

Sales Strategy and Transformation

White Paper: The Evolution and Future of the Sales Function

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Table of *contents*

	Executive Summary	05
1	CoVE Sales: Project Description	07
2	Methodology	09
3	Evolution of Sales: Academic Insights	11
3.1	From Order Pushers to Consultative Selling	13
3.2	The Rise of Knowledge Brokering	13
3.3	Towards the Challenger Orientation	14
3.4	Digital Transformation and the Reconfiguration of Sales	14
3.5	The Emergence of Ecosystem Approaches	15
4	Current Trends in Sales: Practitioner Insights	16
4.1	Customer driven changes	16
4.2	Emerging Trends in B2B Sales	19
4.3	Strategic Implications	21
4.4	Challenges for Sales Organizations	21
5	Analysis: Reconciling academic insights with practitioner reports	23
5.1	Technology-Enabled Customer Empowerment	23
5.2	The Increased Presence of the Tech Stack	26
5.3	The Expanding Role of Marketing and the Rise of E-Commerce in Selling	27
5.4	Inside Sales, Hybrid Structures, and New Organizational Roles	28
5.5	The Evolution of AI in Sales: From Machine Learning to Augmentation	29
5.6	Subscription-Based Models and Recurring Revenue	31
6	New and Emerging Sales Roles	32
6.1	Technology, Marketing, and the Redistribution of Sales Activities	32
6.2	Subscription Models and New Organizational Roles	35
6.3	Customer Success and Marketing Operations	36
6.4	Conclusion	37
7	Next Steps	41
	References	42
	Appendix A – Academic Papers Reviewed	45

Executive Summary

Sales has evolved from a largely transactional function into a digitally enabled, analytically informed, and increasingly specialized capability. Technological advances have transformed the sales function over the past three decades. Digital tools like sales force automation, customer relationship management, social media, and more recently artificial intelligence have become more prevalent amongst sales organizations, albeit with varied levels of success in impacting sales performance. Ultimately, technology should not be viewed simply as a tool for efficiency or control. Its impact on sales lies in how it reconfigures relationships—between buyers and sellers, between sales and other functions, between humans and machines, and between individuals and organizations. The impact of these changes does not signal the death of the sales profession, as many digital gurus have erroneously claimed. Rather, it represents a new renaissance for salespeople and sales managers (Cardinali, 2019).

Rather, it represents a new renaissance for salespeople and sales managers.

The modern sales organization no longer revolves around a single generalist salesperson. Instead, it depends on coordinated roles across marketing, inside sales, account management, customer success, enablement, and operations, all supported by expanding data and technology infrastructures.



In this white paper we begin with a historical perspective on sales and how it has evolved to where it is today. We highlight some of the factors that continue to drive this change and the corresponding impact it has on the sales function. We then go on to detail some of these changes that are shaping the sales function and identifying current trends shaping sales by looking at both practitioners as well as academic literature. We then highlight some new and emerging functions in sales organizations in addition to emerging roles. This paper will lay the foundation for a subsequent white paper which will identify specific roles in the modern sales organization and go on to describe what are the requirements at the skill and capabilities level needed by salespeople to be successful in their profession.

1

CoVE Sales: Project *Description*

This white paper was developed as part of **CoVE Sales**, the public brand of the EU-funded **ERCULES project (Project No. 101260656)**, an Erasmus+ initiative under the Centres of Vocational Excellence action. The main objective of the project is to understand the impact of current marketplace conditions on the modern sales function. In particular, the project focuses on understanding how professional selling and sales management are evolving in response to changes and challenges in the marketplace.

The expected outcomes of the project include: (a) identifying both emerging roles and the evolution of existing roles; (b) understanding how these roles are shaping the modern sales organization; (c) identifying the capabilities and skills that need to be developed or retooled to meet current market requirements; (d) developing relevant sales-role-related content to be made available to vocational trainers and educational institutions across the EU; and (e) updating and, where necessary, creating job profiles for the **European Skills, Competences, Qualifications and Occupations (ESCO) classification**.

CoVE Sales is a 48-month initiative involving 13 partners across six European countries, including academic institutions and professional organizations.



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The intended audience for this white paper primarily includes EU policymakers, who can use this white paper, together with subsequent project deliverables, to support the reclassification of professional selling and sales management roles and the updating of relevant job databases. This can positively contribute to EU policy decisions regarding educational initiatives aimed at helping firms and universities operating in the EU to upskill and reskill their workforces in line with the demands of the modern sales workplace. The white paper can also directly benefit professionals working in organizations, consultants who help professionalize sales organizations, and university educators who can benefit from access to cutting-edge sales content.

Further information about the CoVE Sales project, its activities, outputs, and updates is available through the official project website and social media channels:

Website: <https://covesales.eu/>

LinkedIn: <https://www.linkedin.com/company/selling-excellence-europe/>

Facebook: <https://www.facebook.com/profile.php?id=61590383709056>

Instagram: https://www.instagram.com/covesales_eu/

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2

Methodology

The purpose of this white paper is to understand how the sales function is evolving and the factors influencing the same. Another area this white paper focuses on is how the evolving sales function will necessitate sales organizations to rethink the way they staff their organization with new roles as well as work on reskilling their existing staff to build new capabilities as the marketplace demands. The needs for new functions to be created in these sales organizations as well as how these new functions should co-ordinate with more traditional existing functions also were identified as a possible delivery of this white paper. In order to help us with this challenge, we decided to undertake a two step literature review process: 1) Review extant academic literature on how sales roles have evolved over the years and the possible reasons for the change and how have organizations addressed these changes, 2) Review current literature produced by sales consulting organizations and sales technology providers to not only corroborate the findings from academic literature, but in certain cases identify current trends which academic literature might not have addressed to date. In the next two sections, we highlight how the articles- both academic and practitioner oriented were chosen to help write this white paper.

Academic Literature

In order to understand the evolution of sales over the years, we decided to look for seminal papers in the academic sales domain over the years. We particularly focused



on peer reviewed academic journals that adhered to quality guidelines based on a widely used journal ranking list– published by the Association of Business Schools (ABS) in the UK and commonly known as the ABS list. It was later rebranded and updated as the Chartered Association of Business Schools Academic Journal Guide (AJG) guide or the [AJG guide](#). The AJG guide uses a 5–tier quality scale to rank business and management journals: **4*** (world–leading), **4** (national/international excellence), **3** (high quality), **2** (well–regarded/modest quality), and **1** (emerging/specialized quality). To help us with choosing older journal articles we looked for articles at the 3, 4, and 4* level. For more recent articles, we also included articles at all levels owing to the specific and emerging nature of the topics. We relied on the academic expertise of the partners of the CoVE consortium to look for specific key words, topics that would reflect the emerging nature of the sales function. Furthermore, the availability of systematic literature review (SLR) articles on specific topics in sales that relied on older articles also helped ensure that we were able to capture the emerging role of the sales function– over the years.

Practitioner Literature

In order to supplement the academic literature, we also decided to do a grey literature review which involved looking for sales related articles written by practitioners. We decided to also look at practitioner literature to look at cutting edge business practices in sales that has not been covered in the academic literature owing to the lag involved in getting academic articles published through the extended peer–review process. In particular, we focused on more recent practitioner papers to understand current trends that have not been mentioned in the academic literature owing to the long peer review processes involved. We focused on white papers published by global thought leaders in the consulting space as well as experts from sales technology related companies. We focused on searching for articles from firms like McKinsey, BCG, Deloitte as well as companies like Salesforce, Microsoft, SAP etc to get a broad perspective on sales trends from industries.

Based on the synthesis of both the academic literature as well as the practitioner literature, we then identified emerging trends in the sales domain. In particular, we initially focused on macro level trends that could impact the sales process and its corresponding impact on sales roles and consequently the sales organization itself.

In the following sections, we first begin with highlighting the findings from our academic literature and follow this with a synthesis of the practitioner literature. We then combine the findings from both the streams of literature to provide some findings for the evolving nature of sales at the salesperson and sales organization level. We then go on to conclude with some implications for the different stakeholders that are active in the education, vocational education trainers (VET), as well as managers in sales organizations.

3

Evolution of Sales: *Academic Insights*

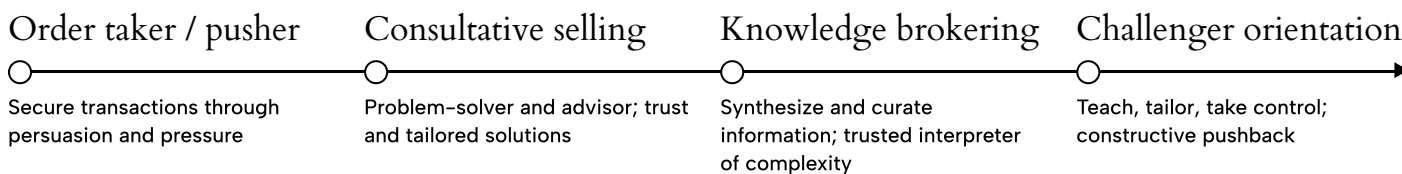
A review of the academic literature on sales suggests that the sales role has constantly evolved over the years– all the way from when salespeople were much more pushy and transaction oriented to now where they are supposed to engage with their customers more holistically and go beyond traditional sales activities (Geiger and Guenzi, 2009; Hartmann, Wieland, and Vargo., 2018; Kalwey et al. 2026; Storbacka et al., 2009). In the last two decades, one of the biggest factors that has both directly and indirectly impacted the sales function is the evolution of digital technologies. For over two decades, technologies like sales force automation (SFA) which primarily involved only the sales function, has evolved to more cloud-based digital technologies that have enabled sales organizations to also better target their customers through more accessible digital channels like website, social media (Ancillai et al. 2019). This has led to customers increasingly engaging with the sales organizations digitally before they actually reach out to salespeople. This has resulted in sales organizations rethinking their customer outreach activities from traditional face to face selling to more digitally enabled touchpoints with the customer. This has led to the creation of new sales roles in organizations which we document in this section. An overview of the evolution of the sales function is provided in Figure 1.

The earliest conceptualizations of professional selling positioned the salesperson primarily as an order taker and an order pusher. In this paradigm, which dominated through much of the early twentieth century, the salesperson's primary function was to

**Figure 1**

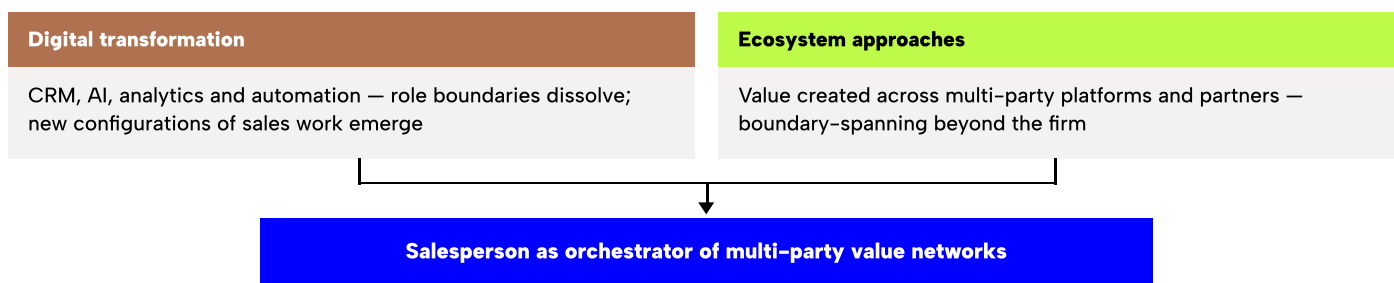
The Evolution of the Sales Function

Schematic overview of the main ideas: the historical evolution of selling (top) and the two converging forces reshaping sales today (bottom).



From persuasion-based selling → toward value creation, customer education and strategic guidance

Two converging forces reshaping sales today



Reading the figure: the four top boxes show the successive sales philosophies described in the white paper — each phase increased the skill demands on salespeople while reducing the viability of purely transactional approaches. The lower boxes summarize the two contemporary forces (digital transformation and ecosystem-based business models) whose convergence reconfigures the sales role.

secure transactions through persuasion, persistence, and in many cases, pressure.

The limitations of this transactional orientation became increasingly apparent as markets matured, competition intensified, and customers grew more sophisticated. By the mid-twentieth century, a new philosophy began to emerge—consultative selling.

The information revolution of the late twentieth and early twenty-first centuries catalyzed another philosophical transformation. As customers gained unprecedented access to product and solution information and competitive alternatives, traditional information asymmetry that had long favored salespeople began to tilt towards more informed customers who also became more demanding of their supplier salespeople.

One of the most recent developments in sales philosophy has been the emergence of what might be termed the challenger orientation. Building on the recognition that customers often struggle to articulate their own needs—or may hold misconceptions about the nature of their problems—challenger salespeople actively push back on customer assumptions, introduce new perspectives, and lead customers toward solutions they might not have considered independently.



Taken together, this progression shows a steady movement from persuasion-based selling toward value creation, customer education, and strategic guidance. Each phase increased the skill demands placed on salespeople while reducing the viability of purely transactional approaches.

In the following paragraphs, we outline the evolution of the sales function. We then go on to focus on the specific impact technology evolution has had on the sales function at the salesperson level as well as the sales organizational level, including the emergence of new roles in the sales function.

3.1 From Order Pushers to Consultative Selling

The earliest conceptualizations of professional selling positioned the salesperson primarily as an order taker and an order pusher. In this paradigm, which dominated through much of the early twentieth century, the salesperson's primary function was to secure transactions through persuasion, persistence, and in many cases, pressure. Success was measured almost exclusively in terms of volumes sold and revenues generated, with little systematic attention to customer needs, relationship longevity, or value creation beyond the immediate exchange.

The limitations of this transactional orientation became increasingly apparent as markets matured, competition intensified, and customers grew more sophisticated. By the mid-twentieth century, a new philosophy began to emerge—consultative selling. This approach repositioned the salesperson as a problem-solver and advisor rather than merely a persuader. Consultative salespeople were expected to diagnose customer needs through careful questioning, propose tailored solutions, and build ongoing relationships predicated on trust and mutual benefit. The consultative model represented a fundamental shift in the locus of value creation, moving from the product itself to the interaction between salesperson and customer. Simultaneously, dealing with very important customers involving multiple stakeholders from both the customer as well as the selling organization came to be referred to as enterprise selling or key account selling (Cuevas, 2018).

3.2 The Rise of Knowledge Brokering

The information revolution of the late twentieth and early twenty-first centuries catalyzed another philosophical transformation. As customers gained unprecedented access to product and solution information and competitive alternatives, traditional information asymmetry that had long favored salespeople began to tilt towards more informed customers who also became more demanding of their supplier salespeople. In response, leading sales organizations have reconceived the salesperson's role as that of



a knowledge broker—an individual capable of synthesizing vast amounts of information, connecting customers with relevant expertise within the selling organization, and helping buyers navigate increasingly complex purchasing decisions.

Knowledge brokering requires salespeople to develop new competencies centered on gathering information relevant to the customer, curating customer relevant information, synthesizing the information gathered, and facilitating customer capability building rather than simple information provision. The most effective knowledge brokers became trusted interpreters of complexity, helping customers make sense of technological possibilities, implementation requirements, and strategic implications that might otherwise overwhelm decision-makers.

3.3 Towards the Challenger Orientation

One of the most recent developments in sales philosophy has been the emergence of what might be termed the challenger orientation. Building on the recognition that customers often struggle to articulate their own needs—or may hold misconceptions about the nature of their problems—challenger salespeople actively push back on customer assumptions, introduce new perspectives, and lead customers toward solutions they might not have considered independently (Rapp et al., 2020).

This approach reverses traditional notions of customer centricity. Rather than simply responding to expressed needs, challenger salespeople bring distinctive insights about the customer's business, industry, or competitive position. They challenge and teach customers something new about their own ways of operating, tailor their message to resonate with diverse stakeholders within the customer's organization and establish control of the sales conversation even if it means confrontation with the customer. The challenger orientation assumes that in many contexts, particularly complex business-to-business environments, customers genuinely benefit from salespeople who are willing to disagree with them.

3.4 Digital Transformation and the Reconfiguration of Sales

The forces reshaping sales roles also need to factor in the impact of evolving digital technologies. Digital technologies have fundamentally altered the nature of customer interactions and the corresponding impact this has had not only on the sales process but also in the internal organization of traditional sales activities. These technologies encompass customer relationship management systems, marketing automation platforms, artificial intelligence applications, predictive analytics, and communication tools that enable new modes of engagement with buyers (Rangarajan et al., 2021).



The implications of these digital technologies on the sales function are profound. Functions that were once the exclusive domain of field salespeople—prospecting, qualification, initial outreach, and even certain aspects of relationship management—can now be performed through digital channels, automated systems, or specialized personnel who work together with salespeople. This technological enablement has created both opportunities and tensions within sales organizations as traditional role boundaries have dissolved and new configurations continue to emerge.

3.5 The Emergence of Ecosystem Approaches

Concurrently with technological change, many industries have witnessed the emergence of ecosystem-based business models that challenge traditional buyer-seller dyads. In ecosystem contexts, value creation occurs through the orchestration of multiple partners, platforms, and complementary offerings rather than through simple bilateral exchanges. Salespeople operating in these environments must develop capabilities for ecosystem navigation, partner coordination, and solution assembly that transcend the boundaries of their own organizations.

Ecosystem selling requires what might be termed "boundary-spanning" competencies—the ability to work across organizational, functional, and even competitive boundaries to create customer value. These competencies have significant implications for role design, suggesting that certain sales positions may need to be conceived less as representatives of a single firm and more as orchestrators of multi-party value networks. More recently sales research has focused on the need for a more holistic approach towards selling while also being prepared to work with multiple stakeholders across an ecosystem of partners.

4

Current Trends in Sales: *Practitioner Insights*

In this section, we synthesize insights from practitioner sources including Deloitte, IBM Institute for Business Value, Salesforce Research, Gartner, and McKinsey. In this section, based on our analysis of the practitioner white papers, we identify nine priority trends and uses them to map the transformation of business to business (B2B) sales that is constantly evolving. Figure 2 outlines some of the key findings from this review of the practitioner literature.

4.1

Customer driven changes

One of the strongest messages from the reports is that customer behavior in B2B markets has become more independent, more complex, and more demanding. Buyers increasingly conduct their own research before speaking with a salesperson. They compare suppliers online, consult multiple information sources, and often form initial preferences before any direct interaction occurs. This means that sellers are entering the conversation later and under different conditions than in the past.

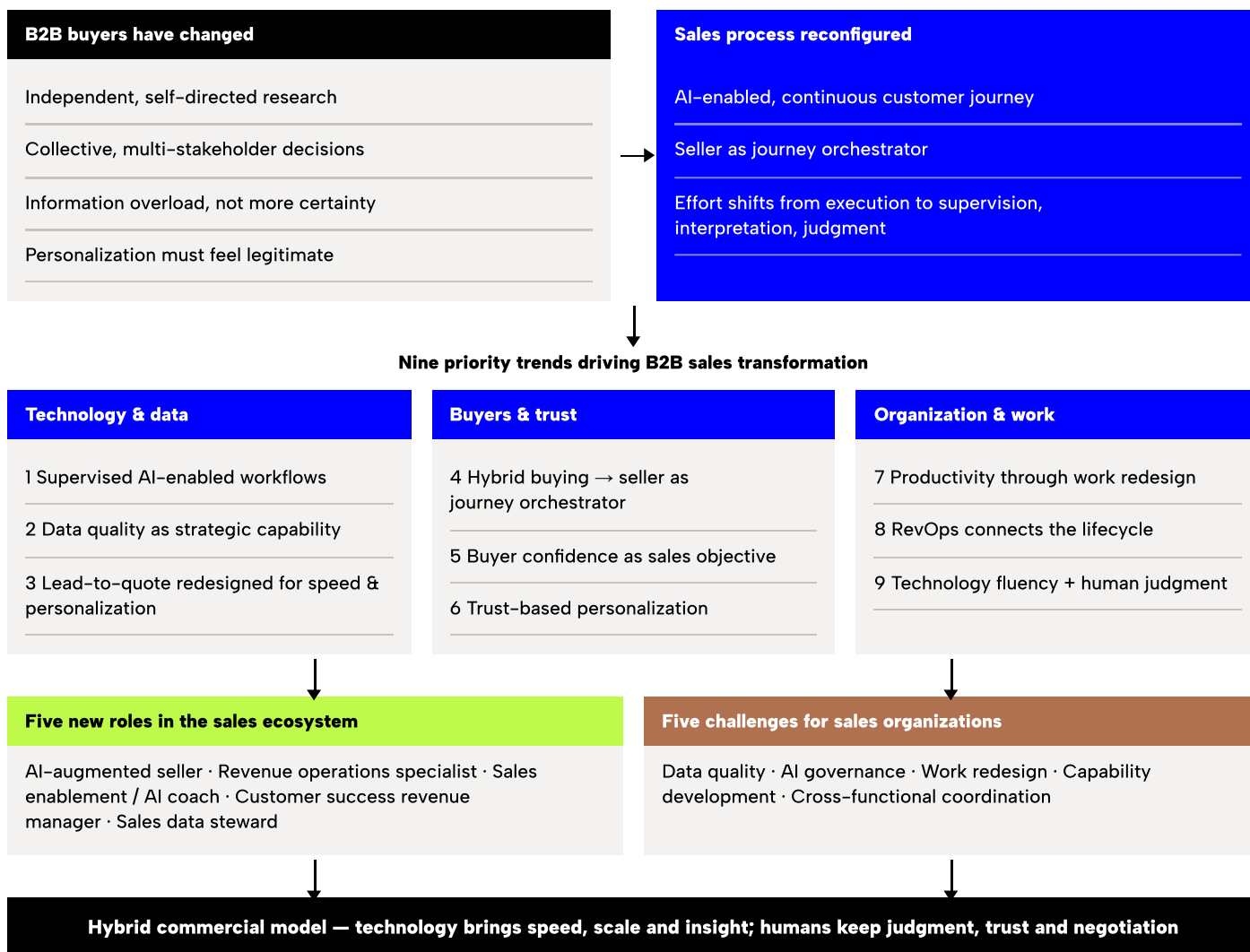
At the same time, B2B buying is becoming more collective. Decisions typically involve multiple stakeholders with different priorities, including technical evaluators, financial decision-makers, operational users, procurement actors, and senior executives (Cardinali et al., 2024). The seller must therefore navigate a distributed decision system rather than persuade a single counterpart. Commercial success depends not only on the quality of the offer, but also on the seller's ability to help different stakeholders interpret information, align internally, and justify a purchase.



Figure 2

Current Trends in B2B Sales — Practitioner Insights

Schematic overview of the main ideas: how changing buyer behavior reconfigures the sales process, the nine priority trends (grouped in three clusters), the five new roles and five organizational challenges, and the hybrid commercial model that results.



Reading the figure: the top row links customer behavior changes to the redesign of the sales process. The middle row summarizes the nine priority trends identified from practitioner sources (Deloitte, IBM, Salesforce Research, Gartner, McKinsey). The bottom row shows the emerging roles and the challenges organizations must solve, leading to the central strategic conclusion — a hybrid model in which technology extends speed and scale while humans keep judgment and trust.



The reports also highlight a paradox of modern buying: more information does not necessarily create more certainty. Buyers face information overload, perceived similarity among suppliers, and pressure to demonstrate return on investment. In this environment, the customer's problem is not simply access to information but the difficulty of translating information into a confident decision. That shift changes the meaning of value in selling. Customers increasingly reward sellers who reduce ambiguity, clarify trade-offs, and support internal consensus.

Another important behavioral change concerns expectations around personalization. Buyers still value tailored interactions, but they are increasingly sensitive to how personalization is produced. If recommendations or outreach appear to rely on weak data, intrusive profiling, or inaccurate assumptions, trust can quickly deteriorate. As a result, relevance alone is no longer enough; personalization must also feel legitimate, transparent, and responsible.

4.1.1

How Customer Changes Impact the Sales Process

These changes in customer behavior have major implications for the design of the sales process. The reports suggest that the commercial journey is being reconfigured from lead generation through renewal and expansion. AI and connected data now influence campaign targeting, account research, product discovery, guided selling, quote preparation, proposal drafting, contract review, and next-best-action recommendations. This creates a more continuous and adaptive process in which customer signals can shape action at every stage.

In lead generation, organizations are moving toward AI-personalized campaigns enriched by intent signals and account-level intelligence. In guided selling, technology supports product discovery and solution configuration, helping sellers respond more quickly and with greater contextual relevance. In proposal and quote development, dynamically generated materials can be assembled using customer data, commercial logic, and evidence-based arguments. In post-sale stages, the same infrastructure supports renewals, cross-selling, and upselling through a fuller view of customer usage, needs, and risks.

This redesign also changes the seller's operational role. Instead of performing every task manually, sellers increasingly work through supervised AI-enabled workflows. They use AI for meeting preparation, lead qualification, CRM updates, follow-up drafting, and account analysis, but they remain responsible for verifying quality, detecting errors, and applying judgment. The reports make clear that this is not a simplification of the role. It is a redistribution of effort: less time on repetitive execution, more time on supervision, interpretation, and high-value interaction.

The process also becomes less strictly sequential. Because buyers move between digital self-service and human engagement, the seller acts more as a journey



orchestrator than as a step-by-step controller. The sales process must therefore support multiple interaction paths, timely expert involvement, and coordinated handoffs across marketing, sales, service, and customer success. What matters is not only process efficiency, but also the organization's capacity to remain coherent across the customer's full lifecycle.

4.2 Emerging Trends in B2B Sales

Our white paper organizes its evidence around nine priority trends that together define the direction of B2B sales transformation. Please refer to Figure 3 for a graphical representation of the emerging trends.

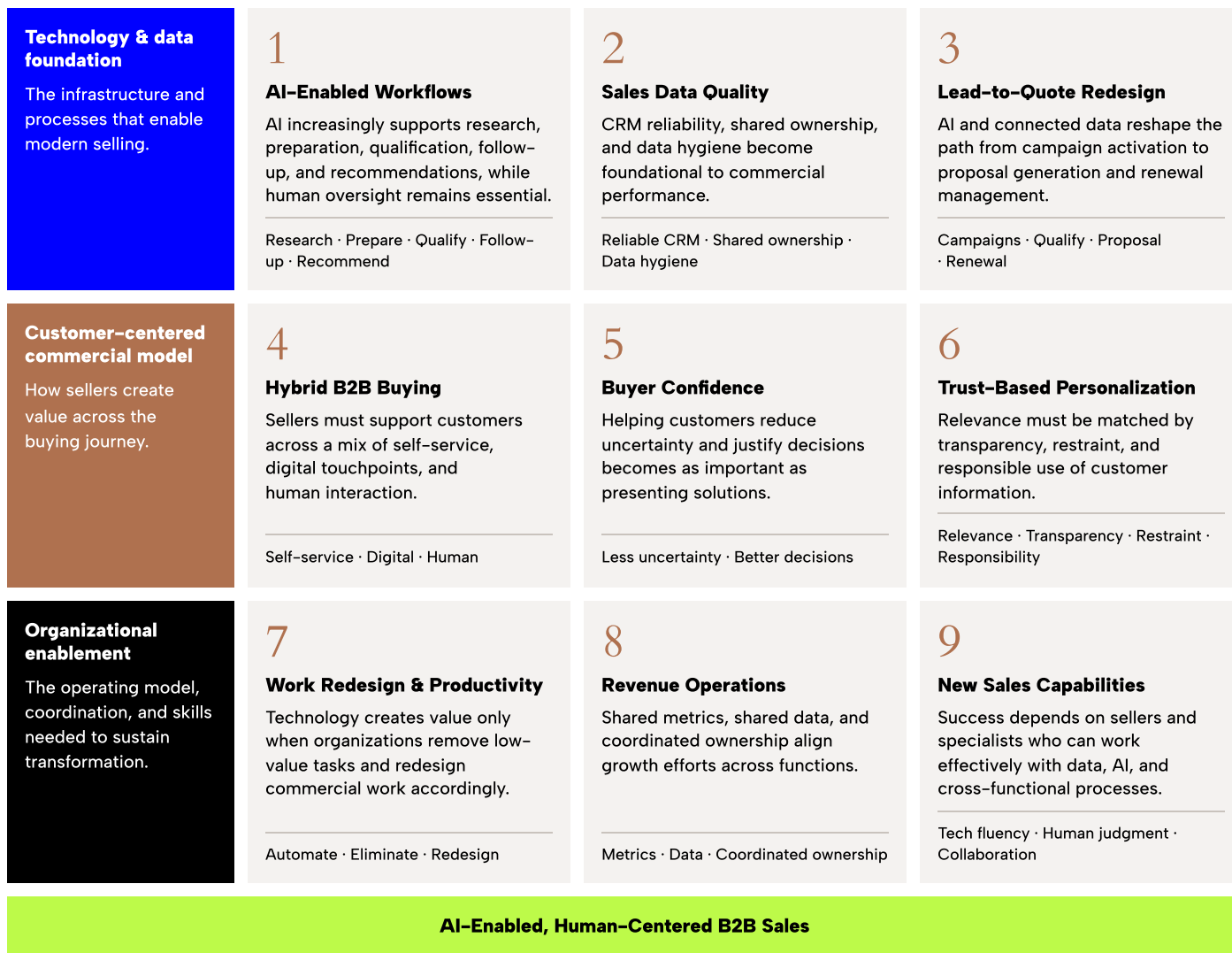
- 01 **From sales tools to supervised AI-enabled workflows:** AI increasingly supports research, preparation, qualification, follow-up, and recommendations, while human oversight remains essential.
- 02 **Sales data quality as a strategic capability:** CRM reliability, shared ownership, and data hygiene become foundational to commercial performance.
- 03 **Lead-to-quote redesigned for speed and personalization:** AI and connected data reshape the path from campaign activation to proposal generation and renewal management.
- 04 **Hybrid B2B buying makes the seller a journey orchestrator:** sellers must support customers across a mix of self-service, digital touchpoints, and human interaction.
- 05 **Buyer confidence becomes a central sales objective:** helping customers reduce uncertainty and justify decisions becomes as important as presenting solutions.
- 06 **Personalization must be trust-based:** relevance must be matched by transparency, restraint, and responsible use of customer information.
- 07 **Productivity as work redesign:** technology creates value only when organizations remove low-value tasks and redesign commercial work accordingly.
- 08 **Revenue operations connects the full customer lifecycle:** shared metrics, shared data, and coordinated ownership align growth efforts across functions.
- 09 **New sales capabilities combine technology fluency and human judgment:** success depends on sellers and specialists who can work effectively with data, AI, and cross-functional processes.

**Figure 3**

The Transformation of B2B Sales in the AI Era

Overview of the nine priority trends reshaping B2B sales across technology and data, customer engagement, and organizational enablement.

AI creates value in B2B sales when connected data, redesigned workflows, and human judgment work together to improve the customer journey.



Reading the figure: The nine trends show how AI, connected data, changing buyer behavior, and organizational redesign converge toward an AI-enabled, human-centered model of B2B sales.

The reports also point to the emergence of five increasingly important roles in the modern sales ecosystem: the AI-augmented seller, the revenue operations specialist, the sales enablement or AI coach, the customer success revenue manager, and the sales data steward. These roles do not eliminate traditional selling positions; instead, they expand the commercial system around them and make explicit the new capabilities required by digital transformation.



4.3 Strategic Implications

Taken together, the findings suggest that B2B sales transformation is not primarily about buying better software. It is about redesigning the commercial model around data integrity, coordinated workflows, buyer confidence, and stronger professional judgment. Organizations that treat AI as a simple efficiency layer will likely capture only limited gains. Those that pair technology adoption with process redesign, role evolution, and governance are better positioned to generate sustained advantage.

For leaders, the practical implication is that commercial transformation should be managed as an organizational change agenda rather than a narrow sales-technology initiative. Investment priorities should include CRM discipline, cross-functional coordination, revised operating models, capability development, and explicit rules for responsible personalization and AI supervision. The competitive gap will increasingly depend on how well firms integrate these elements into a coherent revenue system.

For sales professionals, the direction is equally clear. The future belongs neither to purely traditional relationship selling nor to fully automated commercial interaction. It belongs to a hybrid model in which technology extends speed, scale, and insight, while humans remain essential for judgment, trust, negotiation, and value interpretation. The practitioner reports show that this future is already taking shape and that organizations must adapt now if they want to remain commercially effective in the future.

It belongs to a hybrid model in which technology extends speed, scale, and insight, while humans remain essential for judgment, trust, negotiation, and value interpretation.

4.4 Challenges for Sales Organizations

The reports identify several major challenges that sales organizations must address if they want to benefit from these changes. The first is data quality. Advanced tools only create value when the underlying data is complete, consistent, and trustworthy. Incomplete CRM records, duplicate contacts, disconnected systems, and unclear ownership reduce the value of analytics and weaken AI recommendations. Data quality therefore becomes a strategic commercial capability rather than a technical maintenance task.

A second challenge is governance. As AI-generated outputs become more common across the sales cycle, organizations need clear rules about where automation is appropriate, who verifies generated content, how pricing logic is controlled, and how



risk is managed in proposals and contracts. Without governance, faster output may come at the expense of accuracy, compliance, and customer trust.

A third challenge concerns work redesign. Many sales teams still spend too much time on manual research, reporting, administrative updates, and repetitive follow-up. Technology can reduce this burden, but only if leaders are willing to rethink the process itself. If new tools are simply layered on top of old routines, complexity rises instead of productivity. Organizations must decide which tasks should be automated, simplified, standardized, or removed altogether.

Capability development is another central challenge. The future sales organization needs professionals who are comfortable with digital tools yet able to exercise human judgment in ambiguous situations. This means training cannot focus only on product knowledge or selling techniques. It must also include AI supervision, data literacy, confidence-building communication, and responsible personalization. Sales effectiveness increasingly depends on a blended capability model that spans technology, analytics, communication, and commercial reasoning.

Finally, the reports underline a coordination challenge. Revenue performance now depends on the alignment of marketing, sales, service, and customer success. When these functions operate with separate data, separate metrics, and separate ownership models, the customer experience becomes fragmented and commercial insight is lost. Revenue operations emerges precisely because traditional organizational boundaries no longer fit the way value is created across the lifecycle.

5

Analysis: Reconciling academic insights with practitioner *reports*

Building on recent contributions (e.g., Hartmann et al., 2024; Hochstein et al., 2021; Kanuri et al., 2022; McClure et al., 2024; Sleep et al., 2020; Thaichon et al., 2018; Rapp et al., 2018), the section highlights both opportunities and challenges associated with technological change in sales. It concludes with an agenda for future research, emphasizing the need to better understand the evolution of new business models (Wieland, Hartmann, and Vargo; 2017), dynamics of technology rollout (Gonzalez, Habel, and Hunter., 2026), the evolving division of labor between sales and other internal functions (marketing, services, customer services, etc), and the consequences of digital transformation for salesperson well-being and performance. Please refer to Figure 4 for a summary of key findings.

5.1

Technology-Enabled Customer Empowerment

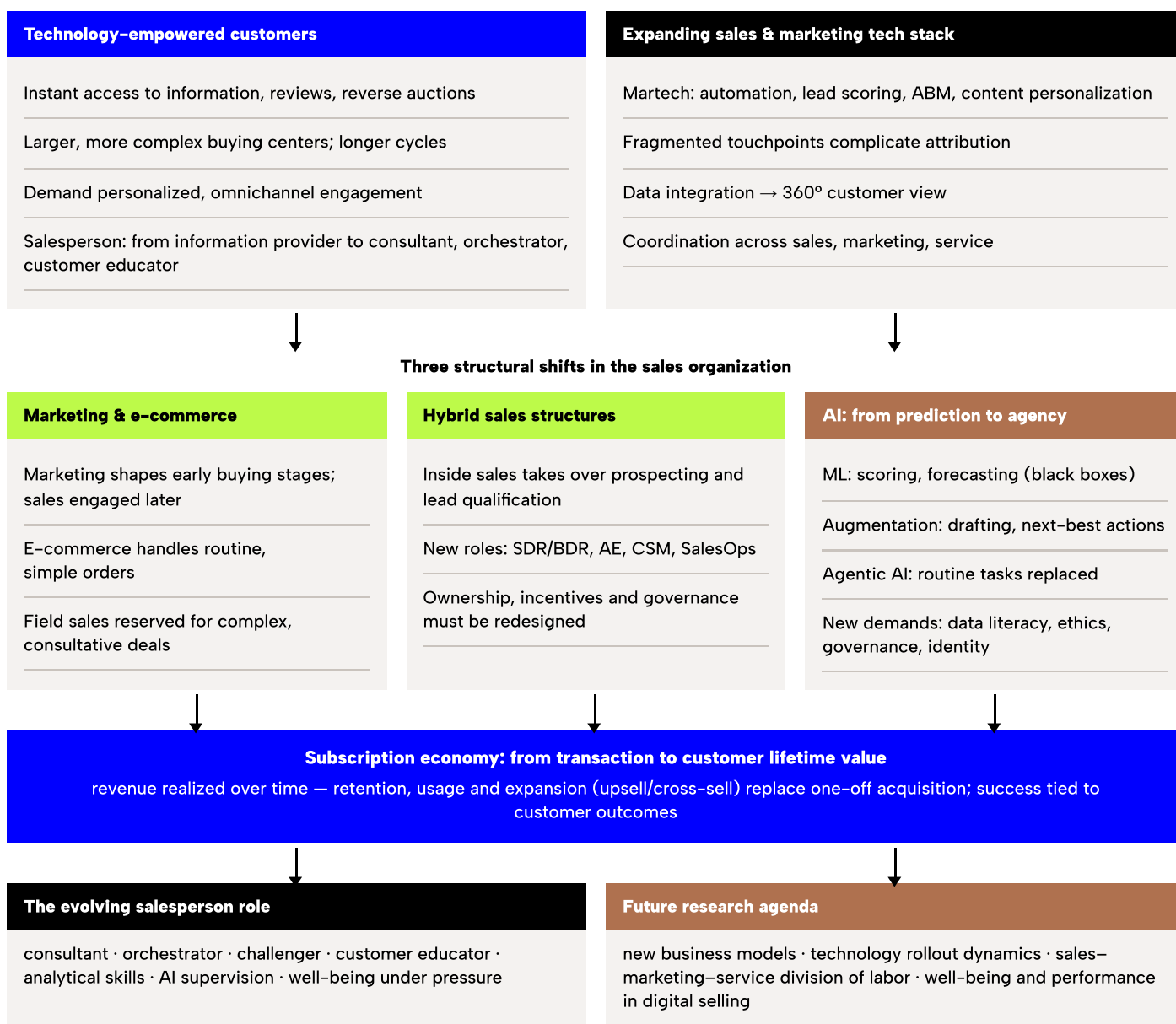
One of the beneficiaries of advances in digital technologies has been customers who have become increasingly empowered and demanding. Prior to the advancement in digital technologies, customers were faced with information asymmetry as they had to rely either on their supplier salespeople or the competition's salespeople to avail themselves of relevant information. However, customers now have near-instantaneous access to product and service information. Moreover, the rise in social media platforms have also given customers access to peer reviews, and expert opinions. Advances in supply chain technologies have also meant that customers today can use reverse auctions to gain information from their suppliers without having to commit to their



Figure 4

Reconciling Academic Insights with Practitioner Reports

Schematic overview of the main ideas: customer empowerment and the expanding tech stack drive three structural shifts (marketing & e-commerce, hybrid sales structures, AI evolution), culminating in the subscription economy, the evolving salesperson role, and the future research agenda.



Reading the figure: the top row shows the two forces analyzed in the chapter — technology-empowered customers and the expanding sales & marketing tech stack. The middle row summarizes the three structural shifts they trigger in sales organizations. The lower band captures the business-model consequence (recurring revenue and customer lifetime value), which reshapes the salesperson role and defines the chapter's future research agenda.

customers. These changes in buying behavior have meant that customers can compare prices, evaluate alternatives, and seek advice through social networks and online communities long before interacting with a salesperson. Furthermore, customers today



also control how they communicate with salespeople. Traditional face to face interactions have been replaced by either online interactions or hybrid interactions, which has implications not only on the skill requirements of salespeople but also on sales force resource allocation issues.

This empowerment of customers has altered the balance of power in buyer–seller relationships. In the past, salespeople often controlled access to critical information; today, customers frequently arrive at initial conversations with more knowledge than the salesperson, at least about basic features and pricing. This shift has several implications. (a) For starters, customers can more easily challenge claims made by salespeople. Not only does this place an increased pressure on salespeople to be better prepared for the conversation, but salespeople might also have to deal with customers who might not have the necessary capability to truly understand their needs. Furthermore, the propensity of these technologies to make information easily accessible within the customer’s organization as well as the reduced costs due to the usage of digital technologies for buyer–seller interactions has meant that more number of people in the customer’s decision making unit are involved in the decision making process– increasing the complexity, and consequently the sales cycle time; (b) The involvement of multiple members in the customer’s decision making unit also means that salespeople have to be prepared to have personalized and high value interactions with every member of the decision making unit. This again becomes a challenge when salespeople might not always have the most relevant information available from different functions within their own organization. Furthermore, creating consensus within the customer’s organization is another challenge that salespeople today face; and (c) and finally salespeople today have to deal with the requirements from their customers about seamless, omnichannel experiences placing salespeople in difficult positions of having to cope with accessing multiple digital platforms to engage with their customers in addition to having to respond to customers almost instantaneously. This is likely to create additional demands on salespeople and might affect their mental health and stress levels over a prolonged time period.

As customers become more informed and discerning, the nature of value creation in the sales process changes. The salesperson’s role must move from information provider to consultant, orchestrator, and problem–solver in an environment where the informational playing field is far more level. More recent research in salespeople has evolved from salespeople being knowledge brokers, to challenging their customers, and more recently to becomes customer educators. In addition, responding to the needs of the customers that extend beyond traditional buyer–seller interactions is also seen as servicing the customer, which not only requires special skills among salespeople, but also has an impact on the sales cycle time as well as the corresponding control systems needed to measure salesperson performance.



5.2

The Increased Presence of the Tech Stack

In response to empowered customers, firms have expanded their use of the tech-stack which usually refers to a set of marketing and sales technologies to manage customer interactions across channels and touchpoints (Bauer et al., 2024; Severini et al., 2026). While the evolution of sales technologies have been well documented in the sales academic literature, very little has been studied about marketing technologies (often referred to as “martech”) include systems for account-based marketing, marketing automation, campaign management, lead scoring, content personalization, etc.

Despite the potential for martech to help in the sales process– for instance in– lead generation, lead scoring, and lead nurturing, the increasing sophistication of martech has also increased of the sales process in at least three ways:

Fragmentation of touchpoints: Customers may interact with a supplier through multiple channels like online search, social media, self-service portals, chatbots, making it more complex to track and attribute a specific technology’s influence on the actual sales process.

Data integration challenges: Multiple touchpoints would mean multiple sources of data, that sales organizations must integrate from multiple platforms (CRM, marketing automation, e-commerce, service systems) to build a 360-degree view of the customer.

Coordination demands: As mentioned earlier, the need to provide an omnichannel experience to customers who demand multiple channels to interact with their supplier, has meant that sales, marketing, and service must align their strategies and actions around a shared understanding of the customer journey, supported by common data and metrics.

In conclusion, technology not only empowers customers but also demands more careful orchestration from sales organizations. Salespeople must increasingly operate within technology-rich environments, interpreting data, coordinating with marketing, and tailoring their approach based on insights generated by these tools. This also calls for salespeople today to possess more analytical skills to make sense of the multiple data streams about their customers, and the availability of data would also mean that sales organizations must look into creating new functions like SalesOps to help their sales teams.



5.3 The Expanding Role of Marketing and the Rise of E-Commerce in Selling

5.3.1

Buyers' Reliance on Digital Research and Marketing's Growing Influence

As buyers rely more heavily on digital technologies to conduct pre-purchase research, marketing plays an expanded role in the selling process (Rangarajan et al., 2021). In many B2B and B2C contexts, buyers progress significantly through their decision journey before any direct interaction with a salesperson. They download white papers, attend webinars, consume product videos, and engage with interactive tools that simulate usage or calculate ROI. This shift has several consequences.

For instance, marketing often initiates and nurtures early-stage engagement, educating the buyer and shaping their needs, and also the consideration set of potential suppliers. Similarly, the use of algorithms to do qualification of leads initiated by marketing activities, increasingly necessitates dependence on digital behavioral data (e.g., content consumption, website visits, engagement scores) rather than solely on salesperson judgment. And consequently, traditional sales engagement tends to occur later in the buying process, when buyers have already formed expectations.

As a result, the traditional boundary between marketing and sales becomes blurred. Marketing teams now influence not only awareness and interest but also evaluation and, in some cases, purchase decisions. For sales organizations, this implies the need for tighter alignment around messaging, data sharing, and role definitions along the funnel.

5.3.2

E-Commerce and the Simplification of Commodity Purchases

Parallel to this shift, buyers increasingly seek simpler, self-service purchase paths for commodity or low-complexity products. Rather than interacting with field sales representatives, many customers prefer ordering through e-commerce channels that provide convenience, transparency, and rapid fulfillment (Kanuri et al., 2022). Sales organizations have responded to this by: (1) Building e-commerce platforms that handle routine and repeat orders. (2) Offering configurators, comparison tools, and subscription options online to streamline buying decisions. (3) Integrating e-commerce channels with CRM and ERP systems for seamless order processing and account visibility.

These shifts reduce the need for salesperson involvement in transactional sales but increase the need for salespeople and sales organizations to carefully manage their resource allocation strategies and engage in strategic selling and account management for complex, high-value, or customized solutions. Consequently, field sales roles are increasingly reserved for consultative selling activities to serve more empowered and demanding customers, while digital channels handle simpler transactions. The challenge for organizations lies in deciding which customers, products, and situations



should be served through e-commerce versus human-led interactions, and how to manage potential channel conflict when online offerings compete with salesperson-driven revenue.

5.4 Inside Sales, Hybrid Structures, and New Organizational Roles

5.4.1 From Field-Dominated to Hybrid Sales Structures

The ability of marketing technologies to reach broad audiences and generate large volumes of leads has had a direct impact on sales organization design. As lead volumes increase, it becomes inefficient and costly for traditionally structured sales to handle all early-stage contact and qualification.

Sales organizations have therefore worked on establishing inside sales roles who are tasked with: (1) Outbound (reaching out) and inbound (responding to) lead generation and qualification. (2) Early-customer buying stage needs assessment, research and appointment setting for field sales. (3) Nurturing smaller or mid-tier accounts via phone, video, and digital channels. Consequently, what was once largely the domain of field sales—prospecting and demand generation—has increasingly shifted to inside sales teams (Thaichon et al., 2017).

5.4.2 New Roles in Hybrid Sales Organizations

As sales organizations increasingly focus on hybrid sales approaches—combining field, inside, and digital channels—this has led to new role types and interfaces within sales organizations. These may include:

Sales Development Representatives (SDR): /Business Development Reps (BDR):

Focused primarily on prospecting, lead qualification, and booking meetings for account executives and/or field sales.

Account Executives (AEs): Responsible for handling qualified opportunities generated either by marketing or inside sales reps, conducting in-depth customer needs analyses, and closing deals.

Customer Success Managers (CSMs): Concentrated on post-sale adoption, satisfaction, retention, and expansion, particularly in subscription models.



SalesOps Managers: Tasked primarily with improving various sales activities and processes and identifying areas for increasing efficiency across the sales force. They are tasked with helping field sales managers and leaders cope with the multitude of data available due to the influx of digital touchpoints along the buyer and selling journeys.

These hybrid structures offer several benefits, such as improved specialization, better coverage of small and mid-sized accounts, and more efficient utilization of field resources. However, they also introduce coordination and governance challenges:

Clarifying **ownership of accounts and relationships** across roles and channels.

Managing **incentive systems** that encourage collaboration rather than internal competition.

Ensuring **consistent customer experience** as buyers move between digital self-service, inside sales, and field interactions.

Thaichon et al. (2018) emphasize that hybrid sales structures are not merely incremental adjustments; they require fundamental rethinking of role definitions, processes, and leadership practices within the sales organization.

5.5

The Evolution of AI in Sales: From Machine Learning to Augmentation

5.5.1

Early AI and Machine Learning Applications

Initial applications of AI in sales were primarily machine-learning (ML) based tasks such as predictive lead scoring, churn prediction, and opportunity forecasting (Syam & Sharma, 2018). These systems used historical data to identify which leads were most likely to convert, which customers were at risk, and what factors influenced win probability. These early AI applications helped sales organizations with enhanced decision quality by providing evidence-based prioritization and recommendations. They also shifted certain analytical responsibilities from humans to algorithms, freeing salespeople to focus on interaction and relationship-building activities. However, ML-based systems were often “black boxes,” raising concerns among salespeople and managers about interpretability, trust, and fairness. When model outputs contradicted salesperson intuition, tensions arose over whose judgment should prevail.



5.5.2

AI for Sales Augmentation and Agentic AI

More recent developments have seen AI move beyond prediction toward augmentation of salesperson tasks (McClure et al., 2024). AI now assists with drafting and personalizing emails and proposals, recommending next-best actions or content based on customer behavior, summarizing sales calls and extracting key action items, and providing real-time prompts during video or phone interactions. In this context, AI and human capabilities are intertwined. Salespeople rely on AI tools to increase efficiency and personalization, while still exercising judgment about which recommendations to follow and how to adapt them. More recently, the rise of Agentic AI has meant that sales organizations can actually use AI applications (Wang et al., 2026) as replacements for certain activities conducted by salespeople, especially routine activities, thereby freeing up the time and resources of salespeople to focus on their customers (Gonzalez, Hunter, and Habel, 2026).

This evolution creates new challenges. Salespeople must learn to interpret AI outputs, understand limitations of AI, and integrate AI into their workflow. Ethical concerns regarding overreliance on AI, undisclosed use of AI-generated content, and potential biases in algorithmic recommendations can raise ethical and regulatory issues. And finally, as AI takes over routine cognitive tasks, some salespeople may question their unique value contribution, leading to identity threats or reduced motivation.

5.5.3

Challenges for Managers and Organizations with AI

Across both ML-based and augmentation-focused AI, challenges emerge also for sales managers and consequently the sales organization too. For sales managers, AI introduces new levers for performance management and coaching but also demands new capabilities in data literacy, algorithmic accountability, and change leadership. For sales organizations, AI adoption requires investments in infrastructure, integration with existing systems, and governance frameworks that address fairness, transparency, and data protection.



5.6

Subscription-Based Models and Recurring Revenue

Technological developments have supported the rise of subscription-based business models, particularly in software, media, and services, but increasingly in other sectors as well. Hochstein et al. (2023) argue that subscriptions fundamentally alter the economics of selling. They argue that revenue is realized over time, not just at a single transaction point, but rather over the lifetime of the customer's engagement with their supplier. Thus, customer lifetime value (CLV) depends on retention of customers, their continued usage of the product/service, and the subsequent expansion by upselling and cross-selling rather than only acquisition. Sales success becomes inextricably linked to ongoing customer outcomes and value realization. This shift has direct implications for the design of sales roles and organizations.

6

New and Emerging Sales *Roles*

This section examines the contemporary landscape of sales roles by analyzing the structural, technological, and strategic forces reshaping how organizations design and deploy their sales forces as listed earlier. The discussion integrates emerging trends including the technologically enabled redistribution of activities between marketing and sales, subscription-based business models, and the proliferation of specialized roles such as sales development representatives, customer success managers, and sales operations professionals. Throughout, the section we highlight that the set of activities constituting the modern sales force requires fundamental reconceptualization from earlier foundational works (Cardinali et al., 2026; Diephuis et al., 2025; Elhajjar, Yacoub, and Ouiada, 2024; Marshall, Moncrief, & Lassk, 1999, 2006; Moncrief, 1986; Plouffe et al., 2026). Refer to Figure 5 which highlights some of the key evolutions in the sales function, roles, and consequently the modern sales organization.

6.1 Technology, Marketing, and the Redistribution of Sales Activities

6.1.1 Marketing's Expanding Role in Lead Generation

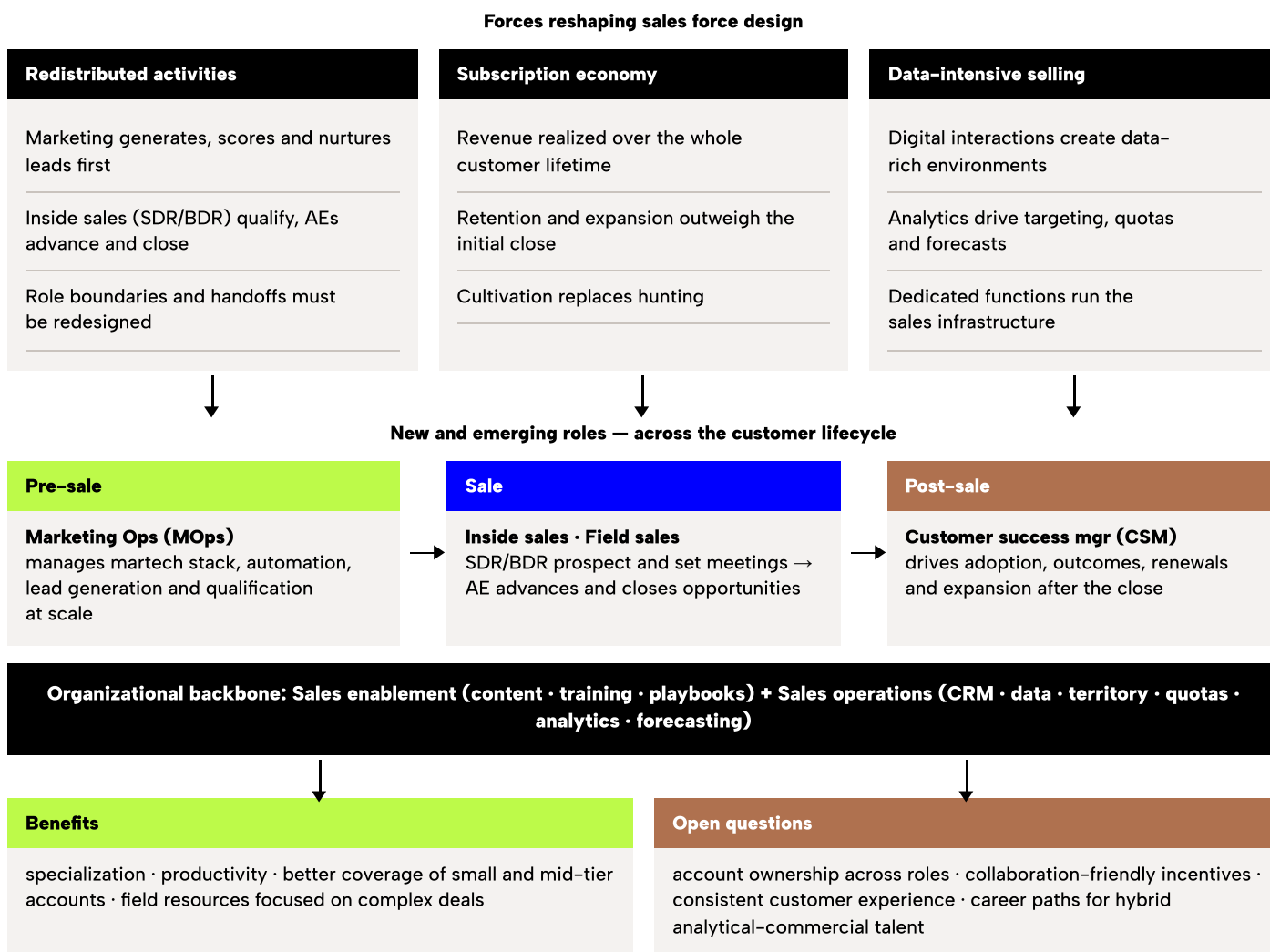
The application of technologies and artificial intelligence has resulted in a significant redistribution of activities between marketing and sales functions. Marketing is increasingly playing a substantive role in generating leads—activities that were once



Figure 5

New and Emerging Sales Roles

Schematic overview of the main ideas: the forces reshaping sales force design, the new roles mapped across the customer lifecycle with the enablement/operations backbone, and the resulting benefits and open questions.



Reading the figure: the top row summarizes the three forces that restructure the sales force — technology-driven redistribution of activities, subscription economics, and data-intensive selling. The middle band positions the emerging roles along the customer lifecycle, supported by the organizational backbone of sales enablement and sales operations. The bottom row contrasts the benefits of specialization with the open design questions (ownership, incentives, experience consistency, careers).

the exclusive responsibility of salespeople. Through content marketing, search engine optimization, social media engagement, and sophisticated digital advertising, marketing departments now attract, engage, and qualify potential customers before any sales representative becomes involved (McClure et al., 2024; Habel et al., 2025).

This shift has been enabled by marketing automation and account-based marketing platforms that can track prospect behavior, score lead quality, and orchestrate



multi-touch nurturing sequences without human intervention. The result is that salespeople often inherit prospects who have already demonstrated interest, consumed substantial content, and been pre-qualified against organizational criteria. This redistribution improves sales productivity but also raises questions about the optimal boundary between marketing and sales, the handoff processes that govern lead transfer, and the attribution of revenue credit across functions.

6.1.2

The Emergence of Inside Sales Roles

The technologically enabled redistribution of activities has given rise to specialized inside sales roles that merit particular attention. Sales development representatives (SDRs) and Business Development Reps (BDRs) focus specifically on outbound prospecting, lead qualification, and appointment setting. They typically work from central locations using phone, email, and digital channels rather than traveling to customer sites. Account executives (AEs) then assume responsibility for advancing qualified opportunities through the sales process toward close.

This division of labor represents a significant departure from traditional models in which individual salespeople managed the entire customer journey. Proponents argue that role specialization enables optimization of each stage—prospecting benefits from high volume, persistence, and resilience in the face of rejection; closing benefits from relationship skills, business acumen, and negotiation expertise. Critics suggest that excessive specialization fragments customer relationships and creates coordination challenges as prospects transfer between roles.

6.1.3

Implications for Sales Organization Structure

The proliferation of inside sales roles, combined with marketing's expanded lead generation responsibilities, demands fundamental reconsideration of how sales organizations should be structured (Habel et al., 2025). Traditional structures optimized for geographic territories managed by general-purpose field salespeople may be poorly suited to contemporary realities. Organizations must deal with questions about role boundaries, reporting relationships, technology infrastructure, and coordination mechanisms.

Research in this domain is still in its nascency. While practitioner literature offers prescriptions for structuring modern sales organizations, academic investigation remains limited. Scholars should examine the conditions under which various structural configurations prove most effective, the change management challenges associated with organizational redesign, and the human capital implications of redistributing activities across roles and functions.



6.2 Subscription Models and New Organizational Roles

6.2.1 The Subscription Economy's Demands on Sales

The movement toward subscription-based business models has transformed the economics and activities of sales. Unlike traditional transactional models in which revenue recognition occurs at the point of sale, subscription businesses depend on ongoing customer relationships for revenue realization. Customer acquisition costs must be calculated over extended retention periods. The financial value of a customer relationship depends critically on renewal rates, expansion revenue, and lifetime duration. Furthermore, the ability to get customers to provide testimonials as well as to act as references could also help salespeople in attracting new customers and by reducing sales cycle times for new customers, can also contribute to the efficiency of the sales organization.

These dynamics have implications for sales roles and activities. The point of initial sale becomes less financially significant than the ongoing relationship management that follows. Salespeople must think beyond closing to the customer's long-term success with the product or service. The traditional hunting mentality—oriented toward the thrill of new wins—may be less important than the patient cultivation of existing relationships.

6.2.2 Sales Enablement as a Function

The demands of modern selling have resulted in the emergence and professionalization of sales enablement as a distinct organizational function (Lauzi et al., 2023; Mukhopadhyay et al., 2025; Peterson et al., 2020, Rangarajan et al., 2020). Sales enablement encompasses the processes, practices, and technologies that help salespeople sell more effectively. This includes content development and management, training and coaching, technology implementation and optimization, and the creation of playbooks and methodologies that codify successful selling approaches.

The rise of sales enablement reflects recognition that individual salesperson capability is insufficient for organizational success. Even talented salespeople require appropriate tools, information, and support structures to perform at their best. Sales enablement functions provide this infrastructure, freeing salespeople to focus on customer engagement while ensuring they have access to the resources needed for effectiveness.

6.2.3 Sales Operations: Infrastructure and Analytics

Alongside sales enablement, sales operations (SalesOps) has emerged as a critical organizational function requiring scholarly scrutiny (Galván et al., 2025). Sales operations professionals manage the infrastructure of selling—CRM systems, data



quality, territory design, quota setting, compensation administration, pipeline analytics, and forecasting. They provide the analytical underpinning for sales strategy and the operational foundation for sales execution.

The emergence of SalesOps as a distinct function reflects the increasing complexity and data-intensity of modern sales organizations. The volume of data generated through digital interactions—emails, calls, web visits, content engagement—creates both opportunities and challenges for sales management. Sales operations professionals transform raw data into actionable insights, develop predictive models that inform resource allocation, and design systems that track and optimize sales performance. The growing importance of sales enablement and sales operations raises important questions about organizational design and career paths. How should these functions relate to sales leadership? What competencies do they require? How can organizations attract and develop talent for roles that blend analytical, technical, and commercial capabilities?

6.3

Customer Success and Marketing Operations

6.3.1

Customer Success Management

Perhaps no role better exemplifies the transformation of sales organizations than the customer success manager (CSM). Customer success management emerged from the software-as-a-service sector but has since spread across industries characterized by subscription or recurring revenue models. CSMs focus explicitly on ensuring that customers achieve their desired outcomes through use of the organization's product or service.

Customer success represents a fundamental reconceptualization of post-sale responsibilities. Rather than treating the close as the culmination of the sales process, organizations with customer success functions view it as merely the beginning. CSMs work proactively with customers to drive adoption, realize value, and identify expansion opportunities. They serve as advocates for the customer within the vendor organization, ensuring that customer needs inform product development, service delivery, and organizational priorities.

The relationship between customer success and traditional sales roles remains contested and varies across organizations. In some structures, CSMs report into sales leadership and carry revenue targets for renewals and expansions. In others, they operate as a distinct function focused purely on customer outcomes. The optimal configuration likely depends on factors including customer base characteristics, product complexity, and organizational culture.



6.3.2

Marketing Operations and Pre-Sales Support

On the pre-sales side, marketing operations (MarketingOps or MOps) has emerged as a function that supports salespeople through the generation and management of demand. Marketing operations professionals manage marketing technology stacks, implement automation workflows, analyze campaign performance, and ensure data quality across marketing and sales systems. The emergence of this function reflects the increasing technical complexity and operational aspects of modern marketing. The proliferation of marketing technologies—research suggests organizations now use dozens of distinct tools—requires specialized expertise for implementation, integration, and optimization. Marketing operations professionals provide this expertise, enabling marketing to generate and qualify leads at scale (Habel et al., 2025) while maintaining data integrity throughout the customer acquisition process.

The relationship between marketing operations and sales is necessarily close. Effective demand generation depends on tight alignment between the activities that attract and nurture prospects and the activities that convert them to customers. Marketing operations professionals often work directly with sales counterparts to define lead qualification criteria, design handoff processes, and troubleshoot conversion challenges.

6.4

Conclusion

Contemporary sales organizations must navigate unprecedented complexity. They must design role structures that balance specialization against coordination, deploy technology in ways that augment rather than substitute for human capabilities, and develop talent for functions—sales development, customer success, sales operations, sales enablement—that scarcely existed a generation ago. They must embrace sales-service ambidexterity while managing the inherent tensions between selling and servicing orientations (Rapp et al., 2018; Kindstrom, Kowalkowski, and Alejandro, 2015). And they must reconceptualize the boundary between marketing and sales as technology continues to redistribute activities across functions.

The implications extend beyond organizational design to fundamental questions about the nature of professional selling. What competencies will distinguish effective salespeople in an era when information asymmetry has collapsed and artificial intelligence can execute routine tasks? How should organizations invest in human capital when role requirements are shifting rapidly? What does a sales career look like when traditional progression paths from inside sales to field sales to sales management may no longer obtain?

These questions underscore the vitality and importance of the sales function in contemporary business. Far from being rendered obsolete by technology or



disintermediated by digital channels, professional selling has become more sophisticated, more specialized, and arguably more consequential than ever before. The challenge for scholars and practitioners alike is to develop frameworks adequate to this new reality—frameworks that build on foundational insights while accounting for the structural, technological, and strategic transformations that define the modern sales landscape.

Far from being rendered obsolete by technology or disintermediated by digital channels, professional selling has become more sophisticated, more specialized, and arguably more consequential than ever before.

6.4.1

Implication for academics

The foundational works that established scholarly understanding of sales activities require updating for contemporary realities. Moncrief's (1986) taxonomy of selling activities and Marshall, Moncrief, and Lassk's (2006) subsequent elaboration provided invaluable frameworks for understanding what salespeople actually do. However, the structural, technological, and strategic changes discussed throughout this chapter suggest that these frameworks may no longer fully capture the diversity and complexity of modern sales work.

Earlier frameworks developed in an era when selling was predominantly a field-based, generalist activity performed by individual salespeople who managed customer relationships from prospecting through close and into account management. The contemporary reality—with its specialized inside sales roles, technology-enabled redistribution of activities, subscription-based business models, and proliferation of supporting functions—demands fresh conceptualization.

Toward a New Typology of Sales Activities

A modern framework for sales activities should account for several dimensions that earlier typologies may have underemphasized:



Phygital integration.

Contemporary selling often occurs across multiple channels, with activities distributed between digital platforms and human interactions. A useful typology should capture not only what activities occur but through what channels and with what degree of automation.

Functional distribution.

Activities that were once performed by salespeople may now be distributed across marketing, customer success, sales operations, and other functions. A contemporary framework should identify activities at the organizational level rather than assuming they reside within a single role.

Temporal scope.

Subscription and relationship-based models extend the temporal scope of relevant activities well beyond the traditional close. Activities related to customer success, renewal, and expansion deserve equal attention to acquisition-oriented activities.

Ecosystem orientation.

Selling in ecosystem contexts requires activities related to partner coordination, platform navigation, and multi-party value creation that extend beyond bilateral buyer-seller interactions.

6.4.2

Implication for sales managers

Sales managers should treat any adoption of digital transformation (including AI) as a redesign of the commercial operating model rather than simply the introduction of new sales tools. This means identifying which of the sales activities—such as customer research, demand management, sales pre-call meeting preparation, and enabling the salesperson—can be streamlined and automated. Sales managers should also take care to provide their salespeople with the human responsibility of judging customer facing activities like negotiation, relationship management, and the interpretation of customer needs. Managers should help in better interfunctional co-ordination across marketing, sales, product management, and revenue operations to help enable their sales teams (Mottola, 2021). Performance measures should extend beyond traditional outcome based performance evaluations and activity based evaluations to also include technology usage, data quality, speed of response, customer experience, conversion, retention, and the quality of buyer decision support. These priorities follow from the finding that technology creates value only when it is integrated into redesigned processes and coordinated responsibilities.

Managers must also develop governance and change-management practices that make AI use reliable and acceptable to sales teams and customers. Clear rules are needed for reviewing AI-generated content, validating recommendations, protecting customer information, controlling pricing and proposal logic, and escalating decisions that require human judgment. Managers should create feedback mechanisms through which sellers can question inaccurate or inappropriate AI outputs without being discouraged



from using the technology. Coaching should focus on how effectively employees combine AI-generated insight with contextual knowledge, ethical judgment, and customer understanding, rather than on how much they automate. This approach is particularly important because the findings identify data quality, governance, work redesign, and capability development as interconnected organizational challenges.

6.4.3

Implication for Vocational Educational Trainers

Sales trainers should adapt their training materials to reflect the shift from traditional selling activities to more technology (and AI) enabled, customer centric workflows with the main aim of helping salespeople better engage with their customers throughout the customer journey. In addition to product knowledge, prospecting, negotiation, and communication, training should develop practical competence in AI-assisted research, prompt formulation, output verification, CRM data management, digital collaboration, and the interpretation of customer signals. Trainees should learn when to accept, adapt, or reject an AI recommendation and how to recognize errors, unsupported claims, bias, and inappropriate personalization. Role-play exercises can simulate hybrid buying journeys in which customers move between self-service, digital interactions, and human engagement, requiring sellers to coordinate information and support decision-making across multiple stakeholders. The objective is not to replace human selling skills, but to combine technology fluency with judgment, empathy, and the ability to reduce buyer uncertainty.

Training should also become more continuous, role-specific, and closely connected to organizational processes. Sales enablement teams can develop modular learning for different emerging roles, including AI-augmented sellers, revenue operations specialists, sales data stewards, AI coaches, and customer success revenue managers. Practical assessments should evaluate whether employees can use AI responsibly in real workflows, maintain accurate customer records, explain recommendations, and collaborate across functions—not merely complete a software tutorial. Trainers should also address the human implications of automation by helping employees understand how their roles are evolving toward supervision, interpretation, and higher-value customer interaction. This is consistent with the document's finding that emerging roles expand the commercial system around traditional selling rather than simply eliminate existing positions.

7

Next Steps

The findings from this first white paper will serve as inputs into the next stage of the CoVE project. Based on the different emerging roles that were identified as part of this research, the members of the research consortium will next look into job postings from sales organizations in each of the 6 countries representing the project. The job postings for each identified sales roles from each country of the project will be collected and then analyzed to focus on the skills and responsibilities for each sales role. Analysis of the job content will be used to further cluster the sales roles into a shorter list of around 12 sales roles, accounting for overlaps in the job requirements for some roles.

The next stage will involve interviewing around 5 sales managers/leaders/experts in each CoVE to reconcile the job posting analysis with the actual requirements for sales roles in the job market. Parallely, a sales role competency grid will be created to guide the members of the project to develop relevant sales content that will then be presented to a sample of sales leaders and vocational trainers to further fine tune the content.

We will also be mapping out all the vocational educational trainers across the six different countries to benchmark the offerings provided by the trainers. We will also map out all institutions and professional associations that provide certification to sales professionals to help shape the content that we will develop. A second white paper will be developed based on the steps highlighted here.

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- Syam, N., & Sharma, A. (2018). Waiting for a sales renaissance in the fourth industrial revolution: Machine learning and artificial intelligence in sales research and practice. *Industrial marketing management*, 69, 135–146.
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- Wang, N., Nahm, I., Pu, Q., Mojir, N., & Singh, J. (2026). Unpacking Generative AI for B2B Sales: Definitional Perspectives, Multidimensional Framework, and Sales Roles. *Journal of Personal Selling & Sales Management*, 1–19. DOI: <https://doi.org/10.1080/08853134.2026.2616240>
- Wieland, H., Hartmann, N. N., & Vargo, S. L. (2017). Business models as service strategy. *Journal of the Academy of Marketing Science*, 45(6), 925–943. DOI: <https://doi.org/10.1007/s11747-017-0531-z>

Appendix A – Academic Papers Reviewed

Count	Citation	Theme
1	Ancillai, C., Terho, H., Cardinali, S., & Pascucci, F. (2019). Advancing social media driven sales research: Establishing conceptual foundations for B-to-B social selling. <i>Industrial marketing management</i> , 82, 293–308.	Impact of social media
2	Bauer, C., Galvan, J. M., Hancock, T., Hunter, G. K., Nelson, C. A., Riley, J., & Tanner, E. C. (2024). Integrating technology within the sales-service ecosystem: the emergent sales techno-ecosystem. <i>European Journal of Marketing</i> , 58(3), 782–811.	Impact of sales tech stack
3	Cardinali, S., Severini, S., Romoli, A., Rangarajan, D., & Stadlmann, C. (2026). Independent sales agents in B2B markets: analyzing activities and performance gaps with customers and principals. <i>Journal of Marketing Theory and Practice</i> , 1–21.	Taxonomy of B2B sales activities
4	Cardinali S, Sharma P, Cedrola E, Giovannetti M, Pillai KG (2024), "Buying centers and emerging developments: the SME perspective". <i>Journal of Business & Industrial Marketing</i> , Vol. 39 No. 5 pp. 995–1007,	Complex B2B Buyer Needs
5	Cuevas, J. M. (2018). The transformation of professional selling: Implications for leading the modern sales organization. <i>Industrial Marketing Management</i> , 69, 198–208.	General Overview and Trends
6	Diephuis, A. J., Hillebrand, B., & Robben, H. (2025). There is more to sales than selling: a literature review of the roles of sales in new product development. <i>Journal of Personal Selling & Sales Management</i> , 45(4), 427–445.	Sales and NPD
7	Elhajjar, S., Yacoub, L., & Ouaida, F. (2024). The present and future of the B2B sales profession. <i>Journal of Personal Selling & Sales Management</i> , 44(2), 128–141.	General Overview and Trends
8	Galvan, J., Niemi, J., Ahmad, T. H., Hochstein, B., & Rangarajan, D. (2025). Industry insights: the role of sales operations (SalesOps) in firm strategy and performance. <i>Journal of Personal Selling & Sales Management</i> , 45(3), 313–316.	SalesOps
9	Geiger, S., & Guenzi, P. (2009). The sales function in the twenty-first century: where are we and where do we go from here?. <i>European Journal of Marketing</i> , 43(7–8), 873–889.	General Overview and Trends
10	Gonzalez, G. R., Habel, J., & Hunter, G. K. (2026). AI agents, agentic AI, and the future of sales. <i>Journal of Business Research</i> , 202, 115799.	AI and Sales



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11	Habel, J., Hartmann, N. N., Wiseman, P., Ahearne, M. J., & Vaid, S. (2025). Sales pipeline technology: automated lead nurturing. <i>Journal of Marketing</i> , 89(5), 66–87.	AI and Sales
12	Hartmann, N. N., Chaker, N. N., Lussier, B., Larocque, D., & Habel, J. (2024). A theory of sales system shocks. <i>Journal of the Academy of Marketing Science</i> , 52(2), 261–283.	General Overview and Trends
13	Hartmann, N. N., Wieland, H., & Vargo, S. L. (2018). Converging on a new theoretical foundation for selling. <i>Journal of marketing</i> , 82(2), 1–18.	Foundational Aspects of Sales
14	Hochstein, B., Chaker, N. N., Rangarajan, D., Nagel, D., & Hartmann, N. N. (2021). Proactive value co-creation via structural ambidexterity: Customer success management and the modularization of frontline roles. <i>Journal of Service Research</i> , 24(4), 601–621.	Customer Success Management
15	Kalwey, T., Krafft, M., Lim, Y., & Mantrala, M. K. (2025). Holistic selling: An emerging paradigm in B2B markets. <i>Journal of Marketing</i> , 89(6), 77–99.	Foundational Aspects of Sales
16	Kanuri, V. K., Habel, J., Chaker, N. N., Rangarajan, D., & Guenzi, P. (2022). B2B online sales pushes: Whether, when, and why they enhance sales performance. <i>Production and Operations Management</i> , 10591478231225999.	E-commerce and Sales
17	Kindström, D., Kowalkowski, C., & Alejandro, T. B. (2015). Adding services to product-based portfolios: An exploration of the implications for the sales function. <i>Journal of Service Management</i> , 26(3), 372–393.	Servitization and Sales
18	Lauzi, F., Westphal, J., Rangarajan, D., Schaefer, T., Parra-Merono, M. C., & De-Juan-Vigaray, M. D. (2023). Understanding sales enablement in complex B2B companies: Uncovering similarities and differences in a cross-functional and multi-level case study. <i>Industrial Marketing Management</i> , 108, 47–64.	Sales Enablement
19	Marshall, G. W., Moncrief, W. C., & Lassk, F. G. (1999). The current state of sales force activities. <i>Industrial Marketing Management</i> , 28(1), 87–98.	Taxonomy of B2B sales activities
20	McClure, C. E., Epler, R. T., Schmitt, L., & Rangarajan, D. (2024). AI in sales: Laying the foundations for future research. <i>Journal of Personal selling & sales Management</i> , 44(2), 108–127.	AI and Sales
21	Moncrief III, W. C. (1986). Selling activity and sales position taxonomies for industrial salesforces. <i>Journal of Marketing Research</i> , 23(3), 261–270.	Taxonomy of B2B sales activities
22	Moncrief, W. C., Marshall, G. W., & Lassk, F. G. (2006). A contemporary taxonomy of sales positions. <i>Journal of Personal Selling & Sales Management</i> , 26(1), 55–65.	Taxonomy of B2B sales activities
23	Mottola, Oliviero. "The Revenue Operations (RevOps) Framework: A Qualitative Study of Industry Practitioners." (2021).- https://digitalcommons.harrisburgu.edu/cgi/viewcontent.cgi?article=1001&context=isem_dandt	RevOps
24	Mukhopadhyay, S., Terho, H., Singh, R., & Rangarajan, D. (2025). Enhancing B2B sales through digital transformation: Insights into effective sales enablement. <i>Industrial marketing management</i> , 125, 29–47.	Sales Enablement
25	Peterson, R. M., Malshe, A., Friend, S. B., & Dover, H. (2021). Sales enablement: conceptualizing and developing a dynamic capability. <i>Journal of the Academy of Marketing Science</i> , 49(3), 542–565.	Sales Enablement
26	Plouffe, C. R., Bauer, C., Peasley, M., & Mathis, D. (2026). 'Retail Business Development Specialists'(RBDS): Understanding customer-facing versus relational performance drivers with Retail-to-Business (R2B) customers. <i>Industrial Marketing Management</i> , 132, 95–116.	Retail Sales
27	Rangarajan, D., Dugan, R., Rouziou, M., & Kunkle, M. (2020). People, process, and performance: Setting an agenda for sales enablement research. <i>Journal of Personal Selling & Sales Management</i> , 40(3), 213–220.	Sales Enablement



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28	Rapp, A. A., Bachrach, D. G., Flaherty, K. E., Hughes, D. E., Sharma, A., & Voorhees, C. M. (2017). The role of the sales-service interface and ambidexterity in the evolving organization: a multilevel research agenda. <i>Journal of Service Research</i> , 20(1), 59–75.	Sales Ambidexterity
29	Severini, S., Terho, H., Mero, J., & Cardinali, S. (2026). Unpacking account-based marketing: Conceptualization, key activities, and performance outcomes. <i>Industrial Marketing Management</i> , 133, 148–161.	Account Based Marketing
30	Sleep, S., Dixon, A. L., DeCarlo, T., & Lam, S. K. (2020). The business-to-business inside sales force: roles, configurations and research agenda. <i>European Journal of Marketing</i> , 54(5), 1025–1060.	Inside Sales
31	Storbacka, K., Ryals, L., Davies, I. A., & Nenonen, S. (2009). The changing role of sales: viewing sales as a strategic, cross-functional process. <i>European Journal of marketing</i> , 43(7–8), 890–906.	Foundational Aspects of Sales
32	Syam, N., & Sharma, A. (2018). Waiting for a sales renaissance in the fourth industrial revolution: Machine learning and artificial intelligence in sales research and practice. <i>Industrial marketing management</i> , 69, 135–146.	AI and Sales
33	Thaichon, P., Surachartkumtonkun, J., Quach, S., Weaven, S., & Palmatier, R. W. (2018). Hybrid sales structures in the age of e-commerce. <i>Journal of Personal Selling & Sales Management</i> , 38(3), 277–302.	Hybrid Organization
34	Wang, N., Nahm, I., Pu, Q., Mojir, N., & Singh, J. (2026). Unpacking Generative AI for B2B Sales: Definitional Perspectives, Multidimensional Framework, and Sales Roles. <i>Journal of Personal Selling & Sales Management</i> , 1–19.	AI and Sales
35	Wieland, H., Hartmann, N. N., & Vargo, S. L. (2017). Business models as service strategy. <i>Journal of the Academy of Marketing Science</i> , 45(6), 925–943.	Foundational Aspects of Sales