

Designing a Digital Meeting Place for B2B Sales Interactions

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Business to business (B2B) sales stands for a big part of today's sold goods and services. Sales people are saying that these sales processes are getting more complex and involve more people than before. The B2B sales are also more and more taking place online. This raises the following question: is there some way to simplify these increasingly complex sales processes and simplify the lives of sales people?

This is the question that I have investigated in my master thesis, in collaboration with GetAccept. The investigation started with a deep dive in the nature of sales processes to get a better understanding of the difficulties sales people face. It was found that most sales processes include the same activities such as making phone calls, schedule meetings and managing documents like presentation material and contracts. Things usually get complex when many people are involved the same sales process, especially when they join at different stages and need to get up to speed with what's going on. If you then add that the information also is spread over multiple communication platforms, it's no wonder that sales processes can be difficult.

My proposed solution to this was a digital meeting place for all things related to an ongoing deal. The meeting place revolved around a feed, similar to social media platforms like Facebook.

Members of the meeting place, people involved in the sales process, could make posts to feed. The post could for example contain a meeting booking, presentation material or a signable contract to support all stages of a sales process. This concept was implemented as a web application (a screenshot can be seen below) and evaluated through usability testing with five sales people. The application received high system usability scale (SUS) scores from all but one of the test participants, indicating that they were overall satisfied with the application. Further, all of the test participants successfully completed all of the test tasks used to evaluate the application. Most importantly, they were all convinced that the application would simplify their sales processes.

Even though the application could be deemed successful there were still additional features requested by the sales persons who tested it that would require further investigation. This included, among other things, integration to services like Google Calendar, a more advanced document viewer and a way to keep private notes in this digital meeting place.

With this in mind I concluded that it was possible to simplify the B2B sales process by gathering sales activities in a common space and my thesis has shown one promising way of doing it.

