large-sized companies. The social media strategy of this firm starts once a potential client-firm has been identified. LinkedIn Sales Navigator is used as a first step to identify the individual that should be approached and to gather as much information as possible to properly understand the potential clients' structure as well as key decision-makers.

> *I3: (I look for) who is in charge of leadership, who do I need to contact, who is the decision-maker, who are the influencer. I got to map all the organization, so I go to LinkedIn first, I look up CLIENT-X, it gives me all people who work at CLIENT-X: contact name, position, and sometimes they have their contact details. I find them, I make my organization chart, and then I build my strategy based on who I need to connect with on LinkedIn.*

Once the salesperson is done mapping its client's structure, they will investigate the individuals that were identified as key individuals in the previous step on a more personal level:

> *I3: I look at (the key individuals), their job history, where they come from, what their background is, who else do they know, and do I know anyone who can*

introduce me. LinkedIn is powerful for that. I can see if anybody at C2 knows the

individual on a personal level.

The main goal here is to use social media to find a common connection with a decision-maker from the targeted firm to be introduced to the latter by someone they already knows. According to I3, this is an excellent way to bring in new accounts. It should be considered that C2's target clients are large firms and that according to I3, their average deal exceeds 100 000$ when brought to a yearly basis.

Stages: In the prospection stage, I3 uses LinkedIn Sales Navigator to analyze target firms and identify key stakeholders that would represent potential clients. Once the target client has been successfully identified, the preapproach stage involves a lot of research on LinkedIn using once again the Sales Navigator, as discussed previously. Social media are also used to try and get an introduction through a common connection to increase the probability of a successful approach. Then, social media are used to a minimal extent throughout the rest of the selling process. On rare occasions, when the salesperson is unable to get an introduction to the decision-maker they is targeting, they will use traditional media for their approach (i.e., email or phone). If this first attempt is not successful, they will then try and reach the decision-maker through the LinkedIn message system before making a second attempt via email. Thus, social media are used as a backup plan if the usual methods do not work.

I3: Once we have identified a preferred method of communication, whether it is

phone or email, most likely it is emails, I do not really go back to LinkedIn after

that.

I3 mentioned that following the initial contact with the client, the only social media they uses is an online conferencing platform when they cannot meet their clients in person due to physical

distance and limited time. In this situation, they will use online conferencing so that the client can still see them. I3 is positive that it is beneficial for relationship-building purposes that their client can see their face and hear their voice because they will be more likely to trust them if they know them. This is consistent with the argument from Doney and Cannon (1997), according to which suppliers build trust with buyers by building strong social bonds. Doney and Cannon (1997) also suggest that trust in a supplier's salesperson increases the likelihood that buyers anticipate doing business with the supplier firm in the future (Doney and Cannon, 1997).

I3 also mentioned sharing content with clients following the sales pitch through an in-house collaborative platform similar to SharePoint, which we will refer to as X01. This platform is used to share the presentation that was used for the sales pitch with the client. There are two reasons why this is used over email: (1) Unlike emails; the platform is not limited in terms of attachment size; (2) It allows the salespeople to track and analyze how the presentation is used. More details on this aspect will be provided in the next sub-section.

Value: I3 argued that social media are most useful at the beginning of the sales process, more specifically, before the approach. It allows them to learn more about the decision-makers they wants to approach, as mentioned in the previous sub-section. As for the approach stage itself, I3 was quite clear that social media is rarely used for this purpose.

As mentioned in the previous sub-section, one of the major benefits that social media brings in I3's selling process is that they allow them to gather valuable information on their clients' needs and, therefore, to be better prepared when they meets with them for a second meeting. Here is a great example of how I3 can leverage social media in pair with analytics tools:

I3: I submitted a presentation an RFP (request for proposal) with CLIENT-S. I

shared all the RFP documents and presentations with them as they were going

> *through the evaluation process. I saw what pages on my presentation they were going at, I saw that they spent two hours on my pricing page, 3 hours on this piece of content which talked about AB-testing versus they spend three hours on this content about journey management. As I understand what is most important to them, I can reposition my marketing or my position, so it is huge payoffs for me. I am more prepared to have a conversation with customers based on the information I am sharing with them and the analytics.*

I3 is positive that social media can be beneficial to prepare for meetings with customers, as discussed in the previous example. However, social media has limited applications to them following the approach as they feels like face-to-face is better to build a relationship with the client:

> *I3: as I continue down the sale cycle because I built that personal relationship with them and their trust, I feel like you do not want to have a digital platform between you and your customer, and you want to always have a personal relationship with them.*

Even though they largely sees face-to-face as superior to social media for relationship building, I3 also mentioned that they would sometimes resort videoconferencing platform BlueJeans since they has clients all across Canada:

> *I3: I cannot be there all the time, but I want to be in front of their face I want them to see my face and recognize my voice just again to take the communication personal with them just do not want to be a guy on the phone*

We can infer from the two previous statements that strategies integrating social media to face-to-face are beneficial as social media remediates to its counterpart's weaknesses.

Videoconferencing is a good alternative to face-to-face as it eliminates the physical boundaries and is still viable for relationship building. However, as suggested by I3, face-to-face remains vital to have a personal relationship with the clients and, therefore, should not be entirely replaced by social media.

Categories: I3 uses three categories of social media. LinkedIn is the only social and professional networking platform they uses. It is only used for the preapproach stage where they gathers information on the clients they targets. Instant messaging platform Slack is used for internal communication with peers:

> *I3: I have really started valuing the tool Slack because it kind of disconnects the professionalism of my email. (...) Slack is a nice platform, less time-consuming. It is quick, it just takes off barriers to communication.*

Slack is used at C2 for internal purposes only. It allows I3 to collaborate and exchange information much more quickly with colleagues, thus saving them time. I3 then uses BlueJeans as a videoconferencing platform as discussed in the previous sub-section

Functions: While our secondary research revealed that C2 is active on several social networking platforms such as Facebook, LinkedIn and Twitter, I3 did not mention anything about C2 using social media to build the brand's identity when asked about the selling process of their firm. This is most the activities we noticed are B2C related. I3 uses the conversation function of social media via instant messaging for internal communications and BlueJeans for external ones. Instant messaging is more fitting for internal exchanges as they allow to exchange content very quickly and do not require a formal format, unlike emails. As for videoconferencing, they allow the client to see their face and hear their voice, which are key elements for them to build a relationship with them. The reputation function is also a significant

one in the case of C2. They use social media to share reports of their industries produced by external firms (i.e., Forrester and Gartner), which attest that they are a leader in their industry. This is also related to the *presence* function as being included in such reports is a great way to build credibility for the brand and maintain barriers to entry in their market as newer players are not featured in such reviews:

> *I3: One thing you want to build is trust (...) how do you build trust? You got to be consistent with something over a period of time. At the beginning of the sales cycle, you do not have time to build successful consistency over a period of time because you are trying to sell something over a short period of time. A quick way to get trust is by credibility. Credibility is a factor of trust, and a very quick way to build trust with a customer is to showcase where you sit in the Market, and this Forrester report or Gartner report is an instant way to (show where we are). It is a way to just bypass 95% of the market.*

4.5 Case #3

The following case is based on a single interview with two interviewees (See Table 4.3). I4 was most knowledgeable about the why behind the social media activities of the firm; in other words, the strategies. I4 was greatly complemented by I5 as the latter was very knowledgeable about the actual use in the daily activities. I5 is directly involved in C3's selling process and therefore knows a lot about the stages of the selling process along with the platforms that are used.

Strategy: C3's marketing strategy has been reviewed and refined to fit its target customers properly. C3's clients are Canadian municipalities, and among those, they have identified two very different personas. The first one represents the "*new generation*" and is

composed of young managers who are very technology-intensive. When talking about reaching

these customers, I4 was very clear about the necessity of using social media:

> *I4: depending on the persona that the customer falls into, if it is the newer*
> *generation that is coming into municipalities, it is non-negotiable. We absolutely*
> *have to have this social media support.*

The second type of customer with which C3 interacts is quite the opposite. This second type of

customer represents "*women of the older generation*" and is composed of managers who avoid

social media. The gap between these two categories of customer greatly influences C3's

strategies:

> *I4: (the older generation customer) is uncomfortable on her computer. She*
> *definitely does not have social media. It is a very different thing. She wants us to*
> *mail her our one-pager, our marketing sheets. It still gets used but in a very*
> *different way, so depending on the persona of the customer we are targeting, the*
> *amount of social media required dramatically varies, and as a result, we have to*
> *do both.*

Due to the focus of this study, the analysis of this case will be mostly centered on the activities

and practices that target the "*new generation*" customers. However, it should still be noted that

social media brings an extra layer of complexity for firms in this situation:

> *I4: I would say (social media) just added complexity of having to do the old*
> *school selling and the new way of selling depending on who our person is*

C3 is currently using a mixed approach, using both pull and push initiatives. While mixed, their

approach is heavier on the push side of things in terms of bringing new customers into its sales

funnel:

I4: We want to build that inbound strategy for marketing, but currently, we do a lot of cold calls to get our clients we lead with sales and then follow up with marketing literature.

Their pull activities aim to maintain brand awareness and provide valuable content to prospective and current clients such as company news and ways to use their product. Social media also helps their push strategy by supporting the message their sales team is communicating to the customers and by making people aware of their brand. As their client acquisition strategy revolves around cold calls, salespeople at C3 inevitably get to leave a lot of voicemails and emails to people that do not know them personally. Thus, I5 is positive that social media is an important piece of the puzzle for this strategy to be successful:

I5: If they are able to stumble upon some of our social media and they see we have a strong brand image and a good looking product with good features, then they are more likely to trust us or call us back.

C3 uses a mixed approach through which pull and push initiatives complement each other. C3's marketing strategy is also complemented by marketing automated platforms to get the most benefit out of their social media activities. First, they use the automated email platform *MailChimp* to share their blog posts with their current clients. This practice is intended to enhance their brand awareness initiatives by increasing the visibility of their posts among a valuable audience (i.e., current customers). They also use the marketing platform HubSpot through which they can track and gather information on the content they send:

I5: if we see someone who starts opening our email four or five times in one day well, then that is a cue for us to maybe call them the next day. We use that

marketing as a support piece. It gives us intelligence on when we should go to close and where we think the customer is in the sales cycle.

The marketing automated platforms complement the brand awareness initiatives on social media to ultimately feed the sales team with valuable insights on who and when to approach.

Stages: In terms of prospecting, the marketing automated platform *HubSpot* is used in concert with social media to allow C3 to identify customers who are likely to buy from them. As for the preapproach, I4 mentioned that their primary tool for research is LinkedIn. Facebook is also used for this purpose but to a much more limited extent. However, since their target audience is not always active on social media, this is not always a reliable source of information for them. Then, the approach is mostly made using traditional media. While it was mentioned that a salesperson from C3 once successfully reached out to a new client via LinkedIn, this practice was characterized as a "potential sales tool for the future," given that it only happened once. Then, videoconferencing platform GoToMeeting is used for presentations and demonstrations. They use it to make a demonstration of their software to clients and qualify GoToMeeting of "very important" to their sales process. Social media is not used in either to handle objections or close deals. Following the sales, C3 follows-up by sharing marketing content with their clients, as discussed in the previous sub-section, to increase the likelihood that they will repeat business in the future.

Value: Given her strategic role at C3, I4 argued that social media is most valuable to the sales process because it enables the firm to build its credibility. This is crucial to C3 because as I4 said:

I4: because we sell to municipalities, one of the things that is important for us is we want to be recognized as a trusted advisor. (...) We use social media to build our credibility as a trusted advisor.

I5 has a different perspective, given that they is more involved in the selling itself. According to them, social media is essential to spread their brand image for potential clients to call them back once they leave a message. Other than that, the two interviewees from C3 emphasized how valuable the intelligence they get from *HubSpot* combined to social media is to their selling process and that the latter bring much structure to their selling process:

I4: I think without Hubspot our sales process would be very messy

I5: Yes, we would not have the structure and the details we have today without Hubspot

Social media, more specifically LinkedIn, also represents a valuable tool to recruit new employees.

Categories: They use four categories of social media at C3. Social networking platforms Facebook and LinkedIn are used to share content and research information on clients before approaching them. Then, the blogging platform WordPress, is used to create and share their content. The third category of social media they use is instant messaging. Skype for business is used for internal communication between staff members. The videoconferencing platform GoToMeeting is used by C3 to demonstrate the products remotely.

Functions: The identity function of social media is arguably the most important function for C3. This is because it supports not only their selling process as discussed earlier, but also their objective as a firm:

I4: our goal as a company is to become a tech leader in Alberta and recognized in

Canada, so we are utilizing social media to leverage that.

The identity function is also tightly related to the reputation function because their strategy revolves around spreading awareness of their brand as technology leaders to build up the credibility of the firm. Credibility is key for this firm because it is a critical factor in their clients' (i.e., Canadian municipalities) buying process. As for the sharing function, social media are used daily to exchange information on clients, mainly through SharePoint internally.

4.6 Case #4

The following case is based on a single interview (See Table 4.3). I6 is a very savvy social medial user and has been involved in every stage of the selling process at C4 in the last years. They was very knowledgeable about the different applications and technicalities of social media and how they can be applied to enhance their firm's selling process and overall performance.

Strategy: C4's strategy is geared around converting a high proportion of their leads rather than creating a very large number of leads:

I6: it is nice to have a few more resources to help out if you are filling that bucket

with leads, but you want to make sure it is not leaking.

They use a pull strategy via which they attract customers in their funnel using social media posts and advertising. The strategy is based on problem awareness. C4 will build their content around problems that their target audience are likely to encounter to pick their curiosity:

I6: It is problem awareness in the ad or social media post that drives to either a

single piece of content, whether it is a blog post or a guide that then pushes you

into a product page where the goal is to start a free trial. It is always like: this is

a problem that you have, come see why we are going to solve that problem.

This strategy is likely to attract relevant customers as it attracts people who have a problem that C4's software can solve. Getting people to install their free trial is key to C4's success, as I6 believes that 60% of the people that install it become customers by the end of the trial. Similarly to the gated content strategy, C4 provides free trials of their product in exchange for information. This information is automatically received via the app store used to sell their software:

I6: If you are a store and you start the install process with C4, after you click that

"add an app" or "install" button, there is an information exchange that happens

automatically because we are a certified app through the Big Commerce or the

Shopify App Store.

The information that is shared pertains to the buyer firm's performance and size among others. Then, potential clients are classified into buckets. C4 will review the information they received from the app store to classify the clients according to multiple factors, such as the average number of orders that clients do in a month. Following the installation of the free trial, C4 will send an automated email to every potential client to thank them and give them a heads up regarding what they should expect in the following 14 days. This is intended to make the customer more comfortable with the software and to reassure them that the installation process is working properly. Then, customers that were classified in "higher tiers" will be directly contacted by the sales team during their free trial through a phone call. If the client does not answer the phone, C4 will send the client an email to try and get a hold of them. This direct contact attempt aims to schedule another meeting via videoconferencing platform Zoom for a product demonstration.

As for the "lower tiers" customers that are not directly contacted following the installation, they will be retargeted by automated emails via a marketing automated platform if they decide not to purchase the software by the end of their trial:

> *I6: If you go through the trial and have not subscribed, then it is a wind back automation campaign focused on: this is why you need (our service), this is why you should come back.*

C4 also takes action to target people that interacted with their content without installing the free trial. They will retarget these potential customers via ads on social media for up to four weeks to try and get them to install the free trial.

Stages: During the prospecting stage, C4 identifies potential customers by attracting them with its lead-generating content. Reddit, Twitter, Facebook, and LinkedIn are all used to a different extent for potential customers to be lead into C4's funnel using the strategy described earlier. Each of the platforms will be discussed in detail in the "Categories" sub-section. For the preapproach, potential customers that reach the free trial are asked for identifying information that will allow the sales team to classify them into tiers. This information, which will help the sales team to know more about each lead, is gathered via C4's website. Social media are therefore used indirectly as it is the posts and ads on social media that redirect the client on the web page that asks for the client's information. Then, phone calls and emails will be used for the approach stage to schedule a videoconference meeting for a demonstration of the software. Phone calls are prioritized for the approach because:

> *I6: If you are able to get them on the phone, it is a lot harder for them to shut you down or ignore you if they actually have you on the line.*

On the other hand, videoconferencing is preferred for the presentation because it allows salespeople at C4 to easily record the sales pitch or demonstrations and digitally save them. These recorded demonstrations can then be used for training and improvement purposes:

> *I6: All of our demos are recorded, and then once a week, there is a sales review session where everyone watches one of their demos, and then people give feedback and constructive criticism.*

Following the demonstrations, social media are not used very much in the rest of the sales process. Sales presentations are sent to potential clients via emails, and then the rest of the interactions are mostly done over the phone as this channel is preferred by most clients.

> **Value:** When asked about how social media is most beneficial to the sales process at C4, here is how I6 responded:

> *I6: The ability to generate awareness and some sort of lead momentum with a very targeted group of people. It is one of the best ways to get in front of people.*

I6 also suggested that social media are very valuable as they allow them to save time and to collaborate efficiently with their colleagues without needing to be physically close to one another:

> *I6: I work from home once or twice a week, so we live on Slack. It is absolutely key. (…) ColleagueX started last month, and she is gone to Spain for four months. She does not need to be here. We chat with her every day.*

As C4's office is located in Canada, this brings home the idea that instant messaging and videoconferencing platforms allow firms such as C4 to implement flexible "work from home" policies as it enables colleagues to collaborate from all around the world by working remotely.

The interviewee also argued that this benefit positively impacts the talent pool that is accessible to C4:

> *I6: By not being remote, we would be limiting ourselves from a talent pool perspective, especially on the engineering side.*

When asked about specific challenges that could relate to long-distance collaboration, I6 suggested:

> *I6: I think one challenge if you go more remote is that it is difficult to reproduce that sort of "water cooler" chat environment. It is little things like some questions that you feel uncomfortable to type. Whether it is about the tone, you do not want to sound rude, or the question seems so small, and instead of just turning around to ask, now you have to type it in and engage on the thing.*

Categories: They use six different categories of social media at C4: moderated web community, microblogs, social and professional network, video hosting/sharing, videoconferencing and instant messaging. Moderated web community Reddit is used to gather knowledge on their audience as well as to create awareness among them:

> *I6: I think Reddit is a great place to have some pretty honest conversations on the business side of things about products, conferences, and to really get in front of a niche audience. This is more as a user less as an advertiser. In our business, we are serving people that use specific platforms like Shopify, Bigcommerce, or Quickbooks Online. So paying attention to those subreddits lets me get a pulse on what is the conversations that matter to the people that are using the platforms*

> *that I ultimately want us to sell to. It can help me with how do they talk and what*
>
> *is on their mind.*

Reddit is also used for content promotion:

> *I6: Reddit can also be a solid avenue for content promotion if you do it properly.*
>
> *(...) Reddit is also a very popular ecosystem for the people that we are trying to*
>
> *sell into.*

It can be inferred from this quote that while moderated web community can be beneficial to promote content among niche communities, specific skill sets are required for it to be successful. Microblogging platforms Instagram and Twitter are used for very different purposes. Instagram is mostly used for recruiting purposes:

> *I6: We see Instagram as a recruiting channel, so we try and promote a lot of our*
>
> *culture, activities, and fun things. We are not really ever talking about our*
>
> *product there.*

On the other hand, Twitter is rather used for brand awareness and advertisement purposes as well as to be aware of what is going on in the firm's targeted community:

> *I6: If you mix being active on Twitter and Reddit, you get a real pulse of what is*
>
> *going on in specific communities. (...)Twitter is great for awareness, not to drive*
>
> *an action. (...)Twitter ads are great for awareness, not great for a direct response*
>
> *if it is a B2B client decision-making thing.*

Social networking platforms Facebook and LinkedIn are also used for different purposes. Facebook is used for advertising, but also to exchange information with specific groups of experts, which will be discussed in further detail in the next sub-section. LinkedIn is used for two different purposes. Firstly, it is used to share and advertise posts, as described in the strategy

section. Secondly, LinkedIn is used to learn more about what is going on in the community. It is also used as a complement to Reddit and Twitter and, thus, to spot upcoming threats or opportunities.

Video hosting/sharing platform YouTube has been used mostly to build partnerships with content creators rather than for content sharing purposes. While scouting C4's YouTube channel, the researchers came across a few videos sharing customer success stories as well as information on their products and how it can be used. However, there were very few videos on the channel, and the last publication was five months old. I6 gave us more detail on the YouTube situation:

> *I6: YouTube is something that we are lagging on any sort of publishing. It is more of a resource thing. Video just always seems to take more work, but something that is interesting is to look at the guides or tutorials that are being produced for people and is there an opportunity for us to connect with a content creator, for example, see if they can promote our product in some way.*

So as they lack the resources and expertise to post videos regularly, C4 switched to a partnership strategy in which they look for content creators that produce content on YouTube that is related to their audience and try to sponsor them to create awareness around their services.

Videoconferencing platform Zoom is used for internal collaboration. It allows colleagues to work remotely and still consistently collaborate, assist in meetings, and even provide feedback on recorded sales pitch. Zoom is also used to demonstrate the products to clients. At last, instant messaging application Slack is heavily used for internal communication as it facilitates collaboration while working from home, as discussed previously.

Another insight that stood out from the analysis of the different social media categories used by C4 is that different platforms of the same category can be used for very different purposes, as displayed in the examples of Twitter and Instagram or Facebook and LinkedIn.

Functions: C4 leverages the reputation function of social media to build their credibility and be seen as trustworthy. Their ads and social media post often include customer success stories which focus around explain how C4's software was able to solve the customer's problem. Then, as introduced earlier, Facebook is used to access specific of experts related to the market they target:

> *I6: What we have got out of Facebook is activity in closed groups specifically for developers of Shopify, Big Commerce, and Quickbooks Online. We can share questions, understand which channels are working, or meet app developers for potential cross-promotion.*

Access to specific groups of experts allows C4 to acquire new knowledge and also offers the potential to find new business partners. To follow-up on the partnership potential, here is another quote from I6:

> *I6: We have used social media to establish contact with other companies for some co-marketing opportunities. For example, last year, we produced an e-book for black Friday and Cyber Monday to help online store owners prepare for that busy time of year. We had three other non-competitive partners: one for the backup thing, one might be doing the shipping, and one might be doing inventory management.*

Thus, social media allowed C4 to create new relationships with other businesses to seize new opportunities. As discussed in the following citation, social media enabled these new partnerships:

> *I6: We do not have a large conference presence. There are not a lot of conferences for us to go to meet these partners. So yes, I would definitely say social media has been key in helping to build (these partnerships).*

The sharing function is also an important one for C4. First, customers do share their impressions on C4's software via comments in the different app stores. This feedback is vital for them as it can be leveraged to improve the firm's message:

> *I6: we had 900 reviews. You read through them, and then you have 900 examples of people telling you what they loved about your product or how they liked that thing, and then that helps inform your messaging.*

It is very valuable for C4 to have all this feedback about how their product has helped people since their content strategy is focused on informing people about how they can solve their problem.

Then, the conversation function of social media is also vastly used by C4. Whether it is to allow them to start a new conversation on Reddit or simply to read through conversations on Facebook, LinkedIn, or Twitter; social media allows C4 to" feel the market's heartbeat." When asked about how this "market's heartbeat" could be leveraged, I6 responded that this is valuable to learn more about the methods that prove to be successful on social media.

> *I6: Which hashtags should we be using for social media posts of ours? What formats of posts are getting higher engagement? Are people using an image or a video? Is it just a block of text, or is it a couple lines spaced out? (...) There are*

> *benefits to seeing how people respond to other posts, and then, you want to mirror*
>
> *the ones that do well and shy away from the other ones.*

4.7 Case #5

The following case is based on a single interview (See Table 4.3). As I7 is the founder and CEO of C5, they is very knowledgeable about the firm's social media practices. They also has two master degrees from two different countries, along with multiple certifications in IT and related domains. It is safe to say that I7 is an expert in information technologies and related good practices, which brings great credibility to the insights they brought to this study.

Strategy: C5 uses a push strategy to sell IT consultancy and training services. The strategy of the firm relies on building the brand image and reputation on social media using advertising and social media posts. The credibility of the person that is in charge of approaching the clients was also mentioned to be very important to generate new business:

> *I7: if I find some person whom I want to talk to, it is almost guaranteed that if this*
>
> *person does not know me, this person will not give me business.*

I7 shared with the researcher that personal reputation and credibility can be built on social media by sharing expertise. An example of relevant content to demonstrate expertise and thus acquire visibility was *"tweeting on trends and best practices in the industry."*

Stages: Social media are only used in the first two steps of C5's selling process. Firstly, LinkedIn is used for prospecting purposes. As expressed in the following quote, the social networking platform is used as a replacement for job searching engine:

> *I7: For me, to find these (clients), I used to look in job search engines like*
>
> *Monster. This time is over. Now we are really into LinkedIn. We are searching*
>
> *and then finding profiles on LinkedIn.*

Thus, LinkedIn is used to identify new clients. Then, it can also be used to learn more about these prospects before approaching them. When asked if they ever used social media to learn more about people before approaching them, they said: "It is an instinct. Before I deal with anyone, I read their whole profile."

We can infer from this statement that social media are very frequently used to research prospects and learn about them. From this point on, social media is not used in C5's selling process. Furthermore, I7 even suggested that approaching clients using social media does not work because "people are over solicited, so they are not answering."

Value: Social media are much cheaper than other tools. For example, YouTube allows to host training videos for free. While the creation of the video is not free and requires specific skills, the social media part that allows sharing it with a restricted group of people via the private function of YouTube is free. Another example is that social networks such as LinkedIn can be a free alternative to the job search engine, which requires users to pay, as mentioned previously. Another benefit of social media is that it allows firms to assess the specific market size and to get a better grasp of the players operating in these markets:

> *I7: Yesterday, I ran the search, and I noticed the trend that there is a lot of new players in business relationship and management in Montréal. Then I looked in Toronto, and there were also a lot. I am checking every six months, and I noticed that this is useful because it gives me the market.*

Categories: Video hosting/sharing platform YouTube is not used in C5's selling process itself, but to host some of their product (i.e., online courses). YouTube is also used for advertising to build the firm's brand image. Social networking platform LinkedIn is used for

promotion, advertising as well as prospecting for new clients and gathering information on them before the actual approach (preapproach). Microblogging platform Twitter is used to share information about trends to build credibility and also to learn about these trends and best practices from other experts.

Functions: C5 leverages the identity function of social media as they use this technology to build and express their corporate brand through advertising, blog posts, and microblog posts. This is intimately related to the reputation function since, as previously established in this case, the credibility of the salesperson is essential for successful approaches. Then, the group function is also leveraged by I7 as they is personally running a closed community of experts. This restricted group of experts allows them to have conversation related to trends and best practices of the industry.

4.8 Case #6

The following case is based on a single interview (See Table 4.3). I8's role at C6 is essentially to generate new business with existing clients at C6. They focuses on upselling and cross-selling to current clients. Therefore, they brings a different perspective to this study as they is not looking to bring new clients to the firms as opposed to the previous interviewees. Furthermore, they is only involved in the prospecting, preapproach, and approach stages of their firm's selling process. In fact, their job is to open the conversation, and once the clients suggest that they is interested, I8 will hand off the client to an account executive for the presentation. Unfortunately, the researchers of this study were not able to interview an account executive from C6 to complete this I8's interview. The researchers decided to keep this case for its contribution to the business development aspect of the selling process. This case will also offer the researchers another opportunity to validate previous findings.

Strategy: I8 works in a business development division of C6 that focuses on generating new business with current clients. They uses a push strategy during which they will use the LinkedIn sales navigator to prospect for new opportunities with existing clients:

> *I8: LinkedIn is our primary tool for prospecting. To create different account lists or finding what kind of position my prospects might be in or finding people under certain titles. Sales Navigator is the easiest way for me to do that.*

Once they targeted the right person and has gathered sufficient information to approach the latter, they will follow-up with phone calls or emails, preferably.

Stages: I8 uses social media in every step of the selling process they is involved in (i.e., prospecting and preapproach). As discussed previously, LinkedIn is used to find the right people to approach. It is also used to learn more on the latter:

> *I8: LinkedIn is a good place to gather research on your prospects, to get information that you otherwise would not be able to get as it is purely just available on social media.*

Once I8 has enough information to make their approach, they will prioritize traditional media (phone or email). However, if the latter are not successful in approaching the client, they may resort to social media:

> *I8: Occasionally, if there is a high-quality contact with whom I am not able to connect with over email or over the phone, I will try to connect with them on LinkedIn. That at least gives them some familiarity, so the next time I email them, they have a better understanding of who I am.*

Thus, social media can be used to let a customer know who you are before engaging with them through more direct channels. This exchange of personal information is inferred to be beneficial since relationships are known to be interpersonal in relational exchanges (Rajamma et al., 2011).

Value: According to I8, social media are most beneficial to the selling process as it makes it easier to find the clients and to get information on them:

I8: if I did not have (social media), I am not sure what I would be doing to be honest because it is a really easy way to find certain people under certain titles or teams or divisions. It definitely helps my job a lot.

Category: The only social media that I8 uses in their work tasks is the social networking platform LinkedIn.

Functions: The relationship is leveraged by I8 when they uses LinkedIn to establish a personal connection with their target client for the latter to be more familiar with them when they tries to approach them subsequently.

5. Cross case analysis

Following the within-case analysis of the six cases, the themes drawn from the cases will be compared and contrasted to identify similarities and differences across the cases. Subsequently, these similarities and differences will be linked to extant literature to give rigor to the research findings (Eisenhardt, 1989; Eisenhardt and Graebner, 2007). Wherever it is appropriate, propositions will be made.

5.1 Strategy

The different social media strategies discussed in the cases can be brought down to three strategies: Pull, push, and mixed strategies. These strategies relate to the two themes of

social media use highlighted by Agnihotri et al. (2012): digital content creation and network-based interaction. In the case of pull strategies, most cases seemed to have adopted a strategy that fitted what was presented by Agnihotri et al. (2012). The strategies were about creating lead-generating content and sharing it on digital platforms to bring potential clients into the firm's sales funnel. This content was followed by increasingly narrow and personalized content aimed at the prospects and even personalized emails. In the case of push strategies, the strategies seemed to consist of two layers. As suggested by Truong and Simmons (2010), communication in push strategies was more general and on a one-to-many basis. These communications also took place through network enablers, as suggest by Agnihotri et al. (2012). However, a pattern was identifiable across the social media posts and advertisements used as communication vehicle in push strategies. The communications were mostly focused on building the brand image and credibility of the firm. Furthermore, salespeople from firms using push strategies were also found to use social media to research their prospects specifically. They identify relevant stakeholders and gather information on them to increase the chance of a successful approach. Rather than letting the clients come to them, they go to the client. LinkedIn is largely used for information gathering, and then face-to-face, phone calls, and emails are used for direct approaches.

5.2 Stages

As discussed in the literature review, "the traditional selling process has evolved and transformed due to several influences, including technological advances (Moncrief and Marshall, 2005; Moore et al., 2015). Therefore, many variations of the process have been proposed over the last years, and no consensus seems to have been reached in the sales literature. To anchor the findings of this research in a pragmatic model of the selling process, the

researchers did not specifically mention any steps of the process in the interview protocol. Instead, they asked the interviewees to describe how social media is used across their whole selling process. The responses were first analyzed according to the traditional selling process. Then, an evolved model is proposed based on the explanations from the in-depth interviews that compose this study.

Moore et al. (2015) suggested that the preapproach and approach stage should be collapsed into the "initial contact" stage. However, this suggestion does not seem to be a good fit in the context of social media study. Social media is used in the preapproach stage for every single case studied in this research. Oppositely, social media is either not used at all or exceptionally used to approach clients. Thus, we conclude that these steps should be treated separately when studying social media in the context of B2B sales.

Then, to the exception of one case, each interviewee suggested that they would be familiarizing themselves and gathering information on their prospects (i.e., preapproach) right as they would identify them (i.e., prospecting). Firms operating pull strategies often exchange identifying information for content, and therefore information is gathered on the prospects just as they are identified. As for firms operating push strategies, platforms such as LinkedIn allow them to identify the stakeholders to approach and to gather information on them at the same time. Accordingly, we suggest collapsing the prospecting and preapproach stages into a single step. Andzulis et al. (2012) also regrouped the prospecting and preapproach stages in their study on social media in the selling process. The collapsed stage was labeled "Understanding the customer." We decided to keep the traditional terms and simply label it "Prospecting and preapproach" to make it easier to relate to.

5.2.1 Prospecting and preapproach:

For each case of this study, social media was heavily used for prospecting and preapproach purposes, which is consistent with Moore et al. (2013). Depending on the strategy, prospects are either attracted or identified using social media. In each case, LinkedIn played a key role in the firm's strategies. In push strategies, LinkedIn Sales Navigator is used to target specific stakeholders, understand the client firm's structure, and to find common contacts that could provide an introduction. In pull strategies, LinkedIn is used as a channel to share lead-generating content. It is also used as a platform for advertisement.

5.2.2 Approach:

Moore et al. (2013) argue that "Salespeople appear to use (social media) most for prospecting and making the initial contact and then for post-sale follow-up." (Moore et al. 2013) To fully understand this statement, it is necessary to consider that Moore et al. (2013) refer to "initial contact" as the preapproach and approach stages. As mentioned earlier, this study supports the claim that salespeople heavily use social media in the prospecting and preapproach stages. However, the six cases on which this study is based suggest that social media is rarely used to approach customers. All interviewees mentioned that phone calls and emails were mostly used to approach B2B clients and that social media would only serve as a last resort, given that they were not able to reach the potential client. The great majority of the cases avoided using social media approach customers for multiple reasons. Among them, the fact that clients are seen as over-solicited online as well as the fact that direct contact through traditional media or face-to-face was better suited for trust-building. Given that the approach stage is the salesperson's opportunity to establish a rapport that is likely to lead to a relationship and sales (Moore et al., 2015), trust-building is critical at this point in the sales process.

5.2.3 Presentation:

Out of the six cases, four of them use social media for presentation. They use online conferencing platforms to do their demonstrations. These platforms allow salespeople to be seen and heard by the clients no matter the geographical distance between the two. Thus, it offers some of the face-to-face benefits, while significantly increasing the reach of a salesperson. Moreover, it greatly enhances the salesperson's efficiency as they saves much time, given that they does not have to travel to meet their customers. However, it should be noted that the cases in which social media is used for presentation purposes all sell digital products or services. Therefore, it is possible that the use of social media for presentation purposes only applies to firm commercializing digital products.

5.2.4: Objection, Closing, and follow-up:

For these later stages of the selling process, five out of the six cases suggested that social media is not used very much. As suggested by I3:

> *I3: as I continue down the sale cycle, because I built that personal relationship with them and their trust, I feel like I do not want to have a digital platform between my customer and me. I want to always have a personal relationship."*

While our research suggests that social media are not used in these stages, other researches such as Moore et al. (2013) and Moore et al. (2015) suggest otherwise. Given the bigger sample size of these quantitative studies and the fact that ours is limited to technology-intensive firms, we recognize that it is possible that social media could be used in objection, closing, and follow-up stages. However, it should also be considered that both these studies adopted a quantitative methodology, and respondents were asked to "check all that applies." Therefore, these studies do not provide more insights as to why and how social media are used in these three stages.

5.3 Value

When asked about how social media is most useful in the B2B sales process, the responses seemed to be influenced by the strategy in which the respondents were involved. The three interviewees involved in pull strategies propose that social media is most useful to create brand awareness. Then, two of the three interviewees involved in push strategies argued that social media is most useful for prospecting purposes. At last, the interviewees operating a mixed strategy proposed that social media is best to build credibility and to create brand awareness.

All 6 cases researched in this study also revealed that social media is beneficial to the B2B selling process because it allows salespeople to access more information on their potential clients that would not be available otherwise. Concerning this, four firms out of the six cases mentioned using some sort of analytical tool to track this information that social media allows them to access. For example, HubSpot is used by C1, C3 and C4 to track potential leads that interact with the firm's content online. This allows them to assess better how close the potential client is to a buying intention and therefore increase the chances of a successful approach.

Three interviewees also suggest that social media is very valuable as it allows the marketing and sales team to save time daily. It allows workers to complete their tasks faster. Here is a shortlist of the other ways in which social media is said to be beneficial: reduce costs, easily reach customers located at great geographical distance, helps to be better prepared to meet customers, lead generation and, facilitate working remotely.

5.4 Categories

This section discusses the different social media categories that are used across the cases, as well as the specific platforms that are used. Here is a table that summarizes the categories and platforms used in each of the cases:

Table 5.1: Social media used in the B2B sales process by categories

	#1	#2	#3	#4	#5	#6
Social and professional network (SPN)	Facebook, LinkedIn	LinkedIn	Facebook, LinkedIn	Facebook, LinkedIn	LinkedIn	LinkedIn
Blogs	WordPress		WordPress			
Microblog	Twitter, Instagram			Twitter,	Twitter	
Online conferencing (OC)	Zoom	BlueJeans	GoToMeeting	Zoom		
Instant messaging (IM)	Slack	Slack	Skype for business	Slack		
Video hosting/Sharing (VHS)				YouTube	YouTube	
Moderated web community (MWC)				Reddit		

5.4.1 Social networking platforms:

Social networking platforms are the most used social media category across all cases. Most specifically, LinkedIn is used in every single case. Two different types of practices are associated with LinkedIn depending on the firm's strategy. Firms operating a pull strategy use it to share blog posts on their profile, mostly lead-generating content. This is also accompanied by advertising to increase the visibility of the posts. On the other hand, firms operating push strategy instead use LinkedIn to identify the right people to approach targeted firms as well as to gather information on the latter before making their approach.

Facebook is only used by firms operating pull or mixed strategies. Similarly to the use that these firms make of LinkedIn, Facebook is mostly used to share lead-generating content. However, two other practices were highlighted in the pull strategy cases. First, C1 and C4 both mentioned that Facebook is used to access closed groups of people that strongly relate to their business. For C1, it is most potential clients to which they can promote their content directly. In the case of C4, it is a group of experts that offer partnership and knowledge exchange opportunities.

5.4.2 Blogs:

Blogging platform WordPress was used in C1, C3 and C4's pull activities. In each case, the platform is used to host blog posts, which could then be shared on the firm's social networking platforms and microblogs.

5.4.3 Microblogs:

Microblogs are used across three different cases (i.e., C1, C4 and, C5). Twitter was used in each of these three cases for different purposes. C1 used it mainly to share blog posts to build brand awareness. C1 also used Instagram for similar reasons. C4 used Twitter to build

brand awareness through advertising and to gather information on its market. C5 used Twitter to share information about trends of its industry to build its credibility in front of its audience.

5.4.4 Online conferencing:

Online conferencing platforms are used in cases C1, C2, C3, and C4. The three different platforms that are used across the cases are all used for the same purpose: demonstration of the firm's products or services. The general justification is that videoconferencing shares a lot of the face-to-face benefits that are known to be important for relationship building. It allows the client to see and hear the salesperson and also enables screen-sharing, which helps the salesperson to demonstrate how their product works.

5.4.5 Instant messaging:

Instant messaging platforms are also used in the first four cases. In each of these cases, instant messaging is used for internal communication and collaboration only. It allows colleagues to share knowledge and help each other in their various daily tasks. I6 from C4 also suggested that instant messaging platforms are excellent at facilitating work from home and collaboration between colleagues all around the world.

5.4.6 Video hosting/Sharing:

YouTube is the only video hosting/sharing platform that is used across the cases. This category of social media is only used in two of the cases, and they do not use it in similar ways. C4 uses it to produce informational content and customer success stories, which aim to increase the firm's credibility and build a strong brand image. C4 also uses YouTube to find content creators to partner with for them to advertise its products. On the other hand, C5 directly advertises its product on YouTube and also uses the platform to host some of its products (i.e., training videos).

5.4.7: Moderated web community:

C4 is the only case in which a moderated web community was mentioned; therefore, it does not seem to be common practice to use this category of social media in the B2B sales process. Two potential explanations could explain why it is used at C4 specifically: (1) their audience and (2) the interviewees' personal preference. First, it was mentioned in the interview with I6 that:

> *I6: Reddit is also a very popular ecosystem for the people that we are trying to*
> *sell to.*

Furthermore, they also shared the following thoughts with the researcher:

> *I6: I love Reddit. I have been using Reddit personally for over ten years for a*
> *variety of things.*

Therefore, we suggest that it is very likely that the use of this category of social media in C4 is heavily influenced by the firm's target audience and the interviewee's preference, which would explain why the other firms did not use such social media.

5.5 Functions

This section will review which of the functional blocks of social media were leveraged across the 6 cases and the extent to which they were. Table 4.2 provides a summary of the functions across the cases.

5.5.1 Identity:

Identity is a crucial function across this study. To the exception of I3, every interviewee mentioned that social media was used to build or express their firm's corporate brand or brand image to a certain extent. This is intended to increase brand awareness across their target market. Brand awareness is important for firms involved in pull strategy as they want

their potential customers to know who they are and what they do to attract more customers into their sales funnel. Firms involved in push strategies rather value brand awareness because they find that customers are more likely to respond to their approach when they know them.

5.5.2 Conversation:

Conversation is also a crucial function in the B2B sales process. Every interviewee mentioned using the conversation function of social media daily. In most cases, social media platforms such as instant messaging are used to foster internal conversations among colleagues. Facilitating communication enhances collaboration with large and diverse groups (Bhimani et al., 2018; Mount and Martinez, 2014) as it is easier for people to discuss needs, solutions, and best practices. Social media is also leveraged for external communication across many cases. Videoconferencing platforms are used by C1, C3 and C4 to demonstrate their product in real-time to potential clients. Social networking and microblogging platforms are also used to either start or simply participate in discussions online with experts, potential clients, or even potential partners.

5.5.3 Sharing:

Social media is greatly leveraged in pull strategies to share lead-generating content. It is a very efficient channel to exchange knowledge for identifying information to identify leads and gather information on the latter. The ability to gather more knowledge on leads is beneficial, considering that, as established in Case #2, it allows the marketing team to make a better assessment of which leads are close to a buying intention. This is very valuable considering that persistent conflicts are known to exist between marketing and sales teams in regards to lead generation (Jarvinen and Taiminen, 2016). Jarvinen and Taiminen argue that it is common for a sales representative to criticize the quality of marketing leads. Therefore, by

acquiring more information on the leads through social media sharing, we can infer that firms are likely to reduce this friction between marketing and sales teams.

Furthermore, social media's function to share content can be greatly beneficial following the demonstration as it enables salespeople to share sales presentations with their clients. I3 mentioned in their interview that "unlike traditional media, social media allows us to share very heavy content." Here, the interviewees refer to the digital information size in terms of Megabytes. Some platforms also allow salespeople to track the content that is shared. This is also very valuable to salespeople because, as established in case #2, it allows them to be better prepared for their meetings with clients.

5.5.4 Relationship:

While it was only discussed in the Case #4, the relationship functionality of social media seemed to open the door for great opportunities. In fact, for smaller firms operating in industries in which trade shows, conferences, or other events of this type are not common, social media seems to be a great alternative to establish new partnerships. Not only can it allow a firm to isolate specific experts through restricted groups, but it also allows a firm to assess the potential partner's reputation. These three functionalities were strongly interrelated in C4's case and offered the firm new opportunities through partnerships that were only possible because of social media. For most other cases, the relationship functional block was not used very much. Diba et al. (2019) posit that B2B consumers of the digital age now focus on relationships based on person-to-person trust. This belief seems to be shared by most of our interviewees as face-to-face, and traditional media are prioritized over social media in the stages of the selling process that require bidirectional exchanges with the clients given that they are perceived to be more fitting for trust-building purposes.

5.5.5 Presence:

The presence function does not seem to be present in most of the cases. The only case in which this function was mentioned is C1. I1 and I2 both argued that it was important for their firm to be present on the review site *Capterra* to be considered a credible option in their market. Their presence on such sites is leveraged by C1 as the firm proudly shares its rating via their profiles on Facebook, LinkedIn, and Twitter.

5.5.6 Reputation:

Just as the conversation functional block, reputation is a critical function as it came up in each interview. Most interviewees suggest that social media offers a great opportunity for their firm to build strong credibility in front of their market. Interviewees that operate in push strategy believe that their firm must have a good reputation online for the client to even respond to their approach.

5.5.7 Group:

The group function of social media is used by the two firms operating pull strategies (i.e., C1 and C4) as well as the consulting firm C5. C1 manages a closed group on Facebook with which they directly share lead-generating content. As for C4, they are part of a closed group, also on Facebook, which is strictly restricted to application developers. This group allows its members to exchange knowledge and allows them to identify potential partners. Then, C5 manages a community of experts. This restricted group is also intended to give its members a place to exchange knowledge and identify potential partners.

In the context of this study, the group function seems to be strongly tied to Facebook in particular. Indeed, all three firms using this functional block mentioned that

Facebook is the platform through which they interact with specific groups of experts or customers.

6. Discussion

This study contributes to the current body of literature on social media in the B2B selling process by answering its three research objectives. First, the results suggest that social media are most beneficial in the prospecting, preapproach and presentation stages. Second, this research suggests that social media cannot support the whole selling process by itself. Accordingly, it should be integrated with traditional media and analytical tools to complement it. Social media value is optimized in the early stages when it is paired with analytical tools and replaced by traditional media in the later stages. Thirdly, this research provides insights into how the different functional blocks of social media are leveraged across the different stages of the selling process concerning the firm's strategy. The study also suggests that firms operating pull strategies use social media differently from firms using push strategies.

6.1 Social media, traditional media, and analytical tools:

Social media is, without a doubt, widely used in B2B sales (Moore et al., 2013). Our key respondents perceive it as valuable to the B2B selling process because it offers a cheaper alternative to traditional methods; it is not limited by geographical distances and; allows completing daily tasks faster. More specifically, in the prospecting and preapproach stage, our research suggests that it is used to identify key decision-makers, understand potential client firm's structure, find common contacts to facilitate approaches, acquire information on potential clients, and to generate new leads.

However, it is known that persistent conflicts exist between marketing and sales development teams when it comes to lead generation, as marketing teams are often criticized for the quality of marketing leads (Jarvinen and Taiminen, 2016). Thus, while social media are great at generating new leads and are very handy when it comes to understanding prospects before approaching them, they cannot guarantee the quality of each lead. The multiple cases on which this study is grounded suggest that complementing social media with analytical tools allows marketing people to assess the quality of leads better and to focus their resources on leads that are closer to an actual buying intention. In cases #1, 3, and 4, the marketing automation tool HubSpot is used for this purpose. According to Jarvinen and Taiminen (2016), marketing automation involves "a software platform that can be used to deliver content based on specific rules set by users." (p. 165) Moreover, they suggest that marketing automation and web analytics capitalize on similar techniques as they both track online website visitors' online behavior (Jarvinen and Taiminen, 2016). HubSpot enables marketers to track who interacts with lead-generating content pushed by the firm as well as how they interact with the content. Each lead can be tracked to allow a better assessment of their potential, which can help the firm to allocate its resources toward better leads. As for case #2, the analytical tool used is a collaborative platform that we refer to as X01. This collaborative platform allows salespeople at C2 to track their clients' behavior concerning the sales material that was shared with them.

Overall, this research suggests that different types of analytical tools can be used in conjunction with social media to enhance the sales process. As approximately 70% of all leads generated by marketing are ignored (Jarvinen and Taiminen, 2016), it is very valuable for the sales team to be able to assess the quality of each lead and be able to discard those that have lesser potential.

Then, our analysis suggests that from the approach stage up until the end of the selling process, face-to-face and traditional media such as phones and emails are prioritized over social media for direct interactions. Our findings suggest that face-to-face and traditional media are prioritized in these steps because they are better suited to create a personal relationship between the salesperson and the buyer. Establishing a strong relationship with the buyer is very important for the salesperson as stronger social bonds are known to foster trust-building, and trust in the salesperson directly increases the likelihood that the buyer anticipates doing business with the seller in the future (Doney and Cannon, 1997). The idea of using face-to-face and traditional media over social media for trust-building is also consistent with the Social Media Capability Maturity Model suggested by Wang et al. (2017). For firms to achieve the highest maturity level of this capability model, they need to transform from a transactional-focused paradigm to a networking-focused paradigm (Wang et al., 2017). This transformation is intended to allow firms to focus on psycho-social concepts such as trust and commitment (Wang et al., 2017). Because of these arguments, we believe that face-to-face interactions still play a key role in the sales process and, thus, in B2B buyer-seller relationship building.

According to our findings, the online conferencing category of social media seems to be the exception when it comes to relationship-building. Across our cases, firms using this category of social media used it exclusively in the presentation stage. The interviewees argued that this specific social media category could be used for demonstration purposes as it features most benefits of face-to-face while offering a much greater reach at lower costs. This is consistent with the findings from Marshall and al. (2012), according to which sales are becoming increasingly global, which creates significant opportunities for increased revenues via access to

new markets. However, our finding comes from firms specifically commercializing digital products, which will be discussed in the limitations.

Also, while social media was not found to be used directly for approaches, our analysis suggests that social media plays an indirect role in the success of the approaches. Most interviewees reported that social media is used to build the firm's corporate brand as well as its reputation online. By sharing educational content, customer success stories, market trends, industry best practices and, market reports, firms can create brand awareness while reinforcing their image as experts and, thus, be perceived as credible. A strong brand and reputation are key factors when it comes to the success of a salesperson approach. This is supported by Doney and Cannon (1997) which found that reputation is often used as a proxy for trust when a firm wants to engage with an unknown partner. Therefore, salespeople are more likely to be perceived as trustworthy and, thus, successfully establish contact with a prospect if they can leverage social media to build a strong reputation. Furthermore, a strong brand image is also associated with higher loyalty and more referrals from buyers (Michaelidou et al., 2011).

In summary, this research's findings suggest that social media, analytical tools and traditional media are all essential components of the modern B2B sales process. This suggestion builds on the previous findings of scholars such as Jarvinen and Taiminen (2016) which discussed the integration of analytics into social media practices. However, this research pushes it a step further by suggesting that traditional media should still be included when looking at social media in the sales process. According to the interviewees, traditional media will very often replace social media in these stages because they are better suited for trust-building and relationship-building. However, this research was also able to identify a notable exception in the use of videoconferencing applications for product demonstrations. In the majority of the cases,

salespeople have adopted this new method of presentation which carries most of the advantages of traditional media as well as benefits that are specific to social media. While it could be possible that this finding indicates an upcoming shift to an increasing integration of social media to the B2B selling process, it is still unclear whether this would only apply to specific firms of technology-related industries.

6.2 The functional blocks of social media in the selling process

Similarly to what Diba et al. (2019) did for the B2B buying process, we decided to analyze how managers could use the functional blocks of social media proposed by Kietzmann et al. (2011) to influence the stages of the selling process. Table 6.1 presents a summary of the direct and indirect influence that social media can have on the selling process for firms using a pull strategy. The last three stages will not be discussed as we established earlier that social media was not used in these across the most cases of this study. The only exception is C3 which did use social media in the follow-up stage. However, as this practice couldn't be validated by any other case, it is not clear whether it is an isolated phenomenon.

Table 6.1: The functional blocks of social media in the selling process

	Identity	Conversation	Sharing	Relationships	Presence	Reputation	Group
Prospecting and preapproach (pull)	X	X	X	-	X	X	X
Prospecting and preapproach (push)	X	-	-	-	X	X	-
Approach	-	-	I	-	I	I	-
Presentation	-	X	X	X	-	-	-

Objection	-	-	-	-	-	-	-
Closing	-	-	-	-	-	-	-
Follow-up	-	-	X	-	-	-	-

X: Direct use of the function; I: Indirect use of the function

Prospecting and preapproach (pull):

As explained previously, our research suggests that social media are mostly used in the early stages of the selling process. Consistently, six of the seven functional blocks are used in the prospecting and preapproach stage. *Identity* is used as social media allows firms to build a strong brand image online and generate awareness about who they are and what they do. This is especially relevant for pull strategies because sellers knock two birds with one stone by using social media and blog posts to share lead-generating content which creates this brand awareness and attract customers into their sales funnel at the same time.

With a pull strategy, *conversation* is networked. Through social networking platforms, the seller can start a conversation through its posts and engage multiple people in the discussion by inciting them to comments and share. As the firm starts the *conversations*, it has control over the general orientation of the discussion and can engage customers and prospects by carefully selecting the themes of its posts. These are usually very accessible and broad to cast a wider net on social media. Our findings suggest that analytical tools help the firm to track its posts and get a better understanding of which ones create more engagement and reactions. Ultimately, these conversations allow them to identify new prospects and stimulate interactions with the firm's content, which can also be tracked for information gathering purposes.

The following piece of the pull strategy is to *share* more specific and valuable content in exchange for more information. Users that participated in discussions initiated by the

firm or simply interacted with the posts can be retargeted using advertising on social networks. The seller offers intelligence by *sharing* more specific content such as ebooks, whitepapers, or market reviews in exchange for identifying information on the prospect and its firm. An exchange of value occurs as the seller provides actionable intelligence in exchange for information that will allow a better assessment of lead quality.

Social media activity also displays the firm's *presence* in its market. In specific industries, reviews platforms are crucial for the firm to be perceived as a credible player. According to Case #1, sharing these ratings to let customers and prospects know that the firm is a competitive player in its market can represent valuable lead-generating content. It helps build the firm's *reputation* by confirming its presence in the industry. *Reputation* is also built by generating credibility through the relevance of the lead-generating content. Social media cannot be taken lightly as firms need to constantly be relevant and provide value to build their status as experts and trustworthy advisors.

At last, *groups* can be used for targeted prospecting and preapproach. By creating and managing restricted groups, firms can create for themselves a pool of prospects and customers. While these groups provide learning opportunities for the firm and its members, they also provide the firm with direct access to new leads.

Prospecting and preapproach (push):

Push strategies especially differ from pull ones in the prospecting and preapproach stages as salespeople are actively identifying and researching on the prospects rather than attracting them. Thus, social media is used differently across this stage, specifically because rather than exchanging valuable content and intelligence for information, the seller is directly digging for the information that is available on social media. According to interviewees I3 and

I8, LinkedIn provides very detailed information on most firms via the LinkedIn Sales Navigator. Thus, push strategies could arguably provide more information on client firms than pull one, but it requires more time and resources. Thus, push strategies seem to be more fitting for salespeople that are looking to close a few large accounts rather than multiple smaller ones. LinkedIn Sales Navigator allows salespeople to understand complex organizational structures and identify key stakeholders.

Accordingly, *conversation*, *sharing,* and *groups* are not used in push strategies because the prospecting and preapproach stage is about acquiring information, not exchanging. However, seller firms operating push strategies still leverage the *identity* and *reputation* function by posting on social media. Our research of secondary data revealed that rather than posting lead-generating content, push firms would focus on posts that contribute to building their brand image and credibility. For example, posts about new partnerships, new releases, or even events the firm is hosting. In a similar fashion, the *presence* functional block is also used as the firm to ensure its "social presence" by posting regularly.

Approach:

For the approach stage, it was established in the previous section that social media does not seem to be consistently used. However, the actions taken in the previous stage influence the approaches. Salespeople will dedicate their efforts to the leads that carry the most potential. This assessment of potential is a result of the information exchange that occurred following the *sharing* of actionable intelligence. Also, not only can the approaches be focused on better leads, by establishing social media presence and a strong reputation, the salesperson is also more likely

to see the prospects return their calls or answer their emails when they are not reached in the first attempt.

Presentation and demonstration:

Following a successful approach, the presentation of the salesperson can be complemented by online conferencing platforms. This specific category of social media allows the salesperson to have a *conversation* with the clients that could not be reached otherwise due to time constraints or geographical distance. This person-to-person interaction also provides an opportunity to build a personal *relationship* between the parties. Also, in cases where online conferencing was not used for demonstration purposes, a collaborative platform was used to complement phone calls and face-to-face. Indeed, they allow the salesperson to *share* their sales presentation and complementary documents with the prospect right after the pitch. In case #2 particularly, the in-house platform allowed C2 to track how the shared documents were used and shared by the client, which helped salespeople to better prepare for subsequent meetings.

6.3 Learning and strategizing

While investigating the different practices and platforms used across the cases, it became apparent that learning and strategizing are key elements in the study of how social media can enhance the B2B selling process. As they learn more about social media, firms seem to change the way they use social media and ultimately adopt or abandon specific platforms and practices. In the case of firms with limited resources and workforce, they seem to focus on a social media strategy that will automatically filter in good clients and allow them to leverage their limited resources as much as possible. Through a combination of content marketing and marketing automation platform they can create a flow of customers that directly comes to them and save a lot of time and resources by limiting the researches and filtering required to identify a

customer. After a few years using social media, some firms can even spot new business opportunities in social media that are very rarely used for business purposes. A great example of that is C4 which found in Reddit a new opportunity to gather valuable information on their target market. This is a very specific use as during our literature review, we have not found a single mention of Reddit being used this way.

On the other hand, larger firms with great amount of resources seem to develop a completely different strategy as they learn more about social media. Their social media use seems to be geared toward concentrating resources toward the acquisition of a limited number of very large clients. They focus their money and time on platforms such as LinkedIn's sales navigator in order to learn as much as possible on specific clients which they have hand-picked. Our secondary research revealed that these firms still post content on social media, but it is very different from the content that results from the content marketing of the smaller firms. Larger players seem to use social media to share their latest initiatives and build their image as trustworthy experts. In the end, it all ties together as these initiatives aim to make sure that the big client they will approach already knows about them.

Overall, we hypothesize that in the context of social media and B2B sales, firm size and experience with social media could have an influence on the social media and related marketing strategies adopted by the latter.

6.4 Limitations and future research

The first limitation of this study is that the firms composing the sample are all from technology-related industries. As a result, the extent to which the insights of this study can be applied to other industries is unclear. The findings of this study should be applied to other contexts with caution. A second limitation of this study is the fact that the cases are composed of

small and large firms only. This limitation is expected to have a minimal impact as the researchers did not find any significant findings related to firm size specifically.

This study suggests two potential avenues for future research. The first suggestion is a quantitative research that would aim to verify the findings of this research. Such research could adopt a larger sample size including small, medium and large-sized firms in order to validate whether or not there is a relation between the size of the firms, their experience with social media, and the strategy they are using. Such research could also gather more information regarding the different analytical tools that are used by seller firms in the B2B selling process. This study highlighted the marketing automation platform and collaborative platforms as a good complement to social media in the sales process. However, our analysis does not suggest in any way that analytical tools are limited to these two types.

The second suggestion for future research is to look into the interrelated relationships that tie analytics, social media and traditional media together. While this research provides evidence that there is a relation between these three concepts, we did not get a clear sense of it given the exploratory nature of the study. It could be beneficial to understand the fine details of this relationship in order to build a framework that illustrates it. Such framework could allow these findings to be easily shared and integrated in other researches.

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