

Understanding B2B customer journeys for complex digital services: The case of cloud computing

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ABSTRACT

Cloud computing services represent a rapidly growing business-to-business (B2B) market, but managers lack guidance on managing the customer journey for these complex digital services. To address this challenge, we conduct an exploratory qualitative study based on 20 interviews with providers and customers of cloud computing services, supplemented by data from observations. Our research highlights critical touchpoints along the customer journey in cloud computing markets and provides implications for B2B customer journey management. A key finding is that B2B customers' IT competency is a crucial differentiator in this market. That is, while IT-savvy companies evaluate these services independently and use them in a self-service fashion, IT-novice companies rely on multipliers (e.g., IT system houses) to act as support and gatekeepers to buying cloud computing services. This difference has implications for the composition of buying and usage centers, the development of the customer journey, and the control of touchpoints by the service provider. Thus, cloud service providers need to manage two types of customer journey: one directly focused on customers and another involving the management of multipliers. Based on these findings, we offer recommendations for B2B practitioners to guide their customers through the journey for this complex digital service.

1. Introduction

Cloud computing services have become an integral tool for professional data storage and accessibility. They offer companies the advantages of reduced initial investments in local servers, cost and time savings due to increased flexibility, and improved environmental sustainability through enhanced resource efficiency (Mathur, 2019). The market for these services has grown remarkably, reaching a value of USD 596 billion in 2023 and projected to exceed USD 1000 billion by 2028 (Statista, 2023). This market encompasses three primary models: infrastructure as a service (IaaS), platform as a service (PaaS), and software as a service (SaaS). These models form the backbone of modern digital services and provide essential digital services for enterprises across the spectrum, from start-ups and small to medium-sized companies to large corporations. However, selling in these novel business-to-business (B2B) service markets is not straightforward, as little is known about how customers make decisions for complex digital services in the B2B context generally and in the cloud computing service market in

particular.

As a first step toward scaling a market for novel digital services, managers need to develop a structured process to approach new customers; in other words, they need to understand the customer journey for B2B cloud computing services. Understanding the customer journey has emerged as a critical competitive advantage in recent years and a focal concept for explaining customer behavior in B2B markets (Steward, Narus, Roehm, & Ritz, 2019). Due to the complexity of B2B customer journeys, it is important to recognize the B2B-specific factors that influence decision-making in the customer journey; such as understanding the structure of the journey, identifying key decision makers, and recognizing important touchpoints (e.g., Homburg & Tischer, 2023). However, the existing literature focuses predominantly on customer journeys in the business-to-consumer (B2C) context and provides few insights regarding B2B markets and the growing B2B digital service industry (Purmonen, Jaakkola, & Terho, 2023; Witell et al., 2020). Existing research on B2B customer journeys remains predominantly conceptual (Durmusoglu, McNally, & Chen, 2022;

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Purmonen et al., 2023; Rusthollikarhu, Toukola, Aarikka-Stenroos, & Mahlamäki, 2022; Steward et al., 2019), and empirical investigations are still scarce (e.g., Homburg & Tischer, 2023; Lundin & Kindström, 2023).

Complex digital services represent a compelling area of study in B2B customer journeys, as little is known about them (Jyoti & Efraxia, 2023; Marston, Li, Bandyopadhyay, Zhang, & Ghalsasi, 2011; Mero, Leinonen, Makkonen, & Karjaluo, 2022) and they often trigger innovation resistance in less IT-competent firms (Eller, Alford, Kallmünzer, & Peters, 2020). This resistance is due to the disparity between those firms' digital proficiency and the intricate, abstract nature of these services, which demands advanced IT competence not only to evaluate their quality but also to implement and operate them effectively (Wei & Pardo, 2022). Consequently, the varying levels of IT competency between IT-savvy and IT-novice companies may significantly influence the approach to managing the customer journey. We thus not only seek to investigate the B2B customer journey for cloud computing but also the varying requirements for journey management based on the level of a company's IT competency.

To address this challenge, we conduct an exploratory, qualitative investigation of the customer journey in the cloud computing service market. Our study draws on qualitative data gathered in 20 interviews with providers and customers of digital B2B services, supplemented by observational data collected over a 1.5-year period at a cloud service provider. We integrate these insights with existing customer journey and B2B marketing literature to provide the following contributions.

First, our research identifies critical touchpoints and their sequence in the customer journey for complex digital B2B services. By illuminating these touchpoints and their implications for customer journey management, we contribute empirical evidence to the predominantly conceptual literature on customer journeys in B2B marketing (e.g., Purmonen et al., 2023; Rusthollikarhu et al., 2022; Steward et al., 2019; Witell et al., 2020). Focusing on cloud computing, our study responds to calls for more empirical research on exploring digital services as a distinct journey type in B2B marketing (Lundin & Kindström, 2023; Purmonen et al., 2023).

Second, we offer insights into marketing approaches tailored to the cloud computing market. Despite its fundamental role, marketing approaches in this domain are still hardly understood (Jyoti & Efraxia, 2023; Marston et al., 2011). Existing studies tend to focus on the quick and straightforward setup of software, overlooking the complex, nuanced customer journey in cloud computing services (Mero et al., 2022). We highlight the customer journey in these services, especially in regard to the varied efforts of customers with differing levels of IT competence (IT-savvy vs. IT-novice). We also consider the role of third-party multiplier firms, such as IT agencies and system houses, which help less IT-competent companies find, evaluate, implement, and operate cloud computing services.

Third, our study provides a structured approach for sellers of cloud computing services to navigate the B2B digital service market. By investigating critical touchpoints and emphasizing the role of IT competency, we offer actionable insights and recommendations for B2B customer journey managers and providers of complex digital services. This structured approach assists marketers in effectively managing and designing customer journeys, enabling them to proactively shape touchpoints along B2B customer journeys (Homburg & Tischer, 2023). Furthermore, our exploratory approach allows us to outline future research avenues in the evolving field of B2B customer journey management, particularly focusing on the triadic relationship between service provider, multiplier, and customer.

2. Research background

2.1. Cloud computing as a complex digital B2B service

B2B services are a heterogeneous market with a wide spectrum of

offerings, encompassing professional services (e.g., HR recruitment and legal advice), financial services (e.g., accounting and logistics), and facilities management (e.g., cleaning, security) (e.g., de Jong, de Ruyter, Keeling, Polyakova, & Ringberg, 2021; Gansser, Boßow-Thies, & Krol, 2021; Wang, Malthouse, Calder, & Uzunoglu, 2019; Wirtz & Kowalkowski, 2023). In this context, IT services have gained prominence as business models shift toward digital “as a service” paradigms (Roland Berger, 2022). These digital-as-a-service models include software applications for marketing, customer relationship management (CRM), e-commerce, and other functionalities. These services rely on cloud computing, so companies wishing to enable various digital services ultimately require cloud computing as a foundational infrastructure, giving it significant importance for companies of all sizes, from start-ups to medium-sized enterprises and large corporations. In essence, B2B cloud computing services serve as a fundamental, versatile digital service, forming the core of modern digital services (Walko, Olney, & Hunt, 2020).

2.1.1. Overview: the cloud computing stack

Unlike in the traditional, on-premises model, in which a company's software operates on servers on site, cloud computing operates from distant data centers on a pay-per-use basis (Sadiku, Musa, & Momoh, 2014). From a marketing standpoint, cloud computing notably is a self-service, as it allows customers to purchase, access, and configure services independently via the Internet (Marston et al., 2011; Wang et al., 2010). Typically, the customer and service provider conclude a service level agreement that defines aspects such as available capacity, with payment structured in subscription or pay-as-you-go models. Cloud computing comprises three main models: infrastructure as a service (IaaS), platform as a service (PaaS), and software as a service (SaaS)—collectively referred to as the cloud computing stack (IBM, 2023) as illustrated in Fig. 1.

IaaS provides the cloud computing infrastructure, including servers, network, and storage (e.g., Amazon Web Services, IBM Cloud), and offers customers the highest level of control (and therefore customization) in the cloud computing stack. While IaaS offers the most customization, it demands hands-on configuration and maintenance, such as setting up operating systems and middleware.

PaaS equips IT developers with a software framework (e.g., Google App Engine, OpenShift) to craft tailored applications. It includes operating systems, middleware, and runtime environments managing the underlying infrastructure. This model offers fewer customization options but simplifies complexities by eliminating the need for customers to handle the cloud infrastructure while retaining control over deployed applications and their customization.

SaaS delivers end-user software via the cloud (e.g., Microsoft 365, Salesforce). Positioned at the top of the cloud computing stack, SaaS streamlines software application deployment and maintenance. As a product running on the cloud, SaaS requires no infrastructure or platform management, yielding minimal control or customization options due to its nature as a pre-built software.

To illustrate the relationship between the three cloud computing services, consider a customer aiming to implement a CRM system in their company (IBM, 2023). Depending on the company's requirements, the customer has three options. First, opting for SaaS involves acquiring a pre-built CRM system managed by a software provider, offering convenience but limited control over features and functionality, akin to purchasing software. Second, PaaS allows the customer to develop and customize the CRM application, offering flexibility in software feature development but no control over the underlying infrastructure. Last, IaaS enables the customer to build their platform to deploy the CRM application, offering full control over servers and operating systems. The approach depends on the company's specific needs. While SaaS is akin to purchasing software, IaaS or PaaS are more complex due to the need to set up advanced infrastructure. However, IaaS and PaaS are gaining importance as companies strive to control their digitalization and offer

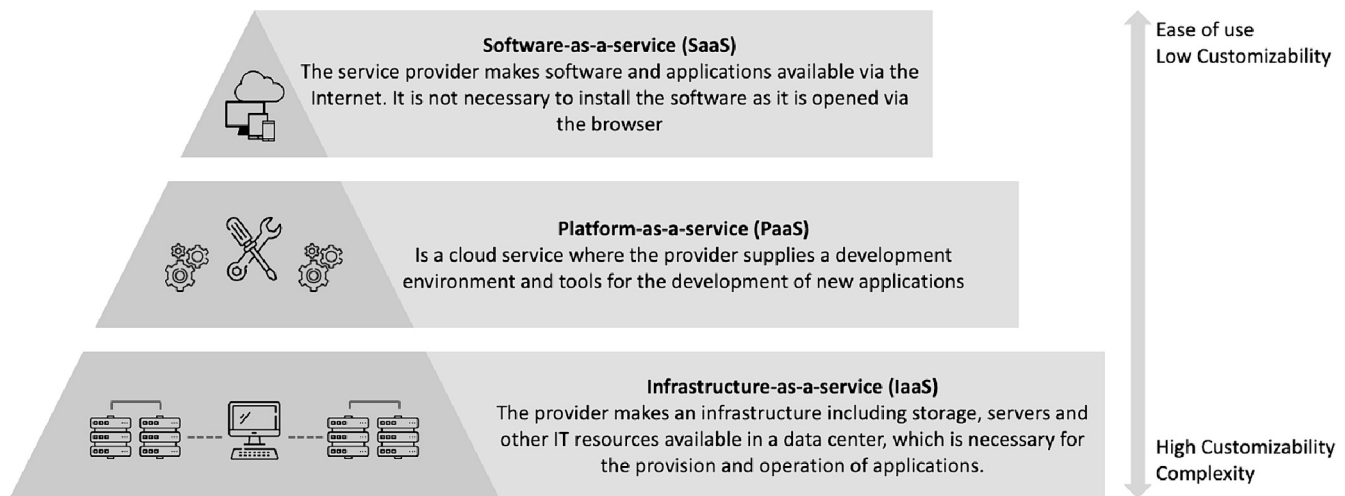


Fig. 1. Cloud computing stack: IaaS vs. PaaS vs. SaaS (IBM, 2023).

customized digital services. Acknowledging this trend and focusing on the core of cloud computing, this paper emphasizes IaaS and PaaS, outlining their complexities in customer decision-making.

2.1.2. Complexity of cloud computing services

Cloud computing services, especially IaaS and PaaS, pose complexities for customers for several reasons (Accenture, 2023; IBM, 2023). First, choosing and combining the appropriate cloud service (IaaS, PaaS, SaaS) demands understanding the distinct purposes and needs they serve. This decision-making process may involve mixing various service providers, necessitating a degree of IT competency. Second, setting up cloud services involves configuring auto-scaling, load balancing, and related services in service level agreements to ensure adequate server capacity without paying for idle resources. Third, cloud computing operates on a self-service and customization model, so customers must comprehend implementation and various customization options. Fourth, data management and migration in the cloud demand careful planning and execution due to factors such as transfer costs, storage options, data security, and addressing compatibility issues of distinct cloud platforms. Considering these complexities, successfully implementing cloud computing requires collaboration between customers and providers as well as sufficient IT competency on the customer's end. We next discuss the role of IT competency.

2.1.3. The role of IT competency in cloud computing

IT services are a particularly interesting area of study, as they often face innovation resistance. This resistance arises from a gap between the customer's limited IT competency and the complex, intangible nature of digital services (Eller et al., 2020; Wei & Pardo, 2022). A company's *IT competency* describes a firm's readiness and proficiency in embracing new technological assets, encompassing both organizational (cultivating IT knowledge and usage in the company culture) and individual aspects (employees' IT knowledge) (Rahman, Bag, Gupta, & Sivarajah, 2023; Vize, Coughlan, Kennedy, & Ellis-Chadwick, 2013). Given the complexity of cloud computing services—requiring judgment, selection, and successful implementation—customer IT competence may be a pivotal factor in the success of the customer journey. Companies lacking IT competency may encounter greater information uncertainty in their customer journey, struggle to filter relevant information for purchase decisions, and exhibit slower adoption of digital practices compared to their IT-savvy counterparts. Consequently, for complex services such as cloud computing, a company's IT competency may significantly influence B2B customer journeys and how service providers manage them (Roland Berger, 2022).

Taken together, the customer journey in cloud computing services

presents an intriguing area for B2B service exploration. While existing studies delve into SaaS implementation, limited attention is given to customer journey management for cloud computing services, particularly the more complex IaaS and PaaS (Jyoti & Efpraxia, 2023; Marston et al., 2011; Mero et al., 2022). Investigating the role of IT competency as an influence on the customer journey is particularly compelling, as IT competency (savvy vs. novice) may crucially influence the critical touchpoints and thus the customer journey management for digital services in B2B markets. To address this research gap, we conduct exploratory qualitative research to identify pivotal touchpoints for managing the customer journey for cloud computing as a complex B2B service.

2.2. Customer journey management in B2B markets

While the concept of the customer journey originated in B2C marketing, its application in understanding B2B marketing approaches has gained importance (Lundin & Kindström, 2023; Purmonen et al., 2023). However, current studies on B2B customer journeys predominantly remain conceptual, focusing on the adaptation of the customer journey concept in the B2B domain (e.g., Durmusoglu et al., 2022; Purmonen et al., 2023; Rusthollikarhu et al., 2022; Steward et al., 2019; Witell et al., 2020). Despite exceptions that investigate the digitalization of B2B journeys or customer journey management capabilities (Homburg & Tischer, 2023; Lundin & Kindström, 2023), empirical investigations of B2B customer journeys are scarce, especially within B2B digital services.

Aligned with existing research, the customer journey delineates the sequential process a customer undergoes to buy and use a company's product or service (Terho, Mero, Siutla, & Jaakkola, 2022). It systematically comprehends the customer experience across crucial interactions known as touchpoints (Lemon & Verhoef, 2016). Approaching the sequence of decision-making and use from an individual's perspective, the customer journey concept in B2B marketing supplements current research on B2B purchase processes and buying centers as well as research on the relational context of B2B exchange (Purmonen et al., 2023). Particularly in contemporary digitalized markets, in which buyers rely less on sellers due to access to digital information, customer journeys facilitate the description of purchase processes (Lundin & Kindström, 2023).

Transplanting the customer journey concept from B2C to B2B requires acknowledging and addressing domain-specific differences (Homburg & Tischer, 2023). In B2B, customers' engagement with touchpoints emerges from utilitarian motives and emphasizes economic value generation, whereas B2C customers have more hedonistic touchpoints. Consequently, B2B customer journeys rely more on rationality

and employ diverse on- and offline channels, resulting in a broader range of touchpoints compared to B2C journeys (Witell et al., 2020). Additionally, the buying and usage center's role significantly impacts the B2B customer journey, which involves multiple decision makers (Homburg & Tischer, 2023). In contrast to B2C-focused literature, in B2B journeys, the post-purchase implementation and operational phases wield considerable influence on journey success, often requiring co-creation between providers and customers to achieve desired outcomes (Purmonen et al., 2023).

2.2.1. Stages of the customer journey

Customer journey management takes the customers' perspective, tracing their phases from initial need recognition through purchase to eventual use of a service, underscoring the significance of both the purchase and usage stages. In this aspect, the existing literature on B2B customer journeys conceptualizes different phases. Witell et al. (2020), for example, delineate four distinct stages—pre-bid engagement, negotiation, implementation, and operations—whereas Purmonen et al. (2023) categorize the journey into need recognition, information search, and comparison of alternatives (the purchase journey), and deployment, use, maintenance, and reassessment (the usage stage). However, the prevalent view typically divides the journey into three stages: pre-purchase, purchase, and post-purchase (e.g., Homburg & Tischer, 2023; Lundin & Kindström, 2023; Rusthollikarhu et al., 2022). Building on these three stages, Rusthollikarhu et al. (2022) further divide the pre-purchase stage into need recognition, consideration, and search; the purchase stage into choice, ordering, and payment; and the post-purchase stage into consumption, use, engagement, and additional service requests.

Our investigation follows the prevalent three-stage view—prepurchase, purchase, and post-purchase—while acknowledging the importance of detailed insights by further distinguishing need recognition, information gathering, and in-depth evaluation in the prepurchase phase, ordering/negotiation and payment in the purchase phase, and implementation and operation in the post-purchase phase.

2.2.2. Critical touchpoints

Customer journeys are commonly conceptualized as a sequence of touchpoints across distinct stages (Lundin & Kindström, 2023). These touchpoints in the prepurchase, purchase, and post-purchase phases significantly impact whether customers continue or discontinue their journey. However, not all touchpoints hold equivalent value in guiding customers successfully along their journey (Lemon & Verhoef, 2016; Meyer & Schwager, 2007). Because they have the most substantial influence on key customer outcomes (Lemon & Verhoef, 2016), it is essential to identify critical touchpoints on the customer journey, often termed “moments of truth.” While service providers can leverage touchpoints to enhance customer experiences and increase sales, not all touchpoints are directly controlled by them, as customers' interactions with a service provider extend beyond direct company interactions (e.g., websites) to include indirect contacts with third parties and external actors (Purmonen et al., 2023; Witell et al., 2020).

To navigate B2B customer journeys effectively and enhance the B2B customer experience, managers need to identify critical touchpoints. This process involves locating barriers that impede customers' progress and identifying vital touchpoints that are not under the service provider's direct control (Toman, Adamson, & Gomez, 2017). Qualitative methods, such as in-depth customer interviews, offer effective ways to identify these touchpoints (e.g., Vakulenko, Shams, Hellström, & Hjort, 2019). Understanding important touchpoints and their sequence along the customer journey is crucial for managers to leverage and optimize them for successful sales (Mora Cortez & Johnston, 2017).

3. Methodology

3.1. Grounded theory approach

We chose an exploratory, discovery-oriented approach rooted in grounded theory to deeply investigate this emerging phenomenon (Glaser & Strauss, 2017; Strauss & Corbin, 1998). First, as outlined above, the literature offers very few empirical insights into customer journey concepts in B2B contexts generally and digital services in particular. The grounded theory approach allowed us to explore this understudied area by building theory based on the ample data available. Second, the strength of this approach lies in its integration of various knowledge domains, including literature findings and observations, to craft novel yet generalizable concepts grounded in empirical data (Strauss & Corbin, 1998). Thus, the variety and richness of available data can be exploited to provide a nuanced understanding of the phenomenon. Third, a grounded theory approach aligns well with our context, allowing us to capture and simplify the complexity of socially constructed concepts holistically within the organizational reality of the participants. Fourth, the method investigates how individuals within a social context interact with their environment and peers, allowing us to also assess the procedural perspective over time. Fifth, the method enables developing a conceptual framework to guide future research on the B2B customer journey concept. Finally, grounded theory has been widely employed in the marketing literature, demonstrating its effectiveness in generating valuable insights in comparable settings (e.g., Hollmann, Jarvis, & Bitner, 2015; Homburg, Jozić, & Kuehnl, 2017; Malshe & Sohi, 2009).

We followed a two-step approach to comprehensively map the customer journey. Initially, we conducted interviews with cloud computing providers to establish a broad overview of the concept. Having led many customers through their journeys, the providers had a comprehensive understanding of the B2B cloud computing customer journey and sketched a broad overview of the concept enriched by insights into internal processes and strategies. Subsequently, we delved deeper into researching the customer journey and its associated touchpoints. This phase involved interviewing customers to explore their interactions with specific touchpoints (Lemon & Verhoef, 2016; Vakulenko et al., 2019). To ensure flexibility in data collection while maintaining structure and comparability, we opted for a semi-structured interview approach (Patton, 2014) as illustrated in Fig. 2.

3.2. Sampling and data collection

Interviews. We balanced our sample so as to develop a comprehensive understanding of the customer journey and discern differences between IT-novice and IT-savvy customers, purposefully selecting interviewees to ensure a homogeneously distributed sample across industries, company sizes, product focus (i.e., IaaS, PaaS), and IT maturity (of customers) (Strauss, 1987). For instance, the customer interviews spanned diverse industries, from modern sectors, such as the Internet of Things (IoT), to more traditional domains, including mechanical engineering, and broad areas such as e-commerce.

Following the two-step approach, we collected data from both sides of the customer journey: the provider company and the customer. First, we collected data from six cloud computing providers across different company sizes, ages, and customer target groups to obtain a comprehensive overview of the processes and strategies in the market. Subsequently, we conducted 14 customer interviews, aligning the interview structure with that of the providers but adapting it for a more in-depth assessment. In selecting participants for the customer interviews, we asked them to assess their company's IT competency level. Similar to gauging technology readiness in B2B settings (Rahman et al., 2023; Vize et al., 2013), we inquired about their company's adoption of new technology and employees' proficiency in using relevant technological assets. To ensure accuracy, the interviewer cross-validated these self-

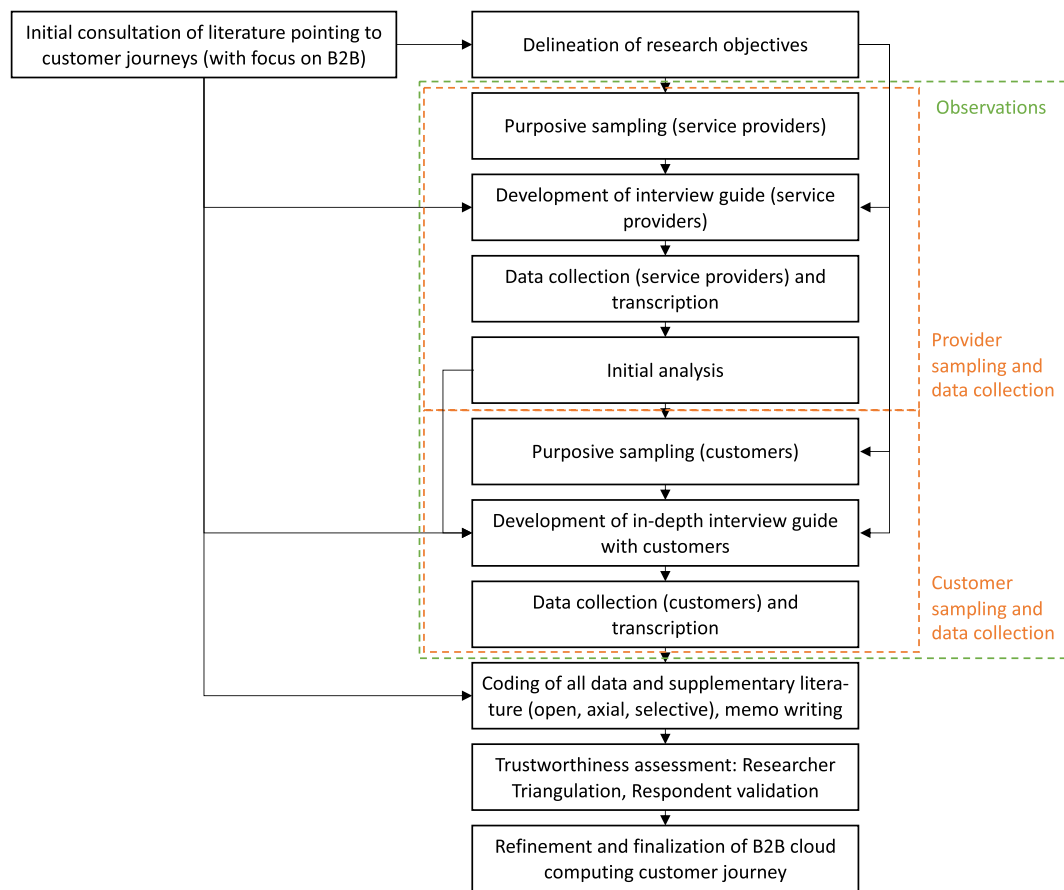


Fig. 2. The grounded theory approach (based on Homburg et al., 2017).

assessments based on industry knowledge obtained during the observation phase. Notably, IT competency is independent of company size, as larger companies may possess lower IT competency, whereas smaller

tech start-ups may demonstrate higher competency levels or vice versa.

Table 1 provides an overview of the participants and the relevant company-related data.

Table 1

Sample overview.

IaaS and PaaS Providers: Interviews					
ID	Interviewee's position	No. of employees	Founding year	Service focus	Further information on service provider
1	CEO and founder	3	2019	PaaS	Novel cloud computing provider with varying pricing approaches
2	Chief revenue officer	53	2014	IaaS & PaaS	Strongly growing cloud computing provider with regular market prices
3	Team lead, marketing and design	21	2018	IaaS	Low-budget cloud computing provider
4	CEO	49	1998	IaaS & PaaS	Established cloud computing provider with regular market prices
5	CEO	82	2003	IaaS	Established provider with a focus on small- and medium-sized companies
6	Team lead, IT sales	270	1925	IaaS & PaaS	Established service provider; transition from IT systems to cloud computing

Customers: Interviews						
ID	Interviewee's position	No. of employees	Founding year	Service interest	IT competency	Industry
7	CEO and founder	5	2018	IaaS	High	IoT provider
8	CEO and founder	4	2019	PaaS	High	IoT provider
9	CEO and founder	31	2016	IaaS	High	Software provider
10	CEO and founder	8	2017	PaaS	High	IoT provider
11	Division leader, information systems	3200	1923	IaaS	Low	Mechanical engineering
12	CTO	420	2005	IaaS	Low	Mechanical engineering
13	CEO and founder	6	2019	IaaS	High	Software provider
14	CTO	12	1985	IaaS	Low	Industrial manufacturer
15	CEO and founder	2	2015	IaaS	High	Fintech
16	Marketing lead	28	1999	PaaS	Low	E-commerce
17	E-commerce manager	130	1972	IaaS	Low	E-commerce, fashion
18	CTO	800	1953	PaaS	Low	E-commerce, fashion
19	IT system administrator	90	2012	IaaS	High	Industrial manufacturer
20	Team lead, IT infrastructure	500	1986	IaaS	Low	Manufacturer

An initial analysis was conducted on the provider data to develop familiarity with the collected content. This content underwent concise open coding, forming the basis for the subsequent final coding of both provider and customer studies. The insights from this initial coding step were pivotal in shaping the customer interview guide and informing the general customer sampling and data collection. For example, it allowed for deeper exploration of significant categories identified in the initial findings. The approach taken to develop the interview guide for customer data collection mirrored that of the provider data but with additional reflection on the initial findings from the provider interviews. Thus, we could more thoroughly explore relevant aspects of the customer journey. To prevent bias from the provider data collection, the researcher assumed a role of deliberate naivety for the customer data collection. The provider interviews averaged 55 min (range: 35–99 min), and the customer interviews averaged 45 min (range: 31–92 min). The interview durations varied based on the complexity of the customer journey and the level of detail provided by the interviewees.

Observations and documents. One of the authors worked 45 h per week for 15 months at a cloud computing service provider, developing substantial insights into sales processes by means of over 100 customer dialogs, 23 service tests, and 8 accompanying discussions about barriers to service usage. Field notes from sales and internal meetings were taken to capture customer considerations during the sales process and accordingly limit self-reporting biases. Additionally, we gathered industry-related documents and organizational details. Access to confidential internal information, strategy documents, and meeting notes provided a contextual backdrop for grasping underlying processes beyond observable behavior and verbal disclosures (Flick, 2022; Shah & Corley, 2006). We used these data throughout the research process, from shaping the research question and refining the interview guide to the data analysis. Table 2 summarizes the data we collected and used in the following data analysis.

Table 2
Overview of data collected.

	Types of empirical materials	Use in data analysis
Interviews	Six semi-structured provider interviews	<ul style="list-style-type: none">- Exploring the company perspective and means for the customer journey- Informing interview guide creation for customer interviews
	Fourteen semi-structured customer interviews	<ul style="list-style-type: none">- Exploring the consumer perspective and needs for the customer journey
Observations	More than 100 customer dialogs	<ul style="list-style-type: none">- Designing the interview guide- Data triangulation- Detailed insights into sales processes to complement interview insights
	Eight accompanying discussions on barriers to service use	<ul style="list-style-type: none">- Developing comprehensive process understanding
	Twenty-three service tests	<ul style="list-style-type: none">- Insights into customer behavior while using company services
Documents	Internal meetings	<ul style="list-style-type: none">- Details on strategic processes
	Meeting notes	<ul style="list-style-type: none">- In-depth insights into processes and motivations- Complementing self-disclosed information
	Internal strategic documents	<ul style="list-style-type: none">- Data triangulation- Providing a holistic perspective on company motivations
	Public company information (websites, reports)	<ul style="list-style-type: none">- Additional company details for contextualization
	Consultancy reports	<ul style="list-style-type: none">- Juxtaposition with industry practices

3.3. Data coding and analysis

Following the provider and customer data collection and concurrent observational data gathering, all the information underwent thorough coding for analysis, adhering to grounded theory principles (Strauss & Corbin, 1998). The interviews were transcribed verbatim, and open, axial, and selective coding were applied in line with Gioia, Corley, and Hamilton (2013) (for other applications in marketing, see also Homburg et al., 2017; Ulaga & Reinartz, 2011).

During the open coding, the data were read line by line in the participants' actual language and coded along definitions captured in a codebook (Strauss & Corbin, 1998). This process generated three distinct code categories: (i) touchpoint-related codes, for example, service provider websites or social media pages; (ii) criteria-related codes, highlighting details linked to specific touchpoints, such as references presented on a provider's website; and (iii) additional information not directly tied to particular touchpoints or criteria, such as activity durations across multiple touchpoints. The goal of this stage was to get an overview of the data, give it a first structure, and identify initial emerging concepts. During the open coding process, constant comparison, flip-flop techniques, and memos were used to ensure quality. The axial coding focused on establishing connections among codes and examining causal conditions, context, and outcomes (Strauss & Corbin, 1998). This was complemented by integrating emerging themes with the relevant literature (Homburg et al., 2017). At this stage, touchpoints and their characteristics emerged. Finally, during the selective coding stage, the core concept of the customer journey was distilled from the overarching phases that encompassed essential touchpoints for gathering initial information about cloud computing providers. Only pivotal touchpoints were selected in this process. We also illustrate the coding structure in the appendix. Theoretical saturation was observed after the 16th interview, but data analysis continued to integrate the additional interviews that had already been conducted or scheduled.

3.4. Trustworthiness assessment

To ensure trustworthiness and credibility, we developed clear coding guidelines, ensured sufficient training of the coders, and employed triangulation in both data and researchers (Lincoln & Guba, 1985). The data triangulation involved the continual comparison of our data with the literature in the relevant research stream, our diverse data sources, and related industry information (e.g., Accenture, 2021, 2023; McKinsey, 2017, 2022; Roland Berger, 2022), enhancing robustness and real-world relevance (Civera, Cortese, Mosca, & Murdock, 2020; Patton, 2014).

Researcher triangulation assessed intracoder and intercoder reliability. To assess intracoder reliability, we let all the coders code two interviews again without having access to their codebook and calculated percentage scores for agreement. For the intercoder reliability, all the coders independently coded one randomly chosen interview, based on which we calculated agreement. Our assessment yielded an 89.5% intracoder and 81.6% intercoder reliability, indicating the findings' reliability (Lombard, Snyder-Duch, & Bracken, 2002).

Moreover, we performed respondent validation by obtaining feedback from the company in which we conducted our observations, a manager in our sample, and two further managers from major cloud computing providers (Amazon AWS, Google GCP) through personal meetings. Based on the feedback, we made a minor refinement regarding the relevance of a relationship between two touchpoints within the information-gathering phase as well as the role of the customer success manager in the post-purchase phase. Apart from this, the respondents expressed strong agreement with the categories and concepts (Homburg et al., 2017).

4. Findings and discussion

We find that the B2B customer journey for cloud computing services has distinct critical touchpoints, relevant role differences in the buying and usage center, and prominent differences depending on the B2B customer's IT competency (IT-savvy vs. IT-novice). Fig. 3 visualizes and contrasts the distinct customer journeys of IT-savvy and IT-novice customers.

Before outlining the customer journey stages and their relevant touchpoints, we discuss the key differences between IT-savvy and IT-novice customers and describe the different roles of customers involved in the buying and usage center depending on IT competency.

4.1. Key differences between IT-savvy and IT-novice customers

While similarities exist in the phases and crucial touchpoints between IT-savvy and IT-novice companies (see Fig. 3), notable distinctions emerge related to the involvement of multipliers as intermediaries. Multipliers are third-party firms, such as IT agencies and system houses, which help less IT-competent companies find, evaluate, implement, and operate cloud computing services. Providing advisory and consulting services on selection, customizing e-products, and establishing the IT infrastructure, multipliers serve as a knowledge bridge between the inadequate IT competence of IT-novice firms and the extensive digital knowledge needed for cloud computing services. Thus, instead of offering an as-a-service model, multipliers mainly provide turnkey IT solutions. Compared to their IT-novice peers, IT-savvy companies generally do not need to buy IT solutions with advisory and consulting services as they have the required capabilities in-house to setup up and operate the cloud computing infrastructure due to their IT competency. Taken together, while IT-savvy companies typically procure cloud computing directly from service providers in a self-service fashion, IT-novice firms typically obtain IT solutions from multipliers.

Based on the insights obtained from our interviews, multipliers

typically collaborate with a select few cloud computing providers. However, IT-novice customers typically have no direct touchpoints with the cloud computing provider, as they communicate primarily with multipliers. Multipliers vary in scale, ranging from small IT agencies to larger companies serving multinational clients with custom solutions. In our study, 4 of the 6 cloud provider interviewees highlighted the significance of multipliers, while 6 of the 14 customer interviewees chose to engage with multipliers to identify the most suitable provider, best expressed by the following statements from customers:

“We rely on IT system houses to be provided with tailored information.”
(ID12)

“The local software office always has been and still is our first point of contact when it comes to IT.”
(ID14)

Thus, in line with B2B approaches such as the service delivery network (Tax, McCutcheon, & Wilkinson, 2013), providers of B2B digital services highlight that they need to approach less IT-competent companies indirectly rather than directly:

“If I look at [an IT novice company] that wants to integrate a new digital service, I need to target it via an IT system house.”
(ID3)

As pointed out by the managers we interviewed, the close relationship between IT-novice companies and multipliers can pose challenges for digital service providers, given that multipliers act as gatekeepers to those customers. To address the lack of control over these pivotal touchpoints, service providers adopt strategies such as offering training and certification programs to multipliers, which helps providers influence touchpoints with clients and distribute their products through multipliers (e.g., via a certified reseller model) (Partner conversation; May 11, 2022). As a result, multipliers typically collaborate with a select

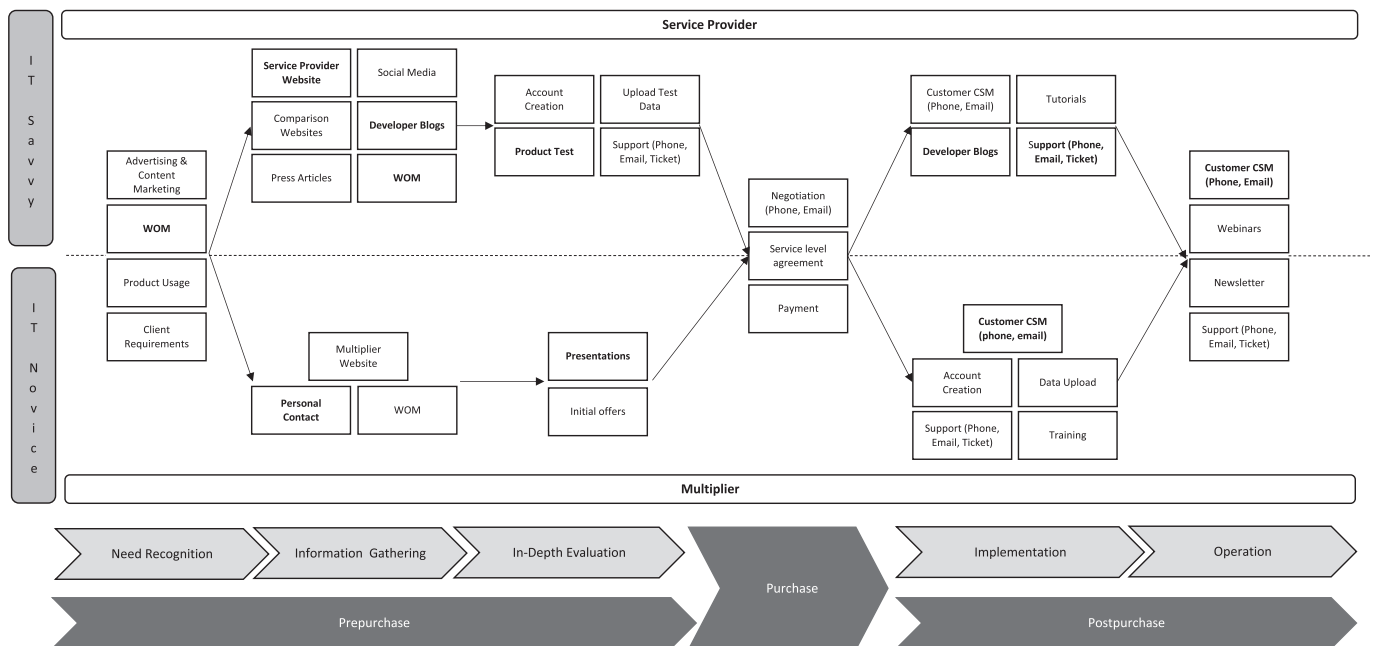


Fig. 3. The differing customer journeys of IT-savvy and IT-novice companies.

Notes: IT-savvy companies buy cloud computing services from the provider, while IT-novice companies buy them as an overall IT solution from a multiplier. As a result, the customer journeys split after the need recognition phase. The touchpoints for purchase do not differentiate between the two groups—yet they are with a different partner (IT-savvy: service provider; IT-novice: multiplier); the same holds true for post-purchase touchpoints.

Touchpoints in bold are more salient in the distinct phase compared to other touchpoints.

WOM = word-of-mouth.

CSM = customer success manager.

few digital service providers, favoring those that align best with their offerings and are financially advantageous. This dynamic can hinder the entry of new or competing cloud providers into an established market where multipliers have existing partnerships with specific providers (Acquisition interview; May 3, 2022).

Additionally, we find that IT competency also has direct implications for the composition of the buying and usage center in B2B companies. IT-savvy companies involve IT specialists and developers already throughout the prepurchase and purchase stages, drawing upon their IT expertise to evaluate and choose services, in addition to the post-purchase stage, as they can best judge whether a new service is needed or an existing one will suffice (ID10). As such, management (e.g., CTOs, heads of department, or buyers, depending on the size of the company) and IT (e.g., IT system leads, IT teams, developers) are integrated in the buying center for IT-savvy companies from the start. Conversely, IT-novice companies predominantly engage managers in the prepurchase and purchase stages, involving IT specialists primarily in the post-purchase phase for implementation and use due to the companies' lack of sufficient IT expertise and consequent reliance on multipliers, who act as IT experts. This finding for IT-savvy companies differs from the conventional buying center composition discussed in the literature, while it is in line for IT-novice companies (Witell et al., 2020).

These distinctions in buying center composition directly impact the relevant touchpoints in the different customer journeys for IT-savvy vs. IT-novice customers. For IT-savvy firms, service providers must offer diverse touchpoints that appeal to both management (e.g., websites) and IT specialists (e.g., developer blogs) to engage the buying center. Regarding the usage center, we find that IT-savvy customers tend to prefer self-service also for solving IT-related problems and are more online oriented, preferring fewer face-to-face interactions to reduce friction. In contrast, IT-novice companies prefer touchpoints that target management, relying on face-to-face interactions and third-party support by multipliers. Due to the lack of IT competency, product tests are not common for IT-novice companies in our sample, which instead let the multiplier present and explain the solution, making the prepurchase stage much leaner for IT-novice than for IT-savvy customers. However, this reverses in the implementation phase, as IT-novice firms require significant assistance from multipliers for cloud implementation and data migration.

The divergence in customer journeys begins from the information gathering stage onward (see Fig. 3). Consequently, due to varying IT competencies, customers self-select into distinct journeys: one focused on buying a self-service from a cloud provider (IT-savvy) and the other on buying IT solutions via multipliers (IT-novice). This underscores the role of multipliers as intermediaries between suppliers and customers, highlighting the need to consider connected customer journeys that initially share the same need but later diverge into separate paths for the same service (Purmonen et al., 2023; Witell et al., 2020). We next discuss the journey stages and their relevant touchpoints in more detail.

4.2. Prepurchase: need recognition

Need recognition initiates the journey. The customer initially encounters the offered service, sparking a first internal consideration of whether it is valuable. We find that initial contact primarily occurs through *ads and content marketing* as touchpoints—in line with existing literature on B2C customer journeys (Kuehnl, Jozic, & Homburg, 2019; Lemon & Verhoef, 2016) and industry reports (e.g., McKinsey, 2017) that highlight their role in the need recognition stage of the customer journey. Despite the growing role of digital marketing in B2B, our findings underscore the significance of informal influencers and interpersonal trust, with participants highlighting the importance of *word-of-mouth* referrals within professional networks, in line with existing research (Kozinets, de Valck, Wojnicki, & Wilner, 2010). The respondents generally received information from professionals with whom they were familiar, such as business friends in their network (ID13), or

from individuals whom they did not know, for example, participants in developer forums (ID1), an experience comparable to community interaction.

Moreover, first contact may be initiated by the customer's interaction with a client who requires a specific cloud computing service. These *client requirements* can be due to the customer's client seeking to achieve certain synergies or fulfill legal requirements. For example, "a main customer can require the usage of a certain cloud for compliance reasons" (ID12). Moreover, *current product use* can initiate need recognition. That is, shifts or upgrades in current digital product use can spark interest in or the necessity for a new cloud computing service setup or add-ons:

"A customer database can be upgraded to a new version that will only run on the cloud, and the customer has to therefore evaluate to migrate data into the cloud."

(ID2)

Notably, we find that salesperson interactions were minimal in this stage, with customers preferring familiar contacts or community forums. Along this line, cold calling was mentioned only by the providers and always with a proviso that it is not effective. ID5 clearly stated that "cold calling does not play a role anymore, due to the high relevance of online channels for digital services."

The first contact is followed by an initial internal discussion between management and departments regarding whether the digital service is needed, in line with B2B industry insights (Toman et al., 2017).

4.3. Prepurchase: Information gathering

Starting from the information gathering phase, the customer journey and associated critical touchpoints for IT-savvy vs. IT-novice companies differ as mentioned above and illustrated in Fig. 3.

4.3.1. Information gathering: IT savvy

We find that the information gathering phase is predominantly online for IT-savvy companies.

Online. Search engines are an important source for information gathering, even after first contact, in line with industry reports (Roland Berger, 2016) and as expressed by a participant:

"Developers use search engines for every question they have. The first step is always Google."

(ID1)

In the interviews, it was consistently pointed out that customers typically discover a *service provider's website* directly or first encounter relevant articles on various platforms, such as *social media, blogs, comparison websites, or press articles*. Subsequently, they navigate to the provider's website. The digital marketing literature focuses predominantly on online advertisements and email marketing (e.g., Bala & Verma, 2018); our research, by contrast, highlights the pivotal role of websites and developer blogs as crucial touchpoints. These platforms serve as primary sources of information for the vast majority of IT-savvy customers throughout their journey. The website as a touchpoint carries significant weight, often becoming a deciding factor in the customer's decision-making process. For instance, ID19 emphasized:

"If the company is not able to produce a good website, I would be skeptical about paying €10,000 per month for their service."

(ID19)

The primary motivation behind visiting a website is to determine whether the service provider's offerings align with the customer's specific requirements. Important criteria for the website mentioned by the interviewees are references (ID10), a good overall appearance, and a clearly stated unique selling point corresponding to the customer's needs (ID19).

While the importance of the website and the associated indications can be explained by the involvement of management in the buying center, the role of blogs can be explained by the involvement of IT specialists and developers in the buying decision. Due to the technical complexity, IT specialists and developers are involved early in the decision process, and they focus on information provided by third parties in developer blogs (e.g., Stack Overflow) because of their deeply rooted community trust. They consider information on ease of implementation and potential concerns with the cloud provider as highlighted by their peers in other companies (ID1).

Offline. In line with the extant literature, we find that *word-of-mouth* remains a critical touchpoint at this stage of the journey (Kozinets et al., 2010). The people consulted are often professionals with many years of experience and comprehensive technical know-how:

“We solely based our decision [to use the digital service] on recommendations from professionals in our network.”

(ID7)

“We went to [a professional] based on a recommendation from a good friend. He works at [a company]. He recommended [a digital service], and thus we chose it. He has been working in that domain for years, and we would never be able to catch up with that know-how within the time necessary.”

(ID13)

The collected information is compiled into a provider longlist based on specific criteria, such as pricing, switching effort, and compatibility with existing IT infrastructure (ID17). The top two or three providers that meet those criteria are subsequently tested in the in-depth evaluation phase. Both management and IT specialists collaborate in the buying center to identify the most promising service providers.

“As a developer, sometimes, I also like to conduct background checks [of service providers]. If a company is younger than a year, for example, I check the CEO in depth. Potentially, it is dropped due to security concerns.”

(ID19)

The involvement of both management and IT specialists at IT-savvy companies at this crucial stage further underlines the need to provide easily accessible, relevant information for both management and IT specialists, as otherwise a provider will fail to remain competitive and will be eliminated before the in-depth evaluation stage.

4.3.2. Information gathering: IT novice

For the IT-novice companies in our sample, we find that they typically opt to approach and select a few multipliers within their network rather than actively seeking cloud computing service providers directly. Due to their lack of IT expertise, these companies rely on multipliers as their IT experts. IT novices have typically already executed IT projects with multipliers; as these multipliers know the customer's hardware and software infrastructure, they are *contacted directly* as a crucial touchpoint characterized by a high level of trust (ID14). Complementing this, other companies' *word-of-mouth* recommendations and the *website* play important roles in evaluating multipliers. This phase is predominantly led by management and does not typically involve IT specialists, resulting in a leaner process than at the equivalent stage for IT-savvy companies and one dominated by interactions with multipliers' websites and personal contacts. While the website emerges as the most important touchpoint in this phase, it is the website of the multiplier rather than the service provider that is of interest to the IT-novice company (ID16).

As a result, the service provider from this point onward loses the direct touchpoint and control over the information to the multiplier. This loss of control is amplified by existing relationships between IT-novice companies and IT partners (e.g., hardware and software providers, such as IT system houses). In addition, as this phase is

predominantly led by management, in-depth technical sources, such as developer blogs, do not play a relevant role in IT-novice companies. Upon gathering information, IT novices create a longlist that includes multipliers rather than service providers. They assess them based on criteria such as domain-specific experience (ID2) which is best exemplified by the following quote:

“The main reason for [working with multipliers] was that we realized that we need support in choosing the eCommerce store. Then we got in touch with various partners who were active consultants in exactly this area, so to speak, and found out who best fits our needs by talking to them.”

(ID17)

It is interesting that formerly crucial touchpoints in the B2B domain, such as fairs (Sarmiento & Simões, 2018; Williams, Gopalakrishna, & Cox, 1993), do not play an important role in B2B customer journeys for cloud computing services based on our findings. Fairs were rarely mentioned, and when they were, the statement had an incidental character: “Maybe at fairs, when they talk to other companies, but that is not really a thing in that domain anymore” (ID1). Another said, “Today, fairs are not relevant anymore, rather online events like webinars” (ID2).

4.4. Prepurchase: in-depth evaluation

4.4.1. In-depth evaluation: IT-savvy companies

IT-savvy companies' in-depth evaluation consists of checking hard and soft factors and conducting a product test as core touchpoints.

Hard factors. Hard factors of the service provided encompass its feature functionality and usability, evaluated through touchpoints such as *account creation*, *uploading test data*, and *service testing*. Typically, this trial period is offered free of charge by the service provider and can span from two weeks to over a month. Other pertinent B2B customer journey literature does not explicitly emphasize the testing phase (e.g., Purmonen et al., 2023), but we found this trial phase to be particularly crucial for cloud computing services. The significance of the trial can be attributed to the ease of testing digital services through a demo version and the valuable insights it provides in a service context that is otherwise challenging to assess (Kempf & Lacznik, 2001). Consistent with prior research on trials (Hamilton & Thompson, 2007; Peterson & Merino, 2003), a positive alignment between the tested service and the customer's needs significantly elevates the likelihood of a favorable decision. Conversely, the occurrence of bugs or poor usability during the trial can substantially decrease the probability of purchase, potentially serving as a deal-breaker for the customer.

“If I test a service and there is a relevant bug right away, I leave it alone. The probability that there are more bugs inside is too high.”

(ID1)

Soft factors. We find that soft factors are assessed concurrently with hard factors, focusing on uncertainties and concerns encountered during testing. Consequently, *support channels* via phone, email, or tickets emerge as crucial touchpoints. These are evaluated based on criteria such as friendliness, responsiveness, reliability, and technical expertise (ID10). Prompt, proficient support is deemed essential in addressing potential problems or queries that might arise during the use stage (ID15). Effective support not only ensures a smooth service experience but also promises a seamless onboarding process supported, for example, by video tutorials and comprehensive documentation, which help customers resolve issues (ID10). Following product testing, the best-suited provider is chosen through internal discussions, marking the transition to the purchase phase.

“[The internal discussion] depends on the size of the company. If it is a small company and everybody is at the same stage, you can directly decide on the best service. If it is a bigger company, you first need to

convince the management and discuss with some stakeholders internally.”

(ID1)

The product testing focus on hard and soft factors (including support) means that IT specialists play a substantial role in the buying center for IT-savvy companies in this customer journey stage and will report their assessment to management for a joint purchase decision.

4.4.2. In-depth evaluation: IT-novice companies

Compared to IT-savvy companies, the IT-novice companies that we interviewed do not focus on product tests. Instead, they invite multipliers for *presentations*, which are followed by *initial offers*. Thus, the touchpoint in their customer journey emphasizes soft factors, as these companies lack the necessary expertise to evaluate hard factors and test the service themselves. Consequently, the touchpoints are predominantly influenced by the needs of managerial decision-makers in the buying center:

“We are rookies in the topic, and it is hard to understand the quality of a software for us. So, we need external help in the process.”

(ID14)

We find that a multiplier’s presentations serve as a crucial touchpoint that significantly influences the customer’s judgment of which multiplier is best to work with. For the customer, it is vital that the proposed solution both aligns with their needs and showcases the multiplier’s extensive domain expertise, giving the customer a good feeling and confidence in the decision (Acquisition interview; May 2, 2022). This finding on reducing uncertainties and establishing rapport for IT-novice companies is directly in line with more traditional B2B research (e.g., [Uлага & Kohli, 2018](#)). Consequently, this phase involves more face-to-face interactions than the equivalent phase for IT-savvy customers. Interestingly, considering the customer’s limited IT competency, multipliers do not focus only on selling a service but instead offer a comprehensive IT solution to the customer. This comprehensive solution includes not only the cloud provider service but also consulting for selection, implementation, and operation (such as maintenance) of the service as an integrated package (Acquisition interview; March 17, 2022).

Following presentations, multipliers usually make initial offers for service delivery. As customers lack the expertise to take this step independently, they must pay for any assistance provided, such as consulting and solution integration; thus, it is crucial that they select the most suitable multiplier. Typically, IT-novice companies commit to one multiplier, and these multipliers usually collaborate with a handful of service providers, aiding in the implementation. Thus, in this stage, IT-novice companies evaluate both the proposed digital service and the multiplier as a solution provider simultaneously to identify the best-fitting package (Acquisition interview; June 3, 2022).

4.5. Purchase

In the purchase stage, we observed minimal differences in touchpoint types between IT-savvy and IT-novice companies. The distinction lies in their interaction partners: the managers we interviewed consistently mentioned that IT-savvy companies *negotiate* and engage directly with service providers, whereas IT-novice companies communicate with multipliers. Consequently, even at this critical stage, service providers do not establish direct contract with customers. Instead, they negotiate service delivery agreements with the multiplier. The multiplier, in turn, finalizes service and consulting agreements with the customer.

In line with existing research on B2B customer journeys ([Purmonen et al., 2023](#); [Witell et al., 2020](#)), we find that, upon selecting the most suitable product through internal discussions, customers may enter a negotiation phase regarding the service’s final cost and the scope of service delivery. Notably, the multiplier may negotiate with the service

provider on behalf of IT-novice companies, particularly in larger enterprise settings. This process culminates in a *service level agreement* or a more comprehensive contract. In IT-novice companies, the buying center is typically assembled by management (Acquisition interview; July 11, 2022), which may require customization of contracts, especially concerning add-on services. In IT-savvy companies, however, the service level agreement discussions often involve both management and IT specialists to ensure correct configuration of auto-scaling, load balancing, and others. Due to its self-service nature, this phase tends to be standardized and brief for IT-savvy companies. That is, these companies generally prefer a rapid setup approach, as expressed in the following quote:

“Testing, deciding, and let’s go.”

(ID10)

Regarding contract length and payment, IT-savvy companies usually maintain short contractual durations with cloud providers due to pay-per-use agreements, enabling flexibility, as there are no long-term costs incurred or contractual obligations involved if they stop using the cloud. Because they directly engage with the cloud provider, the contract length remains adaptable, aligning with the service’s on-demand nature (Acquisition interview; May 18, 2022). Conversely, we find that IT-novice companies in our sample, which contract through multipliers, face contract lengths ranging from one to five years based on the complexity of the project and negotiations (Acquisition interview; May 20, 2022). The initial *payments* are typically processed online via credit card or, for less IT-competent companies, through invoicing, and are then typically recurring over the time of use of the service:

“For payment, we use a credit card since it is the easiest way, and we get the receipt immediately—pretty easy.”

(ID9)

4.6. Post-purchase: implementation

4.6.1. Implementation: IT-savvy companies

As pointed out in our interviews, the implementation phase of complex digital services tends to be streamlined for IT-savvy companies, as initial test data have been uploaded and onboarding procedures have already occurred during the testing phase. This finding diverges from those in B2B customer journey research that typically identify this phase as more extensive ([Witell et al., 2020](#)), but it aligns with the self-service nature of cloud computing for IT-savvy firms, which aim to minimize costs by reducing interactions and friction between customers and providers.

At this stage, IT specialists take the lead as key personnel in the customer journey. Instead of interacting with the service provider directly, however, they prefer turning to *developer blogs* (e.g., Stack Exchange) and *tutorials* (e.g., ones available on the service provider’s website) to troubleshoot implementation-related problems (Acquisition interview; May 12, 2022). If problems resist a self-service resolution, *support* from the service provider via phone, email, or ticket becomes relevant. For IT-savvy companies, however, a reduced need for interaction or waiting times for support enhances productivity, as highlighted by one interviewee:

“In the best case, there is no support interaction at all. Because there are no problems.”

(ID3)

Customer success managers are typically appointed by service providers for customers that generate high revenue. However, as pointed out by the managers we interviewed, the primary goal is not to help customers on the hard factor side—as they are highly IT savvy—but to strengthen the relationship. This approach to optimizing the post-purchase interaction based on the customer’s needs and to building

the relationship is in line with the outline of customer success management in existing research (e.g., Hochstein et al., 2023; Kleinaltenkamp, Prohl-Schwenke, & Keränen, 2022). The customer success manager's role becomes increasingly significant from the post-purchase stage onward, directly managed by the service provider and serving as a primary point of contact. Similar to existing descriptions (e.g., Hilton, Hajihashemi, Henderson, & Palmatier, 2020; Hochstein, Rangarajan, Mehta, & Kocher, 2020), customer success managers bridge the gap between sales and customer support functions, proactively addressing concerns and building strong communication with the customer. Nevertheless, beyond existing findings, we find that their significance is less pronounced during the implementation phase for IT-savvy firms, which aim to minimize friction by independently implementing the service (Provider conversation; October 25, 0.2023). Moreover, the focus of the customer success manager is more directed toward managers than to IT specialists in the usage center.

4.6.2. Implementation: IT-novice companies

We find that for IT-novice companies, the implementation phase involves more touchpoints and is more intense, aligning with the existing literature (Purmonen et al., 2023; Witell et al., 2020). This phase marks the initiation of the actual implementation, with the IT department engaging collaboratively with multipliers to integrate cloud computing services. Due to their limited IT proficiency, these companies fully rely on *customer success managers* provided by the multiplier to assist with service implementation.

“Often it comes to technical misunderstandings [on the customer's side], which can happen with such complex services. The customer success manager solves these together with the customer and ensures a successful transition.”

(ID4)

Initial tasks relate to the service delivery, such as introducing the customer to the platform, including *account creation* and *data upload*. For IT-novice companies, customer success managers aim for both hard factor support and relationship building. Thus, a strong technical understanding and good explanatory skills are perceived to be important in customer success managers (ID12)—which aligns with the need for customer success management particular in cases where customers lack the skills to conduct the required activities (e.g., Kleinaltenkamp et al., 2022). As such, this personalized contact is critical for IT-novice companies, as they rely on being guided through the process. Further touchpoints during the implementation include *training sessions* to get employees onboard and the opening of *support tickets* (ID4).

Focusing entirely on implementing the solution with the multiplier, IT-novice companies tend to refrain from seeking information from outside sources, such as external blogs. Consequently, they engage in more face-to-face interactions, fostering a stronger connection throughout the process. This emphasizes the intimate relationship between the multiplier and the IT-novice customer and highlights the importance of personalized attention and support throughout the post-purchase phase. Notably, to maintain control over multipliers and influence this crucial touchpoint for selling their service and retaining customers (via the multiplier), cloud service providers often seek to certify multipliers' customer success managers (Partner conversation; May 11, 2022).

4.7. Post-purchase: operation

The operation phase is similar for IT-savvy and IT-novice customers, who continue to interact only with their respective partners (i.e., service provider or multiplier). In this stage, we find that the *customer success manager* takes a prominent role. The customer success manager focuses on relationship building and promotes product customization for existing services. In this role, the success manager is crucial to enable customer retention and provide the basis for cross-selling and long-term

growth (Hochstein et al., 2023).

Based on our insights, retention strategies tend to differ between IT-savvy and IT-novice customers due to their distinct contract structures. IT-novice customers, engaged in longer-term relationships (1–5 years) with their IT solution providers, lack flexibility to switch providers. Conversely, IT-savvy customers, working directly with the service provider, have on-demand or pay-as-you-use contracts, allowing them to switch providers quickly. To prevent this, the main task of the customer success manager is maintaining high customer satisfaction. Another strategy of cloud providers is to create lock-in effects, such as nudging the customer into customizing the product with provider-specific usage patterns that are not transferable. This involves working together with the customer's management and IT specialists to customize the product (e.g., by creating pieces of automated code) to make switching to competitors more challenging. These provider-specific features offer advantages to the customer but are not transferable to other providers. As a result, even if management considers switching to obtain lower prices, the decision-making process is significantly influenced by reluctant IT specialists who wish to avoid the additional work of rewriting the automated code (Acquisition interview; May 20, 2022). As such, this role of the customer success manager to create a lock-in is new to the B2B customer journey literature and not yet explicitly considered in the literature on customer success management (e.g., Hilton et al., 2020; Hochstein et al., 2023; Kleinaltenkamp et al., 2022). The focus remains on proactively generating a lock-in effect, which is even more pronounced for highly specific or automated services, such as those offered by companies ID7 and ID8, which operate IoT services.

We find that for IT-novice customers, the customer success manager places more emphasis on relationship building and forging long-term contracts, in line with the more traditional relationship-building approach in B2B marketing (Purmonen et al., 2023; Steward et al., 2019). This partnership bridges the gap arising from the customer's lack of expertise, ensuring smooth operation of the cloud computing service. Complementing the role of the customer success manager, *webinars* play a crucial role in educating customers about new features and products, as illustrated by the following quote from a service provider:

“Online events like webinars play a major role to keep customers informed and interested in our products.”

(ID2)

Naturally, *support* interactions (writing tickets or e-mails, calling for support) and receiving *online newsletters* (monthly or quarterly) are also common touchpoints in this phase.

5. Conclusion

5.1. Theoretical implications

Selling complex digital services, such as cloud computing, poses challenges due to limited knowledge about the B2B customer journey, particularly in marketing approaches for such services (Jyoti & Efraxia, 2023; Marston et al., 2011). This gap in understanding the decision process is pronounced when juxtaposed with the substantial guidance available for managing customer journeys in B2C markets (e.g., Homberg et al., 2017; Kuehn et al., 2019; Lemon & Verhoef, 2016). Recognizing the increasing significance of customer journeys in B2B contexts (Lundin & Kindström, 2023), our study aims to bridge this gap by examining the customer journey within the B2B cloud computing market. By doing so, we aim to provide scholarly insights to aid service providers in acquiring new clients and contribute to a more comprehensive understanding of the customer journey process for complex digital B2B services (e.g., Purmonen et al., 2023; Rusthollikarhu et al., 2022; Steward et al., 2019; Witell et al., 2020).

Our exploration of the customer journey in B2B digital services pinpoints crucial touchpoints and underscores the pivotal role of IT competence in managing this journey. Recognizing that complex B2B

services necessitate cocreation, as success relies not only on providers' capabilities but also on customers' resources (Macdonald, Kleinaltenkamp, & Wilson, 2016), we emphasize the importance of tailoring diverse customer journey approaches that account for the customer's level of IT competence. More specifically, we find the following:

Different market and customer journeys based on IT competency. The customer journey in the cloud computing services market diverges based on the customer's IT competency: one journey emphasizes self-service and the other solution-seeking guidance. IT-savvy companies directly purchase a self-service from cloud providers. In contrast, IT-novice companies buy cloud solutions, including advisory services, from multipliers, such as IT system houses, which act as mediators, alleviating the complexities and risks associated with selecting and implementing cloud services for less IT-competent firms. This introduces a triadic relationship among service providers, customers, and multipliers, making it necessary to recognize parallel yet distinct customer journeys stemming from the same initial need (Lundin & Kindström, 2023; Purmonen et al., 2023). As a result, this differentiation based on IT competency is a pivotal factor in marketing B2B cloud computing services.

Touchpoint control in the customer journey. The divergence between IT-savvy and IT-novice companies impacts cloud computing providers' control along the customer journey. IT-novice firms predominantly engage with multipliers, so cloud providers lose direct touchpoints with the customer and thus control over sales. To navigate this, providers establish certification programs and seek to build long-term relationships with multipliers. This finding underlines the importance of considering these intermediaries' influence in sales strategies and can be linked to similar investigations of channel intermediaries that cocreate value by facilitating the distribution of a manufacturer's products to consumers (wholesalers, distributors, retailers) (Chung, Chatterjee, & Sengupta, 2012; Krafft, Goetz, Mantrala, Sotgiu, & Tillmanns, 2015; Sharma, Cosguner, Sharma, & Motiani, 2021).

Different roles in the buying and usage center. IT competency also has implications for the buying and usage center's composition and its preferred touchpoints throughout the customer journey. In IT-savvy firms, management and IT specialists both wield significant influence in the buying and usage center but use different touchpoints, with management prioritizing websites and direct contact and IT specialists relying on third-party developer blogs, such as Stack Overflow. Thus, for cloud service providers, designing touchpoints for both groups (and particularly engaging in online communities) plays a pivotal role in advancing the B2B sales process (Wang et al., 2010).

Touchpoint design for different customer profiles. IT-novice companies emphasize soft factors in the prepurchase phase, such as presentations and relational approaches, while IT-savvy ones prioritize product testing and hard factors. This disparity leads IT-competent companies toward self-service approaches, reducing reliance on traditional B2B sales mechanisms, such as interpersonal communication. Conversely, IT-novice companies appreciate soft factor relations. Similarly, while customer success managers are important touchpoints in both customer journeys, their role varies. For IT-savvy companies, they focus on customizing the product to create lock-ins that discourage customer switching, whereas for IT-novice companies they concentrate on building relationships and resolving problems. Notably, because IT-novice companies focus on soft factors, face-to-face touchpoints, and relationship building to reduce uncertainties and establish rapport, we found that they generally approach their customer journeys in the manner of customers as described in traditional B2B marketing (e.g., Ulaga & Kohli, 2018) and customer journey literature (e.g., Steward et al., 2019). This is not the case for IT-savvy companies, which concentrate on hard factors and self-service when buying cloud computing services.

5.2. Managerial implications

Actively guiding customers through their journey toward making a purchase is one of the main challenges companies face in the

contemporary business landscape. We offer insights to help sellers of complex B2B digital services, such as cloud computing services, to effectively control, manage, and design customer journeys (Homburg & Tischer, 2023; Rustholkar et al., 2022). Thus, for B2B customer journey managers, there are several key points to consider:

Segmenting the target market. B2B customer journey managers must determine their target market and the resulting customer journey based on the customer's IT competency. They offer their service either directly to IT-savvy companies or indirectly to IT-novice customers through a gatekeeper who provides IT solutions bundled with consulting and maintenance. Importantly, it is not the B2B manager that can influence this path; instead, customers choose their journey based on their IT competency and their ability to use self-service options provided. Each customer segment displays distinct preferences, and the involvement of multipliers as gatekeepers complicates the sales approach to IT-novice companies.

Managing multipliers as gatekeepers. Multipliers act as crucial intermediaries, often controlling the touchpoints with the customer. Thus, B2B managers of cloud computing services need ways to exercise some level of control over these key interactions. Building relationships with multipliers, incentivizing them via competitive remuneration models, and providing training and certification programs for multipliers are vital tools. Providers might also contemplate establishing their own multiplier firms (IT system houses) to cater to this market segment. This, however, involves selling a solution rather than a service, requiring a different business model and specialized capabilities. This setup also presents challenges for new service providers aiming to enter the market, as they must persuade established gatekeepers (with existing relationships and certifications from distinct companies) to sell their services to customers.

Targeting the different buying and usage center roles. To understand the buying dynamics within these distinct customer segments, it is crucial that B2B customer journey managers identify the decision-makers within their respective buying and usage centers. In the case of IT-savvy companies, the involvement of IT specialists begins at the prepurchase phase and extends throughout the customer journey due to their IT expertise and pivotal role in integrating complex services. Therefore, establishing touchpoints that cater to the needs of both managers and IT specialists in the prepurchase stage is essential. Notably, websites are pivotal for management, whereas third-party blogs, such as Stack Overflow, are valuable sources for IT specialists. Managing and engaging in discussions on these specialized blogs is imperative to effectively address the requirements of IT specialists.

Tailoring touchpoint design. Customer journey managers for cloud computing services need to acknowledge that IT specialists in IT-savvy firms tend to focus on hard factors and thus prefer minimal friction and the use of self-service resources, such as online blogs and direct provider information, engaging more deeply only when necessary. Their in-depth understanding of the product enables them to test and assess it themselves. Conversely, soft factors and classic relationship management are pivotal in IT-novice firms' customer journeys. These companies often grapple with uncertainties about digital services and exhibit resistance to change. They rely heavily on multipliers for guidance, necessitating empathetic communication and effective responses to customer queries. Moreover, extensive training may be essential to facilitate their understanding and adoption of cloud computing services.

Using customer success managers. In the operational phase, customer success managers play a critical role for both the IT-savvy and IT-novice segments, but their significance amplifies for IT-savvy companies due to the pay-per-use and on-demand nature of cloud computing services, which gives IT-savvy firms the flexibility to switch providers more readily than IT-novice companies with longer contractual commitments. To retain IT-savvy customers, cloud providers must create lock-in features, and customer success managers must actively nudge users into such features to discourage switching by raising barriers related to required rework.

5.3. Limitations and avenues for future research

As a first step in understanding B2B customer journeys for cloud computing services, this qualitative study necessarily has limitations and suggests avenues for future research.

First, grounded theory is based on the subjective interpretation of qualitative data (Glaser & Strauss, 2017), so its use in this study calls for quantitative studies to provide more objective assessments of how touchpoints along the customer journey affect B2B buying decisions. Tracking and assessing the effect of touchpoints along the customer journey is a significant challenge, so studies on touchpoints in B2C customer journeys can provide methodological guidance on how to best investigate touchpoint effectiveness using, for example, clickstream data or customer journey tracking tools (e.g., Anderl, Becker, von Wangenheim, & Schumann, 2016; Baxendale, Macdonald, & Wilson, 2015).

Second, to guarantee a homogeneously distributed sample across company sizes and industries and to account for the distinct characteristics of IT-novice and IT-savvy companies, our sample consists of start-ups and small to medium-sized firms in the cloud computing services domain. While we also validated the results with larger cloud computing firms, extending these findings to interviewing more and more variant types of larger companies provides an interesting opportunity to extent our research and could offer additional insights into B2B customer journeys in this market. Moreover, getting the view of different stakeholders accessing the same touchpoint within a company (e.g., different stakeholders in the buying and usage center) could yield intriguing contrasts between collective vs. individual value in use (Macdonald et al., 2016) as well as additionally provide broader and diverging perspectives on the customer journey in the cloud computing market. As such, it represents a promising endeavor for future research.

Third, we find that traditional offline touchpoints, such as cold calling and fairs, have waning significance in the cloud computing service customer journey; however, their potential role in the B2B digital service industry requires further investigation to understand their remaining capacity to attract and engage new versus existing customers.

Fourth, we focus on a single decision (to buy a cloud computing

service) and the resulting customer journey, but multiple customer journeys for different cloud computing services may take place concurrently (e.g., IaaS and SaaS for different needs). Understanding how these parallel journeys and decisions interact is an intriguing avenue for future research.

Lastly, we find that multipliers serve as significant gatekeepers for IT-novice customers. Future research should more deeply investigate their role and the resulting triadic relationship between service providers, multipliers, and customers, particularly to illuminate the different internal buying and usage center roles that service providers must manage on the multiplier and customer side and to identify how to exert control over multipliers, for example, via training and certification. Moreover, research might also explore how service providers can integrate multipliers into their customer journey management and directly engage gated customers without relying heavily on multipliers for sales.

CRediT authorship contribution statement

Claas Terpoorten: Writing – review & editing, Validation, Resources, Methodology, Formal analysis, Data curation, Conceptualization, Writing – original draft. **Jan F. Klein:** Conceptualization, Resources, Validation, Visualization, Writing – original draft, Writing – review & editing. **Katrin Merfeld:** Writing – review & editing, Writing – original draft, Validation, Supervision, Project administration, Methodology, Investigation, Formal analysis, Data curation, Conceptualization.

Declaration of competing interest

None.

Data availability

The data that has been used is confidential.

Appendix A. Coding

1st Order Illustrative Quote		2nd Order Themes: Touchpoints	Aggregate Dimensions: Journey Steps
“Number 1 content marketing, of course, in conjunction with SEO and AdWords.” (ID 5)	S/ N	Advertising and Content Marketing	Need Recognition
“It frequently is a business of recommendations.” (ID 6)	S/ N	Word-of-Mouth	
“A customer database can be upgraded to a new version that will only run on the cloud, and the customer has to therefore evaluate to migrate data into the cloud.” (ID 2)	S/ N	Product Usage	
“a main customer can require the usage of a certain cloud for compliance reasons.” (ID12)	S/ N	Client Requirements	
“If the company is not able to produce a good website, I would be skeptical about paying €10,000 per month for their service.” (ID19)	S	Service Provider Website	
“Actually, first of all, like you do when buying a washing machine: Top Ten Cloud Hosting Germany or Europe. So maybe not on Chip.de or Computerexperte.com or something like that, but just Heise or some stuff that has already had something to do with IT in their lives.” (ID 19)	S	Comparison Websites	
“We are very happy about press reports that someone reads something and then contacts us with reference to this article. For example, we were just [featured] in the Handelsblatt.” (ID 2)	S	Press Articles	
“We certainly use the classic social media channels, but only to a certain degree.” (ID 6)	S	Social Media	
“If you’ve informed yourself a bit and enter certain questions, you usually land on certain blogs.” (ID 1)	S	Developer Blogs	Information Gathering
“We solely based our decision [to use the digital service] on recommendations from professionals in our network.” (ID 7)	S/ N	Word-of-Mouth	
“The main reason for [working with multipliers] was that we realized that we need support in choosing the eCommerce store. Then we got in touch with various partners who were active consultants in exactly this area, so to speak, and found out who best fits our needs by talking to them.” (ID 17)	N	Multiplier Website	
“If there is no sympathy for both the employee and the company, then that’s a bad thing. Then he can quickly become one of those who are reduced from five to three from the outset—and we haven’t even talked about the price yet.” (ID 20)	N	Personal Contact	
“We decided this for ourselves straight away and then tested it directly with a trial account.” (ID 10)	S	Account Creation	In-Depth Evaluation

(continued on next page)

(continued)

1st Order Illustrative Quote		2nd Order Themes: Touchpoints	Aggregate Dimensions: Journey Steps
"If everything is clear or they want to compare several cloud providers, for example, then they create an account with each one, play around and then decide on the one that makes the best impression and then they can bring their workload to the cloud they have decided on." (ID 1)	S	Product Test	
"And we also took a look at the surfaces and otherwise we were pretty proactive in testing. So we just signed up and saw what they can do." (ID 15)	S	Upload Test Data	
"And (provider name) simply convinced us the most in terms of customer support and yes, basically quality." (ID 10)	S	Support	
"After the workshop, each had three to four weeks to present a solution, which was then presented in PowerPoint." (ID 2)	N	Presentations	
"And then the whole thing is discussed and, ideally, the whole thing is then turned into an offer that has the character of a contract and then goes to the vote again." (ID 5)	N	Initial Offers	
"Normal contract negotiations and we now have a normal cloud service contract with [provider name]." (ID 11)	S/ N	Negotiation	
"The nice thing about [provider name] was that they had a wide range of all SaaS to IaaS services, which could be cleverly combined and to each of which their own services were developed." (ID 11)	S/ N	Service Level Agreement	Purchase Phase
"For payment, we use a credit card since it is the easiest way, and we get the receipt immediately—pretty easy." (ID 9)	S/ N	Payment	
"For example, from other developers or something like that who have shared their experiences, because that is relatively trustworthy, or from communities that have dealt with the topic. Then you always hear from several people what their opinion is on a certain topic." (ID 1)	S	Developer Blogs	
"There were tutorials, for example, where they were doing well." (ID 10)	S	Tutorials	
"I noticed positively that the support is really really good." (ID 10)	S/ N	Support	
"Often it comes to technical misunderstandings [on the customer's side], which can happen with such complex services. The customer success manager solves these together with the customer and ensures a successful transition." (ID 4)	S/ N	Customer CSM	Implementation Phase
"That's not necessarily their job, but it's actually quite easy to get in touch with a contact person who will really help you and take a short time, maybe even call you." (ID 17)	N	Account Creation	
"And then we set the thing up. Of course, that's also a bit of an effort. That's what he and his team did." (ID 11)	N	Data Upload	
"This [kick-off meeting] ranges from half an hour for a small story to a half-day workshop in which you discuss again exactly who has to do what." (ID 5)	N	Training	
"And at the same time, there is an initial introductory meeting with the Customer Success Manager for about half an hour, where he just explains how [name of service provider] works, points out again which support is available, what escalation options there are, and makes sure that he has all the contact details." (ID 5)	S/ N	Customer CSM	
"Online events like webinars play a major role to keep customers informed and interested in our products." (ID 2)	S/ N	Webinars	
"You get a lot of newsletters." (ID 18)	S/ N	Newsletter	Operation Phase
"So what I always like to do is just give them a call and see what's going on in the company. For example, is there someone there for 24-h support? We've already had a few service providers who promised us the golden egg. And then you call 24-h support three times and three times half an hour later nobody answers. There's not much behind it." (ID 19)	S/ N	Support	

Note: S = IT-savvy customers, N = IT-novice customers, S/N = applicable to both.

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