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Optimising B2B prospect acquisition and conversion through a structured contact-to-lead process
Practical case : EVS Broadcast Equipment

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1 Executive Summary

This thesis investigates how the contact-to-lead process can be optimised to improve B2B prospect conversion at EVS Broadcast Equipment, a global live video production technology company headquartered in Liège, Belgium. As EVS pursues an ambitious growth target of over €350 million in revenue by 2030, expanding beyond its traditional core markets into new segments where its brand recognition is limited, the absence of a structured commercial acquisition process has become a strategic liability.

The research combines a literature review covering lead management, marketing automation, sales-marketing alignment, and the B2B customer journey, with a mixed-methods empirical study. Eleven semi-structured interviews were conducted across the four departments involved in the process, Market & Solutions, Marketing, Sales Enablement, and Sales, and analysed through a matrix-based inductive thematic approach. This qualitative study was complemented by a quantitative pre-post analysis of LinkedIn Ads, Google Ads, and CRM data from Microsoft Dynamics 365, covering the period from 2021 to April 2026.

The findings reveal a process characterised by structural fragmentation: no shared lead definition, silo-based campaign briefing, manual lead management without nurturing capability, and a feedback loop that breaks down at the handoff between Sales Enablement and Sales. Despite these gaps, the data shows measurable progress over the internship period. The lead qualification rate grew from 0.54% to 3.53%, digital sources emerged as structured pipeline inputs, and the proportion of leads feeding existing opportunities rose from 6.8% to 20.4%, signalling the emergence of a marketing contribution logic.

The discussion proposes six operational axes for continued optimisation: process mapping, lead definition, marketing automation, touchpoint management, nurturing, and shared reporting. Together, these axes form a roadmap for transforming the contact-to-lead process from an informal set of practices into a structured, automated, and data-driven commercial workflow.

Words count:

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Keywords:

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3 List of abbreviations

B2B - Business-to-Business
B2C - Business-to-Consumer
AIDA - Attention, Interest, Desire, Action
CRM - Customer Relationship Management
SET - Sales Excellence Team
PMM - Product Marketing Manager
M&S - Market & Solutions
SDR - Sales Development Representative
VP - Vice President
CEO - Chief Executive Officer
CCO - Chief Commercial Officer
SVP - Senior Vice President
KPI - Key Performance Indicator
SFA - Sales Force Automation
LMS - Lead Management System
MQL - Marketing Qualified Lead
SQL - Sales Qualified Lead
NAB - National Association of Broadcasters
CJD - Customer Journey Design
CJM - Customer Journey Management
CJMC - Customer Journey Management Capability
VSM - Value Stream Mapping
BPMN - Business Process Model and Notation
ABM - Account-Based Marketing
BI - Business Intelligence
GDPR - General Data Protection Regulation
CTA - Call To Action
QBR - Quarterly Business Review
IP - Internet Protocol
IT - Information Technology
R&D - Research & Development
OB - Outside Broadcast
I/O - Input/Output
APAC - Asia-Pacific
EMEA - Europe, Middle East & Africa
LATAM - Latin America

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5 Introduction

The digitalization of commercial processes has fundamentally reshaped the way B2B companies identify, engage, and convert prospects. Where sales cycles were once driven almost exclusively by personal relationships, trade shows, and word of mouth, the rise of digital channels has introduced a new layer of complexity: contacts can now be generated at scale through paid media, content strategies, and CRM-driven targeting, but generating a contact is not the same as generating a lead, and generating a lead is not the same as converting a prospect. The ability to manage these transitions systematically, from the first digital touchpoint to a qualified commercial opportunity, has become a critical differentiator for B2B organisations operating in competitive and evolving markets.

In this context, the notion of process becomes central. Without a structured and shared understanding of how contacts become leads, and how leads become opportunities, commercial teams risk operating in silos, duplicating efforts, and losing momentum at every handoff. The absence of a formalised contact-to-lead process is one of the most significant sources of revenue leakage in modern commercial organisations.

To address this challenge, this thesis is structured in several successive layers. A literature review first establishes the theoretical foundations of the contact-to-lead process, covering lead management, marketing automation, sales-marketing alignment, and the B2B customer journey. Building on this framework, a qualitative study based on 11 semi-structured interviews captures the organisational reality of the process across the four departments involved. This is complemented by a quantitative pre-post analysis of digital campaign and CRM performance data. The findings from both studies are then brought together in a discussion that connects empirical observations to theoretical insights, before concluding with actionable recommendations on how to structure, digitise, and align a contact-to-lead process capable of supporting commercial growth in new and competitive B2B market segments.

5.1 Company overview

EVS Broadcast Equipment is a Belgian technology company founded in 1994 in Liège by Laurent Minguet and Pierre L'Hoest. Over the past thirty years, the company has grown from a local startup into a global leader in live video production technology, headquartered at the Sart Tilman Science Park in Liège and operating through more than 20 offices across the globe. EVS employs 817 professionals representing 34 nationalities and has been publicly listed on Euronext Brussels since 1998. The company is currently led by CEO Serge Van Herck.

EVS first gained international recognition by revolutionising live sports broadcasting with its Live Slow Motion system, which rapidly became the industry standard for replay technology at major sporting events worldwide. This foundational innovation established EVS as an indispensable partner for the world's most prestigious broadcasters and sports organisations. Today, EVS solutions are deployed at events such as the Olympic Winter Games 2026 and the upcoming FIFA World Cup, and the company maintains long-standing partnerships with broadcasters including the BBC, SKY, and FOX Sports, as well as sports governing bodies such as FIFA and UEFA. Its motto, "We create return on emotion," reflects its commitment to helping content producers deliver the most engaging live experiences to their audiences.

The company's solution portfolio is structured around five families. LiveCeption covers live production, replays, and highlights. MediaCeption addresses content management for live productions. MediaInfra covers infrastructure management and processing. PowerVision delivers real-time video intelligence for high-stakes decisions. To these four established families, a fifth has recently been added: T-Motion, a dedicated division for media production robotics, born from the simultaneous acquisition of two companies in October 2025: Telemetrics, a US-based specialist in robotic camera systems, and XD Motion, a French company renowned for its ultra-motion camera technology. This dual acquisition signals EVS's strategic intent to expand both its product breadth and its geographic reach, particularly in North America. These five solution families serve three vertical markets: Sports & Events organisations, Broadcast & Media Networks, and Production Facilities & Service Providers.

This portfolio expansion reflects a broader strategic ambition. Having reached €208 million in revenue in 2025, EVS has set a target of exceeding €350 million by 2030. Achieving this level of growth requires not only product diversification but a fundamental shift in commercial strategy: from a model where EVS's market leadership meant clients came to the company, to one where EVS must actively identify, engage, and convert new prospects across a broader and more competitive landscape. It is precisely in this context that the structuring of a robust contact-to-lead process becomes a strategic priority, and the central subject of this thesis.

5.2 Presentation of the sales department[1]

The Sales Excellence Team at EVS is led by Chief Commercial Officer Nicolas Bourdon and brings together 128 professionals organised across several specialised functions. The Solutions Architects team of 30 people provides technical sales support, bridging client needs with EVS's product capabilities. The Business Operations team of 25 handles the operational backbone of the commercial cycle. The remaining headcount is dedicated to Sales, organised by geographic region across EMEA, North America, APAC, and LATAM.

A particularly significant structural evolution is the recent integration of the Marketing team, 12 people strong, into the Sales Excellence Team. Previously operating as a separate entity, Marketing now sits within the commercial organisation, reporting through the same structure as Sales. This integration is not incidental: it reflects EVS's strategic intent to align demand generation more closely with commercial execution, and to build the cross-functional coordination necessary to reach and convert prospects in markets where EVS has historically had limited presence. It is within this newly unified commercial structure that the contact-to-lead process examined in this thesis operates.

5.3 General context

The broadcast and live production industry has undergone profound structural changes over the past decade. The shift from hardware-based to software-defined workflows, the widespread adoption of IP infrastructures, and the growing demand for remote and cloud-enabled production have fundamentally altered the way content is created, managed, and distributed. Broadcasters and content owners are under increasing pressure to do more with less, deliver faster, and support an ever-expanding range of platforms and formats.

[1] Annex 1

In this evolving landscape, EVS has built its reputation as the undisputed reference for live sports production technology. For years, this positioning was self-sustaining: EVS's technology was so deeply embedded in the workflows of the world's leading broadcasters and sports organisations that commercial demand was largely inbound. Clients came to EVS. The company's challenge was not to find customers but to serve them.

This reality is changing. As EVS diversifies its portfolio beyond its traditional core markets and expands into new verticals and geographies, it increasingly operates in segments where its brand recognition cannot be taken for granted. In these new markets, prospects do not yet know EVS, they do not seek it out proactively, and they cannot be reached through the same relational channels that have historically driven growth. Generating awareness, capturing interest, and converting it into a qualified commercial opportunity requires a structured, repeatable, and digitally anchored process.

5.4 Problematisation

5.4.1 What led to this challenge?

EVS's growth ambition, targeting over €350 million in revenue by 2030, cannot be achieved solely by deepening existing accounts. It requires actively acquiring new clients in new markets, through channels and processes that are still being constructed. As EVS expands into segments where its brand is less established, the traditional inbound commercial model, where the company's reputation generated demand organically, is no longer sufficient. Reaching and converting new prospects requires a structured, repeatable process from first contact to qualified lead.

5.4.2 Identification of the problem

At the time this research was initiated, no formalised contact-to-lead process existed at EVS. Campaign briefing was product-driven and siloed across solution units. Lead generation was manual and inconsistent, with no automated follow-up or nurturing capabilities. Lead management relied entirely on individual SDR effort, without scoring frameworks or reactivation logic. The handoff between marketing and sales was characterised by information gaps and structural misalignment. Each of these weaknesses represents a point of revenue leakage in a process that is supposed to feed commercial growth.

5.4.3 Objectives of the thesis

This thesis aims to map, analyse, and propose improvements to the contact-to-lead process at EVS. It seeks to identify the key technological and process levers that can optimise each stage of the process, from campaign briefing to lead reception, and to define how digital channels can be structured and scaled to support commercial growth in new market segments. By combining qualitative insight from internal stakeholders with quantitative evidence from campaign and CRM data, the goal is to produce actionable recommendations grounded in both organisational reality and academic rigour.

5.5 Structure

This thesis is organised in several successive sections. The introduction presents EVS, its commercial organisation, and the strategic context that motivates this research. A literature review then establishes the theoretical foundations of the contact-to-lead process, covering lead management, marketing automation, sales-marketing alignment, and the B2B customer journey. The methodology chapter explains the mixed-methods approach adopted, combining semi-structured qualitative interviews with a quantitative pre-post analysis of campaign and CRM data. The practical case presents the results of both studies, first through the lens of the qualitative findings organised around the four stages of the process, then through the quantitative analysis of digital campaign and CRM performance. A discussion chapter interprets these findings in relation to the literature and the organisational context, before a final set of recommendations is proposed.

5.6 Thesis limitations

5.6.1 Theoretical limitations

The literature on contact-to-lead processes in B2B contexts remains fragmented. Research on lead management, marketing automation, and sales-marketing alignment tends to treat these topics in isolation rather than as an integrated process. Furthermore, the majority of available studies focus on large-scale organisations with mature digital marketing infrastructures, which limits the direct applicability of theoretical frameworks to a company in the process of building these capabilities. The rapidly evolving nature of marketing technology also means that some referenced works may not fully reflect the current state of available tools and practices. Additionally, EVS operates in a highly specialised niche market, and academic literature specifically addressing lead generation and conversion dynamics in the broadcast technology sector is virtually non-existent.

5.6.2 Practical limitations

Several practical constraints affect the scope and generalisability of the findings. The qualitative sample of 11 interviewees, while transversal, remains limited in size and does not include external stakeholders such as clients or partners. The interviewer's position as an internal member of the Marketing team introduces a potential bias in both the framing of questions and the candour of responses. On the quantitative side, CRM data quality prior to 2021 is insufficient for reliable benchmarking, and the pre-post design does not allow for causal claims given the absence of a control group. Finally, the findings are specific to EVS's organisational context and may not be directly transferable to other B2B technology companies, though the process challenges identified are likely to resonate more broadly.

6 Literature review

The purpose of this literature review is to establish the theoretical foundations necessary to investigate the contact-to-lead process in a B2B environment. Given the breadth of concepts involved, ranging from foundational marketing and sales theory to operational tactics such as lead scoring and marketing automation, this review is structured around three distinct yet interconnected layers.

The first layer, macro foundations, introduces the core concepts that underpin the commercial process: the marketing funnel, the nature of leads, the sales funnel, and the relationship between marketing and sales as two complementary functions. This layer provides the definitional groundwork upon which the rest of the analysis builds.

The second layer, marketing-sales integration, examines how these two functions interact in practice. It addresses the customer journey as a shared territory, the management of touchpoints across departments, and the organisational capabilities required to design and steer coherent B2B customer journeys.

The third layer, operational granularity, focuses on the specific tools, systems, and processes that operationalise the contact-to-lead conversion: marketing automation, lead management systems, CRM technologies, digital content strategies, and their measurable impact on sales performance.

These three layers are designed to progressively narrow the analytical lens, from broad theoretical constructs to the operational mechanisms that shape B2B commercial processes. Each layer draws on a distinct but overlapping set of academic sources, ensuring both theoretical depth and practical relevance.

6.1 Macro foundations

6.1.1 The marketing funnel

The marketing funnel is the first concept to examine, as it provides the foundational framework through which the marketing function conceptualises buyer progression. Understanding its theoretical origins, its internal structure, and its empirical limitations is essential before turning to the question of what the funnel ultimately produces: the lead.

6.1.1.1 From AIDA to the buying funnel

The idea that buyers progress through a series of cognitive stages before making a purchase decision is one of the oldest and most persistent assumptions in marketing theory. Hamilton et al. (2021) trace the origins of this thinking back to the late 1800s, when marketing experts first decomposed the effectiveness of advertising into a series of staged effects. The most influential of these early stepwise models evolved into the AIDA framework, which describes the buyer's progression through four states: Attention, Interest, Desire, and Action (Strong, 1925, as cited in Hamilton et al., 2021). Despite being a century old, the AIDA model remains widely used in both academic settings and marketing practice as a foundational reference for understanding how buyers move toward a purchase.

The AIDA model rests on a simple but powerful premise: a buyer does not move directly from unawareness to purchase. Instead, the process unfolds through four sequential phases. In the Attention phase, the objective is to break through the noise and make the buyer aware that a product, service, or solution exists. In the Interest phase, the buyer begins to actively engage with the offering, seeking to understand how it might be relevant to a specific need. The Desire phase marks the moment where interest transforms into a genuine intention to acquire, as the buyer develops a preference for the offering over alternatives. Finally, the Action phase corresponds to the purchase decision itself (Kotler & Armstrong, 2018). This staged logic has proven remarkably durable: it continues to underpin contemporary marketing curricula, communication strategies, and funnel-based commercial models nearly a century after its initial formulation.

Kotler and Armstrong (2018) further refine this model by introducing six buyer-readiness stages that map onto the four AIDA phases (see Figure 1). The Awareness phase encompasses two distinct stages: awareness itself, where the buyer first learns of the offering's existence, and knowledge, where the buyer acquires a basic understanding of what the offering does. The Interest phase similarly breaks into liking, where the buyer develops a favourable attitude, and preference, where the offering is ranked above alternatives. The Desire phase corresponds to conviction, the point at which the buyer forms a firm intention to purchase. Finally, the Action phase corresponds to the purchase itself. This decomposition is significant because it reveals that each macro-phase of AIDA contains internal progression dynamics. A buyer may be aware of a product without having knowledge of it or may like it without preferring it over competitors. For the marketing function, each of these sub-stages represents a distinct challenge and requires a different type of intervention.

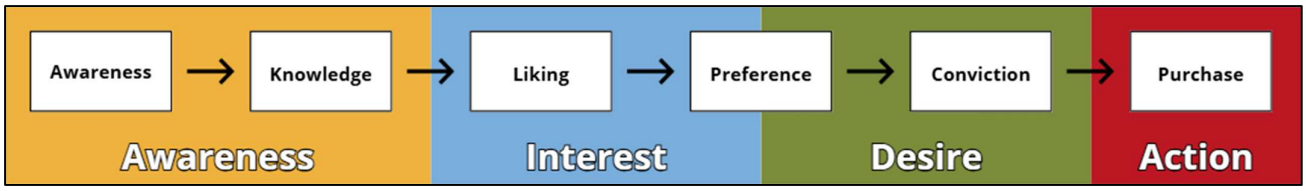


Figure 1 –Buyer-stages journey (adapted from Kotler and Armstrong, 2018)

The importance of these staged models extends beyond their descriptive function. Stewart (2008) argues that marketing has long been considered a cost centre rather than a revenue-generating function, in part because the financial return attributable to marketing activities is poorly understood. He notes that this is due to two factors: marketing encompasses many different activities that vary from firm to firm, and most firms are unable to tie marketing outcomes to financial performance. Stewart (2014) reinforces this argument by calling for greater alignment between measures of marketing accountability and the expectations placed on the marketing organisation. Within the funnel framework, the ability to track a buyer's progression through the AIDA stages provides one of the few concrete mechanisms through which marketing can demonstrate its contribution to the commercial process, ultimately measured by the number and quality of leads generated.

Over time, depictions of the buyer's progression have become more complex and specialised, with additional stages and extensions added both before and after the purchase moment. Hamilton et al. (2021) compile a cross-section of seventeen customer journey frameworks, ranging from Lewis (1908) through Howard and Sheth (1969) to Lemon and Verhoef (2016), all as compiled in Hamilton et al. (2021). Despite the variety of labels and the number of stages proposed, a common structure persists across these models: they all describe a narrowing process in which a broad pool of potential buyers is progressively filtered through stages of increasing engagement and commitment, from initial awareness to a final transaction. This narrowing logic is what gives the process its characteristic funnel shape.

TABLE 1: CUSTOMER JOURNEY MODELS

Source and Type	Customer Journey Stages								
	-5	-4	-3	-2	-1	*0*	1	2	3
Belch & Belch (2015) (T)			Problem recognition	Information search	Alternative evaluation	*Purchase decision*	Post-purchase evaluation		
Chernev (2014)** (T)		Awareness	Understanding	Attractiveness	Purchase intent	*Purchase*	Satisfaction	Repurchase intent	
Court et al. (2017) – Traditional (P)			Awareness	Familiarity	Consideration	*Purchase*	Loyalty		
Court et al. (2017) – Updated* (P)				Initial consideration set	Active evaluation	*Moment of purchase*	Post-purchase experience	Loyalty loop	
Donavan, Minor & Mowen (2016)* (T)	Involvement	Memory	Exposure	Attention	Comprehension				
Edelman & Singer (2015)* (P)				Consider	Evaluate	*Buy*	Enjoy	Advocate	Bond
Edwards (2011) (A)				Awareness	Consideration	*Buy*	Use	Form opinion	Talk
Forrester (2010)* (P)				Discover	Explore	*Buy*	Engage		
Howard & Sheth (1969) (O)		Attention	Brand comprehension	Attitude	Intention	*Purchase*			
Kotler & Armstrong (2012) (T)			Need recognition	Information search	Evaluation of alternatives	*Purchase decision*	Post-purchase behavior		
Lemon & Verhoef (2016)* (A)					Pre-purchase stage	*Purchase stage*	Post-purchase stage		
Lewis (1908) (O)		Awareness	Opinion	Consideration	Preference	*Purchase*			
Mothersbaugh & Hawkins (2015) (T)			Problem recognition	Information search	Alternative evaluation	*Purchase*	Post-purchase		
Puccinelli et al. (2009) (A)			Need recognition	Information search	Evaluation	*Purchase*	Post-purchase		
Richardson (2010) (P)					Engage	*Buy*	Use	Share	Complete
Solomon (2015) (T)			Problem recognition	Information search	Evaluation of alternatives	*Product choice*	Outcomes		
Strong (1925) (T)			Attention	Interest	Desire	*Action*			
Wiesel, Pauwels & Arts (2011) (A)				Information	Evaluation	*Purchase*			

Note: The customer journey frameworks have been aligned by the purchase stage (0), with the stages leading up to purchase identified using negative numbers, counting down to purchase, and those occurring after purchase using positive numbers. Publication type: A = peer-reviewed Academic research, P = Practitioner publication (e.g., *Harvard Business Review*), T = Textbook, O = Other; * Non-linear journey model; ** Combination of two customer journey frameworks

Figure 2 – Customer journey models (Hamilton et al., p50,2021)

6.1.1.2 Limitations of the linear funnel

Despite its theoretical grounding and enduring influence, the assumption that buyers follow a linear, sequential path through the funnel has been increasingly questioned. In a B2B context, Lassila et al. (2023) observe that digital developments have created less linear and more circular engagement patterns. The traditional layered stages of the marketing process, from awareness through

consideration, intent, and satisfaction, carry an inherent narrowing assumption: some prospects will inevitably drop out at each layer, meaning that a large number of potential clients never reach the end of the funnel. Yet the circularity of actual buyer behaviour suggests that prospects may re-enter earlier stages, revisit touchpoints, or skip stages entirely depending on their informational needs and the digital resources available to them.

This conceptual critique finds empirical support in the work of Jansen and Schuster (2011). Through an analysis of approximately seven million keyword advertising records spanning 33 months, the authors demonstrate that the expected sequential progression from Awareness to Purchase does not consistently occur. Their findings show that Awareness-stage queries generated substantially more orders and higher sales revenue than anticipated, suggesting that buyers can move directly from broad awareness to a purchase without necessarily passing through intermediate stages of research and deliberation. The authors conclude that, while the funnel stages remain useful as a classification framework, the actual purchase process is more accurately described as one in which any stage may directly lead to a conversion, depending on individual and product-specific factors.

These observations are particularly consequential for the marketing function. If the funnel is neither strictly linear nor purely sequential, then the moment at which a potential buyer transitions from being a passive audience member to becoming an identifiable, qualifiable entity cannot be assumed to occur at a fixed point in the process. This transition point, from anonymous contact to identified lead, is the subject of the following section.

6.1.2 The sales funnel

While the marketing funnel describes how buyers are guided through successive stages of engagement from the buyer's perspective, the sales funnel frames the same commercial process from the seller's side. Understanding the theoretical foundations, evolution, and limitations of the sales process is essential to grasp how the selling organisation receives, qualifies, and converts the leads that marketing produces.

6.1.2.1 The seven steps of selling

Just as the AIDA model constitutes the foundational framework for the marketing funnel, the seven steps of selling represent perhaps the oldest and most widely accepted paradigm in the sales discipline. Moncrief and Marshall (2005) trace its origins to the early twentieth century, noting that a 1920 sales training book already listed six of the seven steps. Formalised by Dubinsky (1980/1981, as cited in Moncrief & Marshall, 2005), the model describes the typical sales scenario as a sequential and cumulative process composed of seven stages: (1) prospecting, (2) pre approach, (3) approach, (4) presentation, (5) overcoming objections, (6) close, and (7) follow-up. Each step builds upon the previous one, and the traditional model requires that every step occurs for each sales interaction.

Prospecting consists of identifying and screening new potential customers. The preapproach involves all preparatory activities prior to the actual visit, including research on the prospect's needs and background. The approach refers to the strategies employed when first meeting the customer and establishing initial rapport. The presentation is the main body of the sales call, during which the salesperson conveys the product's benefits. Overcoming objections entails responding to the customer's questions and hesitancies. The close is defined as the successful completion of the sales presentation, culminating in a commitment to buy. Finally, the follow-up ensures the customer is satisfied after the transaction and that all promises are being delivered (Moncrief & Marshall, 2005).

The seven steps have served as a basic framework in sales training programmes, personal selling textbooks, and teaching for nearly a century (Moncrief & Marshall, 2005). Their persistence is comparable to that of AIDA on the marketing side: both models assume a sequential, stage-based logic in which the seller (or the marketer) guides the buyer through a predetermined path. However, just as AIDA gave rise to more complex marketing funnel models over time, the seven steps of selling have also undergone significant transformation.

6.1.2.2 From sequential steps to systemic processes

The traditional seven steps of selling, despite their longevity, have progressively lost explanatory power in the face of changing market conditions. Hartmann et al. (2018) argue that the commonly described changes in markets, such as increasing customer demands, globalisation, technological advancements, and expanded buyer access to information, point toward the inadequacy of traditional, restricted, firm-centric, unidirectional, and dyadic views of sales processes. The authors caution against simply attributing these changes to shifts in market complexity and instead suggest that they reveal the need for a more robust theoretical foundation that accounts for the multidirectional nature of sales processes and how they are embedded in dynamic exchange systems.

Moncrief and Marshall (2005) identify a set of transformative factors that have reshaped each of the traditional selling steps over the past decades. Technology, the expanding strategic role of selling within organisations, team-based approaches, increased buyer knowledge and sophistication, and the rise of relationship-oriented philosophies have all contributed to an evolved selling process. The authors present a revised set of seven steps that, unlike the traditional model, are not sequential: (1) customer retention and deletion, (2) database and knowledge management, (3) nurturing the relationship, (4) marketing the product, (5) problem solving, (6) adding value and satisfying needs, and (7) customer relationship maintenance. Crucially, these evolved steps occur over time, are accomplished by multiple people within the selling firm, and do not necessarily follow any given sequence.

The shift from a selling orientation to a customer orientation is perhaps the most fundamental change captured in this evolution. While the traditional seven steps reflected a firm-centric approach focused on pushing the buyer toward a close, the evolved selling process centres on securing, building, and maintaining long-term relationships with profitable customers (Moncrief & Marshall, 2005). Prospecting, for instance, is no longer necessarily performed by the salesperson at all: much of what constitutes prospecting is now conducted by telemarketers, digital platforms, or the marketing department through lead generation activities. The salesperson's role has shifted from finding new customers to retaining and deepening relationships with existing ones.

Traditional seven steps of selling	Transformative factors	Evolved selling process
(1) Prospecting	Telemarketing Internet selling Organizational prospecting	(1) Customer retention and deletion
(2) Pre approach	Laptop account data Support staff	(2) Database and knowledge management
(3) Approach	Build a foundation	(3) Relationship selling
(4) Presentation	PowerPoint/multimedia Listening Team selling Multiple calls Value-added Buying centers	(4) Marketing the product
(5) Overcoming objections	Predetermining needs	(5) Problem solving
(6) Close	Identifying mutual goals	(6) Adding value/satisfying needs
(7) Follow-up	Increased effectiveness of communication through technology	(7) Customer relationship maintenance

Table 1 – Evolution of the seven steps of selling (Moncrief & Marshall, 2005)

Hartmann et al. (2018) extend this evolutionary narrative by arguing that the sales literature is converging on a systemic and institutional perspective. They propose a reconceptualisation of selling grounded in service-dominant logic and institutional theory. In their framework, selling is no longer understood as a dyadic interaction between a salesperson and a buyer, but as the interaction between broad sets of actors aimed at creating and maintaining efficient exchange through the ongoing alignment of institutional arrangements and the optimisation of relationships. This perspective broadens the scope of who is considered a selling actor to include not only salespeople but also customers, prospects, media consultants, and internal employees, all of whom participate in shaping the conditions under which value is co-created through exchange.

This broadening of perspective is also reflected in how the sales literature has characterised the relationship between buyer and seller over time. Hartmann et al. (2018) present an evolution across three paradigms: in the transactional paradigm, the selling firm creates value and delivers it unilaterally, with the salesperson's ability to influence the purchase being perceived as high. In the consultative paradigm, salespeople develop trust-based relationships and help buyers discover their needs, with influence perceived as moderate. In the enterprise paradigm, multiple cross-functional actors from both the selling and buying firms collaborate to co-create value, and the perceived ability of any single salesperson to influence the outcome is low.

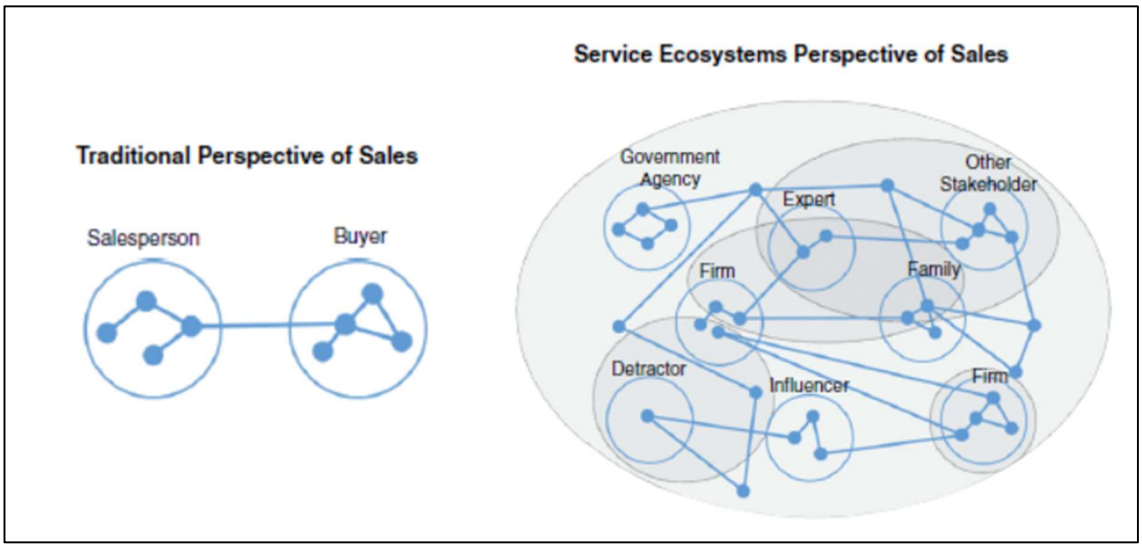


Figure 3 - Contrasting a Service Ecosystems Perspective (Hartmann et al., 2018)

Hartmann et al. (2020) deepen this systemic perspective by examining how social structures frame the selling process. Drawing on institutional theory, they argue that selling is shaped by three institutional pillars: the regulative element, which encompasses formal rules, contracts, and sanctions; the normative element, which describes the values, norms, and goals that shape actor roles; and the cultural-cognitive element, which comprises the shared conceptions that constitute the nature of social reality and underlie habitual actions. This framework reinforces the idea that the sales process cannot be understood as a purely rational, dyadic transaction. It is instead embedded in a complex web of institutional arrangements that enable and constrain how actors exchange value.

This shift from linear to systemic is also visible at the operational level of the sales funnel. Järvinen and Taiminen (2016) present a sales funnel adapted from D'Haen and Van den Poel (2013) that divides the commercial process into four categories: suspects, prospects, leads, and deals. Importantly, their adaptation introduces a re-entering loop for existing customers, reflecting the reality that in B2B contexts, where the pool of potential clients is limited, existing customers frequently cycle back into the funnel for repurchasing, upselling, or cross-selling. This circular dimension reinforces the broader evolution observed throughout this section: the sales process, like the marketing funnel, can no longer be adequately represented as a one-way, top-to-bottom sequence.

The parallel between the marketing funnel and the sales funnel is now clear: both originate from linear, sequential models (AIDA for marketing, the seven steps for sales), both have undergone significant evolution toward more dynamic and relational frameworks, and both face the same fundamental challenge in capturing the complexity of real buyer and seller behaviour. What remains to be examined is how these two funnels connect. The following section addresses this question through Kotler's integrated vision, which explicitly maps the responsibilities of marketing and sales onto a single framework and positions the lead as the critical handoff point between the two functions.

6.1.3 Bridging marketing and sales: The lead as the handoff point

The previous sections have examined the marketing funnel and the sales funnel as distinct constructs, each with its own theoretical foundations, evolutionary trajectory, and limitations. Yet in practice, these two funnels do not operate in isolation. They are connected by a critical transfer mechanism: the lead. This section examines how marketing and sales responsibilities map onto a single integrated framework, defines the lead as the object of this handoff, and explores what happens when this transfer fails.

6.1.3.1 Kotler's integrated buying funnel

Kotler et al. (2006) offer one of the most widely cited frameworks for understanding how marketing and sales share responsibility across the buyer's progression. Their buying funnel is structured around eight stages, from customer awareness through to customer advocacy, and explicitly assigns each stage to one of the two functions. Marketing is conventionally responsible for the first four stages: building customer awareness, brand awareness, brand consideration, and brand preference. Its role also encompasses creating a marketing plan and generating leads for the sales department. Sales takes over from purchase intention onwards, managing the closing process, customer loyalty, and advocacy (Kotler et al., 2006).

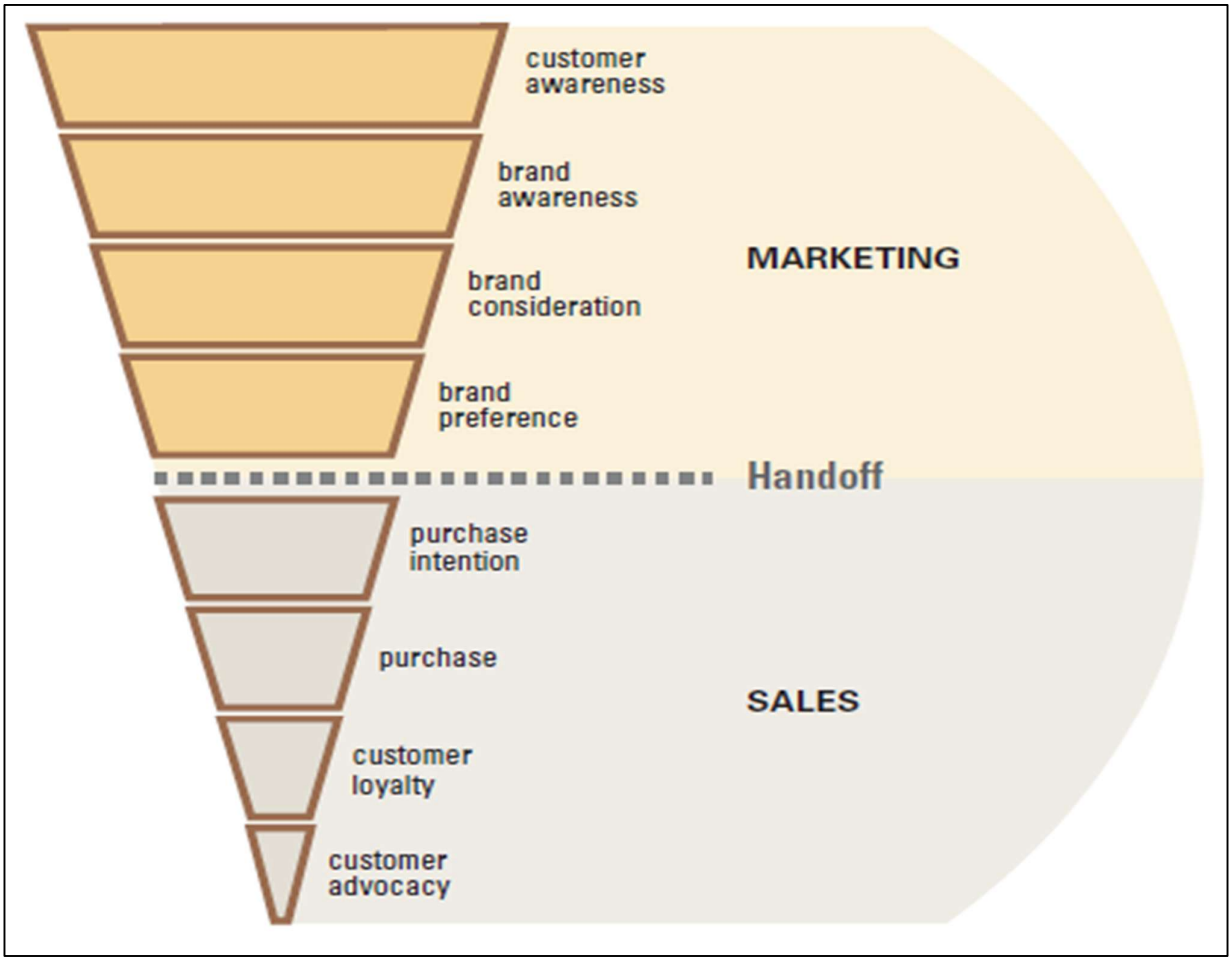


Figure 4 – Integrated buying funnel (Kotler et al., page 77, 2006)

This framework makes visible what the separate marketing and sales funnels only imply: there is a precise boundary between the two functions, and that boundary is defined by the transfer of leads. Kotler et al. (2006) describe this as a handoff: marketing builds brand preference and generates leads, then hands off execution and follow-up to sales. The authors note that this division of labour has practical merit, as it keeps marketing focused on strategic activities and prevents it from intruding in individual sales opportunities. However, the handoff also carries serious risks. When coordination is lacking, the blame game begins. Sales criticise the marketing plan, while marketing accuses sales of poor execution.

Kotler et al. (2006) argue that the solution lies not in reinforcing the boundary but in dissolving it through deeper integration. In the companies they studied that achieved the highest levels of marketing-sales alignment, both functions participated across the full funnel. Marketing contributed to the sales process by helping define common standards for leads, developing value propositions during the needs-definition stage, and providing solution collateral and case study material as customers neared a decision. Conversely, sales participated in upstream strategic decisions such as market segmentation and product positioning. This vision of an integrated funnel, rather than two separate ones with a handoff, sets the stage for understanding why the concept of a lead must be defined with precision and shared across both departments.

6.1.3.2 The lead: defining the handoff object

If the handoff between marketing and sales depends on the transfer of leads, then defining what constitutes a lead becomes a critical question. Yet the academic literature offers surprisingly little consensus on this point. Monat (2011) observes a "surprising paucity of literature regarding the characterization of sales leads, and no predominant unifying theory has emerged; furthermore, corroborative data are almost non-existent" (p. 179). This theoretical void is significant: the lead sits at the centre of the commercial process, but its definition remains contested.

Several authors have attempted to define what makes a lead qualifiable, but their approaches differ substantially. Jolson (1988, as cited in Monat, 2011) defines a qualified lead as one for which the product can satisfy the prospect's needs, the prospect is willing to buy, and the prospect has the ability to buy. Donath et al. (1995, as cited in Monat, 2011) propose five principal determinants of lead quality: desire, need, resources, timing, and decision authority. Kestnbaum and Hsieh (1983, as cited in Monat, 2011) emphasise timing, purchase history, and familiarity with the vendor. While these models share certain common characteristics, such as urgency, funding, and the prospect's decision authority, none provides a unifying theoretical framework, and none has been empirically validated (Monat, 2011).

At the most basic level, a lead can be defined as "a recorded expressed interest in the company's goods or services" (Monat, 2011, p. 179). This definition, shared across much of the literature, highlights a fundamental characteristic: a lead is not simply a contact or a name in a database. It is an entity that has demonstrated a signal of interest, which distinguishes it from an anonymous suspect or an unqualified prospect. However, the nature and reliability of this signal remain open to interpretation, and it is precisely this ambiguity that generates friction between marketing and sales (Sabnis et al., 2013).

Attempting to bring theoretical rigour to this fragmented landscape, Monat (2011) proposes a lead characterisation model grounded in the determinants of industrial customer purchase decisions.

Building on an earlier synthesis (Monat, 2009), the author identifies eight principal determinants that drive a customer's decision to purchase, including the prospect's perception of need, urgency, ability to purchase, risk and trust in the vendor, competition, value, quality, and service. These determinants manifest themselves as 16 observable lead characteristics that can be captured during early interactions. While this framework represents the most comprehensive attempt to ground lead characterisation in purchase decision theory, Monat (2011) acknowledges that different companies weight these determinants differently, meaning that no single model will be accurate for all organisations.

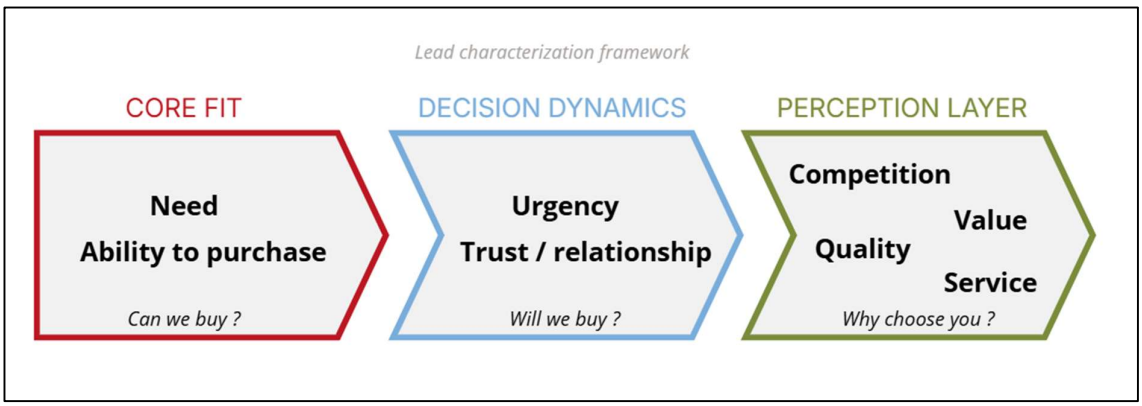


Figure 5 – Lead characterization framework (adapted from Monat, 2011)

At the operational level, Järvinen and Taiminen (2016) introduce a distinction that proves essential for the handoff. Marketing leads are identified contacts for whom the organisation possesses some behavioural data but no clear signal of purchase intention. These contacts can be nurtured through targeted content to deepen their engagement. Sales leads, by contrast, are contacts whose behaviour shows clear indications of a purchase intention, such as requesting a quotation or engaging in actions that signal readiness to buy. The transition from marketing lead to sales lead corresponds to the moment at which the handoff to the sales department should occur. When this distinction is not clearly defined or shared between both departments, the handoff becomes a source of friction rather than a mechanism for commercial efficiency.

The picture that emerges from this review is one of a concept that is operationally central but theoretically underdeveloped. Everyone agrees that a lead represents some form of expressed interest, but how to characterise, measure, and qualify that interest remains a matter of organisational judgment rather than established science. This definitional fragility has direct consequences for the marketing-sales handoff, as the following section demonstrates.

6.2 Marketing-Sales integration

6.2.1 The B2B customer journey

The customer journey is the conceptual framework that unifies the buyer's progression and the seller's engagement into a single analytical lens. This section defines the B2B customer journey, examines its multi-actor and relational nature, and explores the organisational conditions under which marketing and sales can effectively collaborate around it.

6.2.1.1 From funnels to journeys: a customer-centric perspective

The marketing and sales funnels examined in Layer 1 share a common limitation: they describe the commercial process primarily from the seller's perspective. Even when framed in terms of buyer cognition (as in AIDA), the funnel remains a tool for the selling organisation to classify, segment, and act upon buyer behaviour. The customer journey concept offers a fundamentally different starting point. Rather than asking how the organisation moves the buyer through a sequence, it asks how the buyer navigates through a complex set of interactions on the way to purchasing and using an offering (Purmonen et al., 2023).

The customer journey has become a key construct across multiple research streams, including customer experience, digital marketing, sales, and service management (Purmonen et al., 2023). In its general form, it can be defined as an individual buyer's path to purchasing and accessing offerings, comprising touchpoints throughout the pre-purchase, purchase, and post-purchase stages of the process (Lemon & Verhoef, 2016, as cited in Purmonen et al., 2023). The concept is considered particularly useful in digitalized markets, where buyers have nearly unlimited access to information and are therefore less reliant on sellers during the early stages of their decision process. In such environments, the purchasing path is seldom linear; it is a complex and customer-steered process in which buyers navigate through increasingly digital and social touchpoints from search to purchase and beyond (Purmonen et al., 2023).

Despite its growing use in practice, the transposition of the customer journey concept to B2B markets introduces distinctive complexities that consumer-focused models do not address. B2B purchases involve multiple professionals governed by formal organisational rules, driven by a combination of organisational and individual goals, and embedded in long-term business relationships (Purmonen et al., 2023). Recognising these specificities, Purmonen et al. (2023) propose a definition of the B2B customer journey as "a combination of buying and usage center members' intertwined, goal-oriented paths to purchasing and using offerings along multiple direct and indirect touchpoints, which are affected by the context of business relationships"

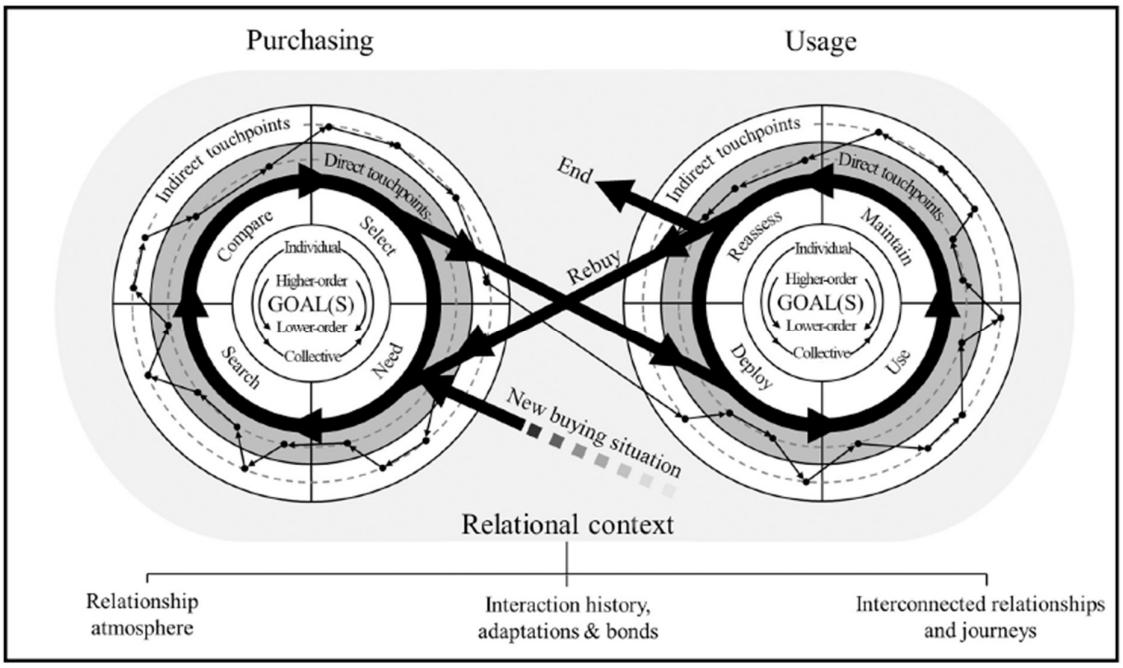


Figure 6 – The B2B Customer journey (Purmonen et al., p80, 2023)

6.2.1.2 The multi-actor and relational nature of B2B journeys

This definition introduces several elements that fundamentally distinguish B2B journeys from their consumer counterparts. First, the journey is anchored to both the buying centre and the usage centre: different individuals within a customer organisation participate in different stages of the journey, and no single individual necessarily experiences the entire process (Purmonen et al., 2023). The buying centre, a concept originally introduced by Johnston and Bonoma (1981, as cited in Purmonen et al., 2023), encompasses all individuals involved in the purchase decision, while the usage centre includes those who will deploy, operate, and maintain the acquired offering.

Second, the framework places equal emphasis on the purchase and usage stages, treating them as interconnected loops rather than a terminal sequence. The process is depicted as an infinite loop in which the usage stage ends with a reassessment that may initiate a new purchase cycle (Purmonen et al., 2023). This iterative structure is particularly relevant in B2B markets where offerings are complex, and customer relationships extend over years or decades.

Third, B2B customer journeys are embedded in a relational context. The interaction history between buyer and supplier, the prevailing relationship atmosphere, and the existence of other interconnected journeys all shape how individual buying and usage centre members navigate their paths (Purmonen et al., 2023). A customer organisation may have multiple ongoing journeys with a single supplier simultaneously, and the pre-purchase stages of a new journey are likely to be shaped by experiences from prior and concurrent ones.

Finally, the journey involves both direct and indirect touchpoints. Direct touchpoints are interactions with representations of the brand or offering that are controllable by the supplier, such as the corporate website, advertising, or sales personnel. Indirect touchpoints are beyond the supplier's direct control, including maintenance managed by a third-party partner, or supplier-related reviews on external platforms (Purmonen et al., 2023). This distinction is critical for the marketing-sales

relationship, because it implies that neither function alone can control the full set of interactions that shape the buyer's experience.

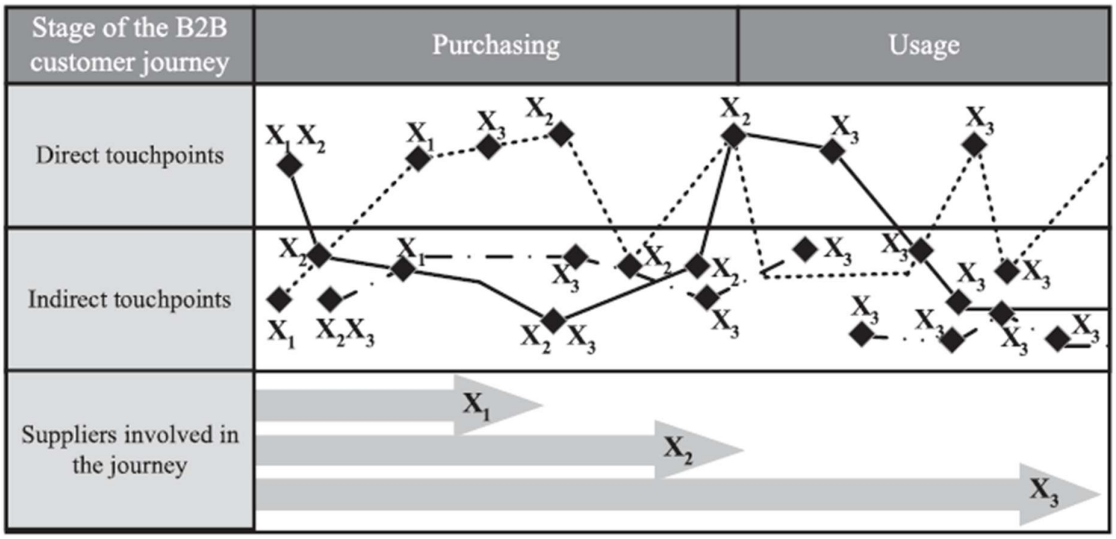


Figure 7 – B2B purchasing and usage member touchpoints (Purmonen et al., p80, 2023)

6.2.1.3 Aligning marketing and sales around the journey

The B2B customer journey, as conceptualised above, spans the entire commercial process, from early awareness through purchase and into long-term usage. It is therefore not a marketing territory or a sales territory but a shared one. However, as Kotler et al. (2006) demonstrate, the degree to which marketing and sales collaborate around this shared process varies considerably across organisations.

Kotler et al. (2006) identify four types of relationships between marketing and sales, representing increasing levels of maturity. In the undefined state, the two functions have grown independently and interact only when conflicts arise. In the defined state, processes and rules have been established to prevent disputes, and the groups begin to build a common language on contentious areas such as the definition of a lead. In the aligned state, boundaries between the two exist but are flexible: the groups engage in joint planning and training, marketing confers with salespeople on important accounts, and the sales group understands and uses marketing terminology. In the integrated state, boundaries become blurred entirely: both groups share structures, systems, and rewards, marketing is deeply embedded in key account management, and a shared set of metrics governs performance (Kotler et al., 2006).

The connection between Kotler's maturity framework and the customer journey concept is straightforward: the more complex and non-linear the journey, the more integration is required between marketing and sales to manage it effectively. In an undefined or merely defined relationship, each department manages its own portion of the funnel independently, and the lead handoff represents the only point of contact between the two. In an aligned or integrated relationship, both functions participate across the full journey, from the earliest touchpoints through to post-purchase engagement. Kotler et al. (2006) note that companies which achieved integration saw marketing helping sales create common standards for leads during prospecting, developing value propositions during needs-definition, and providing case study material as customers neared a

decision. This level of collaboration is precisely what the B2B customer journey framework calls for: a cross-functional approach to a process that no single department can own entirely.

6.2.2 Touchpoints: the building blocks of the journey

If the customer journey is the shared territory on which marketing and sales collaborate, then touchpoints are the individual interactions that compose it. Understanding what a touchpoint is, how its quality affects buyer behaviour, and how digitalization has transformed its management is essential to grasp how the contact-to-lead process operates in practice.

6.2.2.1 Defining and structuring touchpoints

Touchpoints are increasingly recognised as a central element in customer journey research. Lundin and Kindström (2024) define them as the interactions, or engagements, between a supplier and a customer. Because touchpoints are pivotal for, and embedded in, customer journeys, the ability to manage them becomes a key concern for any supplier seeking to design attractive buyer experiences.

To move beyond a generic understanding of touchpoints, Lundin and Kindström (2024) propose a structuring framework that decomposes each touchpoint into three constitutive dimensions: resources, actions, and environments. Resources refer to the elements exchanged at a touchpoint, including knowledge, data, skills, labour, infrastructure, and time. Actions are the activities performed by the customer and the supplier at the touchpoint, such as searching for product information, requesting a demonstration, or configuring a solution. The environment is the space within which the interaction takes place, whether physical (a showroom, a trade fair, a face-to-face meeting) or digital (a website, a digital service platform, a social media channel). These three dimensions together determine the nature and quality of each interaction along the journey (Lundin & Kindström, 2024).

This decomposition is significant because it reframes touchpoint management from a purely marketing concern (which content to display, on which channel) to a cross-functional challenge. The resources exchanged at a touchpoint may originate from marketing (content, data), from sales (product expertise, relationship context), or from the customer itself. The actions may be initiated by the buyer or the supplier. The environment may be controlled by the company or by a third party. Managing touchpoints effectively therefore requires coordination across departments, reinforcing the argument that the customer journey is a shared responsibility rather than the property of any single function.

6.2.2.2 The impact of touchpoint quality on the journey

The quality of individual touchpoints does not merely determine the buyer's experience at a given moment; it shapes how the buyer progresses through subsequent stages of the journey. Koch and Hartmann (2023) investigate this relationship in a B2B setting by examining how the perceived quality of a company website, one of the most frequently used digital touchpoints, influences buying intention across five customer journey phases: awareness, favorability, consideration, intent to buy, and conversion.

Their findings reveal two important dynamics. First, the influence of the website on buying intention declines steadily as the journey progresses: from an average rating of 4.10 in the awareness phase to 3.45 in the conversion phase, representing a 15.85% reduction (Koch & Hartmann, 2023). This suggests that a touchpoint such as the company website has its greatest impact in the early stages of

the journey, where it serves to create awareness and build initial interest, but that its influence diminishes in later stages where more intensive, specific, and often interpersonal interactions are required.

Second, and perhaps more importantly, the influence of perceived touchpoint quality on buying intention increases as the journey progresses. In the early phases, the quality of the website has a moderate effect on buying intention, whereas in the later phases, the correlation becomes significantly stronger (Koch & Hartmann, 2023). This means that while a website may have the greatest reach in the awareness phase, the quality of that website matters most in the later stages. The practical implication is clear: as buyers move closer to a purchase decision, their expectations regarding the quality of the touchpoints they encounter become more demanding. A touchpoint that merely attracts attention early in the journey may need to deliver substantially higher quality to influence a buying decision later.

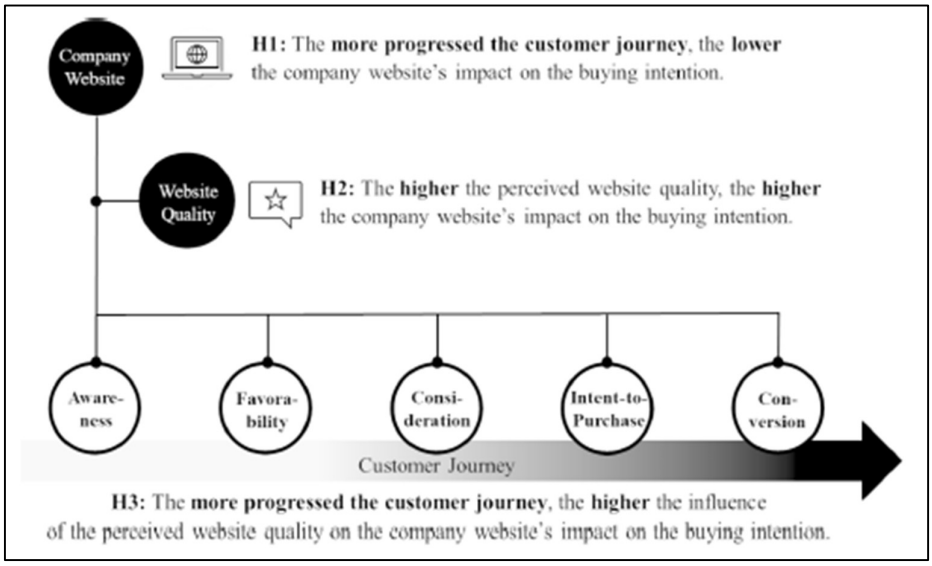


Figure 8 – Importance of website quality on buying intent (Koch & Hartmann, p1525, 2023)

These findings connect directly to the contact-to-lead process. The early touchpoints, typically managed by marketing, serve to generate awareness and initial engagement. The later touchpoints, where quality expectations are highest, are often where sales become involved. If the quality of early marketing touchpoints is insufficient, the buyer may never progress to the stages where sales can intervene. Conversely, if the transition from marketing-managed to sales-managed touchpoints involves a drop in quality or consistency, the buyer's accumulated positive experience may be undermined.

6.2.2.3 Managing touchpoints in a digitalized environment

The increasing prevalence of digital technologies in B2B markets has added both opportunities and complexity to touchpoint management. Lundin and Kindström (2024), through an exploratory case study of a B2B supplier they refer to as "DigiCo", identify seven capabilities that suppliers need to develop in order to manage digitalized touchpoints effectively across the customer journey.

Through their case study, Lundin and Kindström (2024) identify seven capabilities that a B2B supplier needs to develop in order to manage digitalized touchpoints effectively. These capabilities span the

three dimensions of the touchpoint framework. On the resource side, suppliers must be able to assess customers' digital readiness and prepare them to engage at digitalized touchpoints, while also aggregating data from different parts of the journey to create value at each interaction. On the action side, the challenge is threefold: enabling the customer organisation to act collectively rather than through disconnected individuals, providing contextually relevant support depending on where the customer stands in the journey, and knowing when to step back by allowing customers to take independent actions at certain touchpoints without requiring the supplier's direct involvement.

The environment dimension introduces a particularly nuanced challenge. B2B customer journeys rarely unfold in a single type of setting. Customers move between physical environments such as trade fairs or face-to-face meetings, proprietary digital platforms, and third-party digital spaces. Lundin and Kindström (2024) argue that suppliers should not strive to provide fully digital journeys but instead develop a portfolio of environments, combining digital and physical settings according to customers' preferences, and merging digital environments where actions and resources overlap across touchpoints controlled by different actors. The goal is to ensure that a customer can transition seamlessly from one touchpoint to the next, regardless of whether the environment is physical, digital, or hybrid.

Beyond the individual capabilities, Lundin and Kindström (2024) identify two overarching characteristics that emerge from digitalized touchpoint management: touchpoint sequencing, which refers to the need to approach touchpoints not as isolated interactions but as coherent sequences that ensure consistency and seamlessness across the journey; and touchpoint control, which concerns the supplier's ability to balance and prioritise which touchpoints it needs to control directly and which ones it can delegate to the customer or to third parties. Both characteristics have direct implications for the marketing-sales interface, as they require a coordinated approach to designing and managing the succession of interactions that lead from initial contact to qualified lead.

6.2.3 Capabilities for designing and steering the journey

Understanding the customer journey and its touchpoints is necessary but not sufficient. Organisations also need the capabilities to design and manage these journeys in a coherent and value-creating way. This section examines two complementary perspectives on what these capabilities look like: one from the consumer's perspective (what makes a journey design effective) and one from the supplier's perspective (what organisational capabilities are needed to manage journeys in B2B markets).

6.2.3.1 Customer journey design as an organisational capability

Kuehnl et al. (2019) address the question of journey design from the consumer's point of view. They define an effective customer journey design (CJD) as the extent to which consumers perceive multiple brand-owned touchpoints as designed in a thematically cohesive, consistent, and context-sensitive way. Their contribution lies in identifying the three dimensions that, from the buyer's perspective, determine whether a journey feels well-designed or fragmented.

Thematic cohesion refers to the extent to which consumers perceive multiple touchpoints as sharing a common brand theme or experience motif that connects the brand with a specific goal, lifestyle, or desire. A company whose touchpoints all reinforce the same core value proposition exhibits high thematic cohesion. Consistency refers to the extent to which the brand presents a uniform design

across its touchpoints in terms of visual language, communication messages, interaction behaviour, and navigation logic. It facilitates learning and recognition, allowing buyers to move through the journey without confusion. Context sensitivity refers to the extent to which touchpoints are perceived as responsive and adaptive to the buyer's specific goals, situational context, preferences, and activities. It enables personalised journeys suited to the individual buyer's circumstances and fosters perceptions of convenience, control, and risk reduction (Kuehnl et al., 2019).

Through a large-scale quantitative study involving 4,814 consumers across two countries and 42 brands, Kuehnl et al. (2019) demonstrate that an effective CJD has a significant positive influence on customer loyalty, operating through utilitarian brand attitudes. This means that consumers value not only the sensory or emotional experience at individual touchpoints (brand experience) but also the procedural quality of the journey itself: whether it feels organised, coherent, and responsive to their needs. The practical implication is that investing in the design of the journey as a whole can be as important as investing in the quality of individual touchpoints.

While this framework was developed in a consumer context, its relevance to B2B markets is clear. The three dimensions of CJD correspond directly to challenges observed in the marketing-sales interface: thematic cohesion requires that the message conveyed by marketing touchpoints is consistent with the narrative carried by sales interactions; consistency demands that the transition from a marketing-managed website to a sales-managed meeting does not feel disjointed; and context sensitivity requires that both functions adapt their interactions to the buyer's specific position in the journey. Kuehnl et al. (2019) themselves note that an effective CJD can facilitate cross-functional collaboration among departments responsible for different touchpoints.

6.2.3.2 Customer journey management in B2B contexts

While Kuehnl et al. (2019) capture what buyers perceive as effective journey design, Homburg and Tischer (2023) shift the lens to the supplier side and ask what organisational capability is needed to actually manage B2B customer journeys. They conceptualise B2B customer journey management capability (CJMC) as a supplier's ability to achieve superior customer value along the journey by strategically creating value-anchored touchpoints, implementing consistent resource usage across internal organisational boundaries, and continuously monitoring value creation toward individual members of the buying centre.

This capability is operationalised through four complementary dimensions. Value anchoring requires that every touchpoint along the journey is rooted in a transparent, strategically aligned customer value proposition. Consistency ensures that customer value is delivered uniformly across the number of touchpoints and channels from the buyer's perspective. Internal integration demands that touchpoints are functionally integrated across departments and channels to deliver seamless transitions. Individual control involves continuously monitoring touchpoint-related value creation toward the specific needs and roles of the corresponding buying centre members (Homburg & Tischer, 2023).

What makes Homburg and Tischer's (2023) contribution particularly relevant to this thesis is their examination of both the bright and dark sides of CJMC. On the bright side, CJMC drives customer loyalty by creating coherent, value-delivering journeys. On the dark side, it generates customer-related coordination costs: the effort required to align multiple departments, data sources, and processes around a shared journey inevitably increases organisational complexity. Through a

multisource dataset combining survey and archival data, the authors demonstrate that overall, the bright side outweighs the dark side, and CJMC has a significant and positive impact on firm performance measured as return on sales. However, they also find that nearly 80% of B2B suppliers fail to achieve the expected return on investment from their CJM initiatives, suggesting that developing the capability is necessary but not sufficient: it must be accompanied by the right organisational conditions.

The convergence between these two perspectives is striking. Kuehnl et al. (2019) show that buyers value journeys that are cohesive, consistent, and context-sensitive. Homburg and Tischer (2023) show that delivering such journeys in B2B markets requires a capability that spans value anchoring, consistency, internal integration, and individual control. Both perspectives point to the same conclusion: managing the customer journey is not a task that any single department can accomplish alone. It requires cross-functional coordination, shared metrics, and a common understanding of what value means at each touchpoint. This conclusion sets the stage for the third and final layer of this literature review, which examines the operational tools and systems through which organisations attempt to implement this coordination in practice.

6.3 Operational granularity

The first two layers established the conceptual architecture of the contact-to-lead process: the funnels that frame it, the customer journey that unifies it, the touchpoints that compose it, and the capabilities required to manage it. This third layer shifts the focus from concepts and capabilities to the operational tools and systems that make them work in practice. Rather than examining each technology in isolation, this section explores how marketing automation, CRM systems, and lead management tools embed themselves within the customer journey and support the progression from anonymous contact to qualified lead.

6.3.1 Marketing automation and content marketing in the customer journey

Content marketing and marketing automation are two closely intertwined operational mechanisms through which the marketing function populates the upper stages of the customer journey with relevant interactions. This section examines how content serves as a journey enabler and how automation transforms the way contacts are identified, nurtured, and qualified into leads.

6.3.1.1 Content marketing as a journey enabler

The growing influence of digital channels in B2B purchasing decisions has fundamentally changed the way buyers engage with suppliers. Järvinen and Taiminen (2016) note that B2B buyers now complete nearly 60% of a typical purchasing process before contacting a seller, relying heavily on online information sources to evaluate potential suppliers. This shift has given rise to content marketing, defined as the creation, distribution, and sharing of relevant, compelling, and timely digital content to engage customers at the appropriate point in their buying consideration process, encouraging them to convert to a business building outcome (Holliman & Rowley, 2014, as cited in Järvinen & Taiminen, 2016).

Within the customer journey framework, content marketing operates as the primary mechanism through which marketing creates touchpoints in the pre-purchase stages. Järvinen and Taiminen (2016) describe how content is developed in various formats (white papers, blog posts, webinars, newsletters, videos, social media updates) and distributed through multiple channels (search

engines, email, social media platforms, advertising) with the corporate website serving as the central hub. The purpose of this content is not to sell directly, but to attract suspects to the company's digital environment and motivate them to identify themselves by leaving contact information in exchange for access to valuable content. This act of self-identification represents the first concrete step in the contact-to-lead process: the moment at which an anonymous visitor becomes an identified contact.

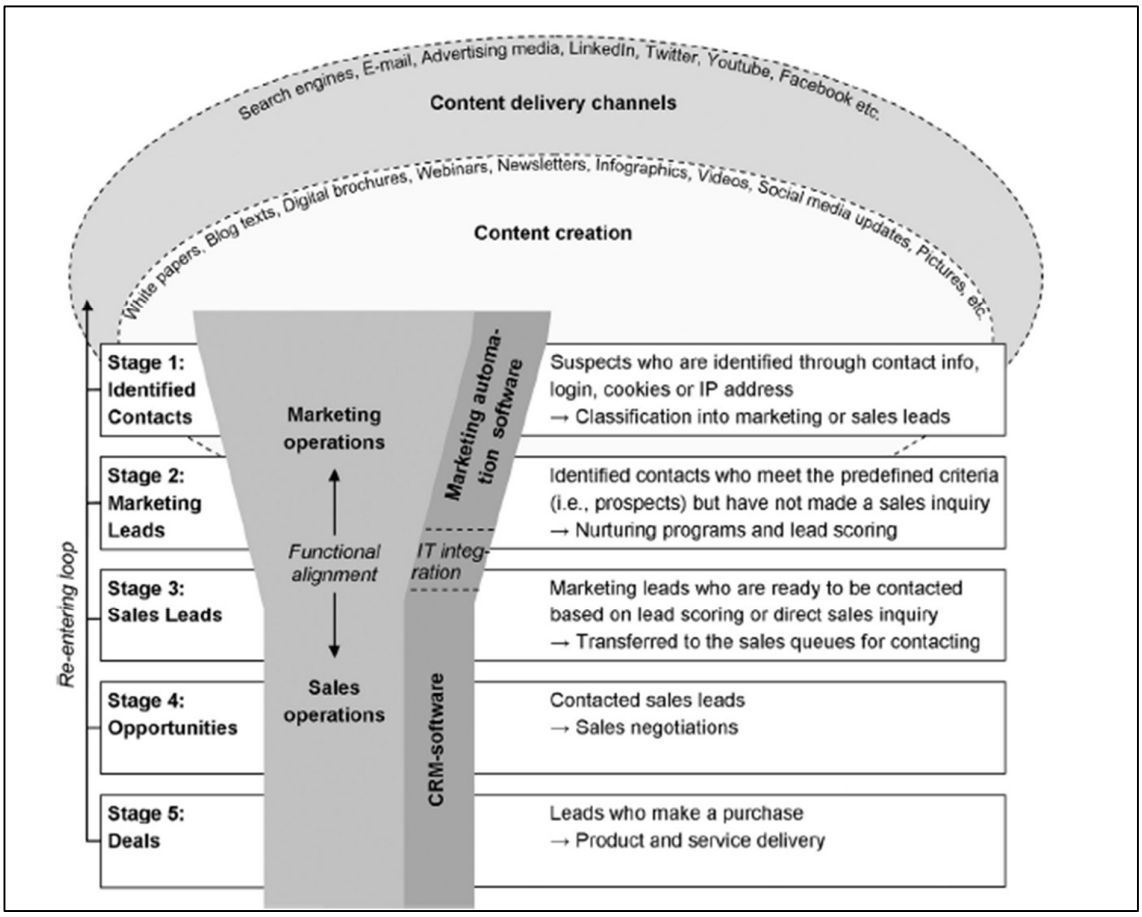


Figure 9 – Content within marketing-sales funnel (Järvinen and Taiminen, p170, 2016)

6.3.1.2 Marketing automation: from contact to qualified lead

Once a contact has been identified, the challenge shifts from attracting attention to qualifying intent. This is where marketing automation becomes central. Järvinen and Taiminen (2016) describe how the case company developed a joint marketing and sales funnel comprising five stages: identified contacts, marketing leads, sales leads, opportunities, and deals. Marketing automation software runs alongside this funnel, collecting behavioural data on each contact, tracking their online activity, scoring their engagement level, and triggering personalised content delivery based on their position in the funnel.

The transition from identified contact to marketing lead occurs when the contact meets predefined criteria, typically based on a combination of firmographic data (company size, industry, role) and behavioural signals (pages visited, content downloaded, frequency of engagement). Marketing leads are then nurtured through targeted content programmes designed to deepen their engagement and reveal their interests more precisely. The critical transition from marketing lead to sales lead, which

corresponds to the handoff discussed in Layer 1, occurs when behavioural scoring indicates that the contact has reached a threshold of engagement suggesting purchase readiness. At that point, the lead is transferred to the sales team's CRM system for direct follow-up (Järvinen & Taiminen, 2016).

What makes this process relevant to the customer journey framework is that it operationalises several of the concepts discussed in the previous layers. The content marketing strategy creates and manages touchpoints across the pre-purchase journey. The marketing automation system implements touchpoint sequencing (Lundin & Kindström, 2024) by ensuring that each contact receives content adapted to their current position. The lead scoring mechanism provides a concrete implementation of the lead qualification challenge identified by Monat (2011) and the marketing lead to sales lead distinction described by Järvinen and Taiminen (2016) themselves. In this sense, marketing automation is not merely a technology: it is the operational backbone of the contact-to-lead process.

6.3.2 CRM and social CRM as journey infrastructure

If marketing automation powers the upstream stages of the journey, CRM systems provide the infrastructure that supports the entire commercial process. This section examines how CRM and its social extension integrate into the customer journey by enabling data continuity across touchpoints and opening new channels for lead generation.

6.3.2.1 CRM and sales technology adoption

CRM technology has been defined as a systematic process to manage customer relationship initiation, maintenance, and termination across all customer contact points to maximise the value of the relationship portfolio (Reinartz et al., 2004, as cited in Ahearne et al., 2007). In the context of the customer journey, CRM systems serve as the shared data layer that ensures continuity as the buyer moves from marketing-managed touchpoints to sales-managed interactions. However, the value of this infrastructure depends on its adoption by the sales force.

Ahearne et al. (2007) demonstrate that IT acceptance by salespeople has a positive effect on sales performance, operating through three mechanisms: salespeople who integrate IT tools into their activities expand their knowledge, which in turn improves their targeting abilities, enhances their presentation skills, and increases their call productivity. Rapp et al. (2008) complement this finding by distinguishing between SFA and CRM usage. They show that SFA usage directly reduces effort (measured as hours worked) while CRM usage has a direct positive impact on adaptive selling behaviours, enabling salespeople to tailor their approach based on customer-specific information stored in the system. The implication for the customer journey is that CRM and SFA tools do not simply record interactions: they shape the quality of the touchpoints that salespeople deliver during the later stages of the journey, precisely where Koch and Hartmann (2023) showed that quality expectations are highest.

6.3.2.2 Social CRM and lead generation

Traditional CRM systems, while effective for managing existing relationships, have a notable limitation: they do not assist with the first and arguably most important step of the sales and marketing process, namely prospecting (Rodriguez & Peterson, 2012). Social CRM addresses this gap by integrating social media tools into the CRM framework, enabling organisations to engage potential buyers in two-way conversations rather than relying solely on outbound communication.

Rodriguez and Peterson (2012) describe how social CRM extends the traditional CRM workflow (campaigns → leads → opportunities → forecast) by adding an engagement layer. Through tools such as LinkedIn, Twitter, and webinars, B2B organisations can create content-driven conversations that attract prospects, build credibility within professional communities, and generate leads that would not have been captured through traditional outbound channels alone. The authors cite evidence that companies integrating social CRM into their existing CRM frameworks experienced improved customer feedback (78%), improved market reputation (64%), and increased sales (40%). Within the customer journey, social CRM operates at the intersection of marketing and sales: it creates touchpoints in digital social environments where both functions can engage potential buyers, blurring the functional boundary that the earlier layers described.

Lamrhari et al. (2022) extend this perspective by proposing an analytic framework for social CRM that integrates advanced data analysis techniques into the customer lifecycle. Their framework addresses three dimensions: customer retention, customer acquisition, and customer conversion. By combining topic modelling, sentiment analysis, and machine learning classification, the framework enables organisations to extract actionable insight from the large volumes of unstructured data generated on social media platforms. The contribution of social media to CRM manifests itself at the customer acquisition level by influencing the degree to which potential customers can engage with a company, at the retention level by maintaining long-term relationships through brand communities, and at the termination level by enabling proactive identification of at-risk customers (Lamrhari et al., 2022). For the contact-to-lead process, this analytical layer is significant because it provides the means to identify and qualify leads from social interactions that would otherwise remain invisible in traditional CRM systems.

6.3.3 Lead management and digital sales enablement

The final section of this literature review examines the operational systems that sit at the junction between marketing and sales: lead management systems and the broader digital transformation of the B2B sales process. These tools operationalise the handoff discussed in Layer 1 and the journey management capabilities described in Layer 2.

6.3.3.1 Lead management systems and sales performance

Ohiomah et al. (2019) investigate the impact of lead management systems (LMS) on inside sales performance. Their study, grounded in the technology-task-fit framework, demonstrates that the use of LMS affects performance through three mediating pathways: task characteristics (call quantity and lead follow-up intensity), selling behaviour (adaptive selling), and salesperson characteristics (technical and salesmanship skills). Together, these variables explain over half of the variance in sales performance. The central finding is that LMS usage improves salespeople's ability to follow up on leads more intensively and to adapt their selling approach based on lead-specific information, both of which contribute to higher conversion rates.

This finding connects directly to the sales lead black hole identified by Sabnis et al. (2013) in Layer 1. If 70% of marketing leads are never contacted by sales reps, part of the explanation lies in the absence of adequate systems to manage, prioritise, and route those leads. Ohiomah et al. (2019) provide evidence that when such systems are in place, they not only increase the quantity of follow-up but also improve its quality through better adaptive selling. In terms of the customer journey, LMS

tools ensure that the transition from marketing lead to sales lead does not result in a loss of momentum or information, preserving the continuity of the buyer's experience across the handoff.

6.3.3.2 Customer acquisition

The contact-to-lead process is ultimately a customer acquisition process. Yet the academic literature has devoted disproportionate attention to customer retention at the expense of acquisition (D'Haen & Van den Poel, 2013; Ang & Buttle, 2006). This imbalance is problematic: startups and companies entering new markets need new customers because they lack existing ones, and even established firms in mature markets will inevitably lose customers and must replace them (D'Haen & Van den Poel, 2013).

D'Haen and Van den Poel (2013) contribute to this area by proposing a standardised customer acquisition framework structured around the sales funnel: suspects, prospects, leads, and customers. Their key insight is that this process is iterative, not static. Each cycle of acquisition generates feedback that refines the next: the successes and failures at each stage fine-tune the overall selection process. Their model uses the current customer base to predict which suspects are most likely to become prospects, then integrates feedback from conversion outcomes to improve subsequent predictions. Preliminary tests show a prospect-to-lead conversion rate of 15.73%, above the commonly cited 10% average. The authors note that approximately 20% of a sales representative's time is spent selecting prospects and that prospecting remains the most cumbersome part of the selling process, reinforcing the need for model-supported approaches (D'Haen & Van den Poel, 2013, citing Moncrief & Marshall, 2005).

A critical dimension that is often overlooked in acquisition research is the link between how a customer is acquired and how long that customer is retained. Thomas (2001) demonstrates that the customer acquisition process and the customer retention process are not independent. Using a Tobit model with selection, she shows that the manner in which customers are acquired, including the marketing tactics used during their first interaction with the firm, significantly influences the duration of their subsequent relationship. The correlation between the acquisition and retention processes was significant across both customer segments in her study. In practical terms, this means that decisions made during the contact-to-lead process have consequences that extend far beyond the initial conversion: the quality of the acquisition shapes the lifetime value of the customer.

Despite this strategic importance, Ang and Buttle (2006) find that firms are generally not skilled at managing the customer acquisition process. Their survey reveals that less than half of the companies studied have a dedicated customer acquisition plan, and the only variable that consistently distinguishes companies that excel at acquisition is the presence of a dedicated budget for these activities. Other variables, such as the presence of an executive responsible for acquisition, an understanding of the economics of acquisition, and the deployment of CRM technologies, were not associated with excellence. This finding suggests that while the tools and frameworks for effective acquisition exist, as demonstrated by D'Haen and Van den Poel (2013) and Thomas (2001), their adoption remains uneven, leaving the contact-to-lead process without strategic direction in many organisations.

6.3.3.3 Digital transformation of the B2B sales process

Mukhopadhyay et al. (2025) examine the broader digital transformation of B2B sales by investigating how firms deploy dynamic sales enablement capabilities into practice. They conceptualise sales

enablement as a cross-functional, organisation-wide initiative that aligns various firm resources to benefit both the customer journey and selling productivity. Their research identifies three key components of sales enablement as a dynamic capability: insight triangulation (combining data from multiple sources to inform selling decisions), enablement infrastructure (the systems and processes that support salespeople), and sales support development (the ongoing development of tools, training, and content that equip the sales force).

The relevance of sales enablement to the customer journey lies in its cross-functional nature. Unlike traditional sales training or technology implementation, sales enablement explicitly aims to bridge marketing and sales by ensuring that the content, data, and tools generated by marketing are accessible and usable by the sales force at the point of customer interaction. Mukhopadhyay et al. (2025) emphasise that integrated marketing automation and CRM platforms provide shared visibility into the sales pipeline, enable real-time data sharing, and support coordinated lead nurturing. These systems help break down the traditional silos between marketing and sales, allowing for a unified view of the customer journey that extends from the first digital touchpoint to the closing of a deal.

An alternative perspective on sales process optimisation is offered by Barber and Tietje (2008), who apply the concept of value stream mapping (VSM), borrowed from lean manufacturing to the sales process. They conceptualise sales as a process in which a buyer and seller jointly participate in creating value and demonstrate through case studies that a majority of both the buyer's and the seller's time is devoted to activities that do not add value. Their analysis reveals that only 7% to 22% of the total consumption time and 8% to 38% of the provision time in the studied sales processes could be classified as value-added. By mapping these processes and identifying waste, firms can redesign their sales activities to eliminate unnecessary steps, reduce waiting times, and shift the focus from selling to helping customers buy. While VSM has not yet been widely adopted in sales contexts, it offers a complementary lens to the technology-driven approaches discussed above: rather than adding tools, it asks which activities within the existing process actually create value for the customer.

6.4 Integrative section

This literature review has examined the contact-to-lead process through three progressively focused layers. The first layer established the foundational constructs on both sides of the commercial process. On the marketing side, the buying funnel provides a century-old framework for understanding how buyers progress through stages of engagement, from initial awareness to purchase decision. On the sales side, the selling process has evolved from a sequential, dyadic model toward a systemic and relational approach involving multiple actors. Between the two sits the lead, a concept that is operationally central to every B2B organisation yet remains surprisingly under-theorised, with no unified definition or validated characterisation framework in the academic literature. The first layer also revealed that the handoff of leads from marketing to sales is a critical failure point, with a large proportion of marketing-generated leads never being followed up.

The second layer shifted the perspective from separate funnels to shared territory. The B2B customer journey emerged as the unifying framework through which marketing and sales can be understood as collaborators rather than sequential operators. This journey is non-linear, multi-actor, and embedded in long-term business relationships. Its building blocks, touchpoints, vary in nature and quality across the journey, with early-stage touchpoints serving primarily to generate awareness and

later-stage touchpoints demanding higher quality to influence purchase decisions. Managing this journey effectively requires organisational capabilities that span design, consistency, and cross-functional coordination, and the literature shows that the degree of marketing-sales alignment directly conditions how well these capabilities can be deployed.

The third layer examined the operational tools that make this collaboration concrete. Marketing automation and content marketing operationalise the upper stages of the journey by creating touchpoints, identifying contacts, and nurturing them toward qualification. CRM and social CRM provide the data infrastructure that ensures continuity across the journey and opens new engagement channels. Lead management systems support the conversion process by improving follow-up intensity and selling behaviour. Customer acquisition, despite being a strategic imperative, remains under-resourced and under-planned in many organisations, and the way customers are acquired directly shapes how long they are retained. Sales enablement connects these elements by ensuring that the content, data, and tools generated by marketing are accessible and usable by sales at the point of customer interaction.

Several gaps emerge from this review. The definition and characterisation of leads lacks theoretical consensus, making the handoff between marketing and sales inherently ambiguous. The customer journey literature has been developed predominantly in consumer contexts, and its transposition to B2B markets, while promising, is still in its early stages. The operational tools examined in the third layer are often studied in isolation, with limited research on how they interact as an integrated system within a single organisation. Finally, while the literature provides strong frameworks for understanding the contact-to-lead process conceptually, empirical investigations of how this process unfolds in specific B2B contexts remain scarce. The following chapter addresses this gap by applying the theoretical framework developed here to the specific context under study.

7 Methodology

7.1 Research approach

This thesis adopts a mixed-methods research design, combining a qualitative study with a quantitative analysis of EVS's internal process data. The qualitative component captures the perceptions, experiences, and mental models of the individuals involved in the contact-to-lead process, while the quantitative component grounds these findings in concrete operational metrics. Together, the two layers allow for triangulation, strengthening the validity of findings by cross-referencing subjective accounts with empirical evidence drawn from the same organisational context.

7.2 Research question

The central research question guiding this thesis is: How can the contact-to-lead process be optimised to improve B2B prospect conversion at EVS Broadcast Equipment?

7.3 Qualitative study

7.3.1 Rationale for qualitative research

A qualitative approach was selected because the contact-to-lead process at EVS does not exist as a single documented workflow. It emerges from the interactions and practices of four distinct departments. Semi-structured interviews were chosen as the data collection format because they offer the flexibility to follow the natural flow of a conversation while maintaining thematic consistency across respondents and allow the interviewer to adapt the depth of questioning to each respondent's profile.

7.3.2 Interview guide construction

The interview guide was built in two stages. The first drew from the literature review, which highlights that the contact-to-lead process is inherently fragmented and distributed across multiple departments, each contributing to a distinct stage of the process. This framing directly shaped the structure of the guide: rather than approaching the process as a single topic, each interview block was anchored to the specific contribution of one department, covering campaign briefing, lead generation, lead management, and lead reception. The second stage grounded the guide in EVS's operational reality, mapping all four functional teams against all five blocks to ensure the full process was covered from start to finish in a single conversation, producing a transversal view rather than a set of siloed departmental accounts.

7.3.3 Interviewee selection

Interviewees were selected through purposive sampling to achieve transversal coverage of the process. The sample of 11 participants spans all **four teams involved**: three Product Marketing Managers from Market & Solutions, four Marketing SET members covering strategic, digital, omnichannel, and content functions, two Area Sales Managers covering different geographies, and the Sales Development Representative and Sales Enablement Manager. This composition ensures

that each handoff moment between teams is represented from both sides and captures multiple seniority levels across different product lines and geographies.

7.3.4 Data collection

Interviews were conducted between April and May 2026, each lasting approximately 45 minutes. Seven took place online via Microsoft Teams with automatic transcription, and four were conducted in person with audio recording. The language was adapted to each respondent's preference, English for four participants and French for seven. Transcripts were reviewed and corrected before analysis, and one was partially reconstructed due to a transcription gap.

7.3.5 Data analysis

The qualitative data was analysed using a **matrix-based approach**[2]. Each transcript was first analysed individually through a vertical analysis, producing a structured profile covering the five thematic blocks of the interview guide. These profiles, presented in the annexes, capture how each respondent organised their answers and which themes were most prominently addressed.

A horizontal analysis was then conducted across all 11 interviews, comparing responses theme by theme to identify convergences, divergences, and patterns across the full sample. This cross-interview reading constitutes the core of the analytical work and forms the basis of the results chapter.

7.3.6 Limitations

Several limitations must be acknowledged. First, the interviewer is an internal member of the Marketing team at EVS, which may have influenced both the framing of questions and the candour of respondents. Conscious effort was made to maintain a neutral, non-directive tone throughout each interview. Second, the sample of 11 participants, while transversal, remains limited in size and scope, as no external stakeholders were included. Third, the use of two languages across interviews introduces a risk of interpretive inconsistency, which was mitigated through careful transcript review. Finally, one transcript was partially reconstructed due to a transcription gap, which may have resulted in a loss of nuance for that respondent.

7.4 Quantitative analysis

7.4.1 Rationale for a quantitative complement

While the qualitative study captures perceptions and structural tensions within the contact-to-lead process, it does not measure the actual evolution of performance over time. A quantitative complement was therefore added to ground the findings in operational data, assess the impact of the changes introduced during a defined period and identify patterns that interviews alone cannot reveal.

7.4.2 Pre-Post analysis framework

The quantitative analysis follows a pre-post design, using September 2024 as the pivotal moment. The pre-period covers the years prior to this date, and the post-period runs from September 2024 to

[2] Annex 14

April 2026. This structure allows for a direct comparison of key performance indicators before and after the strategic and operational changes introduced across the contact-to-lead process.

7.4.3 Data Sources and Scope

The analysis draws on two complementary data streams, reflecting the funnel logic of the process itself. The first covers digital campaign performance on LinkedIn Ads and Google Ads, capturing the contact generation stage. The second covers CRM data extracted from Microsoft Dynamics 365, capturing the lead management and conversion stage. Together, these two streams mirror the structure of the contact-to-lead process as defined in this thesis, from the first digital touchpoint to the qualification of a lead ready for sales. Both streams are analysed over the same reference periods to ensure comparability. Email campaign data was excluded due to a platform migration from Customer Insights to Real-Time Journeys during the study period, which introduced significant inconsistencies in the historical data.

7.4.4 Limitations

Several limitations must be acknowledged. CRM data quality prior to 2021 is inconsistent, with a large share of leads marked as obsolete and limited source attribution. The pre-post comparison therefore focuses on the 2021 to August 2024 period for the CRM analysis. Additionally, campaign data covers platform-reported metrics only and does not account for view-through or offline conversion paths. Finally, as with any pre-post design without a control group, causal claims must be made with caution, as the observed improvements reflect a combination of strategic changes, market conditions, and organisational maturation that cannot be fully disentangled.

8 Practical case

8.1 Qualitative study

8.1.1 Study results

The results are presented following the structure of the interview guide, from the general understanding of the lead through to its reception by the sales team. Each section draws on the horizontal analysis of the 11 interviews and is supported by representative verbatims translated into English.

8.1.1.1 The lead: Central but inconsistent point

The lead sits at the heart of the contact-to-lead process as the handoff point between Marketing and Sales. As highlighted in the literature review, no universal consensus exists around what constitutes a lead in a B2B context, and the gap between marketing-oriented and sales-oriented definitions is a well-documented source of organisational friction. The interviews conducted at EVS confirm this dynamic in a company-specific form.

Every respondent offered a different understanding of what constitutes a lead, and these differences follow a clear departmental logic. Respondents from Marketing and Market & Solutions tend to define a lead as any contact showing a signal of interest, however early. One PMM described it as "any click of interest" that should trigger a follow-up, arguing that the threshold should be as low as

possible. The VP Marketing similarly defines a lead as any person who has directly or indirectly demonstrated a purchase possibility, encompassing broad top-of-funnel signals.

Sales profiles, by contrast, expect a higher level of readiness. Both Area Sales Managers describe a lead as an early-stage contact where a problem has already been identified. The Sales Enablement Manager is the most explicit, stating that buying intent is a mandatory criterion before a lead is actionable by her team.

This divergence is structurally consequential. When a PMM briefs a campaign with the objective of generating leads, and the Sales Enablement team receives those leads expecting buying intent, the mismatch produces friction at every handoff. As one PMM noted, the inconsistency is particularly visible when comparing trade show scans, universally accepted as leads at EVS, with email click-throughs, which are not, despite representing a more deliberate and traceable signal of interest. The Sales Enablement Manager herself acknowledged the historical extent of the problem, noting that three years ago "everyone who had any interaction with EVS was considered a lead," a practice that generated volume without actionability. The progress made since is real, but a common operational definition remains absent.

8.1.1.2 Campaign briefing: Functional process constrained by silos

The campaign briefing process has evolved significantly over the past two to three years. Prior to recent structuring efforts, campaigns were largely opportunistic, triggered by product releases without a formalised brief. Today, all three PMMs describe a PowerPoint-based briefing format covering campaign goals, target audiences, expected deliverables, and KPIs. Several respondents credit the arrival of the VP Marketing with introducing more rigour into the process, particularly around campaign-type expectations and alignment between PMMs and the Marketing team.

However, 9 out of 11 respondents identify the silo-based structure of EVS as the primary constraint on briefing effectiveness. Each solution unit plans its campaigns independently, without prior coordination with the other units. The result, as one PMM put it, is that "we drop all our campaign plans into the monthly meeting and Marketing says: we are six people, how do you think we're going to manage that?" The Marketing team is consistently overloaded with requests that cannot be absorbed at the current team size, while customers receive overlapping communications from different solution units with no coherent market narrative.

The preferred solution, raised by multiple respondents across both PMM and Marketing groups, is a transversal approach to campaign planning: joint campaigns built across solution units before a brief is submitted, targeting market applications rather than individual product lines. This would reduce volume, increase relevance, and better reflect how customers experience EVS as a whole.

Sales input into the briefing phase is also consistently flagged as insufficient. While Sales Enablement is always included, direct sales involvement is rare and described as counterproductive when it does occur — involving the full sales team tends to generate conflicting opinions with no clear decision outcome, lengthening the process without adding strategic value. The preferred model, supported by both PMM and Marketing respondents, is to treat sales input as field intelligence channelled through the Sales Enablement team rather than as a direct voice in campaign design.

8.1.1.3 Lead generation: No process to a functioning machine

Three years ago, as one PMM noted, there was effectively no lead generation engine at EVS. Campaigns existed, but they were not connected to a systematic lead capture and qualification process. The situation has since changed substantially. A CRM-linked lead entry process now exists, gated content strategies have been introduced, and the SDR team has been created to handle lead qualification.

Despite this progress, the lead generation process at EVS remains largely manual, and 8 out of 11 respondents identify automation as the most urgent improvement lever. The absence of automated follow-up sequences means that leads generated by campaigns are processed individually by the SDR team, creating a bottleneck that limits the volume of leads that can be handled at any given time. One PMM described the current situation as a system that defaults to rejection criteria because the manual workload makes it impractical to follow up on everything.

The question of what should trigger lead creation divides respondents along the same lines as the definitional gap identified in the previous section. Marketing and M&S profiles favour a low-threshold approach, where any meaningful digital interaction should enter the CRM and initiate a qualification sequence. Sales-oriented profiles are more conservative, preferring a confirmed verbal contact before a lead is formally opened. A practical convergence point emerges from several interviews: the threshold for lead creation should remain low, but the follow-up protocol should be tiered proportionally to the strength of the signal. A click triggers an automated nurturing sequence; a form submission triggers an SDR call.

The form design debate reflects this tension directly. Across the sample, there is strong agreement that fewer fields reduce dropout rates and improve lead volume, with one PMM recommending a maximum of four fields and prioritising speed of contact over information richness. The most widely supported resolution is adaptive form design, where the level of information requested varies by solution and market segment, with more complete forms for mature high-value solutions and minimal friction forms for emerging solutions targeting new market segments.

8.1.1.4 Lead management: Operational gaps in a process under construction

Lead management represents the stage of the contact-to-lead process where the most significant improvement opportunities have been identified across the 11 interviews. Once a lead enters the CRM, the current workflow follows a structured manual sequence managed by the SDR team: an initial email, a follow-up call if there is no response, and either a meeting or a disqualification. While this process represents a clear step forward compared to the absence of any structured approach three years ago, several gaps remain, particularly around automation, nurturing, and data governance.

The absence of nurturing for unready leads is the most widely shared pain point in the sample. A contact who showed interest but is not ready to purchase today may become a qualified lead in six months, especially in a B2B context where buying cycles stretch over years. Several respondents advocate for an automated reactivation sequence triggered by disqualification reason: a timing issue should produce a scheduled re-engagement, and a budget constraint should produce a content-based nurture sequence rather than a closed record.

The information a lead should contain at the point of CRM entry is another area of convergence. The market application, whether a prospect operates in stadium production, outside broadcast, news production, or corporate media, is identified by 7 out of 11 respondents as the single most important routing signal. It determines the follow-up angle, the relevant product line, and the appropriate sales profile. Budget, by contrast, is considered a disqualification criterion by some but a nice-to-have by most, with several PMMs arguing explicitly that unknown budget should not prevent follow-up.

CRM data quality is flagged as a foundational blocker by 9 out of 11 respondents. The reliability of the entire lead management process depends on the consistency of data entry, and the current state of the CRM is described as insufficiently governed to support any form of automated processing. One PMM with prior experience on a dedicated marketing automation platform noted that a lead scoring framework and automated thresholding are only achievable once data quality is treated as a structural priority rather than an individual responsibility.

8.1.1.5 Lead reception and cross-bucket communication: Structurally incomplete loop

When a lead reaches the sales team, it should carry enough context to allow the sales representative to open a relevant conversation without starting from scratch. This expectation is shared across all respondent profiles. In practice, however, both Area Sales Managers describe receiving leads through the CRM with limited context beyond basic contact information, leaving them dependent on the SDR's notes and their own prior knowledge of the account.

The relationship between the four teams involved in the process is described as uneven. The link between Marketing SET and Sales Enablement is the strongest, described by the Sales Enablement Manager as operating as one with shared dashboards and regular syncs. The link between Market & Solutions and Marketing is functional but structured primarily around the monthly marketing committee, which 6 out of 11 respondents describe as useful but incomplete. The weakest link is the direct connection between the upstream teams and the Sales bucket: sales representatives are not systematically included in the monthly committee, their feedback reaches Marketing exclusively through the Sales Enablement Manager, and their formal input into the process is limited to quarterly business reviews.

This structural gap has a concrete consequence for marketing measurement. When a campaign generates a lead that matches an account already in the pipeline, the lead is currently disqualified as "opportunity already exists" and disappears from marketing dashboards. As a result, the marketing contribution to that account is invisible. Several respondents, including the VP Marketing and two PMMs, identify this as a significant reporting gap, and advocate for distinguishing between direct attribution, where a lead opens a new opportunity, and contribution, where a lead feeds an existing one. This distinction is foundational for any future nurturing and pipeline influence strategy and will be further explored in the quantitative section of this thesis.

8.2 Quantitative analysis

8.2.1 Study results

The quantitative analysis follows the funnel logic of the contact-to-lead process, moving from the first digital touchpoint to the qualification of a lead in the CRM. Results are presented in two complementary layers: digital campaign performance on LinkedIn Ads and Google Ads, capturing the contact generation stage, and CRM data extracted from Microsoft Dynamics 365, capturing the lead management and conversion stage. Both layers are read through a pre-post lens, with September 2024 as the pivotal moment.

8.2.1.1 Digital campaign performance – Linkedin ads

Prior to 2024, EVS's LinkedIn presence was limited to sporadic post boosts tied to trade show moments, with no coherent campaign architecture across solutions or funnel phases. No consolidated performance view existed, making it impossible to assess the combined impact of activities on lead generation. The number of active ads across both platforms stood at 214, reflecting an artisanal rather than strategic approach to paid media.

The post-September 2024 period tells a markedly different story. One of the most significant evolutions has been the introduction of a unified performance dashboard consolidating LinkedIn metrics into a single view. Figure X below illustrates this dashboard as it stood in 2025, reflecting both the maturity of the reporting infrastructure and the volume of activity it now tracks.

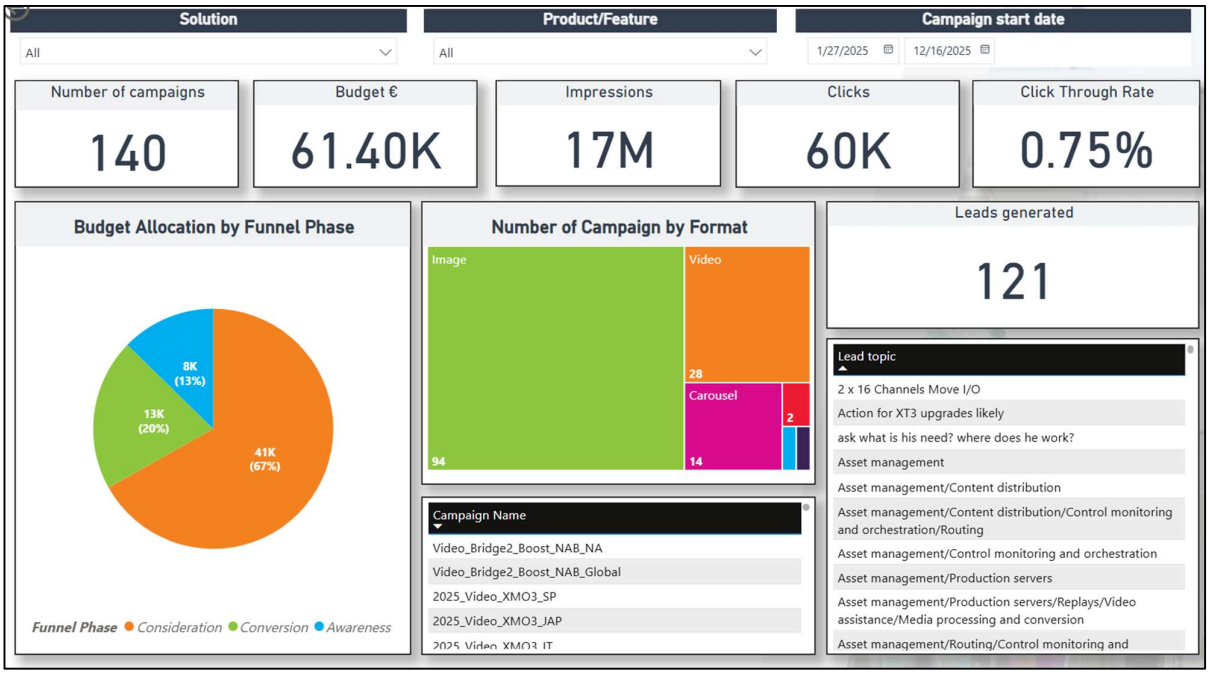


Figure 10 – 2025 Digital linkedin campaign metrics dashboard (EVS internal data)

Total LinkedIn investment grew by 74% over a shorter period, driven by a fundamentally different operating model. The number of active ads grew from 214 to 574, a multiplication by 2.7, reflecting the professionalisation of content production and the introduction of a structured campaign architecture organised by solution, funnel phase, and objective. Impressions grew from 3.5 million to

16.8 million, a multiplication by 4.7, driven by a deliberate shift towards awareness and video formats that generate reach rather than direct clicks. The number of leads generated grew from 36 to 121, a 236% increase, with the cost per lead on conversion-focused campaigns dropping by approximately 48%. Critically, pre-2024 leads were almost entirely concentrated on a single initiative, whereas post-2024 leads are distributed across multiple solutions and funnel phases, reflecting a more diversified and deliberate approach.

Metric	Pre (2021-Sept 2024)	Post (Sept 2024-Apr 2026)	Evolution
Total Spend (EUR)	€35,199	€61,396	**+74%**
Impressions	3,546,129	16,801,669	**+374%**
Clicks	13,540	60,245	**+345%**
Leads generated	36	121	**+236%**
Cost per Lead (conversion campaigns)	€978	€507	**-48%**
Active Ads	214	574	**+168%**

Table 2 – Linkedin Ads Pre-Post analytics

8.2.1.2 Digital campaign performance – Google ads

Google Ads activity prior to 2024 was dispersed across 28 campaigns, primarily search-focused and tied to punctual product launches. Over a near-flat budget, the post period reflects a clear strategic shift. The number of campaigns dropped from 28 to 12, moving away from short-term tactical activations towards longer-term always-on strategies. Video was placed at the heart of the awareness approach, contributing to an explosion in impressions from 4 million to over 19 million at equivalent spend. This shift mirrors the LinkedIn strategy and confirms a broader organisational move towards top-of-funnel influence as the foundation of the contact-to-lead process.

Metric	Pre (up to Sept 2024)	Post (Sept 2024-Apr 2026)	Evolution
Total Spend (EUR)	€15,824	€17,633	+11%
Impressions	4,022,251	19,444,948	+383%
Active Campaigns	28	12	Rationalised
Campaign Types	Search, Video	Search, Video, Demand Gen	Always-on strategy

Table 3 – Google Ads Pre-Post analytics

8.2.1.3 CRM Performance: A shift from volume to quality

The CRM analysis focuses on the 2021 to August 2024 period as the pre-benchmark, and the September 2024 to April 2026 period as the post. Table 3 below presents the key performance indicators across both periods.

Metric	Pre (2021-Sep 2024)	Post (Sept 2024-Apr 2026)	Notes
Total leads	20,502	3,650	Deliberate volume reduction
Qualified leads	111 (0.54%)	129 (3.53%)	x6.5 improvement
Opp. already exists	1,395 (6.8%)	746 (20.4%)	Signal of CRM-based targeting
Top lead source	Tradeshow / Obsolete	Tradeshow + Website	Digital sources emerging
Website leads	56	952	+1,600%
Paid Media leads	0	151	New structured source
Dealfront leads	13	166	Data-driven prospecting

Table 4 – CRM Lead performance: Pre vs Post

The most visible transformation is the shift from volume to quality. The pre-period generated 20,502 leads over approximately three and a half years. The post-period generated 3,650 leads over twenty months, a fivefold reduction in volume. This reduction reflects deliberate control over lead entry points: data quality rules were tightened, non-relevant sources were excluded, and the SDR qualification workflow was professionalised. The Sales Enablement Manager confirmed this trajectory during the qualitative study, noting that the team moved from processing thousands of unfiltered contacts to a structured intake with clear source attribution and routing logic.

The qualification rate reflects the impact of this shift directly. In the pre-period, 0.54% of leads reached qualified status. In the post-period, this rate rose to 3.53%, a multiplication by 6.5. Figure 12 zooms in on January to April 2026, where of the approximately 560 leads that had been fully processed, 54 reached qualified status, representing a conversion rate of approximately 10% on treated leads. This trajectory suggests that the improvements introduced throughout the study period are beginning to produce measurable outcomes at the end of the funnel.

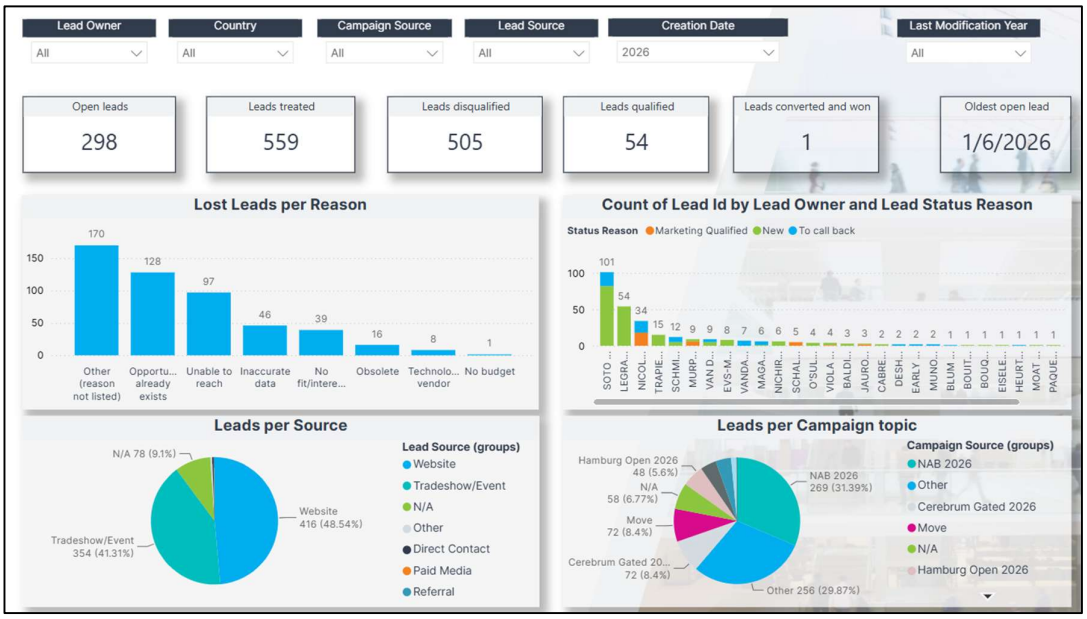


Figure 11 – 2026 CRM Lead management dashboard (EVS internal data)

Beyond the volume and qualification dynamics, the data reveals a structural shift in how leads enter the pipeline. In the pre-period, the lead source landscape was dominated by trade shows and a large share of obsolete or unattributed records, with digital channels playing a marginal role. Website leads stood at only 56, Paid Media was absent as a structured source, and Dealfront contributed just 13 leads. The post-period tells a fundamentally different story. Website leads grew to 952, Paid Media emerged as a new structured source with 151 leads, and Dealfront contributed 166 leads. Together, these digital sources now represent a significant and measurable share of total pipeline input, confirming that the contact-to-lead process has progressively shifted from an event-driven model to a digitally anchored one.

A particularly telling indicator is the evolution of the "opportunity already exists" disqualification reason, rising from 6.8% in the pre-period to 20.4% in the post-period. Rather than signalling a process failure, this shift reflects the growing proportion of campaigns built from CRM-sourced audiences. When targeting is constructed around existing accounts and known pipeline contacts, it is expected and strategically desirable that a share of generated leads will match active opportunities. This is the operational expression of the distinction between attribution and contribution introduced in the qualitative section: a lead that opens a new opportunity represents direct attribution, while a lead that re-engages a contact already in the pipeline represents marketing contribution. The growth of this second category signals that EVS's campaigns are increasingly influencing the pipeline rather than simply feeding it from scratch and opens the door to a more structured nurturing strategy targeting contacts at the opportunity stage.

9 Discussion

The following discussion interprets the findings of both the qualitative and quantitative studies in light of the theoretical framework established in the literature review. Rather than restating results, its purpose is to contextualise them, identify patterns that transcend individual observations, and connect empirical evidence to broader academic insights. The discussion is organised around six thematic axes, each following the same evolutionary logic: the situation that existed before the internship period, the changes introduced during it, and the directions that the evidence suggests pursuing next. Together, these axes trace the trajectory of the contact-to-lead process at EVS from an informal and fragmented set of practices toward a structured, data-driven, and increasingly automated commercial workflow.

9.1 Mapping the Contact-to-Lead Process

The literature review established that the contact-to-lead process is, by nature, a fragmented and distributed construct. As the integrative section highlights, the handoff of leads from marketing to sales represents a critical failure point, with a large proportion of marketing-generated leads never being followed up. One structural reason for this failure is the absence of a shared process map: when no single actor holds a complete view of the end-to-end workflow, bottlenecks accumulate silently and accountability dissolves at the boundaries between teams.

At the outset of this internship, this was precisely the situation at EVS. The contact-to-lead process existed in practice but not on paper. Each team operated within its own segment of the funnel without a transversal view of how the stages connected, where handoffs occurred, or where value was being lost. The qualitative study confirmed this: 9 out of 11 respondents identified silo-based operation as the primary constraint on process effectiveness, and several described a situation in which campaigns were launched, leads entered the CRM, and the downstream outcome remained invisible to those who had initiated the activity.

The response to this gap has been a progressive cartography of the process. Over the course of the internship, the Marketing team's contact-to-lead workflow was fully mapped using a BPMN framework, identifying each entry point, each qualification step, each routing decision, and each handoff moment. This mapping exercise served two functions simultaneously: it made the process auditable for the first time, and it created a shared reference point around which cross-functional conversations could be structured. The literature on value stream mapping in B2B sales contexts supports this approach, noting that visualising the flow of value across commercial stages is a necessary precondition for identifying where waste and friction accumulate. The logical next step is to extend this cartography to the remaining three teams, completing the transversal picture that the literature identifies as a prerequisite for genuine process optimisation.

9.2 Lead definition

The absence of a shared lead definition is one of the most persistent sources of friction in B2B commercial organisations. As the literature review established, no unified definition of the lead exists in the academic literature, and the gap between what marketing considers a lead and what sales expects to receive is a well-documented structural tension. The qualitative study confirmed this dynamic in full at EVS: every respondent offered a different understanding of what constitutes a lead,

with marketing-oriented profiles favouring a low threshold and sales-oriented profiles requiring a demonstrated buying intent before considering a contact actionable.

A first concrete step toward resolving this tension has been taken during the internship period, through a co-construction effort between Marketing and Sales. The resulting definition, "a lead is any organisation or individual expressing interest in EVS's services, products, or solutions, originating from multiple sources and requiring follow-up to assess its commercial potential," is notable for two reasons. First, it is deliberately broad enough to accommodate the low-threshold logic of marketing-generated contacts while explicitly requiring a follow-up assessment, which anchors the sales-side expectation of qualification. Second, and more importantly, it was built jointly rather than imposed by one function on the other. Kotler et al. (2006), as referenced in the literature review, identify the establishment of a common language around the lead as one of the defining characteristics of the transition from an undefined to a defined marketing-sales relationship. EVS has taken this step.

The next challenge is adoption. A definition that exists in a document but is not operationalised in CRM workflows, campaign briefs, and SDR protocols has limited impact. The literature suggests that shared definitions only produce alignment when they are embedded in formal structures such as service-level agreements and qualification criteria that both functions actively monitor. This is the direction the process must now move.

9.3 Marketing automation

The literature review identifies marketing automation as the operational backbone of the contact-to-lead process. Järvinen and Taiminen (2016) demonstrate how automation software enables the classification of contacts into marketing and sales leads, triggers personalised nurturing sequences based on behavioural signals, and transfers qualified leads to the CRM system without manual intervention. This level of automation represents the operational ideal toward which EVS is progressively moving, but from a starting point that was, until recently, entirely manual.

At the outset of the internship, every step of the lead management process at EVS required human intervention. Leads entering the CRM through any source triggered no automatic response. The SDR team processed contacts individually, with no system-level support for prioritisation, routing, or follow-up sequencing. The qualitative study confirmed this: 8 out of 11 respondents identified automation as the most urgent improvement lever, and the SDR described the current workflow as one that defaults to rejection criteria simply because the manual workload makes it impossible to follow up on everything.

The current phase marks the first concrete step toward automation. A Zapier integration is being explored and implemented as an intermediary layer between EVS's existing CRM and its digital touchpoints, enabling automated responses to be triggered at each lead entry point. This approach mirrors what the literature describes as the first stage of marketing automation adoption: connecting existing systems before replacing them, and building automation logic incrementally around the existing data infrastructure. Simultaneously, CRM-triggered email sequences are being mapped for each lead source, with the objective of ensuring that every contact receives a relevant, timely response before any SDR intervention occurs, thereby reducing lead speed time and friction at the point of entry.

The ultimate direction is clear. As Järvinen and Taiminen (2016) show, mature marketing automation does not simply accelerate existing manual processes — it transforms the role of marketing from a tactical executor to a strategic qualifier, able to deliver sales-ready leads to the SDR team with full behavioural context attached. EVS is at the beginning of this trajectory, but the infrastructure decisions being made now will determine how quickly that maturity can be reached.

9.4 Touchpoints and User Experience

The literature review, drawing on Lundin and Kindström (2024), establishes that managing digitalised touchpoints in B2B contexts requires specific organisational capabilities, and that the number and diversity of touchpoints tends to increase as firms introduce digital technologies. In a context where prospects may never interact with a sales representative before forming a strong opinion about a supplier, the quality and sequencing of digital touchpoints is not a peripheral concern but a core commercial capability.

At EVS, the touchpoint landscape prior to the internship was limited. Campaign-driven traffic reached the website but encountered forms with poor flexibility, no automated response, and no structured content designed to capture and retain the visitor's interest. Leads that did submit a form received no immediate acknowledgement. The result was a process in which the digital effort invested in generating a contact was not matched by the experience that contact encountered at the point of entry.

Several improvements are currently underway. Gated content has been introduced on the website and is already producing encouraging results, confirming that prospects are willing to self-identify in exchange for relevant content, which is precisely the mechanism Järvinen and Taiminen (2016) describe as the first concrete step in the contact-to-lead process. More flexible form solutions are being implemented to replace the current rigid infrastructure, with the objective of adapting field requirements by solution and segment. CRM-triggered email automation is being mapped for each entry point, ensuring that every lead receives an immediate and contextually relevant response.

The broader objective behind these initiatives is to ensure that a prospect has already accumulated several meaningful interactions with EVS before the first SDR contact occurs. This sequencing logic, which the literature describes as touchpoint management capability, shifts the burden of qualification away from the SDR and toward the digital infrastructure, allowing human intervention to be reserved for contacts that have already demonstrated a meaningful level of engagement.

9.5 Nurturing

The literature review identifies lead nurturing as one of the most underdeveloped yet highest-potential levers in the contact-to-lead process. Järvinen and Taiminen (2016) describe nurturing as an iterative process through which marketing leads are targeted with personalised content based on their profile and behavioural signals, with the dual objective of deepening engagement and revealing purchase intent more precisely. The critical insight from the literature is that nurturing is not a remedial activity for leads that failed to convert immediately, it is a systematic mechanism for managing the natural asynchrony between a prospect's readiness and the sales team's availability.

At EVS, no structured nurturing process existed at the start of this internship. Leads that were not immediately actionable were disqualified and closed, with no reactivation logic and no content-

based re-engagement sequence. The qualitative study identified this as the most widely shared pain point across all 11 respondents. The SDR described it as the biggest gap in the process, and several PMMs noted that in a B2B context with multi-year buying cycles, the absence of nurturing effectively means that a large proportion of commercial interest generated by campaigns is permanently lost rather than deferred.

Two complementary nurturing initiatives are currently being designed. The first is an internal nurturing flow, in which sales representatives with active opportunities for a given product receive timely and relevant product insights from Market & Solutions, triggered by opportunity type and estimated closing timeframe. This approach uses CRM data to make the content delivery data-driven rather than ad hoc and creates a structured communication bridge between M&S and the sales team that does not currently exist. The second is an external nurturing flow, in which pipeline stage analysis drives targeted paid media and digital content toward the accounts and contacts associated with active opportunities, effectively surrounding the buying committee with relevant messaging at the moment of highest commercial relevance.

Together, these two flows operationalise the distinction between attribution and contribution introduced in the quantitative results. Direct attribution captures the leads that open new opportunities. Contribution captures the leads that re-engage contacts already in the pipeline. A mature nurturing strategy serves both simultaneously, and the rising proportion of "opportunity already exists" disqualifications in the CRM data is precisely the signal that this contribution layer is beginning to take shape.

9.6 Reporting and Shared Visibility

The qualitative study revealed a recurring and transversal frustration: the teams involved in the contact-to-lead process lack visibility into each other's performance. PMMs brief campaigns without access to lead conversion data. Sales representatives receive leads without context on the campaigns that generated them. Sales Enablement tracks qualification rates without a clear picture of which digital sources produce the most actionable contacts. The feedback loop that the literature identifies as essential to iterative funnel improvement was, and to a large extent remains, structurally absent. This is not a data quality problem. CRM data at EVS is well structured and consistently maintained. It is a visibility problem: the data exists, but it does not flow to the people who need it to make better decisions.

At the outset of the internship, performance data was scattered across native platform interfaces with no consolidated view. LinkedIn metrics lived in LinkedIn. Google Ads metrics lived in Google Ads. CRM data lived in Dynamics 365. No single report brought these streams together, and no upstream team had access to the downstream outcomes of their campaigns.

The current phase addresses this through the integration of Supermetrics as a centralised data layer, consolidating digital campaign metrics from LinkedIn and Google Ads with CRM performance data into a unified reporting environment that remains fully compliant within EVS's existing infrastructure. The first performance dashboard, introduced in 2025, already represents a structural shift: for the first time, impression volume, click performance, lead generation, and qualification rates are visible in a single view, enabling cross-functional conversations to be grounded in shared data rather than departmental estimates.

The next step is to make this reporting infrastructure actively used by all four teams. PMM briefs shaped by lead conversion data, SDR workflows prioritised by campaign source quality, and sales feedback captured systematically rather than conveyed informally — these are the operational outcomes that a shared reporting layer makes possible, and the direction toward which this infrastructure is being built.

9.7 Recommendations limitations

The directions outlined in the discussion are grounded in the EVS context and reflect concrete initiatives already underway. However, several constraints limit their pace and scope of implementation. The most significant is organisational bandwidth: the Marketing team is small relative to the volume of initiatives it is expected to carry, and automation, nurturing, and reporting improvements all require sustained investment of time and resources that compete with day-to-day campaign execution. A second constraint is IT dependency: the Zapier integration and CRM automation sequences require technical validation and internal compliance approvals that are not fully within the Marketing team's control. Finally, the adoption of new processes and shared tools across four departments involves a change management dimension that goes beyond tool implementation. Without active buy-in from Sales and M&S, even the best-designed workflows will be underused.

10 Conclusion

This thesis set out to answer a single question: how can the contact-to-lead process be optimised to improve B2B prospect conversion at EVS Broadcast Equipment? The answer that emerges from a structured literature review, two years of operational immersion, 11 semi-structured interviews, and a quantitative analysis of campaign and CRM data is not a single solution but a progression, from an informal and fragmented set of practices toward a structured, automated, and data-driven commercial workflow. The literature established the theoretical foundations of this process, revealing that the handoff between marketing and sales is one of the most persistent failure points in B2B commercial organisations, and that marketing automation, CRM infrastructure, and shared lead qualification frameworks are the primary levers available to address it.

The qualitative study revealed that the process suffers from a set of interconnected structural gaps: an absence of shared lead definition, silo-based campaign briefing, manual lead management with no nurturing capability, and a feedback loop that stops at the handoff between Sales Enablement and Sales. The quantitative study showed that, despite these gaps, measurable progress has been made. The qualification rate grew from 0.54% to 3.53%, digital sources emerged as a structured input to the pipeline, and the rising proportion of "opportunity already exists" disqualifications signals that campaigns are beginning to influence the pipeline rather than simply feed it.

The discussion connected these observations to six operational axes, process mapping, lead definition, marketing automation, touchpoints, nurturing, and reporting, each of which traces a trajectory from the situation that existed before the internship to the improvements introduced during it, and toward the directions that the evidence suggests pursuing next. Together, these axes form a coherent roadmap for the continued maturation of the contact-to-lead process at EVS.

The broader contribution of this thesis lies in demonstrating that in a B2B organisation where market leadership has historically generated inbound demand, building an outbound commercial acquisition capability is not simply a question of adding digital tools. It requires a fundamental realignment of how four departments understand their shared process, define their shared objects, and measure their shared outcomes.

11 Self-assessment report

This chapter constitutes a critical and reflective assessment of the professional learning journey undertaken during the two-year work-study programme at EVS Broadcast Equipment. Drawing on the initial learning plan defined at the outset of the internship, it examines the objectives that were set, the actions that were taken to achieve them, the results that were produced, and the lessons that were drawn from the experience. The analysis is structured around the PDCA framework, also known as the Deming Wheel, which provides a systematic basis for evaluating progress and identifying areas for improvement. Beyond a factual account of activities and deliverables, this report aims to demonstrate the managerial competencies developed over the two years and to connect them to the strategic vision of a commercial director operating in a complex B2B environment.

11.1 Plan

The two-year work-study programme at EVS Broadcast Equipment was structured around a progressive learning trajectory. The M1 year was designed to develop intermediate-level competencies across the core dimensions of the role: campaign management, CRM operations, digital performance tracking, and cross-functional coordination. The M2 year built on these foundations with an expert-level ambition, introducing marketing automation, omnichannel strategy, and the structural optimisation of the contact-to-lead process as the primary objectives.

The learning plan defined five strategic priorities for the M2 year: marketing-sales alignment, omnichannel campaign development, advanced lead management, contact-to-lead automation, and performance tracking. These priorities were not developed in isolation but in direct response to the organisational context: EVS's growth ambition of over €350 million by 2030 required the Marketing team to build a commercial acquisition engine from scratch, without increasing headcount, and in a company where the function had historically played a secondary role relative to product and sales.

The context of entry into this programme is worth acknowledging honestly. Arriving at EVS at the start of M1, the level of knowledge in digital marketing was limited to foundational concepts heard in an academic setting. CRM systems, paid media platforms, marketing automation, and data analytics were familiar in theory but entirely unfamiliar in practice. The learning plan was therefore as much a personal capability development trajectory as it was an operational roadmap.

11.2 Do

11.2.1 First year: building operational foundations

The M1 year began with an immersion phase focused on understanding the operational mechanics of the Marketing team. The first concrete missions centred on campaign management: learning to navigate LinkedIn Campaign Manager and Google Ads, understanding the briefing process, and progressively taking ownership of the full campaign launch cycle. This transition happened faster than expected. Within the first months, the responsibility for campaign execution became fully autonomous, moving from a support role to sole operational owner of the paid media workflow.

The second major development of M1 was the deepening of CRM expertise. Learning to work within Microsoft Dynamics 365 — understanding its data architecture, its lead management flows, its reporting capabilities, and its limitations — became the technical backbone of the internship. This

expertise proved foundational for everything that followed: without a solid understanding of how data was structured and tracked within the CRM, none of the subsequent work on automation, lead scoring, or performance reporting would have been possible.

A defining moment of the first year came during one of the company-wide All Hands meetings. Hearing the strategic priorities of the leadership team, understanding the commercial pressures facing different departments, and grasping the interdependencies between product development, sales operations, and marketing activity produced a shift in perspective. The realisation was clear: individual actions, however well executed, only create value when the entire organisation moves in the same direction. Marketing campaigns that generate leads into a sales process that is not ready to handle them produce friction rather than growth. This understanding fundamentally shaped the approach to the second year.

11.2.2 Second year: from execution to strategy

The M2 year was characterised by a shift from operational execution toward strategic design. The five objectives of the learning plan were pursued in parallel. The automation initiative progressed through the exploration and partial implementation of a Zapier integration layer, designed to connect digital touchpoints to CRM-triggered response flows. The campaign strategy evolved from reactive, product-driven activations to a structured, always-on architecture organised by solution, funnel phase, and objective. Performance tracking was advanced through the integration of Supermetrics, consolidating LinkedIn, Google Ads, and CRM data into a unified reporting environment for the first time.

Two initiatives that extended beyond the immediate scope of campaign management were particularly formative. The first was the design of the internal and external nurturing frameworks, which required engaging directly with both the Sales Enablement and Market & Solutions teams to understand their needs, translate them into actionable marketing workflows, and build a logic that served all parties simultaneously. The second was the conducting of 11 semi-structured interviews across four departments for this thesis, which demanded a level of transversal understanding, diplomatic precision, and analytical rigour that day-to-day operational work rarely requires.

Throughout both years, one of the most significant competencies developed was relational rather than technical. Despite the junior label that inevitably accompanies an internship position, it was possible to build credibility across all four teams involved in the contact-to-lead process. Colleagues from Sales, Market & Solutions, and Sales Enablement came to address their questions and requests directly, recognising the value of having a clear communication bridge between the upstream campaign world and the downstream lead qualification process. This role as an informal connector between the Marketing team, the PMMs, and the SDR team was not planned in the learning plan but emerged organically and proved to be one of the most valuable contributions of the two years.

11.2.3 Check

The quantitative results achieved over the two years are measurable and meaningful. The lead qualification rate grew from 0.54% to 3.53%. Website leads grew from 56 to 952. The paid media infrastructure evolved from 214 to 574 active ads. A unified performance dashboard was introduced for the first time. These outcomes validate the direction of the work and demonstrate that the strategic priorities defined in the learning plan translated into concrete operational progress.

The technical competency development followed a similarly progressive trajectory. Microsoft Dynamics 365 became the most deeply mastered tool of the internship, from basic lead management to advanced reporting and workflow design. The major paid media platforms, LinkedIn Campaign Manager and Google Ads, were mastered at an operational level sufficient to manage, optimise, and report on complex multi-solution campaigns independently. The current focus on marketing automation tools, particularly Zapier and CRM workflow builders, represents the natural next frontier of this technical development.

An honest assessment must also acknowledge the difficulties encountered. The end of the internship was marked by a significant motivational challenge. A contract that had been announced took longer to materialise than expected, creating a period of professional uncertainty that was genuinely difficult to navigate alongside long-term projects requiring sustained commitment. Tasks such as the nurturing strategy, the full automation deployment, and the transversal reporting rollout all require engagement beyond a single internship cycle, and the uncertainty about continuity made it harder to invest fully in their completion. This experience revealed an important professional lesson: maintaining rigour and motivation in the absence of short-term validation is a competence in itself, and one that is rarely taught explicitly.

A second area of learning concerns visibility. Marketing roles in digital acquisition and process design operate in territory that many colleagues in sales and product functions do not instinctively understand. The technical nature of CRM automation, lead scoring, and campaign attribution creates a communication gap that can make the value of the work invisible to those outside the function. The arrival of a VP Marketing with a digital background was transformative in this regard: the work was immediately understood, contextualised, and supported. Without that alignment at the managerial level, the strategic impact of the initiatives described in this thesis would have been significantly harder to achieve.

11.3 Act

If this internship were to begin again, the single most important change would be to invest more deliberately in making the work visible from the outset. In an organisation as structured and as complex as EVS, building internal credibility requires active effort. Sharing results in accessible language, framing the contribution of digital marketing in terms of commercial outcomes rather than technical metrics, and communicating progress through the right internal channels are competences that would have accelerated both the organisational impact of the work and the personal outcomes sought at the end of the programme. Self-marketing, in the most professional sense of the term, is a skill that is as important as any technical capability in an environment where the people evaluating your contribution do not always share your frame of reference.

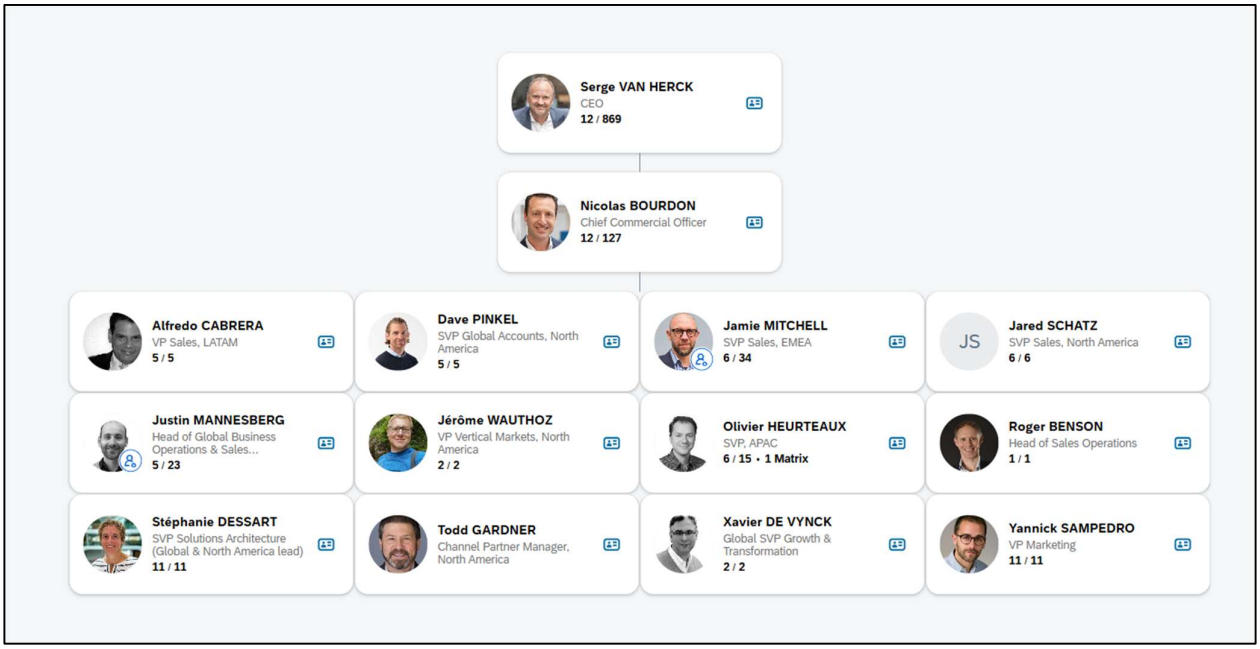
More broadly, these two years have fundamentally transformed the understanding of what marketing means in a B2B technology company. Entering the programme with a largely B2C mental model of marketing, shaped by academic training that rarely addresses the specificities of industrial and technology markets, the adjustment was significant. B2B marketing in a niche technology sector operates under constraints that have no equivalent in consumer markets: sales cycles measured in years rather than weeks, buying committees of five to ten people rather than individual consumers, and an impact that is structural and cumulative rather than immediate and measurable. As a

colleague in the Marketing team once put it with characteristic precision: it would have been simpler if we were selling socks.

The vision of a commercial director that emerged from this experience is one of an integrator: someone who understands the mechanics of demand generation and the dynamics of sales conversion equally, who can translate data into strategic decisions, and who can align functions that naturally pull in different directions around a shared commercial objective. EVS, with its scale, its ambition, and its unusually accessible leadership culture, provided the environment in which that vision could be formed. These two years represent not an endpoint, but a starting point.

12 Appendices

12.1 Sales department



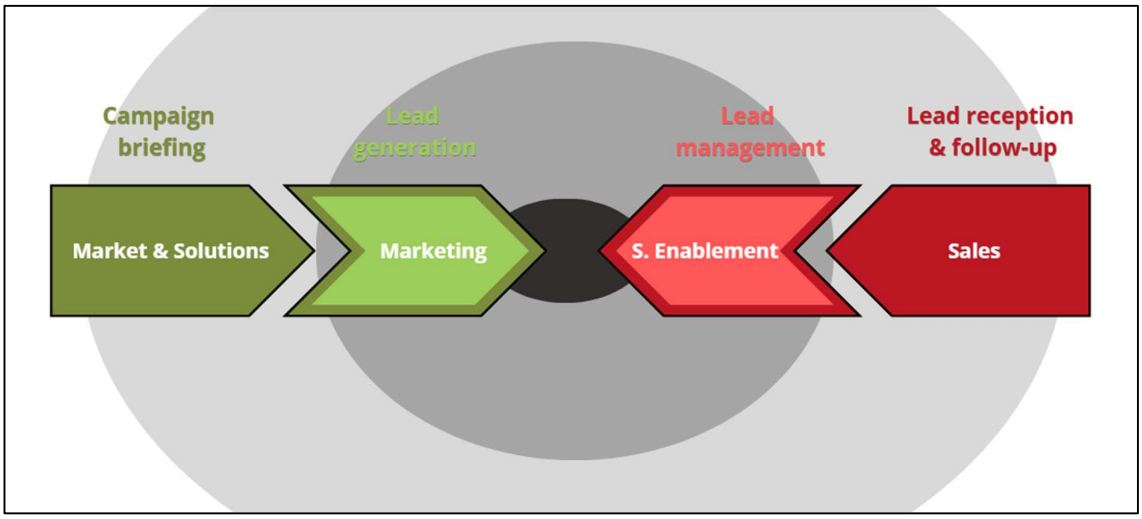
12.2 Interview Guide - Blank version

Introduction

Thank you for taking the time to meet with me today. As you know, I'm currently working on my master's thesis at HEC Liège, and the focus is on how EVS manages its contact-to-lead process basically, how we turn contacts and market signals into qualified leads that reach sales.

Before we dive in, a few housekeeping points: the interview will last around 45 minutes, and with your permission I'd like to record it purely for my own notetaking, everything stays confidential and within the academic framework.

There are no right or wrong answers here. I'm genuinely interested in your experience and perspective, so feel free to be as candid as you'd like.



I'd like to start by showing you something. This is a simplified view of the process I'm studying. You have Market & Solutions feeding into Marketing, which converts contacts into leads that central black point and then passes them on to Sales Enablement and ultimately to Sales. The lead is the critical handoff moment, and that's really the heart of my research.

Throughout this conversation, I'll be asking you about how this process works from where you stand what works, what doesn't, and what you think could be improved.

General understanding

Describe your role within the organization

How would you describe our central point, the lead?

Do you think this definition of a lead is shared and understood consistently across all teams at EVS?

Campaign briefing

How would you describe the campaign briefing process at EVS today?

How well does the briefing reflect the actual needs of the market?

What information does a good campaign brief contain, in your view?

How much input do sales have in the briefing phase?

If you could redesign the briefing process, what would you change?

Lead generation

How would you describe the lead generation process at EVS today?

What criteria should define a qualified lead at EVS, in your view?

Where do most contacts come from, and how are they captured?

In your view, how could M&S or marketing contribute to increasing the conversion rate of opportunities?

What marketing actions can be taken at the opportunity level?

What would a well-functioning lead generation process look like to you?

Lead management

How would you describe the lead management process at EVS today?

What information should a lead contain to be actionable?

How could we get the max amount of information without creating too much friction for the prospect? What is a good balance for you?

What criteria do you use to determine whether a lead is ready to be passed to sales?

What happens to leads that are not yet ready for sales?

What would a more effective lead management process look like to you?

Lead reception

How would you describe the final stage of the contact-to-lead process, where a lead reaches sales?

From your perspective, what should a lead look like when it is ready for sales?

In your view, how well does the current process set the commercial team up for success?

How do you perceive the relationship between sales and the teams that generate and manage leads?

What would a well-functioning lead reception process look like from your point of view

12.3Interview - Product Marketing Manager

Market & Solutions | Online interview, English

General understanding & lead definition

The Product Marketing Manager (MediaInfra) positions himself as a translator between R&D and the market, bridging the technical depth of the MediaInfra portfolio with the commercial and partner-facing reality. His proximity to the contact-to-lead process is direct: he initiates campaign briefs and sets goals in terms of qualified leads, opportunities, and website traffic. Crucially, he immediately raises the feedback loop as a structural gap — noting that the process as currently mapped is linear, whereas in his view it should be circular.

On the definition of a lead, he advocates for a very low threshold: any digital interaction — an email open, a click on a CTA — should constitute a lead entry point. He explicitly challenges the inconsistency between trade show scans (universally treated as leads) and digital clicks (currently not treated as such), calling it a mismatch that the manual process reinforces by defaulting to rejection criteria. His position can be summarised as: generate first, score and follow up proportionally.

Campaign briefing

He describes a reasonably functional briefing template (PowerPoint-based, including expected results, deliverables, and target audiences) but identifies two structural problems. First, PMMs work in silos: each solution unit plans its own campaigns independently, leading to overload for the Marketing team and excessive messaging frequency for customers. Second, the whole organisation is structured in a way that makes transversal planning difficult — silos exist at the R&D, solution unit, and PMM levels simultaneously. His proposed improvement is systematic cross-PMM consultation before any brief is submitted, to explore joint campaign possibilities. Sales Enablement is always involved in briefings; sales themselves are included occasionally but generate decision-making paralysis when consulted too broadly.

On market input, he is release-driven and gut-driven: features that have been repeatedly requested by customers or that address known pain points trigger campaign decisions. He explicitly acknowledges not being data-driven in a formal sense, and frames this as a company-wide norm.

Lead generation

His position is consistent with his lead definition: chase every click of interest, reject as little as possible. He expresses concern that the current manual process systematically over-disqualifies, using rejection criteria as an excuse to reduce workload rather than as a genuine strategic filter. He argues that EVS cannot afford to dismiss any opportunity — particularly for MediaInfra, where smaller accounts can serve as a cross-selling entry point. He supports tiered follow-up logic (low-touch for clicks, high-touch for form completions) and automation as the enabling condition for this approach. He also raises the marketing attribution problem: measuring campaigns against order intake is fundamentally flawed given the length of B2B buying cycles, and KPIs should instead focus on leads generated, opportunities created, and traffic increases.

Lead management

His priority information for a lead is the market application (venue/stadium, OB truck, corporate, etc.), which he considers the single most important routing signal for tailored follow-up. Budget is described as a nice-to-have, not a gate. He criticises the current practice of using budget as a disqualification criterion, arguing that unknown budget should not prevent follow-up. He endorses adaptive friction — varying the information requested depending on the solution and prospect tier.

Lead reception & cross-bucket communication

For sales-ready leads, he expects: specific product interest (granular, not just product line), time to deployment, market application, and budget as a nice-to-have. He views the monthly marketing committee (Marcom + Sales Enablement + PMM) positively but signals that the sales bucket is structurally absent — its voice is relayed exclusively through the Sales Enablement Manager. Sales feedback is only formally collected during QBRs. He explicitly endorses the principle that nurturing existing opportunities is a marketing function, and supports a BI attribution model that counts campaign touchpoints on pre-existing opportunities as contribution.

12.4Interview - Product Marketing Manager

Market & Solutions | Online interview, English

General understanding & lead definition

The Product Marketing Manager (LiveCeption) describes his role as managing pricing, promotion, and placement — the three Ps excluding product — and frames his work as oriented towards "the problems of tomorrow." His definition of a lead is closer to a sales-qualified framing: a touchpoint that could result in business, but in his view this requires a verbal conversation with an EVS representative to be truly qualified. This makes him the most conservative of the three PMMs on lead definition. When challenged on digital clicks, he accepts that these constitute the start of a qualification process, but does not view a click alone as a qualified lead. He self-corrects during the interview when the process framing is clarified, acknowledging that digital interactions are valid entry points.

On shared understanding across teams: he initially expects alignment but, when confronted with the MQL/SQL distinction, acknowledges that his own default was sales-lead thinking — confirming the gap exists even at his level.

Campaign briefing

He describes the briefing as an informal but functional handover of information, supported by a loosely structured PowerPoint. He notes that structure has improved since the VP Marketing joined, bringing more rigour around campaign formats and KPI expectations. He emphasises that the brief is the last step of a longer internal process: features are developed based on market signals (customer feedback, trade show insights, competitive intelligence), and the brief formalises that upstream work. His most recent campaign example — developed specifically to counter competitors gaining share in a high-level sports production segment — illustrates this logic clearly. Sales input in briefing is uneven: sometimes heavy (stadium/venue campaigns), often insufficient. He also mentions GSU weekly meetings and quarterly strategic portfolio reviews with a recently introduced Product Marketing Day as structured channels for sales-market alignment.

Lead generation

His position on lead qualification is the strictest of the three PMMs: a qualified lead requires at minimum a verbal conversation. However, he fully supports using digital interactions as a trigger for the qualification process, and endorses automation to handle the volume of lower-intent contacts. He supports tiered handling: leads with future potential should be labelled and kept warm; leads with no feasible path should be deprioritised. He agrees with the concept of automated lead reactivation for temporarily disqualified contacts when presented with it.

Lead management

His priority fields for a lead form are: role/persona, the problem to be solved, and contact information. He considers the problem statement the most critical piece — understanding why a prospect thinks EVS can help. He endorses adaptive forms as a friction-reduction strategy, noting the balance between guidance and brevity. He validates the idea that simpler forms work better for less mature solution areas, while more complete forms are justified for LiveCeption where higher deal value makes selectivity worthwhile.

Lead reception & cross-bucket communication

For sales-ready leads, he expects contextual information: what products the prospect is interested in, and what conversation context has been established — the sales team should not start from scratch. He acknowledges a structural disconnect between M&S and sales, driven by differing objectives, and notes limited visibility on campaign outcomes post-handoff. He identifies the absence of post-campaign feedback as a key pain point.

12.5Interview - Product Marketing Manager

Market & Solutions | Online interview, English

General understanding & lead definition

The Product Marketing Manager (MediaCeption) is the most marketing-literate and process-sophisticated of the three PMMs, bringing explicit prior experience with marketing automation platforms, lead scoring frameworks, and ABM. He defines a lead as a prospect — someone potentially interested — with buying intent varying across funnel stages, not as a prerequisite. He anticipates and explains the gap in definitions across departments: sales-oriented profiles expect buying intent as mandatory (because they have historically received near-SQLs), while marketing-trained profiles see a lead as anyone showing interest who must then be assessed for fit. He is the only PMM to introduce BANT/MEDDIC framework vocabulary explicitly.

Campaign briefing

He provides the most structured historical account of briefing evolution. In 2022, the PMM function was nascent and campaigns were mostly opportunistic, company-level brand campaigns. The shift has been towards annual strategic planning, quarterly reviews, and a cycle of ideation → planning → execution. He identifies the remaining gap: within the smaller cross-functional team, beyond formal committee meetings and quarterly reviews, there is no structured cadence, no defined triggers for engagement, and no process for reactive ideation. He introduces the concept of always-on campaigns aligned with major B2B industry shifts, with regional and account-level fine-tuning within

those umbrella themes. He explicitly ties this to the longer B2B sales cycle, where influence over two or more years is the norm rather than conversion. He distinguishes between M&S market expertise (strategic, long-tenure knowledge) and sales field information (recent, territory-specific signals), framing both as necessary and complementary inputs.

Lead generation

He confirms that three years ago there was effectively no lead gen engine at EVS, and that the current system represents genuine progress. He identifies GDPR as a structural constraint on EU lead generation automation and frames the main improvement area as lead management rather than lead generation. He proposes a weekly SDR review cadence to correlate incoming leads with existing customer discussions, and flags the need to understand why a lead entered the funnel if it does not match any known account. His position on lead qualification is nuanced: a single click does not automatically constitute a qualified lead, but aggregate behavioural signals combined with account relevance should feed a scoring model. He argues for a formal lead scoring framework, automated thresholding for MQL status, and account-level aggregation before opportunity creation.

Lead management

His position on form friction is clear: fewer fields is better, speed of contact is the priority, maximum four fields. The optimal balance depends on the SDR team's seniority — junior SDRs benefit from more information, senior SDRs can qualify quickly by phone. He introduces the gated content strategy as an example of lean lead capture done well and calls for its replication across all solution areas. He also notes the untapped potential of LinkedIn lead gen forms as a CRM integration point.

On disqualified leads, he endorses retargeting and nurturing automation, and frames the lead scoring framework as the mechanism for routing leads to the appropriate next action rather than binary qualify/disqualify decisions.

Lead reception & cross-bucket communication

He is the only PMM to explicitly introduce ABM at the opportunity stage, describing it as the appropriate response when a lead has converted to a high-value opportunity. He distinguishes between direct marketing engagement for accounts open to it and sales enablement for protective sales profiles, framing both as marketing functions. He raises the CRM data quality problem as a foundational blocker — noting from prior experience that automated lead scoring and MQL thresholding are only possible with clean, structured data. He endorses a formal lead/opportunity distinction tied to a scoring framework, and supports the gated content strategy as the current best practice to be scaled.

12.6Interview - Sales Enablement Manager

SET – Sales Enablement | In-person interview, French

General understanding & lead definition

The Sales Enablement Manager has been in the role for nearly three years and has been central to building the lead management infrastructure at EVS. Her role has two pillars: operational support (lead management, SDR team management, small offers, service contract renewals, CRM support) and enablement proper (toolbox, onboarding, training, the Saleability Matrix, and an AI product-

Q&A agent in development). She defines a lead as any person or legal entity who has directly or indirectly demonstrated buying intent, or who presents a possibility of a purchase intention — a definition that is notably closer to a sales-qualified framing than a marketing-qualified one, and the most explicit use of "buying intent" as a definitional criterion in the entire dataset.

Campaign briefing

She is always included in campaign briefings by PMMs (confirmed independently by the PMM group). She sees her role at this stage as ensuring that the output of campaigns will be manageable and actionable for the SDR team. She does not redesign briefs but flags when proposed campaigns are likely to generate unqualified volume that the team cannot handle. She endorses the need for more transversal campaign planning and notes that the monthly marketing committee — which she attends — is a useful but insufficient alignment mechanism.

Lead generation

She describes the lead generation process from the qualification side. Her concern is not volume but quality: the SDR team needs leads with enough information to make a first contact that is relevant and not cold. She endorses adaptive forms and the idea that the right amount of information varies by solution and market segment — a position she and the interviewer appear to have developed together in a prior conversation referenced during the interview. She is explicitly aware that Marketing's preference for low friction can conflict with her team's need for context.

Lead management

This is her primary domain. She manages the full lead qualification workflow through the SDR team. Her key positions: buying intent is the criterion that separates a contact from a lead in her view; the current process has no systematic nurturing for disqualified or not-yet-ready leads, which she identifies as a gap; automation is needed but not yet in place beyond the gated content follow-up sequence. She is actively working on improving the process and describes a multi-touchpoint approach (email → call → follow-up) as the current operational model. She endorses the concept of lead reactivation for contacts that were not ready at time of first qualification, and sees this as the most urgent automation use case.

Lead reception & cross-bucket communication

She describes the Sales Enablement-Marketing relationship as the strongest cross-bucket link in the process — "as one" in terms of operational alignment, with shared dashboards and regular syncs. The weakest link is the Marketing-Sales direct relationship: sales reps are not reliably informed of campaign activities, and the loop between opportunity-stage sales activity and marketing strategy is thin. She sees the monthly marketing committee and the QBR as the main formal touchpoints but acknowledges they are insufficient for real-time coordination. She notes that three of the four buckets report to the same manager, which helps, but that the direct sales bucket remains the hardest to integrate into the process loop.

12.7Interview - Sales Development Representative

SET – Sales Enablement | In-person interview, French

Note on transcript: This interview was conducted in-person (single microphone). The transcript is attributed entirely to the interviewer, with the interviewee's responses not labelled separately. The analysis is based on the structured notes available in addition to reconstructed content from the transcript.

General understanding & lead definition

The SDR sits at the operational centre of the contact-to-lead process — the role that physically executes lead qualification between Marketing's output and the sales team's input. His definition of a lead is process-driven: a contact becomes a lead when it enters the CRM; it becomes a qualified lead when it has been contacted and a need has been confirmed. He has no notes on a specific definition position in the available data, but his operational role implies a relatively low threshold for lead creation and a higher threshold for handoff to sales.

Campaign briefing

No specific notes available on this section. His proximity to the briefing process is indirect — he receives the output of campaigns rather than participating in their design.

Lead generation

No detailed notes available. His role begins where lead generation ends — at the CRM entry point.

Lead management

This is his core domain. The SDR manages leads through a structured workflow: contact by email → if no response, "to call back" status → follow-up call → meeting scheduled or disqualification. He is aware of the friction vs. information debate on forms and the tension between Marketing's preference for low-friction capture and Sales Enablement's preference for richer data to enable better first contact. His position in the notes suggests he aligns with the need for at least some qualifying information — enough to route the lead and personalise the first outreach. No action currently taken on disqualified/unready leads, which is flagged as a gap.

Lead reception & cross-bucket communication

The SDR is the handoff mechanism between Marketing and Sales. He confirms that the Sales Enablement and Marketing teams operate in close alignment — described in the VP Marketing's transcript as "as one" — with shared dashboards and regular syncs. The main gap he observes is the absence of any systematic process for leads that are not ready: they are currently simply left with no follow-up action, which he identifies as a missed opportunity.

12.8Interview - Area Sales Manager

SET – Sales | Online interview, French

General understanding & lead definition

The Area Sales Manager (France) focuses on the MediaInfra portfolio (Cerebrum, Neuron, Synapse, T-Motion). He describes his proximity to leads as downstream: leads arrive pre-processed by the SDR team, and he only engages once a potential opportunity has been validated. His definition of a lead is implicitly sales-qualified — he enters the process when there is already assessed potential behind a

contact. He is not involved in lead generation or early qualification and does not have a strong opinion on lead definition at the MQL level.

Campaign briefing

He has limited involvement in the briefing phase. His main observation is that campaigns need more geographic flexibility — campaigns are currently designed at a global or product level and do not account for regional differences in market maturity, customer relationship dynamics, and even language preference. He explicitly notes that French-speaking customers struggle with English-only campaigns, which reduces their effectiveness in his territory. He advocates for regional adaptation of campaign messaging and channel strategy.

Lead generation

He does not describe the lead generation process from the inside. His perspective is that of a recipient: he sees leads that have already been through the SDR qualification layer, and his feedback is that the quality of what arrives is directly dependent on how well the SDR has entered and qualified data in the CRM. Poor CRM data quality means poor lead quality from his perspective.

Lead management

He is clear on what makes a lead actionable: the company/entity must be identified, and the preliminary problem — not the solution need, but the underlying business challenge — must have been surfaced. He emphasises that this problem identification is the SDR's responsibility, not the sales team's. He expects the CRM to contain this information before he engages. He adds that the more detail in the CRM, the more efficiently he can work — time is a constraint, as sales are expected to generate revenue and prospect new markets simultaneously.

Lead reception & cross-bucket communication

He confirms that leads arrive via the CRM and that the quality of the handoff is entirely dependent on the SDR's work. He describes his relationship with Sales Enablement as more active than his relationship with Marketing. He raises the geographic customisation point again as his main structural recommendation: campaigns and lead qualification criteria should vary by region, not just by solution.

12.9Interview - Area Sales Manager

SET – Sales | Notes-only transcript

Note on transcript: This interview exists only as structured notes, not a full transcript. The analysis is therefore less granular than for other interviewees but is based on the complete set of notes available.

General understanding & lead definition

The Area Sales Manager defines a lead as a contact showing a certain level of interest, with the SDR functioning as a buffer between low-qualified leads and the sales team. He introduces an important market segmentation distinction absent in other interviews: in core/primary markets where 99% of the market already knows EVS, the lead concept has limited utility — the real question is whether EVS knows the 1% it does not yet know. In target/emerging markets, however, leads are highly

valuable as a means of creating the beginnings of a relationship. This market-type framing of lead value is an outlier in the dataset.

Campaign briefing

He describes campaigns as product/feature-driven and notes that large markets are over-represented in campaign planning — a regional imbalance he considers a structural problem. He reports being largely unconsulted in the briefing phase, with GSU meetings being the main channel through which sales insights are theoretically fed back to the M&S and Marketing teams.

Lead generation

He has no notes on this section in the available data.

Lead management

He notes that disqualified or unready leads should generate insights for M&S — meaning that lead rejection data has strategic value and should be fed back upstream rather than simply discarded. This is a notable position that no other interviewee articulates as directly.

Lead reception & cross-bucket communication

He describes his relationship with Sales Enablement as constant and operational. His relationship with Marketing is minimal — limited to events and occasional campaigns. This confirms the structural gap between Sales and Marketing that multiple other interviewees identify.

12.10 Interview - Content & Communications

SET – Marketing | In-person interview, French

General understanding & lead definition

The Content & Communications Specialist joined EVS three months before the interview, bringing prior B2B marketing and agency experience. Her scope covers content production, social media, tone of voice consistency, and employer branding. She defines a lead as a trigger for action — a contact considered at the beginning of the purchase process — and frames her contribution as creating the top-of-funnel conditions under which a prospect self-identifies as interested. She acknowledges limited downstream visibility from her position.

Campaign briefing

She reports that briefings from PMMs have been adequate in her short tenure, though she is careful to acknowledge her limited exposure. Her external benchmark suggests EVS is not dramatically below market standards at the briefing level, but she identifies room for improvement in how briefs are adapted to market needs, noting that Marketing must compensate when PMMs are more product-oriented than market-oriented.

Lead generation

Her contribution to lead generation is at the top-of-funnel content level: social media posts, web copy, and campaign copy. She argues that quality content is the foundational prerequisite for any lead generation — without it, no form, landing page, or campaign will perform. She flags that EVS's

social media presence was underperforming relative to the quality of its products, and that professionalising it is a direct lever for lead gen improvement. She also raises the use of website visitor identification tools (company-level, not individual) as a form of warm prospecting for companies showing interest without completing a form.

Lead management

She has limited direct involvement in lead management mechanics. Her contribution is to the quality of nurturing content. She supports personalised, contextually relevant communication for key accounts, including event invitations, personalised content, and relationship-building touchpoints as an ABM-type strategy for high-value long-standing relationships.

Lead reception & cross-bucket communication

She confirms the gap identified by the Omnichannel Marketer: sales reps are sending follow-up emails without marketing support and making messaging errors. She advocates for Marketing to close this gap not by taking over but by providing ready-to-use, quality communication assets. She raises the ABM theme explicitly for key accounts. She describes cross-team communication as improving but still fragile — trial and error is the current operating mode. Like the Omnichannel Marketer, she frames the core challenge as information consistency: all teams should share the same vision of the campaign, the market, and the customer, and currently they do not.

12.11 Interview - Omnichannel Marketer

SET – Marketing | In-person interview, French

General understanding & lead definition

The Omnichannel Marketer focuses on campaign operations and cross-channel customer journey coherence. She defines a lead as a trigger for action — a contact at the beginning of a purchasing process — and acknowledges the definition is not consistently shared across teams. She is aware of the MQL/SQL distinction and sees different thresholds as a legitimate source of misalignment.

Campaign briefing

She describes the briefing from the operational receiving end, consistent with the Senior Digital Media Lead's account. She notes that PMM briefing quality varies — it can be too product-centric and not sufficiently customer-need driven. Her main structural concern is communication: everyone must be aligned when a campaign launches, including downstream teams, but this does not always happen. She observes that the inclusion of both M&S and SET in every campaign structurally forces collaboration — a dynamic she views positively as it creates accountability across teams.

Lead generation

She frames lead generation holistically: a lead is not just a form submission but the result of accumulated awareness and consideration. She endorses lower-threshold lead capture and sees automation as the necessary condition for managing volume without sacrificing quality. At the opportunity stage, she sees Marketing's role as influencing the full buying committee — not just the primary contact — via awareness campaigns and LinkedIn targeting for non-opted-in stakeholders.

This aligns with the ABM logic raised by both the VP Marketing and the most marketing-sophisticated PMM.

Lead management

Her perspective is user-journey centred: the lead follow-up experience should feel warm and contextually relevant. She does not describe a technical scoring framework but is aware the current process is largely manual and that automation is needed. She endorses adaptive forms and contextual follow-up as improvements.

Lead reception & cross-bucket communication

She confirms the structural gap at the opportunity stage: once a lead becomes an opportunity, Marketing loses visibility. She describes sales reps sending follow-up emails without marketing support and concludes they are likely making messaging errors. She advocates for Marketing to play a more active support role at the opportunity stage — either via direct communication for ABM-type accounts or via sales enablement collateral. She describes cross-team communication as being at a "beginner level" — improved since the Sales Enablement team was created, but with significant room to grow. She identifies information silos as the core problem: field intelligence from sales should feed back into M&S and Marketing, and it currently does not.

12.12 Interview - Senior Digital Media Lead

SET – Marketing | In-person interview, French

General understanding & lead definition

The Senior Digital Media Lead sits at the heart of the digital marketing operation, managing campaign execution, channel optimisation, and the technical mechanics of lead capture and CRM import. His definition of a lead is operational: a contact that has entered the CRM through a campaign, with source and campaign attribution attached. Buying intent is not his primary framing — a lead is an object that enters the qualification workflow, and it is the SDR's job to assess intent downstream.

Campaign briefing

He describes the briefing from the receiving end: PMMs submit a brief, alignment discussions follow, content is created, and his team deploys across channels. He notes that briefing quality varies — PMMs who are more product-focused do not always translate technical features into market-relevant messaging without help from Marketing. He also flags the absence of a formal, shared template as a source of inconsistency across briefs.

Lead generation

He provides the most granular operational description of the lead generation sequence across all interviewees: campaign brief → content creation → landing page/email/channel deployment → form submission → CRM import (status: New) → SDR email → if no response: status "To Call Back" → follow-up call → disqualification or meeting scheduled → opportunity created or re-entered in callback cycle. He considers lead generation to be functioning reasonably well but sees lead management as underdeveloped. He explicitly describes the friction vs. information tension on form

design and confirms the team has been reducing form fields — but notes ongoing tension with sales enablement, which prefers more data for better qualification context.

Lead management

He favours low friction: fewer fields, faster capture, with campaign attribution and source systematically attached as minimum viable data. He is aware of the CRM data quality problem and confirms governance issues as a structural constraint. He acknowledges there is no formal, transversally understood lead scoring system.

Lead reception & cross-bucket communication

He has limited visibility on what happens after lead handoff to sales enablement. He confirms that Marketing loses sight of leads once they enter the sales pipeline and that feedback loops back to Marketing are weak — a gap he sees as preventing optimisation of lead generation strategy. He cites the attribution problem as a priority to solve, consistent with the VP Marketing's BI initiative.

12.13 Interview - VP Marketing

SET – Marketing | In-person interview, French

General understanding & lead definition

The VP Marketing frames the contact-to-lead process as a core part of his scope, noting that Marketing at EVS sits under the CCO within the commercial organisation — not as a support function but as a revenue-contributing entity. His definition of a lead is functional: any person or legal entity who has directly or indirectly demonstrated buying intent, or who presents a possibility of a purchase intention. He is the only interviewee across all groups to use the term "buying intent" explicitly as part of a lead definition, while simultaneously managing a team whose operational role is to generate volume. He acknowledges the gap between this high-intent definition and the lower-threshold digital signals that campaigns produce, and frames the resolution as a process challenge rather than a definitional one.

Campaign briefing

He confirms the PowerPoint-based briefing system and credits the structuring improvements to his own arrival — introducing discipline around campaign formats and KPI expectations by type. His main concern is the silo problem: PMMs from different solution units submit requests independently without coordination, and the Marketing team cannot absorb the resulting volume. He advocates for more transversal planning and notes that sales should have more weight in early-year campaign decisions, but acknowledges this is structurally constrained by how M&S is organised per solution rather than per market segment or geography. He explicitly highlights that MediaCeption campaigns need to sound very different depending on the region, making centralised briefing even harder.

Lead generation

He describes the lead gen process as campaign-driven and largely linear: briefing from PMMs → content creation → channel deployment → form submission → CRM handoff to sales enablement. He is explicitly aware of the attribution problem: it is very difficult to link a closed deal to a specific campaign given B2B sales cycle lengths. He is building a BI dashboard to track the full journey from

first campaign interaction to opportunity, including cases where an opportunity pre-existed the campaign touchpoint, which he frames as marketing contribution rather than attribution.

Lead management

He positions himself at the orchestration level. His main focus is Account-Based Marketing as the right model for opportunity-stage marketing. He distinguishes two operational modes: direct marketing communication to the client (parallel to sales, requires buy-in) and sales enablement (marketing provides collateral, sales deploys at their discretion). He acknowledges that sales can be protective of key accounts and frames the sales rep as the orchestrator at the ABM stage. He is actively working on building a native CRM link between contacts and users to enable internal nurturing — marketing reaching clients who already have an open opportunity via CRM-driven communication rather than mass campaigns.

Lead reception & cross-bucket communication

He confirms the monthly marketing committee as the main cross-team forum but signals it is incomplete — it does not fully close the loop with the sales bucket. He notes that three of the four buckets report to the same manager, which structurally facilitates alignment between Marketing, M&S, and Sales Enablement, while Sales remains the most disconnected. He endorses the principle that campaign contribution should be measured even when the opportunity pre-existed the campaign.

12.14 Interview - Matrix

INTERVIEW MATRIX — Contact-to-Lead Process | EVS Broadcast Equipment												
Theme	Question / Sub-theme	Market & Solutions (PMMs)			Marketing SET				Sales		Sales Enablement	
		PMM MediaInfra	PMM LiveCeption	PMM MediaCeption	VP Marketing	Sr. Digital Media Lead	Omnichannel Marketer	Content & Comms Spec.	Area Sales Mgr Benelux	Area Sales Mgr France	Sales Dev. Rep.	Sales Enablement Manager
GENERAL UNDERSTANDING	How do you define a lead?	Any click of interest; low threshold	Touchpoint with potential business	Prospect at any funnel stage	Any buying intent or purchase possibility	Contact entering CRM via campaign	Trigger for action; start of buying process	Trigger for action; top-of-funnel entry	Early-stage potential; no buying intent yet	Problem identified; need to solve	Contact becomes lead when need confirmed	Must show buying intent to qualify
	Is the lead definition shared across teams?	No - big gap between teams on threshold	Expected yes; actually unclear	No - depends on role and background	Not consistently; not well aligned	Not consistently; operational gap	Not consistently; different thresholds	Not consistently; trial and error mode	Each team has its own definition	Each person has their own definition	Definition blurry between mkt and sales	No - misalignment between all buckets
	Is the feedback loop adequate?	No - loop missing; process too linear	No - no visibility post-campaign	No - very limited post-campaign insight	No - BI dashboard being built to fix this	No - mkt loses sight after handoff	No - improving but still at beginner level	No - info silos persist across teams	Feedback via Sales Enablement only	Feedback exists but not structured	SE-Mkt loop OK; Sales loop weak	SE-Mkt aligned; Sales still disconnected
CAMPAIGN BRIEFING	How is the briefing process today?	PPT template exists; but silo-based planning	Informal handover; no defined process	Conversation-based; improved with VP Mkt	Structured since VP Mkt joined; still siloed	Received from PMMs; quality varies	Works when both teams are involved	Generally adequate; room to improve	Not involved in briefing phase	Not involved; no geographic input	Receives output; not part of design	Always involved; flag capacity issues
	Do campaigns reflect market needs?	Release-driven; not market-driven	Features first; feedback informs roadmap	Market signals feed features; then campaign	Improving; still too product-centric	PMMs sometimes too technical	Can be too product-centric; mkt compensates	Room to improve market relevance	Campaigns are product/feature-driven	Needs more geographic flexibility	*Not addressed*	Improving; not fully market-driven yet
	How much sales input in the briefing?	Sometimes; but creates consensus issues	Not enough; varies by campaign	Not enough; varies by initiative	Sales should have more weight	Tension: mkt wants less friction; SE wants more	Forced when both teams included	Should provide ready-to-use assets	Not consulted; GSU relays info	Not consulted; wants geographic input	Not involved in briefing design	Always briefed; flag actionability issues
	What would you change in the briefing process?	Cross-PMM alignment before each brief	More structure; clearer market link	Transversal campaigns; shared planning	ABM logic; Annual planning upfront	Shared template; attribution tracking	Shared campaign vision across all teams	Marketing compensates for product-centric gaps	More sales input; geographic segmentation	Regional campaigns; language flexibility	Earlier involvement in campaign design	Involve SE earlier; define follow-up upfront
LEAD GENERATION	What criteria define a qualified lead?	Any click of interest; chase everything	Verbal contact needed for full qualification	Aggregate signals; lead scoring framework	Buying intent or purchase signal	Source + campaign attribution attached	Accumulated awareness leading to self-ID	Top-of-funnel content engagement	SDR as buffer; some interest shown	Problem identified; early-stage need	Need confirmed after first contact	Buying intent mandatory
	Is automation needed for lead management?	Yes - critical; manual process fails	Yes - reactivation of cold leads	Yes - lead scoring and MQL thresholding	Yes - CRM-driven nurturing sequences	Yes - first contact automation priority	Yes - needed for volume management	Yes - nurturing sequences needed	*Not addressed*	*Not addressed*	Yes - no automation currently in place	Yes - reactivation highest priority
	How can M&S/Mkt boost opportunity conversion?	Product experts needed in pre-sales	Collateral and docs; not active per deal	ABM for high-value opportunities	ABM + CRM-driven email sequences	Attribution tracking from campaign to opp	Influence full buying committee	Ready-to-use assets for sales to deploy	Sales enablement collateral helps	Better qualified leads = less sales time	Warm handoff with full context	CRM-triggered content to existing opps
LEAD MANAGEMENT	What info should a lead contain?	Market application (primary signal)	Role + problem + contact info	Behavioural signals + account relevance	Enough to route to right SDR	Source + campaign + country minimum	Contextually relevant to engagement	Company visited; warm prospecting signal	Company + need + basic contact	Company + problem identified by SDR	Enough to personalise first outreach	Buying intent signal + market application
	Friction vs information: what is the balance?	Low friction first; adaptive by solution tier	Adaptive forms; problem statement key	Max 4 fields; speed of contact priority	Low friction; fast contact more valuable	Fewer fields; campaign attribution always	Warm and relevant; not cold transactional	Quick for user; guided not open-ended	SDR fills gaps via first call	SDR qualifies; more CRM detail = better	Balance depends on SDR seniority	Adaptive by solution; LC needs more data
	What happens to unready/disqualified leads?	Should be nurtured; currently nothing happens	Label + reactivate if future potential	Retarget via automated scoring	Nurturing sequences via CRM planned	Nothing currently; big gap identified	Should feel warm; not abandoned	*Not addressed*	Insight fed back to M&S	No follow-up currently	Nothing - biggest gap in the process	No structured process; top automation priority
	Is CRM data quality a blocker?	Yes - manual entry creates errors	Yes - limits post-campaign visibility	Yes - scoring only possible with clean data	Yes - BI dashboard being built	Yes - governance issues persist	Yes - inconsistent across teams	Aware; limited direct involvement	Yes - bad CRM entry means poor leads	Yes - quality depends on SDR input	Yes - process breaks without clean data	Yes - foundational blocker for automation
LEAD RECEPTION	What should a lead look like for sales?	Product interest + deployment timing	Context from interaction history	Conversation context; not starting from scratch	Enough context to open conversation	Source + campaign + country + need	Warm and contextual; not cold hand-off	Ready-to-use assets attached to lead	Market application + basic contact info	Company + problem + SDR pre-qualification	Full context from marketing interaction	Buying intent + market application
	How is the relationship between the 4 buckets?	Monthly committee good; sales absent	M&S-Sales disconnect; limited visibility	Structural disconnect M&S vs Sales	3 of 4 under same manager helps	Feedback loop weak after handoff	Improving but still beginner level	Fragile; trial and error mode	Constant SE link; mkt very limited	SE close; mkt very distant	SE-Mkt aligned; Sales loop missing	SE-Mkt as one; Sales hardest to link
	What would improve lead reception?	Feedback loop from sales to M&S	Context + product interest at handoff	ABM for high-value; context always provided	CRM nurturing + ABM at opp stage	Attribution tracking; full funnel visibility	Marketing stays active at opp stage	Coord between mkt and sales at opp stage	Earlier mkt involvement in the sales cycle	Regional adaptation; better CRM quality	Automated warm handoff with context	Structured loop; Sales in monthly committee

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