Leveraging Omnichannel Strategies to Achieve

B2B Marketing Objectives and Strategic Success

Mrinalini Sundar

McMaster University

Department of Communications Studies and Multimedia, Faculty of Humanities

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Dr. Alex Sevigny, APR

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Abstract

This research explores how and to what extent business-to-business (B2B) organizations can effectively leverage omnichannel strategies to meet their marketing objectives and achieve strategic success. It examines key elements such as a company's marketing goals, the proximity of marketing teams to communications and business development, and the differences between multichannel and omnichannel approaches. By conducting a systematic literature review and semi-structured interviews with senior marketing professionals from leading large for-profit B2B companies with a minimum of 500 employees, the study uncovers best practices, challenges, and the impact of omnichannel strategies on brand engagement, customer retention, and sales performance. The insights gained provide actionable recommendations for optimizing omnichannel marketing to enhance overall marketing performance and strategic outcomes.

Keywords: Brand engagement, omnichannel marketing, integrated marketing communications, customer journey, and marketing strategy, business-to-business (B2B)

Introduction

Omnichannel marketing has become a pivotal strategy for B2B organizations to align marketing efforts with business goals in a digital-first world. Unlike multichannel approaches, omnichannel integrates online and offline touchpoints to deliver personalized, seamless buyer journeys. This paper addresses gaps in understanding how these strategies influence logistics, customer relationships, and data-driven decision-making. Digitalization has transformed traditional marketing approaches, compelling firms to integrate various communication channels to create cohesive and personalized buyer journeys (Kauffman & Pointer, 2021). Unlike multichannel strategies, omnichannel marketing leverages the power of both online and offline touchpoints, enabling businesses to enhance customer interactions at every stage of the purchasing process (Spencer & Sutton-Brady, 2021). This integration allows firms to maintain consistent messaging and offers, thus improving their proximity to business development goals. As B2B buyers increasingly demand tailored and seamless experiences across all platforms (Accenture, 2015; Aichner & Gruber, 2017), omnichannel strategies help companies align their internal marketing teams closely with communications departments, fostering a holistic approach to customer engagement. Despite the rapid growth of omnichannel adoption, research reveals a gap in understanding the full potential of B2B omnichannel strategies, especially regarding logistics, distribution, and their impact on customer-supplier relationships (Alonso-Garcia et al., 2022; Gavin et al., 2020). These strategies have proven effective not only in reaching company-specific goals but also in addressing the complexities of buyer behavior in a fragmented digital marketplace (Berman & Thelen, 2018). The application of analytics in marketing decision-making is driven by both the availability of vast amounts of data and the continuous advancements in analytical techniques (Wedel & Kannan, 2016). As the digital ecosystem

evolves, B2B organizations must prioritize data-driven approaches to navigate these dynamics and capitalize on omnichannel capabilities (Cummins et al., 2016).

Literature Review

This section explores brand engagement in the context of omnichannel marketing, emphasizing the importance of mental and physical availability. It also highlights the role of Customer Data Platforms (CDPs) and automation in building consistent customer experiences across touchpoints.

Brand Engagement and Omnichannel Marketing

Building a B2B brand requires establishing both mental and physical availability. Mental availability refers to how easily your brand comes to mind for potential customers, while physical availability ensures your brand is readily accessible across channels (Romaniuk & Sharp, 2015). In B2B contexts, companies often overlook the importance of maintaining consistent brand engagement over time, particularly with potential buyers. By maintaining continuous engagement spaced strategically over time, companies can ensure their brand remains top of mind and is not forgotten. This is critical, given the challenges of divided buyer attention, fading memories, and competitive interference in the B2B space (Romaniuk & Sharp, 2015). Messaging should be designed to create and reinforce Category Entry Points (CEPs)—mental triggers that link the brand with relevant needs or situations in the buyer's memory. In a B2B context, CEPs must not only address the company's needs but also consider the anticipated thoughts of employees, colleagues, and customers. This broader scope of engagement helps ensure that when B2B buyers are making decisions, your brand is considered relevant to all stakeholders in the decision-making process.

B2B omnichannel marketing involves strategically coordinating all channels organizations use to engage with potential and existing clients, ensuring a consistent and reliable

brand experience. This approach integrates various platforms, creating a seamless journey for accounts interacting with the company (Demandbase, n.d.). The primary objective of B2B omnichannel marketing is to provide relevant information and offers through the channels where target accounts are most active. As smartphones and social media become integral parts of daily business activities, B2B consumer behavior has shifted significantly towards omnichannel engagement (Fujimura & Ishino, 2020). The ongoing digital transformation has redefined cultural and operational structures and pushed firms to innovate in their interactions with customers, intermediaries, and stakeholders. Other researchers, such as Ind et al. (2017), emphasize that digital channels provide companies with the opportunity to create brand communities, which are crucial in the corporate brand-building process. These digital communities enable customers to establish relationships not only with brands but also with other users, thereby fostering stronger brand loyalty and engagement (Boon et al., 2015). Furthermore, Cooper et al. (2023) note that the evolution of social media has significantly enhanced the ability of companies to interact with stakeholders, leading to deeper and more impactful practitioner-stakeholder relationships that reinforce brand identity. This shift has required businesses to embrace new strategies for managing relationships across these groups. Specifically, in the context of brand management, evolving digital channels have significantly influenced how organizations connect with stakeholders, leading to new methods for engagement and communication (Cooper et al., 2023). B2B high-tech startups have had to adapt rapidly to this omni-digital environment, utilizing innovative digital tools to build and sustain their brand presence while maintaining consistent stakeholder relationships across various platforms (Olivieri & Hu, 2023).

Clients in B2B sectors now expect a seamless transition between digital and offline interactions, requiring companies to optimize their communication across email, in-person

interactions, social media, and client portals. This transition reflects how customers expect to engage with brands consistently, regardless of the channel, enhancing brand engagement and awareness (Fujimura & Ishino, 2020). Whether through email, social media, retargeting display ads, or other methods, an omnichannel strategy guarantees a positive experience on each channel by maintaining consistent brand positioning, personalized messaging, and content tailored to the buyer's stage in the journey (Demandbase, n.d.). Furthermore, omnichannel marketing emphasizes customer-centric communication that maintains high engagement levels, even as customers move between digital and physical interactions. This is particularly important for building long-term customer loyalty and brand awareness (Sintani et al., 2023). Omnichannel marketing greatly enhances a B2B brand's reach by enabling connections with a broader and more diverse customer base (B2B Chicago Online, n.d.). Instead of relying on a single channel, an omnichannel strategy coordinates interactions across various platforms to create a unified and consistent brand experience (B2B Chicago Online, n.d.).

Omnichannel marketing adopts a customer-centric focus, emphasizing a holistic shopping experience where the customer's journey is smooth and uninterrupted, irrespective of the channels they engage with (Payne et al., 2017). Omnichannel marketing strategies that incorporate both customer-centric approaches and data-driven personalization have been shown to significantly enhance brand engagement in B2B contexts (Alonso-Garcia et al., 2022). The most crucial interaction is with the brand rather than the individual channels (Payne et al., 2017). Verhoef et al. (2015, as cited in Payne et al., 2017) define omnichannel management as the synergistic coordination of various channels and customer touchpoints to optimize customer experience and performance across all channels. This comprehensive approach highlights two primary aspects: how customers obtain information and how transactions are completed (Payne et al., 2017). These strategies allow companies to foster deeper connections with their clients by

offering tailored experiences that align with customer expectations at every stage of the buyer's journey. Through the seamless integration of online and offline channels, businesses can maintain consistent brand messaging, which is crucial for building trust and long-term loyalty (Alonso-Garcia et al., 2022). Many firms prioritize building and managing brand equity (Madhavaram et al., 2005). According to Keller (1993, as cited in Madhavaram et al., 2005), establishing brand equity involves two main steps: (1) developing a strong internal brand identity and (2) integrating this identity into the firm's overall marketing strategies, including product development, pricing, advertising, promotions, and distribution decisions. The effectiveness of brand equity from communications relies on how well these brand identities are embedded within the supporting marketing programs (Madhavaram et al., 2005). Keller (2003) also emphasizes the need for effective strategies in integrating marketing communications to build and sustain brand equity (as cited in Madhavaram et al., 2005).

The engagement between consumers and brands through touchpoints has diverse consequences. According to Payne et al. (2017), these can be categorized into brand effects (identity, awareness, associations, personality, loyalty, advocacy, perceived quality), product effects (attitude toward products, purchase frequency), consumer effects (attitude self-prediction, consumer power, social capital), content effects (attitudes toward brand-related content, user-generated content, re-sharing intentions), and market effects (campaign effectiveness, purchase intentions, sales, willingness to pay, conversion rates, market level changes).

Diffusion of Innovations Theory

To understand the adoption of omnichannel marketing in the B2B context, it is useful to draw upon Diffusion of Innovations (DOI) theory, first introduced by Ryan and Gross (1943) and later expanded by Rogers (2003). DOI theory, rooted in sociology, management, and communication theory, seeks to explain how new ideas and technologies spread within a social

system (Rogers, 2003). This framework is particularly relevant to this study as it helps explain the factors that influence the adoption of omnichannel marketing strategies by B2B organizations.

Rogers (2003) defines diffusion as "the process by which an innovation is communicated through certain channels over time among the members of a social system" (p. 5). In essence, it is a communication process driven by the uncertainty surrounding a new idea. This uncertainty motivates individuals and organizations to seek information and evaluate the potential benefits and drawbacks of innovation (Rogers, 2003).

In the context of this research, omnichannel marketing can be viewed as an innovation that B2B companies are considering and adopting. Rogers (2003) identifies five key attributes of an innovation that influence its rate of adoption:

1. Relative advantage: The degree to which the innovation is perceived as better than the existing practices.

2. Compatibility: The extent to which the innovation is consistent with the organization's values, needs, and existing systems.

3. Complexity: The degree to which the innovation is perceived as difficult to understand and use.

4. Trialability: The extent to which the innovation can be experimented with on a limited basis.

5. Observability: The degree to which the results of the innovation are visible to others.

Applying this framework to omnichannel marketing, B2B companies are more likely to adopt this approach if they perceive it as offering significant advantages over their current marketing strategies, aligning with their organizational goals and values, and being relatively easy to implement and measure. Furthermore, Rogers (2003) proposes an innovation-decision

process that individuals or organizations go through when considering a new idea. This process includes five stages: knowledge, persuasion, decision, implementation, and confirmation. In the context of omnichannel marketing, this suggests that B2B companies will progress through these stages as they learn about, evaluate, and ultimately decide whether to adopt this approach.

It is important to note that interpersonal channels and social influence play a crucial role in the diffusion of innovations. Rogers (2003) argues that while mass media can effectively raise awareness of an innovation, interpersonal communication is more influential in shaping attitudes and driving adoption decisions. This highlights the importance of peer networks and industry leaders in promoting the adoption of omnichannel marketing among B2B companies.

By integrating DOI theory into your analysis, you can gain valuable insights into the factors driving the adoption of omnichannel marketing strategies and identify potential barriers to implementation. This theoretical lens can strengthen your research findings and contribute to a deeper understanding of how B2B organizations can leverage omnichannel marketing to achieve their strategic objectives.

Personal Innovativeness and Emotions

In the realm of B2B marketing, there has been a significant shift in understanding the role of emotions in purchasing decisions. Historically, B2B decisions were viewed as purely rational, but recent research indicates that emotions play a pivotal role in influencing business relationships and purchasing behavior (Taylor, 2017). By forging emotional connections with customers through omnichannel strategies, businesses can differentiate themselves in a crowded marketplace. This connection helps brands resonate with customers on a deeper level, enhancing loyalty and engagement. Emphasizing emotional engagement across multiple channels ensures consistent brand experience, which fosters long-term relationships and stronger brand advocacy (Taylor, 2017).

In the omnichannel marketing landscape, personal innovativeness is a crucial determinant of consumer behavior. According to Juaneda-Ayensa et al. (2023), consumers who exhibit a higher degree of innovativeness are more inclined to explore and adopt new technologies, which, in turn, enhances their engagement across various omnichannel platforms. These consumers, often referred to as "early adopters," actively seek out novel ways to interact with brands, making them pivotal in driving the success of new omnichannel initiatives. Personal innovativeness thus acts as a direct driver of purchase intention, as these consumers enjoy experimenting with new channels and devices, leading to a more immersive and integrated shopping experience. For businesses, this means that continuously introducing innovative digital solutions and seamless integration across platforms is essential to capturing this segment of consumers and improving overall sales performance (Juaneda-Ayensa et al., 2023). Similarly, performance expectancy— defined as the degree to which consumers believe that using different channels will enhance their shopping experience—also plays a vital role in influencing behavior. In the omnichannel context, performance expectancy is tied to consumers' belief that the integration of digital and physical touchpoints will provide them with tangible benefits, such as increased convenience, better pricing, and a faster purchasing process. Juaneda-Ayensa et al. (2023) highlight that performance expectancy is one of the strongest predictors of purchase intention, as consumers tend to favor technologies and platforms that they perceive to enhance the overall efficiency and effectiveness of their shopping journey. For instance, when omnichannel shoppers can seamlessly transition from browsing on a mobile app to completing a purchase in-store, they perceive the brand as more reliable and efficient, which positively impacts sales performance.

Strategic Business Objectives

Strategic business objectives in omnichannel marketing are deeply tied to creating and sustaining customer value. Sintani et al. (2023) explain that a value-based marketing strategy

focuses on enhancing customer satisfaction and loyalty, which directly contributes to long-term business success. In an omnichannel environment, businesses must consistently deliver value across all touchpoints by integrating customer feedback and preferences into their marketing strategies. This approach not only aligns with broader business goals but also ensures that all customer interactions lead to sustainable competitive advantages. When companies employ omnichannel strategies that consider customer value creation, they can better align their marketing efforts with overarching business objectives, such as market expansion and operational efficiency (Sintani et al., 2023). One must also not forget that omnichannel marketing must evolve beyond mere tactical execution and focus on aligning with broader business strategies that prioritize customer needs over product features. By doing so, businesses can ensure that their marketing efforts not only drive sales but also contribute to long-term strategic goals such as market leadership and innovation (Taylor, 2017).

Whether in B2B or B2C contexts, delivering high-quality services is a core objective for any company. In an omnichannel environment, service quality plays a crucial role in ensuring customer satisfaction. It focuses on a business's ability to offer consistent support across multiple platforms, including customer service chatbots, emails, and in-store interactions. By maintaining high standards across these channels, companies can boost customer satisfaction, which in turn fosters greater loyalty (Bakhtieva, 2020; McKnight et al., 2014).

Omnichannel Marketing vs Integrated Marketing Communications

Omnichannel marketing has emerged as a strategic model designed to align all customer-facing channels and touchpoints, presenting a cohesive front to the customer while streamlining business operations. According to a study by Accenture, omnichannel marketing is defined as a synchronized operating model where "all of a customer's channels and touchpoints are aligned,

presenting a single front to the customer and a single, distinct manner of conducting business" (Accenture, 2015). This definition emphasizes the integration of channels, ensuring consistent and seamless interactions across both digital and physical platforms.

Unlike multi-channel strategies that operate in separate silos, Omnichannel marketing uses all available touchpoints in a unified manner to enhance B2B marketing efforts. While multi-channel strategies have been explored extensively in both academic and industry research, scholars such as Trenz (2015) argue that there is a disconnect between the conceptualization of multi-channel marketing and today's rapidly evolving digital marketplace. Hansen and Sia (2015) similarly note that omnichannel strategies are better suited to dynamic, tech-driven environments, providing a more integrated approach for modern B2B marketing.

Omnichannel marketing's goal is to deliver consistent messaging and communication across all channels simultaneously, ensuring that B2B customers experience a unified brand interaction whenever and wherever they engage with the company (Järvinen, 2011). This approach is particularly effective in the digital era, where brand communication must be coherent across all platforms to meet the complex expectations of B2B customers. Cross-channel marketing, while similar, lacks the complete interactivity and integration that characterizes omnichannel marketing (Berman & Thelen, 2018; Beck & Rygl, 2015). While cross-channel marketing serves as a precursor to Omnichannel marketing, its limitations make it less effective in fully capitalizing on the interconnected nature of modern B2B marketing strategies.

In today's competitive environment, businesses must develop marketing strategies that can efficiently target profitable market segments while leveraging digital platforms (Sintani et al., 2023). The growing preference for omnichannel marketing among brands is due to its potential for sustainable growth across multiple channels, offering harmony beyond traditional multichannel marketing (Yeğin & Ikram, 2022). In 2021, a mere 0.14% of multi-channel

marketing sales were attributed to single-channel efforts, while 83% were omnichannel marketing orders (Yeğin & Ikram, 2022). These statistics underscore the importance for marketers, brand owners, managers, and retailers to thoroughly understand and effectively implement omnichannel marketing strategies.

Understanding the development and execution of marketing strategies is crucial for both practical application and academic research in marketing. Gaining insights into marketing strategy knowledge is vital for advancing theoretical frameworks and ensuring the discipline's relevance (Morgan et al., 2018). The adoption of omnichannel marketing in B2B contexts is increasingly seen as essential for aligning marketing efforts with broader business goals. A key aspect of this alignment is the strategic use of omnichannel platforms to enhance operational efficiency, improve resource management, and reduce customer churn (Alonso-Garcia et al., 2022). Notably, most marketing strategy research published in leading journals has concentrated on marketing tactics or the inputs to marketing strategy, such as resources and capabilities, and their impact on performance outcomes (Morgan et al., 2018). This focus has often been examined directly and in various external and internal environmental contexts. In contrast, there needs to be more research addressing the central aspects of marketing strategy itself (Morgan et al., 2018).

In an increasingly crowded B2B marketplace, distinguishing your brand is crucial, and an omnichannel strategy can give you a competitive edge (Weber, 2024). Businesses can enhance customer engagement and keep potential clients interested in their offerings by creating a personalized experience through seamless transitions between channels and maintaining a consistent brand presence. This continuous interaction reinforces your brand and boosts the chances of converting leads into customers (McGuire, 2024).

While omnichannel marketing has been defined, it is important to recognize that multi-channel marketing, integrated marketing communications (IMC), and omnichannel marketing share common characteristics, particularly regarding maintaining message consistency across various customer touchpoints (Payne et al., 2017). The primary distinction among these approaches is their handling of digital channels. Multi-channel marketing involves the use of multiple distinct, yet coordinated, channels to enhance customer value through acquisition, retention, and development (Neslin et al., 2006), while IMC emphasizes consistency in messaging across multiple touchpoints, integrating stakeholders, content, and results for a unified communication strategy (Kliatchko, 2008). Omnichannel marketing differs from multi-channel and IMC by focusing on creating a holistic, unified experience across all platforms, emphasizing mobile and digital integration (Brynjolfsson et al., 2013; Cummins et al., 2016).

The shift towards omnichannel marketing has heightened the need for a more interactive IMC approach, which reduces organizational silos and fosters communication synergies that improve customer engagement and deliver a cohesive brand experience (Payne et al., 2017). Rather than treating communication touchpoints separately based on customer preferences, omnichannel marketing integrates all available tools and platforms into a unified environment (Payne et al., 2017).

Marketing Technology (Martech)

Implementing large-scale omnichannel strategies often requires significant investments in technology, infrastructure, and organizational restructuring (Fujimura & Ishino, 2020). In omnichannel marketing, the Technology Acceptance Model (TAM) is critical in understanding how technology adoption affects sales teams and customer interactions. TAM evaluates two key dimensions: perceived usefulness and perceived ease of use. These dimensions significantly influence the acceptance and integration of new digital tools across channels (Davis, 1989).

Perceived usefulness, which refers to how effectively technology enhances job performance, is particularly important in B2B omnichannel strategies. It directly impacts users' productivity by making it easier to manage sales, inventory, and customer engagement through integrated digital platforms (Davis, 1989). In B2B contexts, sales teams that perceive the technology as useful are more likely to adopt it, leading to improved coordination between online and offline touchpoints (Kusuma, 2022). Similarly, perceived ease of use, defined as how easy the technology is to interact with, affects adoption rates, particularly among users who are less familiar with digital tools. Simplifying the interface and providing user-friendly features can significantly increase the likelihood of adoption, ensuring that the omnichannel strategy is executed smoothly (Venkatesh et al., 2003; Kusuma, 2022).

For B2B companies, this can include the integration of inventory management systems, Customer Relationship Management (CRM) tools, and customer interaction platforms to ensure a seamless customer experience across various channels. Similar to large retailers, B2B companies must unify data across multiple touchpoints to provide consistent engagement and sales opportunities. This alignment directly impacts the strategic success of the business, as effective omnichannel execution fosters operational efficiency and increases market competitiveness. These investments, while substantial, can ultimately lead to higher customer retention and more efficient sales pipelines, aligning with broader business objectives (Fujimura & Ishino, 2020). While talking about technology, one cannot miss talking about Big Data Analytics (BDA) which allows companies to capture and analyze customer behavior across various touchpoints. Through BDA, businesses can personalize product offerings, improve customer retention, and align marketing efforts with strategic goals such as market expansion and enhanced customer experience. This data-driven approach not only boosts operational efficiency but also supports long-term success by offering insights that help businesses anticipate

customer needs and optimize inventory levels (Saghiri & Mirzabeiki, 2021). The other model the researcher refers to is the Information Systems (IS) Success Model proposed by DeLone and McLean (2003), which offers a structured approach to evaluating the performance of digital tools in B2B omnichannel marketing. In the context of omnichannel strategies, the model highlights that system quality, information quality, and service quality are pivotal factors influencing customer satisfaction and use. By ensuring that these factors are well-integrated across all digital and physical channels, businesses can provide a seamless experience that meets customer expectations, thus driving higher levels of engagement and improved operational outcomes (DeLone & McLean, 2003). Research also shows that satisfaction with one channel significantly influences behavior toward the other due to the halo effect (Thorndike, 1920). A positive offline experience enhances online perceptions (Kwon & Lennon, 2009) and displaying store inventory online boosts offline shopping (Gallino & Moreno, 2014). This cross-channel satisfaction is also evident in O2O commerce, where customer trust flows between online and offline entities (Phang et al., 2014).

Digital Transformation of B2B Customer Journeys: A Multi-Dimensional Framework

Customer journeys represent the pathways through which customers purchase and experience products and services, viewed from their own perspective. This concept can be likened to "walking in the customer's shoes" (Holmlid & Evenson, 2008, as cited in Harris et al., 2020, p. 343). A B2B customer journey framework increasingly embraces digitalization, incorporating three main dimensions for structuring customer interactions: touchpoints, actor roles, and the processual flow over time. Touchpoints are specific points of contact between the company and the customer, encompassing both digital and physical interactions. Each touchpoint may include elements like self-service portals, live chat, and digital content, which collectively help build a cohesive experience tailored to meet customer needs at different journey stages (De

Keyser et al., 2020). These touchpoints expand customer options, promoting autonomy while posing new management demands (Bolton et al., 2018).

In this framework, actor roles pertain to the evolving responsibilities of all involved parties. As customers gain autonomy through digital tools, they shift from passive recipients to active decision-makers. Companies now adopt facilitator roles, coordinating among multiple internal and external stakeholders, while customers may collectively engage and share insights, creating a more collaborative environment (Becker & Jaakkola, 2020; Witell et al., 2020). This approach enables a shared journey that better aligns with organizational goals and the individual needs of each actor. The processual flow over time reflects the journey's sequential and dynamic nature. This dimension captures the progressive transitions customers experience across touchpoints, emphasizing continuity and consistency. Processual flow benefits from real-time data and adaptive designs that reduce friction, ensuring each stage of the journey builds upon the previous one to enhance satisfaction and engagement (Cuc et al., 2019). These dimensions support a detailed exploration of the B2B digital journey, where each aspect responds to new technological demands and evolving customer needs (Lundin & Kindström, 2023).

This framework reveals that digitalization significantly transforms touchpoints—extending interactions into earlier phases, altering customer-supplier engagement dynamics, and making previously physical interactions digitally accessible (De Keyser et al., 2020; Homburg et al., 2015). As new touchpoints are added, such as self-service digital interfaces or automated scheduling systems, customer journeys are extended and fragmented, necessitating adaptive management approaches (Bolton et al., 2018; Grewal & Roggeveen, 2020).

In addition, actor roles within the digitalized B2B journey vary widely. Supplier control over each touchpoint may lessen as customers engage autonomously, shifting from passive participants to proactive decision-makers (Witell et al., 2020). Digital roles also introduce

collective and collaborative interactions where multiple customer stakeholders can share data across touchpoints in real-time, strengthening a cohesive journey experience (Becker & Jaakkola, 2020). This collective role dynamic demands new management strategies that recognize both individual and organizational roles in co-creating value.

Finally, digitalization enhances the overall process by offering sequential and dynamic customer journey mapping, making it easier to predict, support, and streamline transitions between touchpoints. By ensuring consistent, integrated data availability across touchpoints, the digitalized B2B journey facilitates a more seamless progression, enhancing the customer experience and aligning customer activities with supplier offerings in an end-to-end journey framework (Khasanah et al., 2023). Digitalization thus introduces flexibility, allowing for process customization that can strengthen long-term engagement while reducing journey friction.

Customer Journey

B2B companies often fall into the trap of focusing on tactics and channels rather than integrating their marketing strategy with overall sales performance objectives (Taylor, 2017). Omnichannel marketing requires B2B marketers to move away from a "features and benefits" approach and adopt a holistic strategy that incorporates both digital and traditional channels. This integration ensures that all customer interactions contribute to improved conversion rates, customer lifetime value (CLV), and, ultimately, sales performance. By adopting a customer-first perspective, businesses can better align their marketing plans with sales goals, driving measurable outcomes (Taylor, 2017).

At first glance, customer journey mapping may appear to be a straightforward concept, aiming to visually represent a customer's interactions with an organization. Since customer experience is shaped through the customer journey, a journey map essentially traces this experience over time, space, and across multiple touchpoints. The primary objective of customer

journey mapping is to enhance the overall customer experience. Rather than predefining the steps in the journey, the mapping process itself should reveal these steps. However, the map can be structured around broad phases that customers are anticipated to experience, such as responding to an email, making a purchase, or seeking customer support. The roots of customer journey mapping can be traced back to service blueprinting (Shostack, 1982), which is grounded in business process modeling and information systems design. These methodologies share the ability to visually capture the content and flow of a process (Harris et al., 2020).

For businesses to effectively evaluate the relative performance of their marketing channels, it is essential to analyze both the utilization and interdependence of these channels, as well as the traffic patterns between them. For instance, they should determine the proportion of customers who converted through social media compared to those who made purchases at an event. To measure the effectiveness of an omnichannel marketing strategy, organizations must focus on customer-driven engagement metrics such as interactions via social media, phone calls, emails, word-of-mouth referrals, and time spent on different platforms.

Additionally, various customer touchpoints, including physical stores, websites, mobile applications, social media, and email communications, must be assessed. Store-initiated activities, such as targeted promotions, also play a critical role. These engagements collectively contribute to cross-channel conversions or single-channel conversions, while also enhancing metrics like CLV or Recency, Frequency, and Monetary (RFM) value. RFM analysis uses behavioral data from existing customers to project the future actions of potential customers. When executed effectively, such an omnichannel strategy ensures seamless integration of these elements, driving higher conversion rates and long-term customer loyalty (Palmatier et al., 2020). Verhoef et al. (2015) were pioneers in exploring the relationship between customer experience and multichannel management. They described customer experience as a holistic

construct encompassing every stage of the customer journey, including search, purchase, consumption, and post-sale interactions. This concept reflects the customer's cognitive, affective, emotional, social, and physical responses to the provider. Additionally, customer experience is multi-dimensional, influenced not only by factors within the provider's control—such as service interfaces, store ambiance, product offerings, and pricing—but also by external factors beyond the provider's influence, such as the behavior of other customers, the purpose behind the shopping trip, or even environmental elements like weather conditions (Verhoef et al., 2015; Harris et al., 2020).

A key finding in recent omnichannel marketing research is the importance of leveraging real-time data to optimize sales performance (Alonso-Garcia et al., 2022). By integrating data-driven strategies across digital and physical touchpoints, businesses can make more informed decisions on resource allocation, channel investment, and customer engagement efforts. For instance, advanced data analytics can track customer behavior patterns across multiple channels, allowing for dynamic pricing, personalized offers, and better-targeted marketing. This level of data integration helps to fine-tune marketing strategies that directly improve conversion rates and CLV (Alonso-Garcia et al., 2022). These insights underscore how B2B firms can not only align their sales goals with omnichannel strategies but also continuously refine their approaches based on real-time feedback from various customer interactions. One of the crucial components of B2B omnichannel marketing is the ability to integrate customer data across multiple touchpoints, ensuring a consistent brand experience. Automation plays a significant role in achieving this integration. According to Braun and Heißler (2023), Customer Data Platforms (CDPs) allow companies to manage customer interactions by unifying data from different sources. This helps businesses maintain consistent communication and engagement with their customers across all channels, thereby reinforcing brand loyalty. Furthermore, CDPs enable businesses to personalize

content for each customer, increasing the likelihood of building stronger emotional connections, which are critical for long-term brand engagement (Braun & Heißler, 2023).

While various consumer-brand touchpoints can influence engagement metrics, the true measure of a firm's marketing success ultimately hinges on profitability indicators such as conversions, profit margins, return on investment, sales figures, customer retention, and CLV (Payne et al., 2017). Adopting an omnichannel approach requires evaluating customer profitability as a collective measure across all touchpoints rather than individually assessing each channel's profitability. This holistic view of customer touchpoints provides deeper insights than isolated profitability assessments (Payne et al., 2017). Heinzelbecker (2023) argues that the integration of CRM and marketing automation tools enables businesses to deliver personalized customer experiences, which in turn supports broader strategic goals like market expansion and customer retention. The use of automation in Account-Based Marketing (ABM) allows companies to target key accounts with tailored messages, ensuring alignment between marketing initiatives and overall business objectives. This approach not only improves operational efficiency but also helps businesses achieve long-term strategic success by maintaining consistency in customer interactions across various channels (Heinzelbecker, 2023). Automation tools have significantly improved the efficiency of B2B sales strategies, particularly in omnichannel environments. Schuster (2023) explains that tools like lead scoring, content personalization, and automated follow-up systems enable businesses to optimize their sales funnels and improve conversion rates. By analyzing customer behavior across multiple channels, businesses can tailor their outreach strategies to target the most promising leads. This data-driven approach enhances sales performance and increases CLV, which is critical for maintaining profitability in a competitive B2B market (Schuster, 2023).

Research Problem and Questions

This study investigated the strategic implications of omnichannel marketing in the B2B sector to demonstrate how businesses can leverage integrated marketing approaches to enhance brand engagement, align marketing efforts with overarching business objectives, and drive sales performance. By examining the impact of omnichannel strategies on key metrics, this research sought to offer practical insights and recommendations for B2B organizations. To explore how B2B organizations can leverage omnichannel marketing strategies for optimal business outcomes, this research examined three key questions.

Research Questions

RQ1: How and to what extent do omnichannel marketing strategies influence key metrics of brand engagement, such as customer interaction frequency, social media engagement, and brand awareness?

This question explored omnichannel strategies' direct impact on brand engagement metrics. By understanding how these strategies enhance interaction frequency, engagement on social media platforms, and overall brand awareness, the study tested the hypothesis that integrated approaches lead to better brand engagement.

RQ2: How and to what extent do omnichannel marketing strategies align with and support broader business objectives and strategic success in B2B companies?

This question explored how omnichannel marketing serves as a crucial component of overall business strategy. It examined how these strategies contribute to achieving strategic objectives such as market expansion, competitive advantage, and operational efficiency, thus testing the hypothesis by linking marketing efforts to broader business success.

RQ3: How and to what extent do omnichannel marketing strategies impact sales performance metrics, such as conversion rates, average order value (AOV), and CLV?

By examining specific sales performance metrics, this question directly tested the hypothesis that omnichannel strategies improve sales outcomes. It aimed to provide concrete evidence of the effectiveness of integrated marketing in driving sales compared to more fragmented approaches.

Hypothesis

B2B companies that implement well-integrated omnichannel marketing strategies will experience significantly higher levels of brand engagement, customer retention, and sales performance compared to those that use less integrated marketing approaches.

Justification for Interview Questions

The interview questions (see Appendix A) were crafted based on the insights gathered from the literature review and were designed to uncover real-world evidence of how omnichannel marketing strategies are implemented and optimized within leading B2B organizations. The questions aim to explore the relationship between omnichannel marketing and key concepts such as brand engagement, customer journey mapping, and the integration of marketing technology. Following Yin's (2014) framework for case study research, the interview questions were constructed considering both the content and form of the inquiry, addressing "who," "what," "where," "how," and "why" aspects of omnichannel marketing within the B2B context. Ultimately, the research questions are structured to gather data that will contribute to analytic generalizations, enabling the researcher to "corroborate, modify, reject, or advance theoretical concepts" (Yin, 2014, p. 41).

Method

This qualitative study employed triangulation by combining interviews with marketing professionals and a literature review to explore explored how B2B organizations leverage omnichannel strategies for optimal marketing outcomes and strategic success. A total of 17

participants from leading B2B organizations were interviewed to analyze the implementation and impact of omnichannel strategies, supported by insights from key academic and industry sources. Triangulation involves collecting and using multiple data sources, methods, and perspectives to verify and corroborate research findings, enhancing credibility and validity. Triangulation, by incorporating multiple data sources and methods, provides a comprehensive view and reduces the likelihood of bias, ensuring that the research findings are both reliable and valid (Denzin, 1970).

This research used methodological triangulation by combining semi-structured interviews with marketing professionals from B2B companies and an extensive literature review. Through 17 interviews, the researcher engaged participants with 14 interview questions, conducted via Zoom or Microsoft Teams, examining the implementation, challenges, and impact of omnichannel strategies on brand engagement, customer relationships, and sales performance. The study also incorporated a comprehensive literature review to analyze real-world applications and theoretical concepts in the B2B omnichannel landscape. The mixed-methods approach enhanced the credibility and validity of the findings.

The literature review provided a comprehensive theoretical foundation by defining key concepts, outlining current trends, and identifying gaps in existing research related to omnichannel marketing in B2B contexts. Semi-structured interviews gathered detailed qualitative insights from senior marketing professionals about their experiences, challenges, and strategies related to omnichannel marketing. This method allowed for flexibility in questioning and deep exploration of individual experiences while maintaining consistency across interviews. The use of two primary research methods is justified by the need for methodological triangulation to achieve a holistic understanding of the research problem.

Data Collection

Following research ethics board approval, participant recruitment occurred between September and December 2024. Participants were selected based on their senior marketing roles within B2B companies employing at least 500 individuals. This ensured a robust pool of respondents with extensive experience and insights into omnichannel marketing strategies.

Recruitment Process

Recruitment involved targeted LinkedIn and email outreach, leveraging the researcher's professional network for introductions. Potential participants were provided with an ethics-approved consent form detailing the study's purpose, methods, and confidentiality protocols. This approach ensured informed consent and participant comfort.

Participant Demographics

A diverse group of 17 senior marketing professionals from leading B2B organizations across Canada and the United States participated. These included Chief Marketing Officers (CMOs), directors, senior managers, a CEO, and a digital transformation officer, representing industries such as IT, insurance, consulting, and manufacturing. This variety of industries and roles provided a comprehensive understanding of the challenges and opportunities in implementing omnichannel marketing strategies.

Data Collection Methods

Data collection comprised semi-structured interviews conducted via Zoom or Microsoft Teams, with sessions lasting between 30 minutes and an hour. This format allowed for flexibility in questioning, enabling deeper exploration of participants' experiences while maintaining consistency across interviews. Questions focused on key areas such as brand engagement, technological integration, customer journey mapping, and sales performance metrics. To ensure data accuracy and confidentiality, interviews were transcribed immediately following each session, and audio recordings were securely deleted post-transcription.

Comprehensive Literature Review

A parallel literature review analyzed existing research on omnichannel marketing in the B2B context. This review established a theoretical framework to contextualize and compare interview findings. Key themes from the literature, such as personalization, technology adoption, and strategic alignment, were used to inform the interview structure and guide the analysis.

By combining participant interviews with a systematic literature review, the study employed methodological triangulation, enhancing the credibility and reliability of findings through diverse data sources.

Data Analysis

The analysis of the qualitative data obtained from the 17 interviews will be guided by the framework outlined by Yin (2014, 2018) for case study research. This framework emphasizes aligning the data analysis with the theoretical propositions that underpin the study. In this case, the researcher will primarily rely on two key strategies identified by Yin (2014): (1) relying on theoretical propositions and (2) working the data from the "ground up."

The theoretical propositions, encompassing omnichannel marketing, sales performance, and brand engagement theories, will provide a lens through which to interpret the data and identify meaningful patterns. This approach will help organize the analysis, highlight relevant contextual factors, and guide the examination of potential explanations (Yin, 2018). Simultaneously, the researcher will work with the data inductively, allowing themes and patterns to emerge from the interviews themselves. This "ground up" approach will ensure that the analysis captures the nuances of the participants' experiences and perspectives.

Yin (2014, 2017) identifies several methods for analyzing qualitative data, including pattern matching, explanation building, and time series analysis. For this study, the researcher will primarily utilize pattern matching, comparing the theoretical patterns derived from the

literature with the observed patterns emerging from the data (Sinkovics, 2018). This approach will facilitate a deeper understanding of how the theoretical concepts manifest in the real-world practices of B2B organizations. Furthermore, the analysis will incorporate elements of narrative analysis and thematic analysis. Narrative analysis will illuminate the mindsets and perspectives of the interview participants, while thematic analysis will identify similarities and differences across the data, enabling the researcher to develop deeper interpretations and draw meaningful conclusions. This multi-faceted approach to qualitative data analysis will ensure a comprehensive and nuanced understanding of the research topic.

Results

Four months were dedicated to extensive outreach and conducting interviews, followed by a month of intensive analysis to synthesize the findings (see Appendix B for a snapshot of the results). This study involved semi-structured interviews with 17 marketing professionals from a variety of B2B organizations across Canada and the United States (see Table 1).

Table 1

Overview of research participants

Position	Location	Industry
Senior Marketing Manager	U.S.	3D printing and additive manufacturing industry
Head of Marketing and Communications	Canada	Information Technology
Senior Channel Marketing Manager	Canada	Software Development
Director, Digital Marketing	Canada	Artificial intelligence (AI) industry
Senior Manager, Digital marketing	Canada	Banking
Director, Brand and Positioning	Canada	Big Four – consulting group
Director, Sales and Strategy	Canada	Information Technology

Lead Director, Branding and Marketing	Canada	Telecommunication
Vice President, Marketing	Canada	Wholesale Building Materials
Senior Vice President, Marketing	Canada	Telematics
Marketing Strategist	Canada	Property and Casualty Insurance
Digital Transformation Officer	U.S.	Healthcare Information Technology
Senior Integrated Marketing Lead	U.S.	Information Technology
Fractional Chief Marketing officer	U.S.	Healthcare services
CEO	U.S.	Technology Consulting and IT Services
Director, Marketing Operations	U.S.	Revenue Technology (RevTech) industry
Head of Wealth and Insurance Marketing	Canada	Insurance
Marketing Operations Specialist	U.S.	Software Development

Participants were carefully selected based on their expertise and leadership roles within their companies, ensuring they could provide valuable insights into the implementation and impact of omnichannel marketing strategies. Data collection ceased upon reaching saturation (Hennink & Kaiser, 2021), indicating that no new significant themes were emerging from the interviews. This research benefited from the expertise of seasoned marketing professionals who have spearheaded omnichannel initiatives within their respective organizations. Representing a broad spectrum of industries, these individuals offered valuable perspectives on how omnichannel strategies shape brand engagement, drive business objectives, and influence the adoption of marketing technology.

RQ1: How and to what extent do omnichannel marketing strategies influence key metrics of brand engagement, such as customer interaction frequency, social media engagement, and brand awareness?

Brand Engagement and Omnichannel Marketing

The findings reveal that omnichannel strategies significantly enhance brand engagement by fostering consistent and personalized customer interactions. Brand awareness emerged as a critical objective, with many participants highlighting the role of cohesive messaging across platforms. These findings resonate with Romaniuk and Sharp's (2015) emphasis on maintaining mental and physical availability to ensure sustained brand engagement. Participants highlighted challenges in differentiating their brands in commoditized industries, underscoring the need for consistent Category Entry Points (CEPs) to remain competitive. For more than half of the marketers that the researcher interviewed, brand awareness, lead generation, and cross-marketing were some of the top priorities (see Figure 1). For example, one participant from the Revenue Technology company highlighted that brand awareness is in fact a Key Performance Indicator (KPI) that the team strives to achieve yearly. Another important facet the researcher discovered was that brand engagement extends beyond customer interactions to include partners and resellers. Similarly, participants from the consulting and insurance industries noted that brand awareness efforts also extend to talent acquisition, with marketing being used to attract skilled employees.

Figure 1

Primary Marketing Objectives
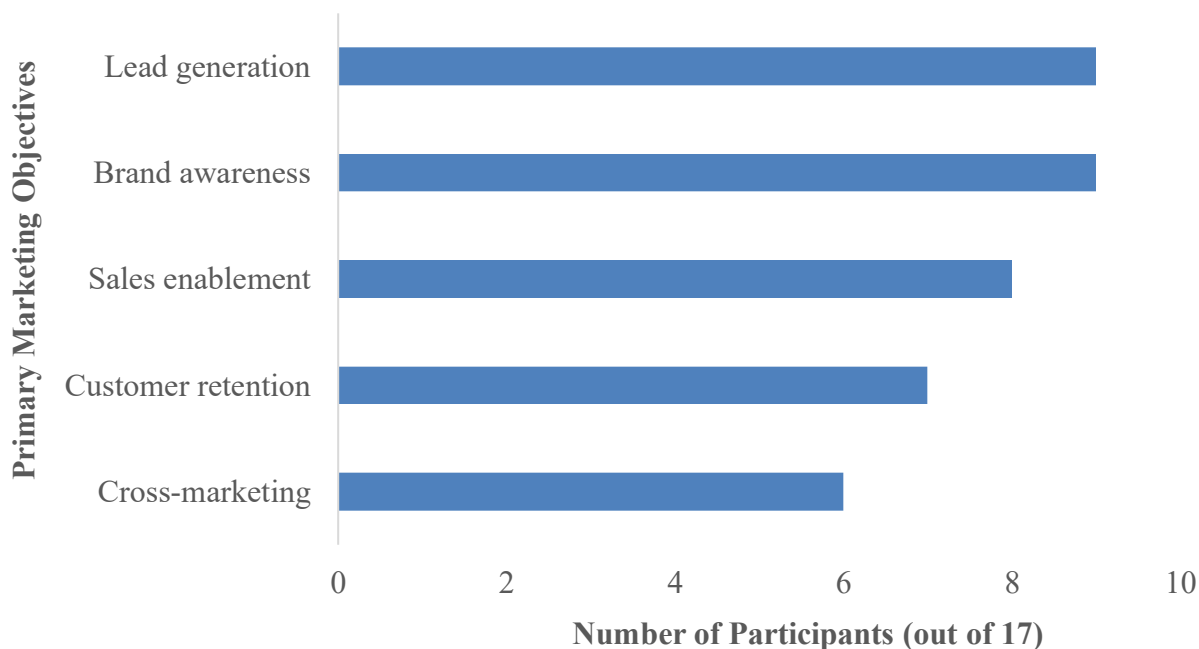
A participant from the wholesale building materials company emphasized the importance of ensuring their partners understand the company's value proposition and how their products can solve customers' challenges. This is particularly crucial for companies that do not have a large market share with individual customers, as partners or resellers become vital brand ambassadors. Another participant from the consulting industry agreed and shared:

> Through our annual market research, we've identified that a key factor driving client decisions is the perception of deep industry expertise. Clients tend to choose firms they believe excel in this area. However, the perception of our firm is that we lag competitors, which are seen as having strong industry experts. To address this, we're tackling the issue from multiple angles to shift this perception.

Brand engagement also plays a crucial role in attracting external talent. The same interviewee also highlighted the need to attract skilled employees as the company grows. They see marketing

as a key tool in communicating their people and culture strategy to potential candidates, emphasizing the role of brand engagement in employer branding and talent acquisition.

Approximately 47% of participants stressed the importance of building a strong brand identity and maintaining consistency across all channels to drive brand engagement. A participant from the technology consulting and IT services industry stated, "Brand identity, brand recognition, and expansion are key service pillars for us." Another participant, from the insurance sector, stated, "On the B2B side of our business, it is about brand awareness, enhancing our brand and reputation and it ultimately also impacts us on the conversion side."

On the other hand, several interviewees acknowledged the challenges associated with measuring brand awareness and engagement (see Figure 2).

Figure 2

*Challenges in Measuring Brand Engagement*
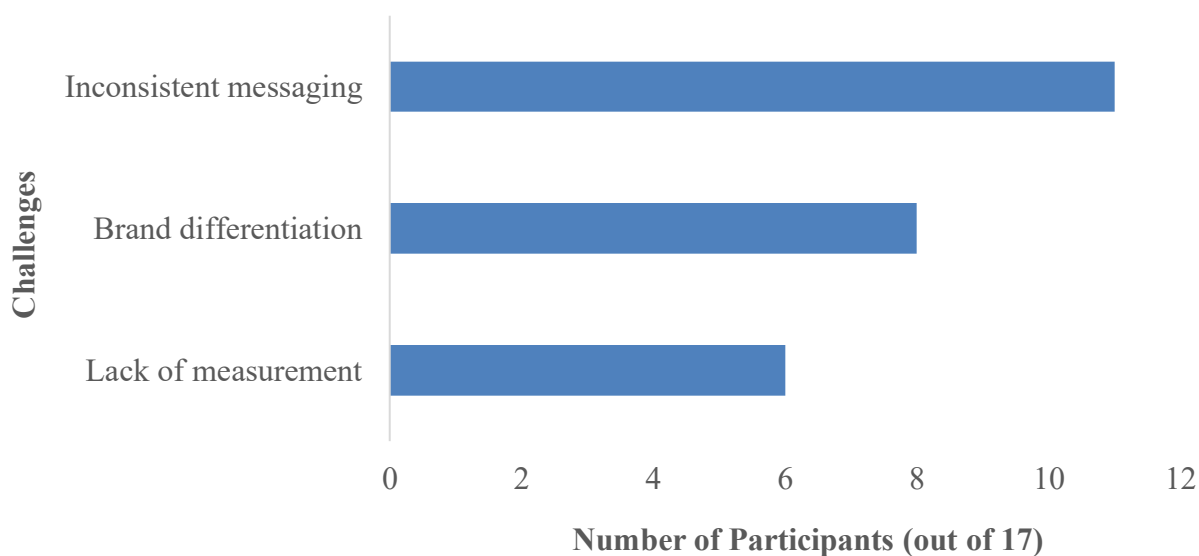
A participant from the building materials manufacturing company highlighted the difficulty of creating a brand in a commodified space, underscoring the need for differentiation. A participant from the technology consulting industry agreed and added, "Brand awareness has always been a

challenge for us. Nobody knows the brand. We did a lot of reporting on brand recognition from the markets, and it was low for our company." A senior marketing manager from the 3D printing and additive manufacturing industry mentioned, "We don't measure brand awareness and customer journeys. We are a little behind on this." While brand building and identity are crucial for B2B companies, measuring and establishing brand awareness and engagement can be challenging, even for established B2B companies.

The interviews also revealed a diverse range of channel preferences for B2B brand building, with events emerging as a dominant trend (see Figure 3).

Figure 3

Preferred Channels for Brand Engagement
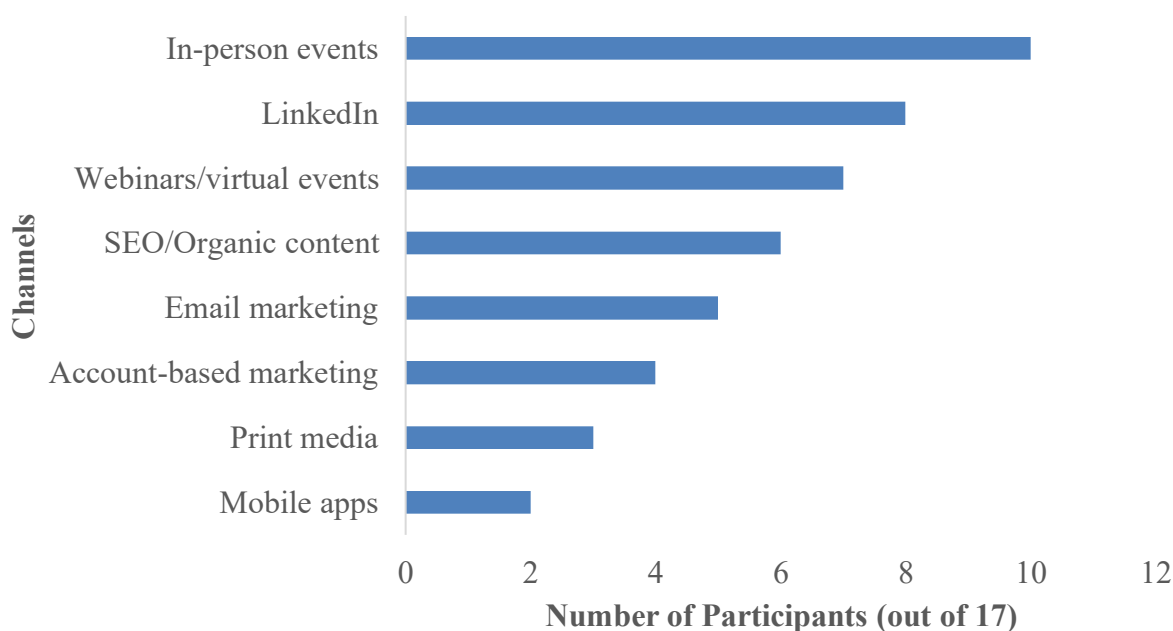
The importance of events—both in-person and virtual—was underscored as a key driver of brand engagement. A participant from the telecommunications sector shared that large-scale events accelerate pipeline opportunities, while a marketing lead from the IT industry highlighted

the success of experiential activations in enhancing brand visibility. This was echoed by another participant, who said that in-person events are "super popular." She also shared an example of how in-person events can still be highly effective:

Some people say in-person events don't work anymore, or that corporate hospitality is no longer relevant. However, we've observed a different reality. When we host in-person events, we can literally see our Stage 0 and Stage 1 opportunities accelerating through the pipeline. These events remain highly effective and popular for driving engagement and results.

LinkedIn also emerged as a critical platform for establishing thought leadership and professional engagement, with participants emphasizing its effectiveness in reaching target audiences.

Interviewees emphasized its effectiveness in targeted advertising, content marketing, and industry engagement. A company CEO highlighted, "LinkedIn sponsored posts and blog content are effective because professionals want to see your accomplishments." Similarly, another participant from the insurance sector noted LinkedIn's value for targeting professionals, including dealers and banks, while also leveraging in-person and virtual events to nurture leads through the sales pipeline. Other channels mentioned included SEO, organic content, email marketing, print media, and mobile apps, with their relevance varying by industry and audience. Additionally, the director of salsa and strategy at an information technology company underscored the growing significance of AI and ABM, emphasizing the role of account insights and behavioral signals in driving targeted campaigns. This integration of AI and ABM demonstrates the increasing sophistication of B2B marketing strategies.

Finally, 65% of the interviewees highlighted the importance of dedicated brand teams and clear brand guidelines in ensuring consistency through all the messaging. A senior integrated

marketing lead from the information technology sector highlighted the importance of having a dedicated brand team to ensure consistency and alignment across marketing efforts. They shared an example of an internal resource called "Brand Central," a centralized website where marketers within the company can access the latest updates on branding, design, and messaging, including tailored guidance for specific products. This tool supports cohesive and effective brand representation across all marketing channels. A participant from the healthcare services industry drew attention to the issue of inconsistent messaging and tone of voice across organizational channels, noting that such discrepancies can lead to client confusion and diminished brand trust. The participant also underscored the importance of developing brand guidelines that account for cultural and regional nuances to ensure relevance and effectiveness in diverse markets.

RQ2: How and to what extent do omnichannel marketing strategies align with and support broader business objectives and strategic success in B2B companies?

Revenue Growth as a Primary Objective

Omnichannel strategies align closely with business objectives by driving revenue growth, enhancing operational efficiency, and fostering cross-departmental collaboration. These strategies enable seamless integration between marketing, sales, product development, and technology teams, ensuring alignment across touchpoints and a cohesive approach to achieving strategic goals. For example, agile frameworks such as "pods" or cross-functional teams allow organizations to respond dynamically to market changes while fostering innovation and shared accountability. However, achieving this collaboration often presents challenges, such as breaking down silos, integrating data systems, and aligning priorities across departments. Overcoming these hurdles requires a commitment to technology adoption, a unified vision, and clear communication to maximize the impact of omnichannel strategies.

Revenue growth consistently emerges as the primary objective driving strategic decisions in B2B organizations, shaping the alignment of marketing initiatives with overarching business goals. Approximately 80% of the participants emphasized the importance of a unified approach to ensure marketing efforts contribute directly to measurable outcomes, such as sales performance and customer satisfaction. One participant from the manufacturing industry emphasized the importance of fostering partnerships, explaining, "A key objective for us is to foster a collaborative and mutually beneficial partner ecosystem that enables and empowers partners to effectively sell and grow revenue." Similarly, a participant from the telecommunications company highlighted the cascading nature of revenue-focused goals within their organization: "The company's objectives are acquiring new customers, sales numbers, and revenue goals. These flow through to the sub-teams so that everyone is working towards the objective in some way." Another respondent, from the revenue technology industry reinforced this focus, stating, "Everything we do ties back to revenue. Omnichannel efforts allow us to target the right customers, in the right way, at the right time to ensure we're meeting these goals." Beyond revenue, objectives such as customer satisfaction, market leadership, and operational efficiency frequently underpin these strategies, ensuring that marketing initiatives not only meet immediate financial targets but also contribute to the organization's long-term success. By aligning marketing KPIs with broader business metrics, as one interviewee explained, companies create synergy across departments: "Each of the wealth business lines come up with their annual goals and objectives that incorporate their net sales and net earnings goals as well as customer satisfaction score (CSAT) scores. From there, they develop their top-line business KPIs, which I take and build into my marketing KPIs to link directly to those goals." This alignment demonstrates how omnichannel strategies can serve as powerful tools for driving revenue while supporting comprehensive strategic objectives.

A recurring theme in the interviews was the necessity of collaboration between marketing and other departments, such as sales, product development, and technology, to achieve strategic goals. More than half the respondents frequently pointed to the integration of these functions as a key driver of successful omnichannel strategies, enabling alignment across touchpoints and fostering a cohesive approach to business priorities. For example, one participant from the banking sector described her organization's "agile setup," where team members are grouped into "pods" that include representatives from marketing, business, and technology. This structure facilitates real-time collaboration, allowing teams to respond dynamically to evolving market needs and customer expectations.

Sixty percent of the interviewees also underscored the role of partner-centric strategies in enhancing sales collaboration. One participant from the building materials company explained that his organization focuses on "making sure that we have the right offers in market" and developing "programs that are going to drive sales growth with our partners." This approach underscores the importance of marketing initiatives that directly contribute to sales enablement and partner success. Similarly, another participant from the telecommunications company noted that they prioritized "sales enablement" as a core objective, ensuring that marketing efforts support the sales team in meeting revenue targets.

Product-led growth emerged as another trend in cross-functional collaboration, with some companies integrating marketing and product teams to reinforce their market position. One participant from the telematics industry highlighted the need to "show the power of the ecosystem" and ensure "the market clearly understands who we are in a rapidly evolving and changing landscape." This approach reflects a broader organizational emphasis on aligning product and marketing strategies to enhance brand visibility and market relevance. These insights demonstrate how cross-functional collaboration extends beyond traditional silos,

creating integrated frameworks where marketing, sales, product development, and technology teams work together to implement omnichannel strategies.

Operational efficiency, long-term strategic goals, and customer-centric approaches

      The interviews revealed three interrelated themes in how B2B organizations utilize omnichannel strategies to align with and support broader business objectives: operational efficiency, long-term strategic goals, and customer-centric approaches (see Figure 4). Together, these elements form the foundation for achieving both immediate and sustained success in a highly competitive marketplace. A prominent theme across interviews was the ability of omnichannel strategies to improve operational efficiency by centralizing data and optimizing resource allocation.

Figure 4

Key Drivers of Omnichannel Strategy in B2B Organizations
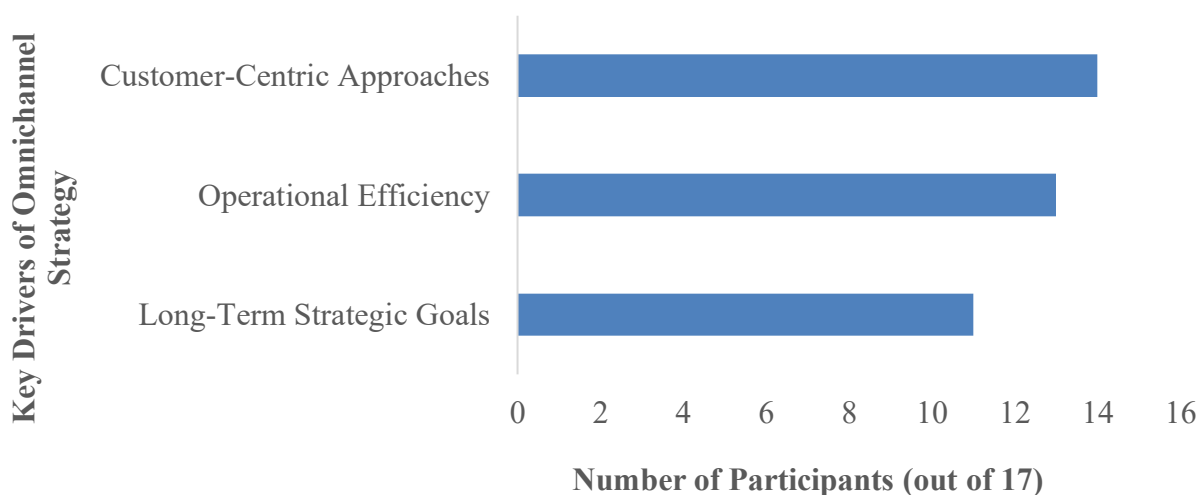
      More than three quarters of the participants emphasized the value of tools such as CDPs and marketing automation systems in unifying customer insights, streamlining communication,

and enabling data-driven decision-making. A participant from the printing industry described, "Omnichannel gives us the ability to track customer behavior across touchpoints. This ensures that all efforts, whether marketing or sales, are optimized to achieve our broader goals, including expansion." These systems not only facilitate real-time decision-making but also allow organizations to maintain consistent engagement across channels. One participant from the healthcare information technology industry mentioned, "Customer Data Platforms unify data from different sources, helping maintain consistent communication and engagement with customers across all channels. This reinforces brand loyalty while enabling us to achieve operational efficiency and align with strategic objectives." This emphasis on operational efficiency reflects the broader trend of using technology to eliminate redundancies and align marketing strategies with overarching business goals, such as market expansion and competitive differentiation.

Beyond immediate ROI, interviewees frequently discussed the role of omnichannel strategies in achieving long-term objectives such as innovation, market leadership, and sustainable growth. By leveraging integrated platforms, organizations are better positioned to adapt to shifting customer needs and capitalize on opportunities for expansion. One CEO of a technology consulting company explained, "Our omnichannel approach isn't just about immediate results; it positions us as market leaders by ensuring we're at the forefront of customer engagement and innovation."

The focus on customer-centricity was a recurring theme, with participants emphasizing the importance of delivering seamless, personalized experiences across channels. This approach directly supports strategic objectives such as customer loyalty and competitive differentiation. A director from the digital marketing industry shared, "Our goal is to ensure a seamless and personalized customer experience across all channels. By meeting customer needs proactively,

we enhance their engagement and satisfaction, which directly contributes to long-term loyalty and competitive advantage." By aligning marketing efforts with customer expectations, organizations can foster deeper engagement and build stronger relationships. The integration of digital and physical interactions allows companies to meet customers where they are, creating a unified and satisfying experience that enhances brand advocacy and CLV.

RQ3: How and to what extent do omnichannel marketing strategies impact sales performance metrics, such as conversion rates, AOV, and CLV?

Impact of Omnichannel Marketing Strategies on Sales Performance Metrics

Omnichannel marketing strategies have demonstrated a significant impact on sales performance metrics, including conversion rates, customer retention and CLV. By integrating personalization, fostering stronger customer relationships, leveraging robust measurement techniques, and utilizing advanced technologies, organizations are transforming their sales processes.

Power of Personalization

Personalization is a key driver of sales performance, with more than 80% of the participants frequently citing its ability to enhance customer engagement and increase both conversion rates and AOV. By tailoring content, messaging, and offers to individual customer behaviors and preferences, omnichannel strategies ensure customers receive relevant and timely communications across touchpoints. A Senior Marketing Manager described how automation has been central to their personalization efforts, "We have automated all our webinars, in-person events, and everything from end to end. This ensures that customers experience seamless, customized interactions that align with their needs." Another participant from the manufacturing industry agreed and stated the importance of creating personalized experiences that positions the

organization as a trusted advisor, "We're trying to get to this personalized view of where we can be your guide. It is not just about selling; it is about leading the customer journey and ensuring we address their unique needs. By providing tailored support and recommendations, businesses can increase customer satisfaction and drive sales." Personalization extends to adapting content based on customer behavior and product interactions. A participant from the insurance industry highlighted how tailoring communications to specific offerings enhances engagement, "We tailor messaging and communication based on the products that they are approved to sell. This means we are not just pushing generic messaging but instead offering them what is most relevant to their capabilities and the market they serve." This leads to the topic of tracking customer interactions comprehensively. Omnichannel strategies enable businesses to nurture these relationships by providing seamless and consistent experiences across all touchpoints. A participant from the revenue technology industry mentioned, "Every single person who could potentially touch that account has their activities tracked at the contact level. This allows us to build a comprehensive view of the customer journey and engage them more meaningfully."

Data and CRM Systems in Lead and Conversion Tracking

Data-driven insights emerged as a critical enabler for tracking sales performance. CRM systems and marketing automation tools were highlighted as essential for lead tracking and pipeline management. These technologies allow organizations to prioritize high value leads and target outreach efforts effectively, thereby enhancing pipeline efficiency. Approximately 75% of the participants consistently highlighted how CRM systems provide the foundation for capturing, organizing, and utilizing data to optimize lead management and conversions. This approach allows businesses to align marketing and sales efforts, ensuring a seamless progression through the sales funnel. This directly supports findings from the literature, such as Payne et al. (2017), who argue that omnichannel strategies streamline operational workflows and enhance resource

allocation. One participant from the information technology industry emphasized the centrality of data in understanding and enhancing customer engagement. "It's all about the data—how many times have you reached out to that customer? How many campaigns have they engaged with? This information helps us understand where we stand with the customer and how we can improve our engagement strategies."

CRM systems were identified as indispensable tools for managing these interactions and tracking customer journeys. Another participant from the IT industry elaborated on the critical role of CRM systems in aligning sales efforts with organizational goals, "How our salespeople use our CRM on a day-to-day basis makes a significant impact in how we measure our success. The better the data we collect, the more informed our strategies become."

Participants noted that CRMs are pivotal in managing the sales funnel, tracking prospects from the initial Marketing Accepted Lead (MAL) stage through Marketing Qualified Lead (MQL), Sales Accepted Lead (SAL), and Sales Qualified Lead (SQL) stages. These designations allow organizations to systematically evaluate where each lead stands in the pipeline and deploy targeted strategies to nurture them. For example, CRM systems integrate data from demo forms, email campaigns, and other touchpoints, providing a comprehensive view of lead activity. One participant from the AI industry remarked on how these tools help streamline lead prioritization and improve the efficiency of sales teams, "Our CRM tracks every interaction, from downloads to webinar attendance, assigning scores that help us identify which leads are ready for outreach. This ensures we focus our efforts where they are most likely to convert." Additionally, advanced CRM functionalities, such as real-time notifications and predictive analytics, were highlighted for their ability to empower sales teams with actionable intelligence. As another respondent from the software development industry noted, "Having a CRM that integrates with marketing

automation tools lets us see not just who's engaging, but how they're engaging, and it allows us to time our outreach perfectly."

Technology Enabler

Advanced technologies play a critical role in driving the success of omnichannel marketing strategies. AI-powered tools enable real-time adjustments to campaigns, aligning with performance expectancy as a driver of adoption (Juaneda-Ayensa et al., 2023). From CDPs and AI-powered analytics to marketing automation systems and specialized platforms, participants consistently highlighted the importance of technology in optimizing sales performance. A recurring theme among approximately 70% of the participants was the transformative potential of AI and machine learning. A participant from the information technology industry described how their organization utilizes these technologies to analyze customer interactions and predict behaviors, "We have models in place that use millions of interactions based off the customer. These models help us predict behaviors and personalize engagements at a massive scale." This aligns with Brynjolfsson et al.'s (2013) findings on technology's role in breaking down barriers between digital and physical channels.

Marketing automation tools were frequently cited as essential for scaling personalized campaigns while maintaining consistency across platforms. A participant from a consulting company discussed the use of their in-house platform to facilitate data analysis and campaign optimization, "We use our own product to do a lot of data analysis ourselves. This gives us insights into what's working, where we can improve, and how we can tailor our strategies more effectively." Platforms like 6sense were highlighted for their ability to provide predictive insights that enable sales and marketing teams to focus their efforts on where they will have the greatest impact. The importance of ABM technologies was also emphasized as a means of

targeting high-value accounts. Another participant from the information technology industry explained, "We're very deep in ABM. It's about understanding what intelligence we have based on the utilization of things in the account and then acting on that insight to engage effectively."

Beyond sales and marketing, technologies such as Netstock were noted for their operational impact, demonstrating how automation extends beyond customer-facing processes. A participant from the software development industry shared, "We use a lot of software... We use Netstock to manage inventory. This ensures that we're optimizing operations, which has a downstream effect on improving sales performance."

Impact Measurement

While omnichannel marketing strategies offer numerous opportunities to enhance sales performance, participants frequently noted challenges in effectively measuring their impact. These challenges, rooted in data silos, limitations of CRM systems, and a lack of sophisticated attribution models, hinder the ability of organizations to fully leverage omnichannel strategies. Insights from the interviews reveal specific areas where gaps persist, offering a comprehensive view of the obstacles faced by B2B organizations (see Figure 5).

Figure 5

Challenges in Measuring Omnichannel ROI
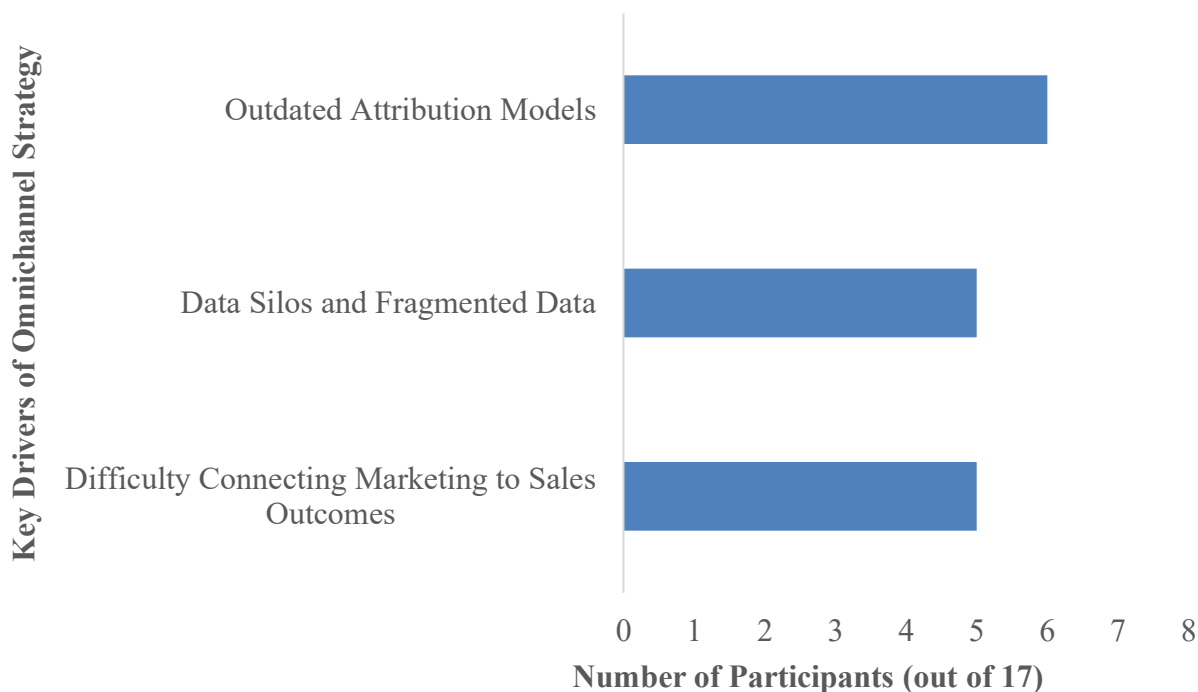
One of the most prominent issues identified by 5 out of 17 participants (29%) was the fragmentation of data across teams and systems. Siloed data creates significant barriers to gaining a holistic view of the customer journey and aligning marketing efforts with sales objectives. A participant from the Information technology domain highlighted this challenge, noting, "A lot of the companies I've been at have this challenge: how our salespeople use our CRM on a day-to-day basis makes a significant impact in how we measure our success." Specific examples from participants illustrate these challenges. A participant from the telematics industry stated, "We largely rely on last-touch attribution, which doesn't account for the full customer journey. This limits our ability to demonstrate the impact of marketing efforts." Another participant from the healthcare information technology sector highlighted the difficulties of fragmented data, saying, "Our systems are not well-integrated, and the lack of a unified data platform means we often miss critical insights from customer interactions across touchpoints." The reliance on sales teams to update CRM systems often results in incomplete or inaccurate

data, limiting the effectiveness of automation tools and analytics. Even in organizations leveraging advanced tools like ABM platforms, the overwhelming focus on specific strategies can exacerbate integration challenges. A participant exclaimed, "We're very deep in ABM... overwhelmingly so."

Six out of the 17 participants (35%) highlighted another critical gap: attribution models which are used to evaluate the success of omnichannel strategies. Many organizations still rely on simplistic frameworks that fail to capture the complexity of the customer journey. Another participant from the 3D printing industry highlighted the limitations of last-touch attribution, "We're mostly last touch... we do not have a methodology in terms of how to spread the touch."

Finally, 5 out of the 17 participants (29%) also highlighted the difficulty of connecting marketing initiatives to measurable sales outcomes. The lack of clear, quantifiable objectives often leads to a disconnect between marketing activities and their impact on revenue generation. A participant from the manufacturing industry reflected on this issue, "We're in a constant struggle of trying to justify the ROI of marketing... It's a classic challenge in any business." A participant from the consulting industry shared, "The accuracy of the information and the attribution that marketing has... The pendulum swings all over the place. I think sometimes the perception can be that our... our attribution and our lead generation is totally inflated to the point where it's not really believed." These models overlook the intermediate touchpoints that play a critical role in nurturing leads and driving conversions. Offline channels, such as direct mail, further complicate attribution. A participant from the healthcare information technology sector noted, "It is difficult to find out leads and conversions through the physical mail... you have to put some call to action into your direct mail." This lack of predictability makes it challenging for marketers to demonstrate the value of their efforts.

Another big theme that came up during the interviews was the challenges of aligning marketing objectives with overall business goals, particularly with resource constraints and budget limitations. One participant from the information technology industry highlighted the difficulties of achieving marketing objectives with limited budgets and hiring freezes, especially when targets are continually upgraded. Another participant from the same industry emphasized the struggle to justify marketing investments due to the difficulty of quantifying marketing objectives and demonstrating a clear ROI.

Discussion

This section revisits findings in light of the Diffusion of Innovations (DOI) framework and the Technology Acceptance Model (TAM). Participants' emphasis on trialability and observability aligns with DOI's adoption criteria, while TAM's perceived usefulness highlights the role of CRM and AI tools in enabling data-driven decisions. Challenges such as data silos and undefined attribution models underscore the need for more sophisticated measurement frameworks, as noted in the literature.

This research study examined how and to what extent B2B organizations leverage omnichannel strategies to achieve strategic success, focusing on areas such as brand engagement, alignment with business objectives, and sales performance metrics, including conversion rates, and customer retention. The interviews sought to explore how B2B organizations leverage omnichannel strategies to drive strategic success, focusing on key areas such as brand engagement, alignment with business objectives, and sales performance metrics including conversion rates, AOV, and CLV. Specifically, the study examined how tools like CRM systems, CDPs, and AI-powered analytics enable personalization, lead tracking, and campaign optimization.

Extensive research by Verhoef et al. (2015) and Brynjolfsson et al. (2013) underscore the critical role of omnichannel strategies in achieving B2B marketing objectives. Their findings lead us to understand that seamless integration across customer touchpoints removes barriers between physical and digital channels, creating a unified and personalized experience. Brynjolfsson et al. (2013) describe this evolution as a shift toward a "showroom without walls," while Verhoef et al. (2015) highlight how channel integration enhances customer engagement and drives performance. This body of research strongly supports the importance of omnichannel strategies in meeting customer expectations and achieving strategic success.

It was evident from speaking with participants that omnichannel strategies are not an isolated tactic but a foundational approach to customer engagement and business success. One participant summarized this sentiment succinctly, stating, "Everything we do now has an omnichannel lens. It's about meeting customers where they are and ensuring that every interaction, whether online or offline, feels consistent and seamless." This perspective underscores the critical role of omnichannel strategies in maintaining brand engagement and building trust through personalized, unified experiences. Participants also spoke about how omnichannel tools foster customer retention by creating sustained engagement across multiple touchpoints. A marketing leader noted, "By tracking customer journeys end-to-end, we can identify exactly where engagement drops off and ensure we're delivering value at every stage to keep them loyal to the brand." In terms of conversions, the data-driven nature of omnichannel strategies was highlighted as a game-changer. One senior executive remarked, "The ability to use real-time data to adjust messaging and offers across channels has been transformative. It directly improves our ability to convert leads into customers."

The research indicates that the integration of technologies such as AI, CDPs, and CRM systems plays a pivotal role in enabling omnichannel strategies to align with broader business

objectives and drive measurable success. These technologies serve as the backbone for personalization, real-time customer engagement, and data-driven decision-making. As participants highlighted, the ability to unify and analyze data across channels empowers organizations to deliver seamless customer experiences while optimizing sales performance and operational efficiency. Several interviewees emphasized the importance of leveraging technology to bridge the gap between marketing strategies and business objectives. For example, the use of CRM systems was frequently cited to track customer journeys and align marketing efforts with sales outcomes. One participant noted, "How our salespeople use our CRM on a day-to-day basis makes a significant impact in how we measure our success. The better the data we collect, the more informed our strategies become." This perspective reflects broader research, such as the TAM, which highlights that perceived usefulness and ease of use influence the adoption of tools that streamline workflows (Marangunić & Granić, 2015).

This study's findings on CRM adoption and challenges resonate with TAM's core components: 'perceived usefulness' and 'perceived ease of use.' Participants emphasized how CRM systems enhance productivity and decision-making, directly aligning with 'perceived usefulness.' Simultaneously, challenges around user-friendly interfaces and staff training highlight the importance of 'perceived ease of use,' a critical factor influencing adoption rates.

Similarly, the role of AI-powered tools was underscored by participants as transformative in enabling businesses to act on real-time insights. A participant explained, "We have models in place that use millions of interactions based off the customer. These models help us predict behaviors and personalize engagements at a massive scale." This aligns with literature by Brynjolfsson et al. (2013), which emphasizes that technology removes barriers between physical and digital channels, enabling organizations to create unified, personalized experiences.

The interviews further revealed how technology fosters a data-driven culture within organizations, encouraging marketers and sales teams to collaborate more effectively. Ionita (2023) highlights that organizations failing to establish a data-driven culture risk financial losses, inefficient decision-making, and reduced innovation, which can hinder overall performance. By incorporating tools like CDPs and automation platforms, organizations can systematically analyze customer behavior and track engagement, enabling them to optimize campaigns for better conversions and retention.

While omnichannel strategies offer significant potential, participants noted several challenges that hinder their successful implementation. Chief among these challenges are data silos, undefined attribution models, and CRM inconsistencies, which together limit the ability to track and measure omnichannel performance effectively.

A recurring issue highlighted by participants is the fragmentation of customer data across various systems and departments, leading to data silos. This fragmentation makes it difficult to develop a unified view of the customer, which is critical for delivering consistent and personalized experiences across channels. As Cui et al. (2021) emphasize, data access and integration remain key obstacles in achieving the full potential of omnichannel strategies, requiring organizations to adopt robust data management solutions.

The challenge of undefined attribution models was another significant theme raised by participants. Organizations struggle to identify which channels contribute most effectively to conversions, as the customer journey often involves multiple touchpoints that are difficult to measure. Schoeneberg et al. (2020) argue that traditional attribution approaches fail to account for the complexities of omnichannel environments, making it imperative for businesses to adopt frameworks capable of mapping customer interactions across all channels. Undefined attribution

models hinder accurate decision-making and resource allocation, preventing businesses from optimizing their marketing efforts.

Lastly, participants discussed inconsistencies in CRM system usage as a barrier to omnichannel success. While CRM systems are valuable tools for tracking leads and customer behavior, their effectiveness depends on accurate and consistent data entry. Gaps in CRM adoption and incomplete data result in missed opportunities for personalized outreach and campaign optimization. The IS Success Model (Mojtahed et al., 2011) underscores the importance of system quality and information quality in ensuring the successful implementation of CRM and other technological solutions.

Recommendation for Practitioners

This research identifies critical gaps in B2B marketing strategies, revealed through interviews and literature review. Key challenges include fragmented data, inconsistent messaging, insufficient personalization, and limited ROI tracking. These issues hinder lead generation, brand awareness, and strategic alignment with business objectives. To address these gaps, this study proposes a four-part strategy: leveraging intent-driven omnichannel marketing, co-marketing, adopting ABM, and implementing social selling. Each recommendation is designed to directly tackle identified challenges by improving targeting precision, enhancing personalization, optimizing resource allocation, and aligning marketing efforts with measurable business outcomes.

Account-Based Marketing (ABM)

Account-Based Marketing (ABM) addresses critical gaps identified in this research, such as inefficient targeting, misaligned sales and marketing efforts, and inadequate personalization.

While ABM provides a solid starting point for B2B marketers by leveraging tools like Target Account Lists (TALs) and personalized messaging, it is not yet widely adopted by all companies, as noted by several interviewees. ABM's ability to target high-potential accounts, align cross-functional teams (see Table 2), and deliver measurable campaign impact is effective but represents only the foundation of a broader account-based strategy.

**Table 2**

Core Components of ABM

Component	How it fills gaps identified in research
Targeting High-Value Accounts	Resolves inefficient targeting by narrowing efforts to high-potential accounts using TALs and intent data.
Personalization	Addresses lack of tailored engagement by delivering messaging aligned to account-specific needs and goals.
Collaboration	Overcomes sales and marketing misalignment by fostering shared goals and consistent messaging.
Long-Term Relationships	Tackles sustainability issues by focusing on trust-building and driving ROI over time.

The biggest takeaway for marketers is the need to understand and utilize intent data—tracking how leads interact with websites and other digital touchpoints. This data serves as a critical component for identifying in-market accounts and personalizing outreach. ABG (Account-Based Growth) emerges as the natural evolution of ABM (see Figure 7), focusing on an end-to-end journey from initial intent to purchase and beyond, encompassing upsell, cross-

sell, and retention. ABG enables companies to map out true customer journeys, with integrated touchpoints and consistent engagement, rather than isolated email nurture campaigns or one-off tactics. ABG is a comprehensive framework that incorporates ABM, account-based-experience, and account-based sales into a unified growth strategy.

Figure 7

ABM Evolution Map
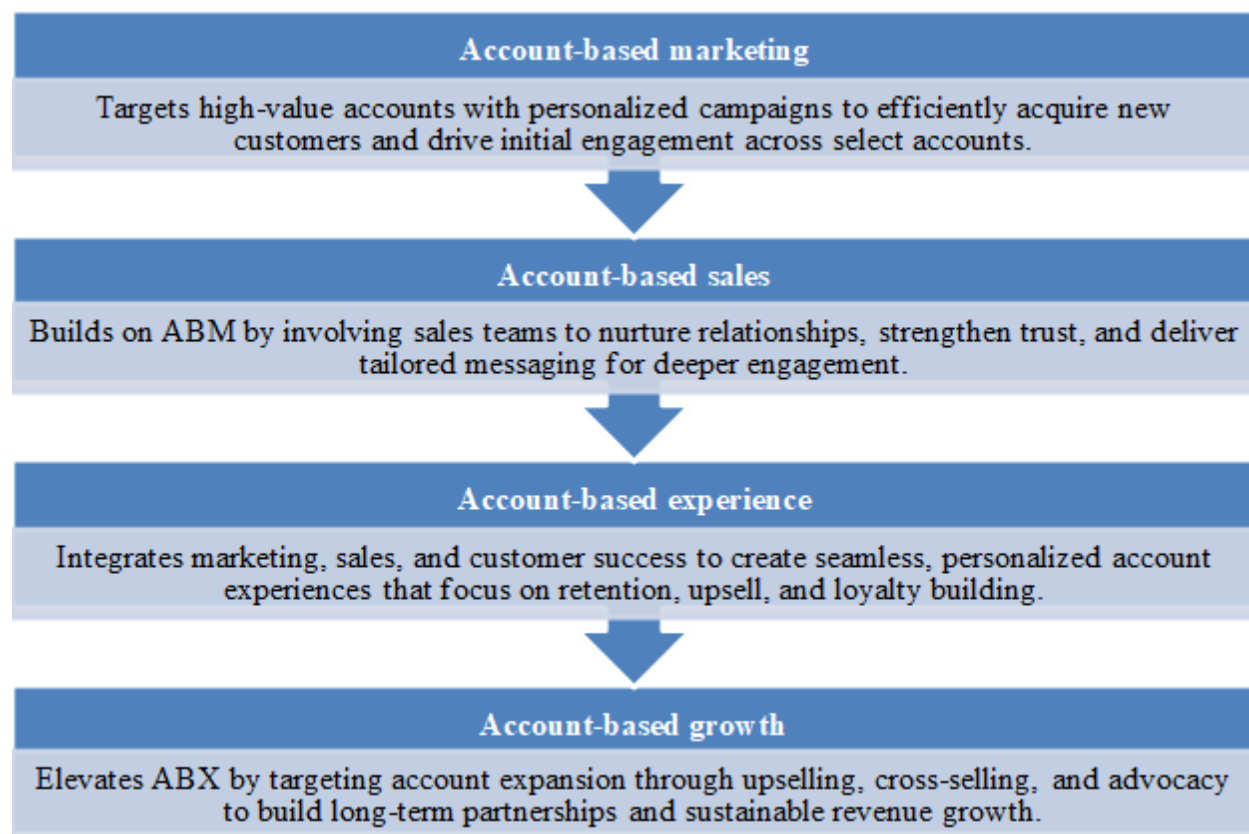
Omnichannel Approach with Intent Data

Intent data addresses some of the gaps identified above by offering actionable insights into buyer behavior, enabling marketers to prioritize leads effectively and align engagement strategies with buyer intent.

Why Does Intent Data Help Marketers?

Intent data improves targeting by identifying prospects actively researching products or services, enhancing personalization by enabling tailored messaging, and optimizing resources by focusing on leads with high purchase intent. This not only increases ROI but also shortens sales cycles by engaging prospects already exploring solutions. By leveraging intent data, marketers can:

- Identify high value leads and allocate resources efficiently.

- Engage prospects with tailored, timely outreach, accelerating the sales process.

- Align omnichannel strategies with buyer behavior, creating seamless and impactful customer experiences.

Marketers gather intent data from various activities, including website interactions, content downloads, social media engagement, and search behavior. Third-party tools like Bombora or 6Sense track business web activity, while content syndication, event participation, and webinars reveal audience interest.

Marketing Performance Reporting Template

This framework addresses critical gaps identified in the research, such as challenges in ROI tracking, lead prioritization, and aligning strategies with business objectives. By providing a structured approach to evaluating tactics, results, and opportunities for improvement, it ensures that marketing efforts are data-driven, measurable, and actionable. The framework directly answers research questions by demonstrating how strategies can be optimized based on performance metrics and insights, ultimately enabling marketers to make informed decisions and drive better outcomes. Figure 6 shows an example of a campaign reporting template.

Figure 6

Example of Campaign Reporting Template

CAMPAIGN: NAME (NAMER)

- **KPAs:** x MAL , x MQL, Pipeline value
- **Marketing lead sources**
- **Highlights:**

Lead Performance YTD [report link]	
Budget	X (% spent to date)
Total Leads	x (x% to target)
Total MALs	x (x% to target)
Total MQLs	x (x% to target)
DQ leads	x (x% existing contact)
OPPs	x (x% to target). Pipeline value $x

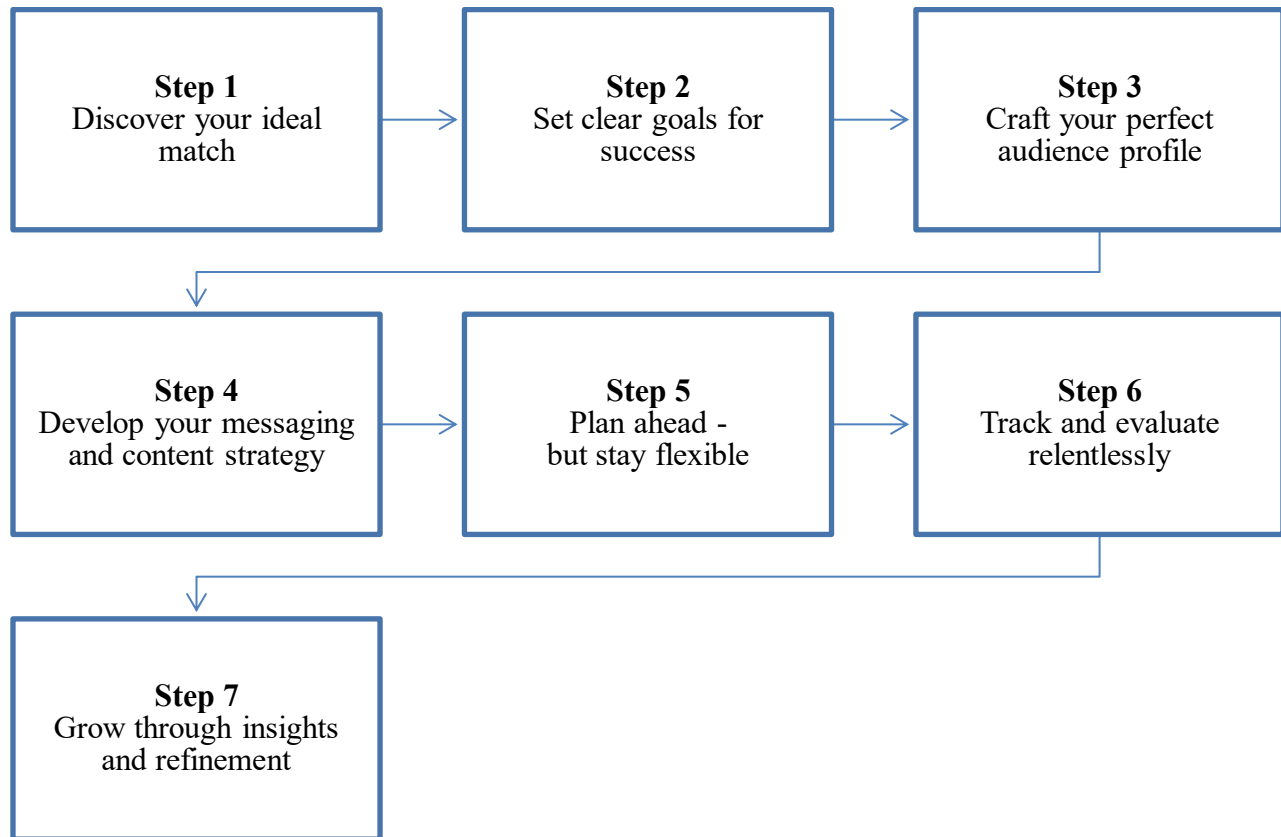| Programs	Objective	Tactic	Results	Opportunities to improve & Recommendations (persits/pivot/perish)
Ex. see next slide				

- PERSIST
- PERISH
- PIVOT

Co-Marketing: A Strategic Partnership for Growth

Co-marketing focuses on building partnerships with companies that share your target audience but do not directly compete with you. This collaborative approach allows businesses to leverage each other's expertise for content creation and tap into their partner's audience for lead generation. By utilizing the trust that a partner has already established with their audience, co-marketing can effectively drive qualified traffic and enhance brand visibility. Figure 8 shows the seven main Co-Marketing steps to keep in mind.

Figure 8

Seven Main Co-Marketing Steps

Step 1 Discover your ideal match	→	**Step 2** Set clear goals for success	→	**Step 3** Craft your perfect audience profile

Step 4 Develop your messaging and content strategy	→	**Step 5** Plan ahead - but stay flexible	→	**Step 6** Track and evaluate relentlessly

Step 7 Grow through insights and refinement

Social Selling

Platforms like LinkedIn, Facebook, and Instagram offer targeted advertising options to reach specific audiences and collect leads through forms or landing pages.

- **Traditional vs. social selling:**

  o Traditional: Cold calls, generic outreach, gatekeepers.

  o Social: Warm introductions, personalized engagement, decision-maker access.

- **Best practices for success:**

  o Build a professional brand.

  o Engage with the right prospects authentically.

  o Share relevant, value-driven content.

    o Stay consistent and track engagement.

- **The future:** Transitioning from social selling to Account-Based Growth (ABG) for a holistic sales approach

Limitations

This research acknowledges several limitations that may influence its findings and applicability. A primary limitation lies in the uneven maturity of B2B organizations regarding omnichannel marketing and the use of advanced technologies like AI and analytics for tracking ROI and attribution. Despite interviewing senior marketing professionals, it became evident that many organizations are still in the early stages of integrating AI-driven tools, CDPs, and attribution models into their marketing strategies. This lack of alignment limits the depth of insights into how advanced tools can fully optimize omnichannel campaigns.

As highlighted by Schoeneberg et al. (2020), the complexity of omnichannel customer journeys makes it difficult to accurately measure the impact of individual touchpoints on conversions and CLV. Many organizations still rely on simplistic last-touch attribution models, which fail to account for the interplay of multiple channels. This limitation in organizational measurement capabilities constrains the ability to fully explore the effectiveness of omnichannel strategies. Additionally, the absence of a unified messaging framework emerged as a potential limitation, hindering the ability of B2B organizations to convey a consistent brand voice and tone across touchpoints.

Furthermore, the reliance on qualitative interviews introduces potential biases, as participants' perspectives may not reflect the entirety of their organization's practices or broader industry trends. Some participants noted the ongoing challenges of justifying marketing ROI to

leadership due to incomplete attribution models, which underscores a gap in how success is measured and reported across touchpoints. This limitation could restrict the study's ability to provide definitive conclusions on the effectiveness of these strategies in delivering consistent ROI.

Additionally, the study focuses on large, for-profit B2B organizations with over 500 employees excludes smaller enterprises or non-profit sectors that may approach omnichannel marketing differently. The exclusion of these perspectives limits the study's applicability to a broader range of organizations.

Future Research

Several avenues for future research emerge from this study. Investigating how smaller B2B companies with limited resources adapt omnichannel strategies could reveal distinct approaches and challenges. As AI becomes increasingly integrated into marketing, a comprehensive study on AI and marketing is crucial. This research could explore AI's capabilities in personalization, automation, and campaign optimization, and address ethical considerations and the impact on brand identity.

Furthermore, developing a framework for brand consistency and measurement is essential. This framework could guide organizations in establishing a unified brand voice and tone across diverse channels and customer segments, incorporating metrics to track brand performance throughout the omnichannel customer journey. By addressing these gaps, future research can further enhance the understanding of B2B omnichannel marketing and provide valuable insights for organizations seeking to optimize their strategies in an increasingly complex and dynamic marketplace.

Conclusion

This study underscores the potential of omnichannel strategies to transform B2B marketing. While challenges like data integration persist, actionable recommendations such as leveraging intent data and Account-Based Marketing can bridge critical gaps. Future research should explore AI-driven personalization and frameworks for measuring omnichannel ROI.

In conclusion, this research has demonstrated that omnichannel marketing, when implemented effectively, offers significant benefits for B2B organizations, including enhanced brand engagement, improved alignment with business objectives, and measurable impacts on sales performance. However, the findings also reveal that even leading organizations face challenges, such as siloed data, limited attribution models, and a lack of cohesive frameworks to link marketing efforts to ROI and revenue. This indicates that smaller companies have a significant opportunity to gain clarity and adopt best practices to optimize their omnichannel strategies.

As AI and advanced technologies continue to evolve, the landscape of omnichannel marketing is set to change dramatically. There is a need for future research and tools that address these gaps, offering integrated solutions for centralized data management, personalized customer experiences, and clear metrics for success. By bridging these gaps, organizations can fully harness the potential of omnichannel marketing to drive strategic success in an increasingly complex marketplace.

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Appendix A

Interview Questions for Marketing Leaders

General Questions

1. Can you briefly describe your role and responsibilities within your organization?

2. How long have you been working in marketing, and what specific experience do you have with omnichannel strategies?

Marketing Objectives and Alignment

3. What are the primary marketing objectives for your company?

4. How do you ensure your marketing objectives align with your organization's overall business objectives, and where does this direction come from?

Organizational Structure and Resources

5. Where does the marketing function sit within your company's organizational structure and how do you and your team work with other adjunct departments, such as communications, sales, and business development?

6. What challenges do you face in acquiring internal resources and getting buy-in for your marketing initiatives?

Omnichannel Strategies

7. How have you integrated various marketing channels (e.g., social media, email, in-person) to create a cohesive omnichannel marketing strategy? Which of the channels worked best? Can you rank them?

Implementation and Best Practices

8. How do you ensure brand consistency across different channels?

Technology and Software

9. What software or platforms do you use to manage your marketing activities?

10. How do you track, and measure leads and conversions and how does your relationship

    management tracking integrate with your omnichannel marketing strategy?

Customer Engagement and Retention

11. How do you measure customer engagement and what strategies do you use to maintain

    high levels of customer retention?

Impact on Performance

12. What effects have you observed on customer retention, brand performance, and sales

    performance as a result of your omnichannel marketing efforts?

13. What key performance indicators (KPIs) do you use to evaluate the success of your

    omnichannel marketing efforts and how do you track and measure the ROI?

Future Outlook

14. What future trends do you see shaping the landscape of B2B marketing?

Appendix B

Key Insights from B2B Omnichannel Marketing Strategy Interviews

1. Brand Engagement and Awareness

- 65% emphasized dedicated teams and clear guidelines for consistent messaging.
- 47% identified brand differentiation in commoditized markets as a critical challenge.
- Top Channels for Brand Engagement: In-person events (60%), LinkedIn (45%), and webinars/virtual events (40%) drive growth and scalable engagement.

2. Alignment with Business Objectives

- 80% aligned omnichannel strategies directly with revenue growth targets.
- 60% reported that sales enablement and partner collaboration impact sales success.
- Cross-functional pods (marketing, sales, tech) are reshaping real-time collaborations.

3. Operational Efficiency and Technology Integration

- 76% rely on CDPs and automation to unify customer data.
- 70% utilize AI and machine learning for predictive customer engagement.
- 75% use CRM systems to drive personalized marketing and optimize sales funnels.

4. Impact on Sales Performance

- 82% saw higher conversion and AOV with personalization.
- CRMs are pivotal in advancing leads through MAL → MQL → SAL → SQL stages.

5. Barriers to Measuring Impact

- 58% struggle with fragmented data and siloed systems.
- 52% rely on basic attribution models, limiting accurate ROI analysis.
- 34% face challenges linking marketing activities to revenue.

6. Resource Constraints

- 62% cited budget limits and hiring freezes as key marketing barriers.

Appendix C

Glossary

- Account-Based Marketing (ABM): A targeted marketing strategy that focuses on identifying and engaging specific high-value accounts rather than targeting a broad audience. ABM tailors marketing and sales efforts to meet the needs of individual accounts.

- Artificial Intelligence (AI): The simulation of human intelligence by machines, particularly computer systems, to perform tasks such as learning, reasoning, and decision-making. In marketing, AI is often used for predictive analytics, personalization, and customer engagement.

- Customer Data Platform (CDP): A software solution that collects and integrates customer data from multiple sources into a unified profile. CDPs enable businesses to personalize marketing efforts, improve customer engagement, and make data-driven decisions.

- Customer Relationship Management (CRM): A system or software used to manage a company's interactions with current and potential customers. CRM tools organize customer data, facilitate communication, and improve sales and customer service processes.

- Omnichannel Marketing: A marketing strategy that integrates and synchronizes all online and offline communication channels to provide customers with a seamless and personalized experience throughout their journey.

- Personalization: The practice of tailoring content, messaging, and experiences to individual customer preferences and behaviors, often leveraging data and technology to enhance relevance and engagement.

- Predictive Analytics: The use of data, statistical algorithms, and machine learning techniques to identify future outcomes based on historical data. Predictive analytics helps marketers forecast customer behavior and optimize strategies.

- Triangulation: A research method that combines multiple data sources, methodologies, or perspectives to enhance the validity and reliability of findings. In this study, triangulation involves the use of literature reviews and semi-structured interviews.

- Unified Messaging: A consistent and cohesive communication strategy across all channels and touchpoints, ensuring that brand identity and messaging remain aligned, regardless of the platform or medium.