Strategic cross-functional alignment in B2B technology companies

Laura Gutierrez Vite

Haaga-Helia University of Applied Sciences

Leading Business Transformation, Master of Business Administration

Leading Sales and Customer Experience

Master’s Thesis

2025

Abstract

Author(s) Laura Gutierrez Vite
Degree Leading Business Transformation, Master of Business Administration
Report/thesis title Strategic cross-functional alignment in B2B technology companies
Number of pages and appendix pages 80 + 4

Orchestrating cross-functional alignment is essential for business success. Commercial and engineering departments at business-to-business (B2B) technology organizations commonly operate as independent entities, rather than performing in close collaboration towards a unified goal. Leading staff from diverse areas of expertise and interests present significant challenges. Moreover, the COVID-19 pandemic intensified interdepartmental barriers in increased remote and hybrid settings.

To address this issue, the aim of this thesis was to provide a comprehensive examination of cross-functional alignment across the entire customer journey in B2B technology companies. Alignment among commercial departments (marketing, sales and customer success) and engineering/technical units (product, R&D, innovation and support) was explored across three stages of the customer journey: pre, purchase and post-purchase.

The literature review covered key customer centricity and customer experience concepts. As a foundation, the review synthesized existing studies addressing interdepartmental interactions to support the discussion of findings.

A qualitative research approach was used by interviewing 16 elite informants with relevant professional experience in the selected departments. Research sampling was a combination of convenience sampling and purposive sampling. A thorough thematic analysis was conducted, identifying core-themes and sub-themes, thus extracting barriers blocking and best practices enhacing cross-functional alignment. Through the lens of human centricity (customer/employee), elite informant's perspectives were compared by department and customer journey stage.

Findings reveal a widespread existance of barriers in multiple areas, particularly silos and competition. To eliminate barriers, B2B technology companies are advised to adopt a strategic aproach, prioritizing competent and transparent leadership, shared performance management and developing a human (employee/customer) orientation. Participatory leadership and strategic design thinking are suggested.

Cross-functional alignment should begin by focusing first on customer experience and then improving operations in reverse. This customer-centric view encourages joint participation in strategic alignment. The thesis concludes that cross-functional alignment in technology organizations demands careful consideration in shaping supportive company culture and leadership, while cultivating staff's competences such as interpersonal skills, product/business acumen and human (employee/customer) centricity at all functions and across entire customer journeys.

Keywords
Cross-functional alignment, organizational leadership, organizational culture,
customer centricity, employee centricity, business-to-business technology

Table of contents

1 Introduction

1.1 Problem definition

A significant challenge that hinders revenue growth in business-to-business (B2B) organizations is the absence of harmonious cross-functional alignment. According to author's observations of different business settings, the COVID pandemic in 2020 exacerbated alignment barriers, forcing organizations to lead entire businesses distantly through online technology platforms while undermining team cohesion. Normally, functions such as marketing, sales, customer success and engineering/ technical teams tend to operate as independent entities, rather than performing in alignment towards a unified goal. Andersson, Aagerup, Svensson & Eriksson (2024, 160-161) acknowledge that limited personal interactions caused by the pandemic impacted significantly on B2B business-customer dynamics, driving a higher digitalization of communications and transforming B2B customer journeys. Not to mention, the limited in-person selling in B2B customer interactions (compared to consumer markets) combined with complex relationships among functions (marketing, sales, customer support, etc.) have affected company alignment (p. 161).

Therefore, this master's thesis intends to explore post-pandemic challenges and best practices in cross-functional alignment, both internally and in relation with customers along the B2B customer journey. In this thesis, integration, alignment and collaboration are seen as interconnected concepts. The terms alignment, integration, collaboration and coordination will be used interchangeably.

Although some studies have discussed the organizational interaction between sales and marketing, or sales & customer success, there is a limited number of studies that address a comprehensive overview of alignment within commercial departments and in relation to non-commercial departments (new product development or research & development – R&D). The latter traditionally have limited daily engagement with customers. Kotler, Rackham & Krishnaswamy (2017) asserted how marketing and sales departments typically struggle to recognize the value of each other's contributions, causing organizational performance decline. In practice, such a disconnection takes place across critical functions in organizations.

As highlighted by Ellis & Brown (2017, 35), the conventional practice in all types of companies, regardless of the size, is organizing departments in silos with a minimum synergistic approach. The absence of cross-functional communication reduces the ability of departments, such as product development or marketing, to be more customer-centric, consequently slowing growth (Gulati, 36; as cited in Ellis & Brown 2017). For this reason, building cross-functional teams is a core element of the growth hacking method proposed by Ellis & Brown (2017). Although such an approach refers to the alignment of team members from different departments to achieve a specific business goal or project, the concept is relevant at higher organizational levels. Inarguably, the performance of each department and the integration of them into an organization, including the non-customer-facing functions, play a vital role in ensuring superior customer experience (CX) across the customer journey.

To manage the scope, this research is delimited to interviewing practitioners experienced in B2B technology international companies, mainly based in Finland. Whereas B2C companies experience similar challenges, they are intentionally excluded to narrow the observations in line with the research questions. B2B markets merit being the focus of this study as cross-functional alignment becomes more demanding in this context. B2B markets are characterized by intricate sales cycles where staff from different functions are expected to manage diverse cross-functional internal processes effectively, in parallel with managing sustainable customer relationships (Lagat & Frankwick 2017; as cited in Jagodič & Milfelner 2022, 4).

The study of cross-functional alignment becomes relevant at B2B technology companies for multiple reasons. According to the Finnish trade association Teknologiateollisuus (2024), the technology industry is the primary export sector and leading industry in Finland. It is composed of five main sectors: information technology, machinery & metal products industry, metal processing, design & consulting, and electronics & electrical industry. Contributing nearly to 30% to the gross domestic product (GDP), the sector plays a substantial role on Finland's economy.

As a fast-paced industry, it must develop and adapt to markets rapidly. Nonetheless, departments have diverse – even contrasting – personalities, goals and needs that increase the probability of conflict when collaborating. For instance, tech specialists are more likely to concentrate on technological matters (Attah, Garba, Gil-Ozoudeh & Iwuanyanwu 2024, 3252). Meanwhile, marketing staff tend to be data-driven with limited customer contact compared to their sales peers. In contrast, sales staff are mainly engaged in fieldwork, interacting with clients with a short-term view aimed at closing deals (Kotler, Rackham & Krishnaswamy 2017, 82). Aligning people with such a variety of expertise and interests present significant challenges that deserve in-depth study.

1.2 Objectives

The primary aim of this research is to investigate the best practices that facilitate cross-functional alignment as well as barriers that impede it across three key phases of customer journey in B2B technology companies. This thesis will use a customer journey management model as guidance to investigate how team members are internally aligned in relation to customers across the journey. As B2B customer journeys tend to be complicated due to multiple stakeholders and touchpoints between companies and customers, this research considers a simplified model with three key phases of a B2B customer journey: pre-purchase, purchase and post-purchase (Lemon & Verhoef 2016, 76). This approach will facilitate data collection through a semi-structured conversation with interviewees, as well as facilitating the analysis of best practices/barriers for cross-functional alignment across the customer journey. Specifically, the study focuses on three research objectives:

RO1: Identify best practices and barriers for cross-functional alignment (technical/engineering, marketing, sales and customer success) *across the customer journey* in B2B technology companies.

RO2: Identify best practices and barriers for cross-functional alignment (technical/engineering, marketing, sales and customer success) while comparing perspectives among departments *in each phase of the customer journey*:

a. Prepurchase phase (customer awareness and buying intention)

b. Purchase phase (decision, order placement and payment)

c. Post purchase (from onboarding to loyalty)

RO3: Provide development recommendations on how to enhance cross-functional alignment in the B2B technology context.

Although departments vary throughout companies, the study will be limited to revenue-related departments as they are traditionally impacting directly on the customer experience such as:

- Engineering/technical functions: Product, new product development (R&D), innovation and technical support.

- Customer-facing functions: Marketing, sales and customer success.

The outcome of this research project is to generate actionable recommendations for managers and leaders into how functions can enhance alignment in B2B technology organizations.

1.3 Research questions

The research questions directing this master's thesis are the following:

1. What are the best practices and barriers for cross-functional alignment (technical/engineering functions, marketing, sales and customer success) *across the entire customer journey* in B2B technology companies?
2. What are the specific best practices and barriers for alignment (technical/engineering functions, marketing, sales and customer success*) in each phase of the customer journey* in B2B technology companies?

a. Prepurchase phase (customer awareness and buying intention)

b. Purchase phase (decision, order placement and payment)

c. Post purchase (from onboarding to loyalty)

3. What development recommendations can support B2B technology companies to enhance cross-functional alignment?

The first research question intends to fulfill the research objective one (RO1) which focuses on addressing interdepartmental interactions from an end-to-end customer journey perspective instead of a siloed approach. The second research question, linked to the research objective two (RO2), explores specific barriers and best practices of alignment from elite informants representing each individual department. By having a comprehensive understanding of all stakeholders under a human centricity (customer/employee) approach, the study will analyze and compare views to provide practical recommendations (RO3) for managers and leaders to enhance cross-functional alignment.

1.4 Structure of the report

To guide the reader, this report is organized as follows.

Chapter 1 presents the problem statement, research objectives and research questions. The literature review is divided into two separate chapters. The first one is focused on customer centricity, and the second one examines cross-functional alignment concepts and models from prior studies.

Chapter 2 outlines customer centricity-related concepts such as customer experience, the Business-to-Business (B2B) customer journey model, B2B customer journey management and trends in B2B customer journeys and customer behaviors, including disrupting technologies which are transforming customer journeys and integration challenges.

Chapter 3 provides multiple definitions found in the literature around cross-functional alignment in B2B contexts. The chapter builds on body of literature to summarize benefits and barriers impeding cross-functional alignment. The review synthetizes existing studies and frameworks describing challenges and recommendations on cross-functional alignment, applicable to interactions within customer-facing functions (sales, marketing and customer success), as well as dynamics between customer-facing and technical functions (product, R&D).

Chapter 4 outlines the research methodology, including data collection and analysis process.

The subsequent chapters (Chapter 5 and 6) portray the findings and discussion, followed by practical recommendations, limitations, future research and a reflection on the author's learning process in Chapter 7.

The thesis has used ChatGPT application to brainstorm synonyms and improve phrasing in English language. AI-generated suggestions were carefully reviewed and edited by the author. The AI application has been used ethically and responsibly, taking into consideration data protection and copyright. All sources cited in the report have been used correctly and are not AI generated.

2 Customer centricity

The literature review aims to offer a comprehensive view on cross-functional alignment utilizing customer centricity, together with employee-centricity, and customer journey model as foundational lenses. The thesis dissertation proposes to view businesses as a continuum where functions are synchronized when serving customers, while individuals - customers, partners, employees - remain as the core of business strategy and decision-making.

2.1 Customer centricity and customer experience

Customer-centricity and customer experience (CX) have gained prominence in Business-to-Business (B2B) contexts due to increased competition, high customer expectations and growing organizations with more complicated structures. Interdepartmental conflicting targets create friction that ultimately impacts on customer churn. Hence, it is critical to ensure an optimal equilibrium between leading successfully every department and collaborating towards mutual goals across the customer journey. More specifically, alignment between units across the customer lifecycle is essential. Understanding customer experience at every touch point from the customer's perspective allows staff to acknowledge the impact of their own functions on the customer and the business overall (Aa 2020, 7-19).

B2B sales cycles are generally long with various stakeholders in charge: buyers, users, decision makers, etc. Such a type of sales requires a structured process with active involvement of company functions and a customer-centric orientation, as customers have taken an active role in the value creation process in recent years (Fließ & Kleinaltenkamp 2004). According to a study conducted by Deloitte Research, customer-centric companies are 60% more profitable compared to non-client focused companies (Deloitte 2017, 5).

An empirical study conducted by Ruud, Klaus & Wetzels (2023, 7) found that customer experience management (CXM) leads to increased profitability compared to businesses overlooking it in their business strategy. Top-tier firms are characterized by having a "more customer-experience-centric" and long-term approach. In such cases, great performance has not been the central focus but the result of developing customer-experience-centricity overtime.

There is a direct relationship between successful brands and customer-centricity. Top-performing brands are characterized by being both customer-centric. For instance, Apple, Amazon, Microsoft, Google, Paypal, Visa, Mastercard, among others (Newman 2021, 8-9). In fact, Apple's CEO, Steve Jobs, introduced a paramount concept on customer centricity and customer experience as a vital company mindset at the Worldwide Developers Conference back in 1997:

“You’ve got to start with the customer experience and work backwards to the technology. You can’t start with the technology and try to figure out where you’re going to try and sell it.” (Jobs 12 February 2022).

This concept applies to both B2C and B2B contexts.

Newman’s framework on customer centricity (2021, 4-21) provides key customer-centric traits as “fundamental building blocks” to improve customer experience and drive profitability. The customer-centricity traits range from technology, value-based selling, purpose and personalization. For this master thesis dissertation, two key elements of Newman’s framework (p.14) are relevant:

“Employee-first culture”: The first pillar for customer centricity is human centricity. By enhancing employee experience, they are more likely to put customers first and deliver outstanding customer experience. Employees strive beyond the standard when they feel empowered and valued (Newman 2021, 14, 98). A company’s culture becomes easily visible to customers. Thus soft-touch leadership towards employees and customers is vital (Karlson 2015).

“Aligning everyone in the direction of travel”: When departments function independently, customers are less likely to receive high-quality customer experience (Newman 2021, 14). The organizational structure must foster seamless collaboration across the customer journey, combined with the workforce’s eagerness to cooperate across the full chain. Customers do not perceive companies as separate departments, but experience services at different touchpoints of a journey (Aa 2020, 18-19).

Authors on cross-functional leadership concur with the fact that customer experience needs to be extended beyond customer service departments or contact centers. In 2025 customer experience is expected to adopt a company-wide approach, more critically than in the past. Firstly, the use of Artificial Intelligence (A.I.) as a tool to interconnect departments will be increasing. Yet, the key factor will be creating supportive environments. By enhancing a sense of belonging, accountability and collaboration between individuals and departments, companies are better equipped to deliver superior customer experiences (Morrisey 2024; as cited in Swinscoe, 2024).

Studies confirm that companies with brand-loyal customers and brand-loyal staff are more profitable than their competitors (Aa 2020, 20). Therefore, organizational culture becomes a strong foundation while organizational structures are strategically integrated. To ensure effectiveness, leaders need to share an aligned view on human-centricity. Some real case examples of successful employee-centric businesses are Pret A Manger, Hunkemöller, Google and Amazon, where culture and people have played a crucial role on business success (Newman 2021, 101-108).

On a deeper level, McKinsey stated that less than 30% of businesses have a strongly cooperative culture, meaning that further work needs to be done to embed shared commitment inside organizations towards customer centricity. In fact, highly successful companies are recognized for building cross-functional teams with an emphasis on redesigning and improving customer experience (Doheny 2025). Latest publications from McKinsey (9 December 2024) emphasize the importance of team-centric transformation which may result in 30% organizational improvement.

2.2 Business-to-Business (B2B) customer journey model

"Customer journey" has emerged as an essential framework to gain insights on customer behaviors across multiple business domains such as sales, marketing, service management, service design or customer experience (Purmonen, Jaakkola & Terho 2023, 74). Within a customer journey, multiple touchpoints between customers and brands occur. The quality of interaction during these "touchpoints" can have an impact on buying intentions and decisions (Koch 2023, 1516). Despite its complexity, it becomes relevant for businesses to map critical touchpoints (so-called "moments of truth") throughout customer journeys that might have the greatest impact on business outcomes (Lemon & Verhoef 2016, 82).

Successful companies actively evolve their value propositions, proactively innovate and improve their processes even when they are already performing well. Particularly, mapping the customer journey serves to visualize and track the full customer journey and to identify possible strengths and weaknesses, facilitating decision-making and sales process enhancement at every touchpoint, leading to sustainable business growth (Osterwalder 2015).

As mentioned earlier, the organizational structure must foster seamless alignment across the customer journey, where employees are motivated and eager to cooperate across the full chain, especially because customers perceive companies as a whole unit, experiencing services at different touch points of a journey (Aa 2020, 18-19). Nonetheless, B2B customer journeys are more complicated than B2C customer journeys due to multiple buyers interacting with multiple departments of a brand at the same time. In fact, a weak alignment among departments is a common problem in organizations (Patterson, 2007; as cited in Andersson, Aagerup, Svensson & Eriksson 2024).

This thesis considers a high-level B2B customer journey model from a decision-making perspective: pre-purchase, purchase and post-purchase phases (Lemon & Verhoef 2016, 76). Pre-purchase refers to customers' interactions with the company between initial contact with the brand until buying intentions. The purchase stage includes the interactions of the customer with the business such as making the purchasing decision, order placement and payment. Post-purchase implies multiple critical factors once the client has purchased, such as onboarding, usage experience, support, renewals and loyalty (Lemon & Verhoef 2016, 76).

2.3 B2B customer journey management

Whilst a customer journey consists of a set of contact points between the customer and firms, customer journey management (CJM) is a concept where suppliers fully oversee touchpoints within an organization to produce a desirable impact on customer experience (Baxendale et al., 2015; as cited in Homburg & Tischer 2023).

A recent study conducted by Homburg & Tischer (2023) presents four action recommendations for effective B2B customer journey management:

- Integrate a customer value proposition in each touchpoint throughout the B2B customer journey. An example given by the author is a vendor who defined different elements of value: cognitive, emotional, etc., depending on the product, and then linked them to each touchpoint of the customer journey.
- Guarantee customer value consistently in each B2B touchpoint and all channels from the customer perspective. A best practice example implemented by a car manufacturer was having an overarching vision with specific value elements, followed by collecting customer feedback about the value delivered at each touchpoint, and refining quarterly with all department heads in joint meetings.
- Integrate/align internally the critical touchpoints across all departments and channels to ensure fluid and uninterrupted transitions across the customer journey. For instance, a firm mapped 20 key customer touchpoints and established which resources (involved staff, departments, data), interfaces (technical or non-technical ones) and who was responsible for each touch point.
- Ensure all B2B touchpoints fulfill individual buyers' needs in a buyer center that is commonly composed of multiple roles such as buyers, technical users, managers, etc. They tend to have different priorities and information needs. A best practice mentioned by the author is enabling individual buyer/user accounts with specific interaction options and information based on their role.

2.4 Trends in B2B customer journeys and customer behaviors

B2B customer behaviors and preferences have drastically evolved due to the pandemic COVID19. According to a global survey, more than 90% of B2B firms switched to online sales after 2020 and 70-80% of B2B executives would opt for remote operations. Likewise, more than 70% of buyers are in favor of conducting business virtually and a significant 97% of them indicated their openness to complete remote purchases surpassing $50,000, a fact that seemed to be unthinkable in the B2B context (McKinsey & Company 2021).

Two key trends of B2B customer behaviors have been identified in the current literature: the increasing demand for B2B omnichannel customer experience and disrupting artificial intelligence (AI) technologies transforming customer journeys.

2.4.1 B2B omnichannel customer experience

Emerging studies demonstrate the growing demand for omnichannel experiences, particularly intensified by the pandemic COVID-19 and modernization needs across industries (Alonso-Garcia, Pablo-Martí & Nunez-Barriopedro (2021, 99). B2B customers expect seamless progress throughout the buyer journey without redundant communication. They await rapid responses and face-to-face interactions to discuss tailored B2B solutions. A definition of an omnichannel customer experience is "a seamless and integrated multi-channel experience that enables customers to continue their journey across different touchpoints, devices, and channels" (Kumar 15 November 2023). In this definition, multichannel refers to the implementation of specific tools (e.g. chatbots) in different channels, whereas omnichannel is the deployment of a standalone chatbot across all channels, offering consistent B2B customer experience. Hayes & Kelliher (2022) identifies omnichannel as a strategic operational framework which aligns channels and touchpoints, "presenting a single front to the customer, and a single distinct manner of conducting business" (Carrol & Guzman 2015, 4; as cited in Hayes & Kelliher 2022, 2157).

Omnichannel is a customer-centric approach applicable to different functions, e.g. sales and marketing, which firms can capitalize through collecting customer data, identifying ideal customer profiles, personalizing messaging per channel and building closer B2B customer relationships (Kumar 15 November 2023). B2B suppliers cannot avoid the omnichannel trend as B2B customers prefer a combination of multiple sales channels such as video conferencing, face-to-face meetings, phone calls, online chats or virtual marketplaces. As stated, "To equip customers to navigate this complex omnichannel ecosystem, sales professionals will increasingly need to become "journey orchestrators," directing customers to different types of channels for experiences that sellers in the past might have completed themselves" (McKinsey & Company 15 December 2021).

The recent B2B Pulse Survey by McKinsey & Company uncovered that 50% of B2B respondents expect a unified omnichannel experience through different channels and touchpoints. In addition, B2B decision makers utilize nowadays ten or more channels to interact with B2B vendors, compared to 5 channels in 2016. Omnichannel capabilities constitute a market penetration success factor as

B2B customer touchpoints become more complex in the era of digitalization (Plotkin, Stanley, Harrison & García de la Torre 12 September 2024).

2.4.2 Disrupting technologies transforming customer journeys

Next generation technologies such as machine learning, artificial intelligence (AI) and advanced analytics are driving shift in customer journey mapping, empowering firms to forecast customer patterns, automate operations and use data analytics for informed decision-making (Finn & Downie, 20 December 2024).

The use of AI algorithms in CRM systems allows the segmentation of customer data with high levels of detail to address personal client needs and enhance B2B communications (Hennessey, 18 June 2024). In relation to the trend of B2B omnichannel experiences, AI-powered omnichannel tools are emerging to support data management to offer exceptional customer experience throughout the customer journey, regardless of the touchpoint or communication channel (Finn & Downie, 20 December 2024).

A recent report by Gartner (Sladdin & O'Sullivan 17 February 2025) reveals the growing uptake of customer journey analytics and orchestration (CJA/O) technologies. According to Gartner, customer journey analytics and orchestration (CJA/O) can be understood as “solutions that track and analyze how customers and prospects interact with an organization across multiple channels over time”. Gartner’s report adds that these solutions “enable organizations to prioritize and orchestrate real-time improvements to the customer experience in multichannel journeys throughout the end-to-end customer life cycle.” (Sladdin & O'Sullivan 17 February 2025). This recent publication by Gartner highlights that customer experience (CX) is more effective when using a cross-functional approach to customer journeys. For instance, nowadays CX-focused vendors are launching CJA/O functionalities into cross-functional solutions such as multichannel marketing hubs, VoC platforms and contact center as a service (CCaaS) (Sladdin & O'Sullivan 17 February 2025).

Dozens of AI-driven customer journey mapping tools were found by the author via Google search. Merely to mention a few, “TheyDo” is an AI journey management technology that aligns multiple functions such as product, customer experience, service design, etc. around customer journeys. Another solution is “Customer.io”, which offers visual workflow builders, collects behavioral data, creates cross-channel campaigns and allows cross-functional collaboration on a single platform. “Boardmix” is another product with online customer journey templates and real-time collaborative workspace. Further examples of innovative AI customer journey tool vendors can be found through online search engines.

AI hyper-personalization is another relevant B2B customer expectation in today's world. AI hyper-personalization of customer experiences furthers traditional personalization methods through using real-time data, machine learning, and AI-assisted data analysis to track client preferences and deliver tailored content and solutions (Chow 14 February 2025). According to the McKinsey & Company's annual global B2B pulse (13 Abril 2023), 77% of businesses utilizing one-on-one personalization experienced a rise in market share, whereas firms investing significantly in hyper-personalization tools for sales functions noted more than 10% of yearly market share growth. This phenomenon is becoming predominant in countries such as China, the United States or India, across a variety of sectors (banking, insurance, telecommunications, media, technology, energy and materials).

As an illustration, hyper-personalization in the financial technology sector (fintech) is considered an innovation driver in 2025 and upcoming years, allowing fintech businesses to create successful tailored products, to streamline marketing efforts and offer hyper-personalized customer experiences. A product team lead in Latin America asserts that "hyper-personalization, supported by AI and advanced data analytics translates into a significant increase in conversion rates and marketing ROI for fintech companies. It enables better risk assessment and fraud detection, adapting to the individual behavior patterns of each user" (as cited in CE Noticias Financieras 11 December 2024).

A potential future trend in business-to-business is the use of blockchain technology combined with AI for secure B2B knowledge access management, smart contracts and protection of sensitive data in real time (Singh, Rajawat, Goyal & Waked 2025, 2900).

2.4.3 Technology integration challenges

As firms adopt multiple AI solutions across multiple cloud platforms, integration obstacles emerge from the technical and strategical point of view. These involve privacy issues and lack of interoperability among existing applications, impeding proper integration and data exchange among multiple cloud platforms. AI driven innovations require careful planning, deployment, monitoring and optimization, including change management strategies and employee AI training to ensure a seamless adoption of AI technologies (Goswami 2021). Ledro, Nosella & Dalla Pozza (2023) found that integration of AI into customer relationship management (CRM) tools turns highly complex, as firms tend to use a range of incompatible platforms as well as CRM systems involve several stakeholders from various departments (at least marketing, sales and customer success). From an organizational angle, resistance to change might occur. The researchers suggest the need for customer-centric and data-driven cultures to facilitate AI-CRM transformations, although traditional siloed structures hardly facilitate the process. AI-CRM tools must allow flawless data exchange among existing platforms and AI integration projects must ensure prior alignment across all departments involved. Resistance to change can be mitigated by educating, augmenting staff's AI literacy and reskilling.

3 Cross-functional alignment

The purpose of this literature review section is to provide an overview of previous academic studies and conceptualizations of cross-functional alignment in organizations. Specifically, the literature review examines research relevant to the thesis' objectives: first, to understand interdepartmental dynamics (product, marketing, sales, customer success) including barriers and best practices with an end-to-end customer journey point of view; and second, to identify and compare individual functional barriers and best practices concerning internal alignment.

3.1 Definitions

The literature review comprises different terms to describe the interaction between organizational units. These variations in terminology range from inter-functional coordination, cross-functional alignment, cross-functional collaboration to cross-functional integration, ultimately referring to similar phenomena.

Narver and Slater (1990) recognized "interfunctional coordination" as one of the three key "behavioural components" of market orientation (aside from customer orientation and competitor orientation). In their view, interfunctional coordination entails "the business's coordinated efforts, typically involving more than the marketing department, to create superior value for the buyers" (Narver and Slater 1990, 21). Surely, such a definition has evolved rapidly in the last decades.

Tomaskova (2018) provides with a comprehensive overview drawing from multiple scholars to highlight its definition, benefits and evolving role. Interfunctional coordination is "the harmonization of all processes and functions within an organization" being the key aim "to encourage the coordination of all processes and activities in a company and allow the effective flow of information within an outside the company" (Tay and Tay 2007, as cited by Tomaskova 2018, 105). Alignment has been later defined as "the degree to which the needs, demands, goals, objectives, and/or structures of one actor are consistent with the needs, demands, goals, objectives, and/or structures of another actor" (Graesch, Hensel-Börner & Henseler 2024, 10).

Other studies have defined integration as "the quality of the state of collaboration that exists among departments, which is necessary to work together and meet the demands of the environment" (Lawrence and Lorsch 1967, 11; as cited in Pimenta, da Silva & Tate 2016, 570). Kahn introduced a framework for cross-functional integration, where collaboration manifests as "informal processes in which people from different departments interact and help each other to reach the organization's goals". More concretely, collaboration belongs to an unstructured social framework involving "affectivity, volunteering, mutual understanding, trust and willingness to share information and resources" (Oliveira, Pimenta, Hilletofth & Eriksson 2016, 410).

Another perspective on cross-functional integration is provided by Khao (2011, as cited in Kang, Lee, Hwang, Wei, & Huo 2021, 1517), as "the degree to which a firm can incorporate its strategies, practices, and procedures into collaborative and synchronized processes across functional departments to improve customer value". In this respect, such integration demands a profound transformation in organizational culture, through a strong focus on relationships, where departments are strategically aligned "through a shared vision, collective goals and joint rewards" (Kahn 1996; as cited in Holland, Gaston & Gomes 2000, 236).

As can be seen, the literature about the alignment and communication across departments varies in terminology. The terms "integration", "alignment", "collaboration" and "coordination" will be used indistinctively, as they embrace a more strategic definition and are more comprehensive for the purpose of this research. In the next sections, cross-functional alignment in B2B technology companies is discussed, as well as the benefits of transcending boundaries across departments. Later more specific definitions and models for challenging those boundaries are discussed, in the context of specific units.

3.2 Cross-functional alignment in B2B technology companies

Deal sizes and sales cycles of B2B technology solutions are even larger compared to traditional B2C or B2B sales. Technological sales demand customer-facing functions to craft persuasive value propositions to demonstrate the Return on Investment (ROI) of tech products. Customer-facing functions are expected to collect valuable customer feedback to understand customer needs and develop customized solutions (Chatelaine 18 December 2024). To fulfill this approach, alignment between customer-facing teams with product teams is vital. Nonetheless, lack of department alignment is a common challenge faced by B2B technology companies (Viebrock 2025). For instance, cross-functional alignment in B2B software-as-a-service (Saas) is highly complex. As stated by industry expert Ahuja (31 March 2025) "SaaS businesses move fast, the go GTM [go-to-market] model is multi-threaded, buyer journeys are non-linear, teams are hybrid, global, matrixed, and often stretched thin".

Technology companies are characterized by the constant need for innovation and new product development (NPD). In such a scenario, forming cross-functional teams for innovative purposes is particularly challenging as members possess diverse expertise levels, skills and mindset. Projects can fail if poorly managed, hence an effective cross-functional integration is crucial to satisfy customer needs (Nakata & Im 2010, 554).

Diverse viewpoints present in cross-functional teams often lead to conflict. These conflicts in many cases stem from misaligned priorities or contrasting problem-solving methods, especially with individuals from different professional backgrounds (Ojukwu et al 2024; as cited in Attah, Garba, Gil-Ozoudeh & Iwuanyanwu 2024). Technical staff might prioritize technical attributes, whereas commercial units might focus on customer experience or other non-technical business aspects. Despite these possible tensions, multifaceted teams composed of different functions such as engineering, marketing, finance and design, can potentially introduce unique points of view or challenge the status quo (Akerele et al., 2024; as cited in Attah, Garba, Gil-Ozoudeh & Iwuanyanwu 2024). As an example, when developing a new technology-based solution, engineers might suggest innovative technical features, whilst a designer would improve the visuals, and together with marketing, the cross-functional team might produce economically viable and customer-centric solutions (Attah, Garba, Gil-Ozoudeh & Iwuanyanwu 2024).

3.3 Benefits of cross-functional alignment

Cross-functional alignment entails numerous benefits on a larger scale rather than operating as individual units. It enables a cohesive strategic direction, facilitates decision-making across the buyer journey (Mollenkopf et al., 2000; Alam et al., 2014; as cited in Pimenta, da Silva & Tate 2016, 571) and fosters the development of innovative strategies and organizational transformation (Turkulainen & Ketokivi, 2012; as cited in Pimenta, da Silva & Tate 2016, 571).

Through a review of existing literature, Tomaskova (2018, 107) compiles numerous benefits on "inte-functional coordination" discussed by other scholars, such as:

- Interfunctional coordination enables communication between customers and employees, promoting collaboration and harmony in the workplace, resulting in improved business performance (Woodside 2005).
- It acts as an instrument for information sharing and cooperation (Bouranta et al. 2005; Peng & George 2011).
- Contributes to fostering positive relationships with employees (Mohsen & Eng 2013).
- Drives customer value and business results (Luo et al. 2006 and Jüttner et al. 2007).

In addition, Tomaskova (2018, 109-110) found that the highest positive correlation between inter-functional coordination and customer success occurs in two key areas: ethics and goodwill, and strategy. Ethics and goodwill refer to employees who identify with the company and consequently they will reflect positively on the external environment towards the customer. Strategy denotes top management implementing inter-functional coordination using a driven approach by addressing the internal environment, which ultimately produces effects on the external environment resulting in satisfied customers.

In addition, collaboration among functions connects talent with diverse skills and perspectives, facilitating product development, accelerated product rollout and product value (Wheelwright and Clark1992; as cited in Ewim, Achumie, Adeleke, Okeke & Mokogwu 2024, 16). What is more, problem solving is highlighted as an advantage due to the “cognitive diversity” of gathering individuals with different perspectives in cross-functional teams (Hackman 1987; as cited in Ewim, Achumie, Adeleke, Okeke & Mokogwu 2024, 16). Last but not least, enhanced communication between functions empowers individuals to share critical information, refine objectives, resolve conflicts in early phases and ultimately, being aligned to deploy company’s strategy seamlessly (Griffin and Hauser 1996; as cited in Ewim, Achumie, Adeleke, Okeke & Mokogwu 2024, 16).

3.4 Barries impeding cross-functional alignment

Although alignment among units offers multiple benefits, challenges are observed in practice. Organizations find challenging interdepartmental coordination, e.g. sales & marketing departments due to differences in vision, budget allocation, level of interaction with customers, and other multiple reasons, leading to constant reciprocal blame which ultimately causes harm to organizational performance (Kotler, Rackham & Krishnaswamy 2017). Similar challenges apply to other units, e.g. sales-customer success, or sales-product departments, and/or research and development.

Within commercial departments, discrepancies can be grouped into two categories (Kotler, Rackham & Krishnaswamy 2017). The first one is economic conflicts due to uneven budget allocation and competition. For instance, different views on budget allocation, either for advertising by marketing or for hiring sales staff. In some cases, top leaders might lean towards favoring with more sales budget, while marketing might encounter pressure to produce results with lower budgets. The second aspect is cultural conflicts. Each department is traditionally performed by individuals with diverse personalities, goals and a mindset towards success. Marketers are data-driven, guided by project outcomes and limited customer contact compared to their sales peers. In contrast, sales staff are mainly engaged in fieldwork, interacting with clients and focused on closing deals, holding a short-term view.

Based on a survey of 43 Fortune 500 companies in the United States, six cross-functional obstacles are discovered by Wall and Lepsinger (1994, as cited in Holland, et al. 2000, 233):

- conflicting organizational goals (main issue)
- lack of time to complete responsibilities
- overlapping responsibilities
- conflicting personal goals
- no clear direction or priorities
- lack of cooperation

If incentives are misaligned, sales and marketing begin facing conflicts. For instance, marketing may advocate selling products with higher margins, while sales prefer to reduce margins to increase sales. In addition, sales might have more immediate reward as their results are immediately tangible compared to marketing's business impact (Kotler, Rackham & Krishnaswamy 2017). In this respect, perceived inequity and unfairness is common to surge.

Misalignment between sales and customer success encounters its own challenges. The customer success function typically overlaps with sales functions producing friction, depending on how each function is involved along the customer journey. Boghe, Van Vaerenbergh, Teixeira & Vancoetsem (2024) explain three key sources of tension between customer success and sales:

- When sales representatives adopt a short-term sales focus, just aiming at closing deals to win commissions, instead of pursuing long-term customer care. At times, salespeople might overpromise, transferring the responsibility of customer care to customer success representatives.
- When sales and customer success compete for the customer, even after the handover, creating mistrust between units and the customer. Equally, a prevailing practice is accusing one another when projects fail.
- Poor handovers when there is insufficient or inadequate transfer of relevant follow-up customer information from sales for customer success.

In the case of the relationship between Research & Development and Marketing, some alignment barriers discussed by the literature are the following: contrasting character traits, cultural differences among departments, field-specific jargon, priorities and different understandings of success (Griffin & Hauser 1996; as cited in Holland, Gaston & Gomes 2000, 235-236).

The following sections outline strategies for alignment based on the literature review.

3.5 Alignment between customer-facing functions and technical functions

It has been proven that cross-functional integration produces successful new product development projects in manufacturing companies. Such integration is particularly more effective when organizations focus on first building internal cooperation among multiple departments (R&D, engineering, sales, purchasing, manufacturing, etcetera) and then involving third-parties such as suppliers and customers. By this means, external partners provide valuable information on current market trends and needs, then customer-facing functions would be expected to sustain open and smooth communication with R&D to ensure new products and features are designed and improved based on market feedback (Kang, Lee, Hwang, Wei, & Huo 2021, 1515-1531).

A more comprehensive study was undertaken by Keszey & Biemans (2016) about the impact of the so-called “sales-marketing encroachment” on new product development. This research defines sales- marketing encroachment as the "sales' level of involvement in several tasks that are strategic by nature and traditionally belong to marketing's domain" (Keszey & Biemans 2016, 3699). The approach is applicable to contexts where marketing and sales boundaries are unclear. The study found that motivating sales departments to participate in strategic tasks typically owned by marketing allows organizations to capitalize on better customers relationships, therefore, more innovative products are developed. The “sales–marketing encroachment” and the impact on new product development applies to B2B and B2C contexts and multiple business sectors, indistinctively. In fact, the “sales-marketing encroachment” naturally induces cooperation between the functions, resulting in more impactful product development.

The next section outlines the existing literature of alignment between sales, marketing and customer success.

3.6 Alignment between customer-facing functions

This section presents existing frameworks addressing the alignment between customer-facing departments: sales, marketing and customer success. Such units are commonly found in most organizations. Therefore, additional commercial units are excluded to limit the scope of the study.

First, Kotler, Rackham & Krishnaswamy (2017) uncovered four types of professional interactions between sales and marketing: undefined, defined, aligned and integrated functions. As can be seen in table 1, these interactions evolve as those departments develop, transitioning from being undefined to being integrated. Most observed cases rarely showed being in a fully integrated state.

Table 1. Types of relationships between sales and marketing (Adapted from Kotler et al. 2017)

Type of Relationship Sales and Marketing	**Characteristics**
Undefined	- Sales and marketing have evolved separately. - Each department is engaged in their own responsibilities and goals with limited knowledge of each other. - Communication happens when conflicts emerge.
Defined	- Both departments have agreed on a shared language, processes and protocols to safeguard against conflict. - Conversely, each team performs their own duties in most cases. They cooperate mainly in industry events and business fairs.

Type of Relationship Sales and Marketing	Characteristics
Aligned	- Clear and flexible boundaries between sales and marketing functions. - Team-based planning and training. - Marketing gets involved in discussions with sales on key accounts and commodity sales.
Integrated	- Structures, systems and incentives are shared. - Marketing is thoroughly integrated into key account management. - Together create and deploy shared metrics. - Budgeting turns into a flexible and less confrontational process.

According to Kotler, Rackham & Krishnaswamy, the first step to improve alignment/integration is to assess the current relationship state between units. Next, companies can evaluate the necessity of upgrading from one level to another. To establish a more aligned relationship starting from a defined relationship, it is recommended to stimulate disciplined communication through regular meetings between sales and marketing, establish joint tasks and rotate roles, create geographical closeness between both units and develop mechanisms to exchange mutual feedback (Kotler, Rackham & Krishnaswamy 2017). The authors provide specific recommendations to achieve cross-functional integration beyond alignment, such as appointing a chief revenue (or customer) officer, to establish a joint marketing and sales funnel with clear steps, and to develop shared sales and marketing metrics, revenue targets and compensations systems.

Alternatively, after the global COVID pandemic, Graesch, Hensel-Börner & Henseler (2024, 10) developed a comprehensive multidimensional framework "COMPLY Framework" to facilitate organizational alignment of marketing, sales and IT departments across the customer journey, aiming to enable a more impactful customer success management. The authors define alignment as "the degree to which the needs, demands, goals, objectives, and/or structures of one actor are consistent with the needs, demands, goals, objectives, and/or structures of another actor" (p.3).

This framework offers managers different intradimensional and interdimensional alignment interventions, to be selected and combined as needed according to the specific context, teams and organizational structure (tables 2-7). Intradimensional adjustment interventions indicate how to achieve the alignment inside each dimension. Interdimensional adjustment interventions refer to combining dimensions and use overlapping interventions (P1-P6) based on alignment needs (Graesch, Hensel-

Börner & Henseler 2024, 9). Tables 2-7 show the summary of the COMPLY framework which includes the following 6 dimensions: "communication and information", "objectives", "mindset & orientations", "power", "linkages & resources" and "yielded knowledge & skills".

Table 2. Dimension 1: Communication and Information. Overview of COMPLY Framework. (adapted from Graesch, Hensel-Börner & Henseler 2024, 9)

Dimension 1: Communication and Information		
ATTRIBUTE	INTRADIMENSIONAL ADJUSTMENT INTERVENTIONS (How)	INTERDIMENSIONAL ADJUSTMENT INTERVENTIONS
Digitalization	Deploy CRM systems throughout the whole customer journey and use digital platforms collaboratively for customer communications	P1. Transparency "Transparent communication and digitalized information sharing must be established proactively"
Proactivity	Foster a collaborative environment and establish together information sharing mechanisms	
Transparency	Ensure that customer interactions, all information and planned activities become fully available and transparent in real time	

Table 3. Dimension 2: Objectives. Overview of COMPLY Framework (adapted from Graesch, Hensel-Börner & Henseler 2024, 9)

Dimension 2: Objectives		
ATTRIBUTE	INTRADIMENSIONAL ADJUSTMENT INTERVENTIONS (How)	INTERDIMENSIONAL ADJUSTMENT INTERVENTIONS
Definition of objectives	Jointly define objectives for all stakeholders.	P2. Joint Prioritization "Objectives are defined in an interdisciplinary way, including jointly prioritized, measurable key results"
Prioritization	Place emphasis on achieving mutual goals in a cooperative culture.	
Measurability	Communicate objectives to all stakeholders, jointly agree on KPI's and organize interdisciplinary discussions on progress and results.	

Table 4. Dimension 3: Mindset & Orientations. Overview of COMPLY Framework (adapted from Graesch, Hensel-Börner & Henseler 2024, 9)

Dimension 3: Mindset & Orientations		
ATTRIBUTE	INTRADIMENSIONAL ADJUSTMENT INTERVENTIONS (How)	INTERDIMENSIONAL ADJUSTMENT INTERVENTIONS
Willingness & motivation	Maintain mutual awareness of each other's (sales, marketing and IT) tasks and involve all stakeholders in the entire customer journey	P3. Customer Orientation "A joint motivation consisting of customer orientation, attentive collaboration and an innovative mindset must be established"
Attentiveness & self-efficacy	Promote a collaborative environment and a culture of trust.	
Customer orientation	Generate IT projects that support sales efforts. Enhance and ensure customer communications are shared internally.	
Innovativeness	Build a startup and digital mindset.	

Table 5. Dimension 4: Power. Overview of COMPLY Framework (adapted from Graesch, Hensel-Börner & Henseler 2024, 9)

Dimension 4: Power		
ATTRIBUTE	INTRADIMENSIONAL ADJUSTMENT INTERVENTIONS (How)	INTERDIMENSIONAL ADJUSTMENT INTERVENTIONS
Accessibility	Maintain a close relationship with top management and consolidate related tasks and responsibilities.	P4. Bundling in top management "Responsibilities must be divided equally, and accessible top management must be established".
Responsibility	Ensure common understanding roles, tasks, responsibilities and jointly decide on plans.	
Equality	Build a respectful environment characterized by appreciation of roles and personalities. Build team spirit.	

Table 6. Dimension 5: Linkages & Resources. Overview of COMPLY Framework (adapted from Graesch, Hensel-Börner & Henseler 2024, 9-10)

Dimension 5: Linkages & Resources		
ATTRIBUTE	INTRADIMENSIONAL ADJUSTMENT INTERVENTIONS (How)	INTERDIMENSIONAL ADJUSTMENT INTERVENTIONS
Availability	Focus on value-adding tasks and perform jointly capacity management and project prioritization.	P5. Close Process Management “Close proximity and frequently used linkages must be established by available teams through joint processes.”
Frequency	Develop a process for interdisciplinary collaboration. Differentiate the need of group meetings and individual projects.	
Proximity	Design office spaces that facilitate team proximity and balance.	
Team orientation	Erase barriers between sales, marketing and IT. Promote teamwork.	

Table 7. Dimension 6: Yielded Knowledge & Skills. Overview of COMPLY Framework (adapted from Graesch, Hensel-Börner & Henseler 2024, 10)

Dimension 6: Yielded Knowledge & Skills		
ATTRIBUTE	INTRADIMENSIONAL ADJUSTMENT INTERVENTIONS (How)	INTERDIMENSIONAL ADJUSTMENT INTERVENTIONS
Product orientation	Communicate product details with all stakeholders. Verify that they understand the potential impacts of new product features requested by customers.	P6. Respect Individual Competencies “The capability for skills must be respected, selected and combined, and the yielded knowledge regarding the product, market and tools must be shared.”
Tool orientation	Select tools together and provide training to sales and marketing teams on IT tools’ advantages and limitations.	
Market orientation	Marketing automation turns into a common goal for marketing, sales and IT. Implement digital market intelligence and data analytics to support the sales function.	

Dimension 6: Yielded Knowledge & Skills		
Capability	Combine skillsets and train all teams for a common understanding on the skillsets.	

As illustrated in the previous framework, departmental alignment can be addressed from multiple angles and requires a combination of different strategies.

A further essential interaction within modern technology organizations is between customer success and other units. Customer success management is an emerging discipline focused on strategic planning and implementation of initiatives to fully understand customer goals and align them with the company´s offering to ensure customer success. The customer success function has been adopted in multiple B2B industries besides the Saas industry (Madruga, Hilton, Hochstein, Navarro, Silva, Haddad 2024, 3,13). The customer success function arose from the need to eliminate conflict for sales units, which traditionally perform not only sales tasks, but also service responsibilities (Agnihotri, Gabler, Itani, Jaramillo, & Krush, 2017, as cited in Boghe, Van Vaerenbergh, Teixeira & Vancoetsem 2024). In fact, it has been observed that sales performance is maximized when salespeople concentrate their efforts only on one function, either sales or service, instead of handling multiple responsibilities (Gabler, Ogilvie, Rapp, and Bachrach 2017, as cited in Boghe, Van Vaerenbergh, Teixeira & Vancoetsem 2024).

Boghe et al. (2024, 125-126) proposed a taxonomy of customer success involvement in sales. By interviewing customer success (CS) managers in several organizations, four categories were identified. The first one is “pure service CS management”, referring to minimally engaged customer success managers in the sales process, whereas acquisition, upselling and cross-selling are in charge of sales personnel. Overselling can be a challenge in this setting.

The second one is the so-called “hunting-supporting CS management”, referring to customer success managers who are deeply engaged in presales but have minimal participation in up- and cross-selling. Frustration and tensions may arise if there are unequal sales compensation or lack of clarity on customer ownership.

The third category is “farming-oriented CS management” referring to customer success managers focusing on up- and cross-selling with a reduced participation in presales. In this category, one main challenge is that customer success managers might be perceived by customers as impartial advisors when their role implies sales goals.

Fourth, “fully ambidextrous CS management” entailing customer success managers heavily involved in the full customer journey, from presales, deal closing, contract extensions to upselling/cross-selling. The main identified challenges in a fully ambidextrous CS management model is the risk of being perceived as impartial advisors as in the farming-oriented model, and possible tensions on customer ownership.

As can be seen, cross-functional alignment is a complex and multifactor phenomenon. The concepts and frameworks discussed throughout the literature review section are summarized in a mind map in appendix 1.

4 Research methods

4.1 Research aim and objectives

The aim of this research was to investigate post-pandemic practitioners' views, best practices and barriers impeding cross-functional alignment/integration across the customer journey, within customer-facing departments and between them, and non-customer-facing departments (product /new product development/innovation). The customer journey model used for this study was composed of three generic phases: pre-purchase, purchase and post-purchase. This approach is a strategic narrowing to allow are more manageable scope for qualitative analysis.

To reach research objectives the key research questions were as follows:

Research question 1: What are the best practices and barriers for cross-functional alignment (technical/engineering functions, marketing, sales and customer success) *across the entire customer journey* in B2B technology companies?

Research question 2: What are the specific best practices and barriers for alignment (technical/engineering functions, marketing, sales and customer success) *in each phase of the customer journey* in B2B technology companies?

a. Prepurchase phase (customer awareness and buying intention)

b. Purchase phase (decision, order placement and payment)

c. Post purchase (from onboarding to loyalty)

Research question 3: What development recommendations can support B2B technology companies to enhance cross-functional alignment?

Although departments vary throughout companies, the study was limited to revenue-related departments as they are traditionally impacting directly on customer experience such as:

- Engineering/technical functions: Product, new product development (R&D), innovation and technical support.

- Customer-facing functions: Marketing, sales and customer success.

4.2 Research approach

A qualitative research approach has been selected because the research aims to explore an understudied post-covid area from managers' perspectives, the challenges and best practices they have observed for cross-functional alignment within an organization in relation to customers. Qualitative studies allow us to capture people's views on real-life situations and the rise of new ideas that have not been addressed by previous literature (Omeihe & Harrison 2024, 8).

4.3 Qualitative research interviews

Data was collected through exploratory semi-structured interviews. The sampling type for data collection was a combination of convenience sampling and purposive sampling. Convenience sampling refers to selecting participants based on accessibility (Omeihe & Harrison 2024, 145), while purposive sampling (also known as selective sampling) is a sampling technique where respondents are selected deliberately based on specific characteristics or specialized knowledge relevant to the research topic (Bullard 2024). The study involves interviews with elite informants, meaning top managers and influential decision makers at organizations (Aguinis & Solarino 2019). For instance:

- C-suite executives / top management: Chief Executive Office, Chief Technology Officer.
- Heads of Departments: The aim of this type of interview was to examine practitioners' perceptions from various viewpoints (Cassel 2015) at higher levels in different B2B technology companies.
- Mid-level managers / functional managers with expertise in technical (product and support), sales, marketing and customer success roles.

The data collection for this study involved contacting a total of 19 potential elite informants. Invitations were extended based on the accessibility through the researcher's professional network and the specific informants' professional experience relevant to this study. Elite informants were contacted between April and July 2025 through LinkedIn and e-mail. They received an invitation with a research announcement disclosing details of the research project, confidentiality, data management and data protection information.

In total, 16 interviews were completed and included in the final analysis. The sample was intended to include Revenue Chief Officers; however, access was limited to this type of function. In fact, one chief revenue officer had initially consented to participate but was unable to attend the interview. Table 8 outlines the list of interview participants. Additional details about each elite informant are provided in appendix 2.

All participants preferred to be interviewed online using Microsoft Teams. Participants provided consent of recording and real-time transcription of the interview by Microsoft Teams application.

To reduce bias, an interview guide was used during the interview (Omeihe & Harrison 2024, 172). The interview guide comprised open-ended questions focused on gathering barriers and best practices of interdepartmental alignment per customer phase. At the end of the allocated time for the interview, if there was time available, the interviewees were invited to share any additional thought related to the topic (appendix 3).

The length of the interviews conducted for this study varied, with a minimum duration of 45 minutes and a maximum duration of 1,5 hours. The majority of interviews lasted 1 hour. In fact, each interview was planned to last approximately 1 hour. The variation in length was influenced by the availability of the participants and depth of their responses. The interviewer was mindful of the plan duration by asking open-ended questions that allowed participants sufficient time to provide responses while ensuring an efficient discussion.

Table 8. List of elite informants

Elite Informant	Function	Role
Interviewee 1	Leadership	Chief Executive Officer, CEO
Interviewee 2	Leadership	Chief Executive Officer, CEO
Interviewee 3	Marketing	Marketing Director
Interviewee 4	Marketing	Head of Marketing
Interviewee 5	Marketing	Marketing Specialist
Interviewee 6	Sales	Sales Director
Interviewee 7	Sales	Head of Sales
Interviewee 8	Sales	Senior Sales Manager
Interviewee 9	Customer success	Customer Success Director
Interviewee 10	Customer success	Customer Success Manager
Interviewee 11	Customer success	Customer Success Manager
Interviewee 12	Customer success	Customer Success Specialist
Interviewee 13	Technical role	Chief Technology Officer, CTO
Interviewee 15	Technical role	Technical Support Manager
Interviewee 16	Technical role	Innovation Manager

4.4 Thematic data analysis

Braun and Clarke's thematic analysis model was used in this study, which is composed of six phases as described by Cormack, Postăvaru & Basten (2018).

Phase 1: Transcriptions were downloaded from the Microsoft Teams application for thematic analysis. The author gained familiarity with the data by reading the text carefully.

Phase 2: Raw data was transferred to an Excel file to produce initial codes. The Excel file contained different columns identifying the interviewee, the specific function, nature of code (barrier or best practice) and customer journey phase that the code was related to pre-purchase, purchase or post-purchase phase, or the entire customer journey. This categorization facilitated this data analysis. A total of 422 codes were identified across 16 interviews by capturing granular segments from the transcripts.

Phase 3: Once initial codes were generated, the researcher proceeded to find patterns across these codes and group them into potential broader themes. Multiple codes were found repetitive, overlapping or outside the scope of this investigation. The relevant codes were organized into broader patterns concerning the research questions. Codes were grouped by similarity or according to their belonging to the same broader concept. As it was a large set of codes several iterations were made, moving back and forth between raw data, codes and potential themes, while merging and discarding irrelevant data.

To answer research question 1, significant core themes emerged. In total, 4 core themes and 21 sub-themes were identified in this phase. Since the research design, particularly the research question 2, considered the examination of perspectives from different departments in different phases of the customer journey, the thematic analysis per function exhibited a greater diversity of themes/sub-themes, which naturally were related to the core themes previously identified. Thus, for the pre-purchase phase, the author identified 31 subthemes. There were no findings for the purchase phase. In the case of the post-purchase phase the author found 22 sub-themes. These figures include both barriers and best practices.

Phase 4: This phase involved reviewing and refining the themes and sub-themes. This process consisted of checking whether the themes were coherent and meaningful. Some sub-themes could be still merged or even excluded if did not contribute meaningfully to answering the research questions. The subthemes were reorganized to be presented in a structured manner. After refining, a total of 4 core themes and 11 subthemes were generated, answering research question 1 (section 5.1). Concerning the cross-departmental views across the customer journey (research question 2), in total 13 specific sub-themes per phase (pre and post-purchase) were found. Some of them naturally are related to the core themes and sub-themes identified previously, but they were named slightly differently for clarity in this section. These subthemes are disclosed separately by respective functions (marketing, customer success, etc.) to capture the specific patterns and perspectives sought in the research question 2 (sections 5.2, 5.3 and 5.4).

Phase 5: In this phase core themes were described. At this point, the themes and sub-themes had been revisited, and they had sufficient evidence from interview excerpts.

Phase 6: Findings were written and presented in an organized manner as can be seen in Chapter 5.

5 Findings

This chapter presents the discussion of core themes that surged from elite experts' professional experiences in leadership positions, marketing, sales, customer success and technical roles. Qualitative research revealed barriers and best practices of cross-functional alignment in B2B technology companies across the customer journey.

5.1 Strategic cross-functional alignment

Operating in silos is one of the main challenges faced by B2B technology organizations according to most experts interviewed for this study. This finding reflects patterns reported in existing literature. As mentioned in the literature review section, the conventional practice in all types of companies, regardless of the size, is organizing departments in silos with a minimum synergistic approach (Ellis & Brown, 2017, 35). Evidently, the absence of cross-functional alignment slows down business growth (Gulati, 36; as cited in Ellis & Brown 2017).

In the interviews experts shared their views and experiences concerning cross-functional alignment. A customer success manager (interviewee 10) has witnessed siloed operations in the B2B context. In their opinion, internal collaboration demands greater efforts as companies scale:

> "The barrier I've come across is internal collaboration, which is in silos. As companies grow, it's natural that your teams get bigger, very quickly the collaboration aspect is forgotten... How do we make sure that we're still sticking together? Even though our teams are getting bigger and you can't necessarily involve every member of the team in those collaboration sessions all the time. Are you making sure that you have enough collaboration? So, most of the time, the sticking points have to do with those silos."

Similarly, the head of marketing (interviewee 4) noticed silos as well. A successful alignment entails a systematic approach in combination with a customer-centric culture:

> "I think that one of the most recurrent challenges is that companies are organized in silos, in functions which don't often communicate or don't communicate well enough. For example, when sales and marketing systems are not within the same organization, it has happened quite often due to different organizations, sales and marketing are not reporting to the same leader and when that happens, you create a disconnect".

> "Simply the alignment, it's not something that comes naturally, especially because of the silos that we have discussed. Alignment requires a systematic approach and requires the company to shift from an organization-centric approach to a customer-centric approach. If you shift this view to a customer-centric approach, you cannot do anything else but realize that organizations need to work as a team".

A head of sales (interviewee 7) highlighted the importance of internal alignment of functions:

> "It's critical that if a company wants to succeed, all departments need to be aligned. Otherwise, the strategy and growing the business are not going to happen in a sustainable way. It might grow, but it's not going to be in a sustainable way and you're going to encounter a lot of hurdles down the road. From my experience working for SaaS companies that are Venture Capital

> backed, the main goal of aligning the departments is when investors want to, for example, double or triple their investment. That cannot happen if marketing, sales and customer success are not in sync".

The following sections outline the 4 core themes that respond to research question 1 (table 9), meaning the barriers that impede interdepartmental alignment, combined with successful practices that facilitate it across the whole customer lifecycle:

Table 9. Summary of findings on cross-functional alignment across to the entire customer journey

Core Themes	**Sub-themes**
Organizational Leadership	Organizational strategy Leadership skills Communication & transparency from leaders Remote & hybrid leadership
Performance Management: Revenue targets, metrics and rewards	Conflict of interests Performance metrics Reward systems
Company culture & employee orientation	Psychological wellbeing at the workplace Employee development & training
Customer centricity across functions	Customer-centric organizational culture Operational efficiency fostering customer centricity

5.1.1 Organizational leadership

The role of organizational leadership in cross-functional alignment emerged as the most frequently discussed theme by nearly all experts, regardless of their function, managerial level or phase of the customer journey. In this study, the sub-theme "organizational strategy" appeared most often, followed by "leadership skills", "communication dynamics from leaders" and "remote/hybrid leadership".

From an organizational point of view, mission and vision from founders was mentioned as a key alignment element:

> "From my experience the most important above all [alignment best practices] would be mission and vision from founders. If it's clear and articulated in the company, and all company aligned towards that, that's ideal. But honestly, I have not seen it so often. I mean if it's a bigger company like scale up or enterprise, they usually have silos of tasks, etc." Customer success manager (interviewee 10).

Such statement was echoed by a top leader in the software industry (CEO, interviewee 1) who believes a top-down leadership approach ensures effective alignment across all business units. In their opinion, top leaders are responsible for harmonizing the organization:

> “In this early phase, I think my approach is from top to down. [As a CEO] I have the big picture first and then I am able to talk about the details. First, in the company you should have a unified vision and goals. It sounds old fashioned, but it's so true. Your organization is like an orchestra and there are different instruments, and you have to harmonize the way they are playing. [...] I think the most critical ones are to get access to information, and to take care of the participation of all departments.”

This CEO (interviewee 1) suggested, as a best practice, cascading a cross-functional approach by actively involving all the heads of departments as follows:

> “This is the vision. Each one of you needs to communicate or needs to get people to do this [company strategy] in your respective areas [...] but ensure that you [as a leader] cascade the message properly. That is one key thing. And this is all about how the company is organized”.

A second Chief Executive Officer (interviewee 2) pointed out their key role in goal setting and alignment within the startup they currently lead. In the context of their startup, a flat organizational structure is preferred, where leadership values and relies on employee’s ownership for cross-functional alignment. This CEO claimed that their role is to draw inspiration from successful companies’ philosophies, such as Amazon or Google, and consequently encourage employees to take ownership, while placing the customer at heart.

A practical example of the previous statement was mentioned by the innovation manager of a large successful Finnish technology company. An overarching strategy serves as guidance followed by cascading it through heads of departments:

> “At our company there is an overarching company strategy which is set by the CEO and the leadership team, and the way that case cascades down is that we have these four core themes or core shifts is what we call them right now and the global business units essentially cascade down”. Innovation manager (interviewee 16).

In a similar participatory point of view, a Chief Technology Officer (interviewee 13) of a small-medium sized business believes that top leaders are responsible for setting a preliminary overarching company strategy, then adjust it and enhance it by considering staff’s feedback, market signals and customer feedback.

Conversely, two experts highlighted the need for bottom-up participation and individual agency to enable cross-functional alignment:

> “Alignment comes from everyone. When it's successful, it comes from everyone. So, it should be every individual within the organization which should kind of pull towards that alignment and make sure that you're following certain processes and stuff. I think it varies with your organizations where the initial drive probably [...] comes from the management team who then starts executing it within the organization, but sometimes it can come from sort of people who aren't

part of the management team, but they're raising issues and highlighting things, such as: this isn't working or the process is out of sync”. Customer success manager – Interviewee 11.

“So they [top leaders] have these four objectives, but they also give us a lot of opportunities to to create our own goals. So, it's not like my manager tells me what my goals are. Co-creation is ok and we do it together.” Innovation manager (interviewee 16).

Reporting to the same leader was an additional best practice suggested by a marketing director (interviewee 3):

“...Reporting to different bosses [becomes] very complicated because even the bosses at the top may have their own opinions... The best way to ensure communication and collaboration is that all these departments report to the same single person. That is the ideal [way] and I have seen it... [As a director of marketing] I was talking with the head of engineering which had no clue about marketing. Of course I was explaining my thing. He was explaining his thing. So, we understood each other. That only happens because we were reporting to the same person. One person at the top is crucial in the organization chart.”

Next, limited “leadership skills” was identified as one of the main blocks for cross-functional alignment in B2B technology companies. This sub-theme was addressed by participants from different perspectives. For instance, at least three experts expressed that some leaders, despite their strong technological expertise, may have a limited understanding of customer relationship management and may lack people management skills, which are fundamental to empowering teams, therefore, achieving revenue goals. In this respect, managing directors with extensive technical expertise combined with commercial experience could enhance their leadership opportunities for success compared to their counterparts with less exposure to the customer-facing side of businesses.

Reflecting on the gap between technical expertise and commercial skills, a marketing director (interviewee 3) argued:

“… Sometimes if you want to fill a quota, you start promoting people that might not be as competent or as skilled or as interested (even) in a leadership position. When I mean leadership position means also having responsibility for people. So, you might be a great expert, but you don't necessarily have the interest, passion, or competence to lead people. They are two different things”.

Interviewee 7 cited poor leadership at the executive level, with one specifically case referencing a Chief Executive Officer CEO’s leadership style that created disconnection between teams. The CEO used to organize separate meetings with the heads of departments and relevant information was hidden between them. Nevertheless, the same interviewee 7 witnessed a more effective leadership style in another organization:

“The CEO made all the departments come together and ensure that this was following through, and all the units, not only the commercial ones, had to collaborate and be aligned or integrated.”

“I think it goes back to the leadership of the company. It all stems from the CEO. If the CEO does not enforce what needs to happen, the way to collaborate, these are barriers that are going to continue to happen from all angles. From marketing, not knowing who to target, from salespeople not getting information that they need from marketing like use cases, case

> studies... Product only doing what they want to do because they think that's the way." Head of sales (interviewee 7).

According to CEO (interviewee 1) top executives play a key role as top executives in guaranteeing mutual employee awareness of business units' expectations, others' roles and responsibilities. "We have the slogan that you have to walk the talk" (CEO, interviewee 1) and create transparency that fosters mutual awareness. Although, lack of internal awareness remains a challenge in some businesses. Operational staff believe that *"*everyone in the company needs to know what we are doing but sometimes I would say that it's not so clear for everyone". Interviewee 5. In this respect, a "transparent leadership approach" can be considered an effective practice.

Another issue preventing effective cross-functional alignment is "remote & hybrid management". At least five experts in this research have experienced challenges managing remote teams, particularly after the pandemic COVID19. For instance, the CEO (interviewee 1) shared the difficulties of engaging teams virtually, since active listening is not guaranteed in virtual settings. Therefore, a combination of both online and offline meetings would be ideal as stated:

> "From my experience it's very important that you meet the other departments at the same time; if it's possible of course, if you have a company of thousands of employees, it's not possible. But if it's possible, it should be a combination of online and face to face meetings to share this information, because by sharing face to face, it's much more effective and people can learn from each other better". CEO (interviewee 1).

In this respect, a customer success manager (interviewee 11) highlighted that leadership abilities are required to manage human resources in hybrid settings, both on-site and online because: "After the pandemic, they [top management] haven't understood how to make it work within the hybrid model either, which is why some organizations are trying to push people back to the office full time". A second customer success manager (interviewee 10) who currently leads teams fully remotely in different regions suggested that "ideally, they [all departments] should meet in person at least two times per year, all of them, in a 3-day session for collaboration, for alignment, for making connections, for synergy". Nevertheless, companies with global operations in various time zones experience additional challenges to reunite remote teams face-to-face regularly (interviewee 10).

A technical support manager (interviewee 15) argued that face-to-face collaboration is vital: body language can be observed directly in physical meetings which enables more effective communication, true connection with team members and mutual understanding, compared to online interactions. A similar opinion from a technical success manager (interviewee 14), emphasized that there must be a balance between different types of communication: in-person when needed for complex issues, but using online tools (like Slack or virtual meetings) for day-to-day discussions. Collaborating in person provides an experience that online communication can't replicate: "You sit in the room and brainstorm... Then discuss topics. That can't be taken away. There is a different feeling [between in-person] than online, when you are sitting around a table".

5.1.2 Performance management: revenue targets, metrics and rewards

Subthemes associated to performance management influencing cross-functional alignment were "conflict of interests", "performance metrics" and "reward systems", which are described along this section.

One of the CEOs (interviewee 1) and function leaders (interviewees 6, 7 and 8) remarked the importance of avoiding competition between all units and motivating employees to work towards a unified goal. According to them, this objective is achievable when unified metrics and reasonable compensation schemes are established. The right metrics can potentially start removing silos and barriers across business and technical units.

A recurrent problem with cross-functional alignment explained by a senior sales manager (interviewee 8) is tensions arising from conflicting revenue targets/interests and incentives across marketing, sales, delivery departments (customer success) and even finance departments:

> "Incentives, KPIs [Key Performance Indicators], bonus plans, all these together also have a lot of influence. If you're looking for best practices or barriers, it means sometimes sales and delivery departments have different incentives, you know, sales normally have revenue targets. The sales guy decides to give a 10% discount out of this €1,000,000 deal for him to get his bonuses and then he goes to Hawaii for an incentive trip. But the delivery guy says 'no, if you give 10% out of the sales margin, out of my profitability, the bill drops to 10% and I don't reach my target'.
>
> You need to balance all this…The most important thing for the sales director is to get the deal, but the other ones might want to save, safeguard the profitability of this deal or capabilities of the delivery. So KPIs between the organizations [departments] or bonus plans should be aligned, or at least understand the KPI of your peer, whether you are part of the same team, or if you are marketing, sales, delivery, finance.
>
> Controlling [Finance] is very important here. Controlling is the one that finally decides what profitability is and if you should go or not to go. So, at least in this big software company. But that was their KPI. So sometimes in big companies it becomes very difficult to work with because their KPIs are so different. Those KPIs should be balanced. Incentives should be known by everyone and connected to the customer."

Furthermore, a head of marketing (interviewee 4) shared that "there is a certain culture which takes sales in the palm of their hand as the hero of the day, because then the relationship between functions is very unbalanced." Instead of creating an internal culture of competition, a top leader (interviewee 1) recommended employee recognition as team success in equal measure:

> "In the companies you celebrate the big deals, and then normally it's the salesperson, one person who is then promoted and given the bottle of champagne. He or she gets all the bonuses and that's not the way. You should celebrate the whole team and keep the bonus for the whole

> team. But there should be one small slice that is personal, but still that celebration is for the team."

To facilitate equal measure, one head of sales (interviewee 7) advised the introduction of shared success metrics across marketing, sales and customer success, while all teams work together, not competing, towards the same objective:

> "I have seen it implemented that way [shared success metrics] and the outcome was that this specific company was generating 3 million euros in revenue [previously] but with that alignment the revenue grew to 7 million euros. So, we collaborate. We are not competing...It was more of how we can help each other out? How can I make your job easier? How can I make my job easier?".

Interviewee 6 observed similar conflicts between sales and customer success (delivery), and suggested an alternative cross-functional bonus model to solve competition issues:

> "The leadership should be aware that they possibly set targets for sales that affect customer success or performance… What should performance or bonuses be based on?
>
> If the customer renews for the first time, sales should get a cut. If the customer churns, you know, sales don't get the cut. So, there should be this additional bonus to sell to ideal customers rather than to not so good ones. Then it could also include other types of metrics like how good or how fast or easy was the onboarding process or how we were able to move the customer forward in the journey". Customer success manager (interviewee 6).

Team-based bonuses and transparency on the reward system were proposed:

> "The competition for the salary earning and salary scheme are important. So, first of all, you plan the targets, you can count for instance 40% as the success of the team and then there is a percentage of the individual part. Then you launch this bonus scheme and get their [employees] commitment to it. They must find it fair enough. It depends also on the company culture, and how they react. Are they supporting it? Then you will start to introduce it. And that's the best way as you get quite open about what are the schemes for everyone." CEO (interviewee 1).

5.1.3 Company culture & employee orientation

Within the core theme of "company culture & employee centricity", the sub-theme "psychological wellbeing at the workplace" was the most relevant one concerning cross-functional alignment. Gatekeeping was mentioned as a barrier. A marketing specialist (interviewee 5) described:

> "For example, on a specific company sometimes people were resentful of sharing, [reflecting] why would I need to share that information with marketing?... If there is not a good culture where everyone is collaborative and trying to help each other, then of course it [cross-functional alignment] will be more difficult".

Interviewee 5 highlighted the relevance of employee centricity in cross-functional alignment, and ultimately, for revenue generation. In their view, leaders should safeguard not only revenue, but employee wellbeing:

> "It's not about only focusing on getting sales but trying also to understand what we can do internally to provide the service, but at the same time, how I can take care of the workforce. Like having a leadership that allows communication between all the departments and it's empathetic trying to understand how to generate revenue without putting the human capital at risk".

Psychological safety in the workplace was accentuated as a basic need for team members. Edmonson (1999, 354) defined psychological safety as "a sense of confidence that the team will not embarrass, reject, or punish someone for speaking up. This confidence stems from mutual respect and trust among team members." On this matter, interviewee 5 continued:

> "...When it comes to good practices, we need to consider that people are different, so you need to create a way that helps everyone to feel safe to share opinions and information together to be able to fulfill the goals of the company. This psychological safety is extremely important for everyone, not only for us as employees but also for the company to have good results".

The head of sales (interviewee 7) shared a similar view:

> "People are what make your company, so you cannot afford to lose talent as it is hard to find talent nowadays... A happy employee equals a happy customer. The more you take care of them, the more they take care of the customer, the more money for the company".

Supporting this perspective, a technical support manager (interviewee 15) expressed a personal and organizational need for well-being resources, psychological support and professional coaching:

> "Once I asked the human resources department, where's the occupational psychologist? We need that help. I don't know if I'm crazy, but I think we need that type of help on a personal level to be able to analyze and simplify processes, to take care of the staff, but not from the traditional perspective. We need psychological support, and professional coaching."

The second sub-theme was "employee development & training". Continuous professional training, combined with a transparent working culture ("where everybody is known") appeared to be fundamental cross-functional enablers. A positive example in a startup shared by interviewee 5 was:

> "He [a CEO, founder] was trying to build full transparency. It was a company where everyone needs to be known. It was kind of a rule not to send private messages, everything that was related to a project, or anything had to be documented... Apart from this transparency, he tried to align and check that everyone was on the same page". Marketing specialist (interviewee 5).

Interviewee 5 noted that the CEO promoted internal conferences where everyone shared their own expertise with others, training sessions, design thinking workshops and discussions about market signals. Moreover, employees were encouraged to read specific book titles from the company library on diverse topics, not only technology-related books, but also materials on management, leadership and business. Certainly, such best practices are more easily implemented in small and mid-sized companies than in large corporations, as pointed out by the interviewee. Another similar best practice in a different startup, mentioned by interviewee 2, is supporting employees' personal and professional development. This CEO allocates a budget for employees to participate in at least one relevant training course per quarter.

5.1.4 Customer centricity across functions

Customer centricity was another relevant cross-functional theme mentioned by experts in this study.

The first subtheme to be discussed is “customer-centric organizational culture”. The sales director (interviewee 6) has witnessed the lack of customer centricity across the whole customer journey in the Saas business:

> “Make sure that the customer doesn't see any silos or gaps… I know a lot of companies say ’customer is our priority’, but is it so? Because when sales go and say, ‘the customer is our priority because we do all these things’, and customer success says the same thing ’customer is our priority’ but the problem is that we're not looking at the customer as a priority from the whole internal operations”.
>
> “I've seen it so many times. We keep saying the customer is our priority, but it might be for sales, for customer success, for marketing, but as a whole it might not be”. Sales director (interviewee 6).

The lack of customer-centricity can be observed in the product development area as well, according to interviewee 7. There seems to be a tendency to create products rewarding with technical aspects, not based on customer expectations. Creating a “good product” first and expect it to be sold represents a huge challenge and “that’s the most expensive way of doing things”:

> “Having a good product is great. It's the basis of everything but you need good salespeople to sell that product and you need your product to create that demand. So that's why I always say that in departments we need to help each other out because everyone has their own strengths. Engineers, for example, have the strength to build an incredible product. But they need help with how to create that demand. Like, how are they going to sell this product? How are they going to put that in the world if they don’t talk about it or if they don’t showcase what the product can do? That’s where marketing comes in.” Head of Sales – Head of sales (interviewee 7).

A senior sales manager (interviewee 8) emphasized the importance of understanding that customers perceive businesses as one unit, opposite fragmented departments. Hence, customers expect the same treatment from different teams:

> “I also saw that customers don't see these departments as different. If they meet a salesperson, they expect that he or she will represent the whole company, or if they see me as a sales manager, they expect that I will also convince the product department to develop the products, so they don't have to contact all these departments. So, whoever they meet expects that this guy is taking care of everything which is impossible in big organizations.” Senior sales manager (interviewee 8).

A similar concern is the following one:

> “So, from a customer perspective, it really doesn't make any difference if you are working in sales, marketing or customer success. For customers you are only known as a certain brand. They don't care about the way you are organized. They care that the person that gets in touch with you, helps their job to be done, their troubles to go away, and this is fundamentally forgotten.” Head of marketing (interviewee 4).

Interviewee 4 continued explaining that alignment requires a systematic approach and a mindset shift from an organization-centric to a customer-centric approach:

> “Simply the alignment, it's not something that comes naturally, especially because of the silos that we have discussed. Alignment requires a systematic approach and requires the company to shift from an organization-centric approach to a customer-centric approach. If you shift this view to a customer-centric approach, you cannot do anything else but realize that organizations need to work as a team”.

Continuing with thoughts on sustaining a customer-centric organizational culture, the role of leadership was noted:

> “I think the whole customer journey, how the customer is a priority for the whole company should be on the leadership table… Should it be on the table when you think about ‘how do we organize our internal operations? What software are we using? How is the customer visible?‘ In everything we do, because if it's not, then [the customer] is not our priority. Sales director (interviewee 6).

In reference to a second subtheme “operational efficiency fostering customer centricity”, streamlining the buying process was identified as a vital element in a customer-centric organization. A positive example of this was the principle of being 'easy-to-do-business-with', originated at top levels in large successful technology company in Finland. Such principle was used to shape company culture focused on customers, while streamlining the purchasing process to make customers' lives easier. Interviewee 3 justified this principle by saying:

> “We have one overarching principle that in theory everybody should follow, which is being easy to-do-business-with. We want to be easy-to-do-business-with and be easy to find, easy to buy from, easy to maintain, easy to recycle at the end of product life. Each easy [process] is owned by certain areas of the company. This principle can come from one of the directives realizing how complicated we were. Sometimes some companies tend to make simple things quite complicated.” Marketing director (interviewee 3).

Equally, a cohesive customer information flow among business units is crucial to ensure a positive customer experience (CX). Nonetheless, ineffective transferring of customer data across functions, from marketing to delivery tasks, showed up as a limitation to nurture customer centricity. Dropping information between units interrupts the value chain as described by a sales director:

> “In terms of the whole customer journey, from marketing sales to customer success to support, each of those persons who are in touch with one particular customer need to have access to the full story of that customer, but having different internal tools make it complicated. How do you move the data between those departments? The information keeps dropping between them. That becomes a real challenge if you have multiple people contacting the customer, how do you make sure that they don't ask the same questions again? What did other colleagues asked? That's time-consuming and the customer gets irritated because they keep repeating themselves. So, all technology is good, but then we silo all the data.
>
> Running that one customer through the whole processes and internal operations is what I've tried to emphasize in the companies, but it's very difficult to tell this to sales and to customer success leaders. It must come from the top management.” Sales Director (interviewee 6).

Additional sub-themes associated with customer centricity are discussed in sections 5.2, 5.3 and 5.4 as part of individual expert views applicable to their specific functions and specific customer journey phases.

Thus far, the analysis of this research has focused on relevant barriers and best practices applicable across entire customer journeys. The following sections will discuss concrete barriers and practices on cross-functional alignment from individual functions' point of view as per customer journey phase: pre-purchase and post-purchase. No particular elements were found in the purchase phase.

5.2 Technical and commercial functions' experiences on cross-functional alignment

A wide range of sub-themes emerged in the analysis by functions: "technical proficiency", "cross-functional collaboration", "cross-functional communication", "product-centricity vs customer centricity" and "organizational strategy", each illustrating specific barriers and best practices in aligning technical with commercial teams. These subthemes did not emerge in a linear sequence. Then barriers and best practices are presented in a way that reflects a coherent narrative flow from technical and commercial informants (table 10).

Table 10. Technical and commercial functions' experiences on cross-functional alignment

Sub-themes
Technical proficiency & training
Cross-functional collaboration
Cross-functional communication
Product centricity vs customer centricity
Organizational strategy

Product, research & development (R&D), innovation and support departments studied in this dissertation are technical in nature, as they oversee developing new products, enhancing technological offerings or solving customer problems from a technical side. These roles traditionally participate in preliminary stages of the customer journey with product development, and at the end of the customer journey with technical support, usage and product improvements.

A Chief Technology Officer CTO (interviewee 13) expressed experiencing difficulties in gathering teams into the same room in larger companies compared to startups or scaleups. Additionally, outsourcing in startups with limited staff has been a potential barrier to achieve seamless cross-functional collaboration. This CTO has witnessed weak product knowledge from commercial roles, hindering revenue operations: "You [sales, marketing] would need to know the product yourself. You need to be an active user, or you need to have some training course, or someone would show you the product before you can sell it. I think sometimes staff don't understand products well".

A technical success manager (interviewee 14) shared a similar sentiment, since lack of technical proficiency appears as a blocker for commercial staff to understand customer needs from a technical point of view:

> "When sales come into the picture, they may not be that technically proficient in each nitty gritty matter. They know the product […] but then customers may have very niche requests, so some of the technical aspects might be a challenge for the sales team to understand what exactly customers need." Technical Success Manager (interviewee 14).

Regarding interactions with commercial teams, the technical support manager (interviewee 15) has had limited or null relationship with commercial staff, for instance. Conversely, their support and maintenance teams collaborate seamlessly with engineering teams in charge of system development and technical implementations. In their opinion, all teams (including commercial teams) should be connected to a certain degree, not only certain departments.

A top manager has dealt with a lack of active communication from product units concerning SaaS (software-as-a-service) development roadmaps, a fact that limits sales department's knowledge for new sales or upselling. In their opinion, product teams should regularly communicate to commercial departments the status of roadmap initiatives, upcoming features and estimated dates for sales pitching and retention. Moreover, "Product managers should be in constant communication with the sales team and customer success. Product Managers would ask customer success 'hey, get me a meeting with your client who canceled so I can talk to him and get more feedback´." CEO (Interviewee 2).

In light of this, the head of sales (interviewee 7) encountered disengagement between product developers and commercial units:

> "In this other company there were silos. For example, the main barrier was the fact that product [the department] was not connected to other departments. With the customer journey, it's very important to have a feedback loop because, at the end of the day, the users are the ones that will tell what features they need."
>
> "In this specific company, product [the department] was just making features that no one asked for and they wouldn't communicate with anyone. So, there was a very big disconnect. Product developers didn't see the value in talking to sales. That was the biggest barrier, that they would spend a lot of money and time building features that nobody asked for and when they were done, they wouldn't even communicate them."
>
> "Product [the department] didn't want to take part in any meetings. Because they thought that they were developers, they developed the product to be better, and they don't see the need to sit down with commercial facing roles. That is up to the head of sales or the head of marketing. So, they didn't understand the importance of being there in those meetings."

Reinforcing this point of view, the head of marketing (interviewee 4) mentioned the existence of a predominant product-focus orientation among technical peers:

> "…In companies like [X, Y - big Finnish technology companies] that's very typical. There's plenty of engineers. Engineers are great people like every other with a different background, but they approach problems in a very peculiar way, and I know that I'm generalizing, but this is what I've observed.
>
> When you create a product oftentimes or a service, there is a tendency to create something which is rewarding the technical aspect. Meaning you work on things just because they are technically feasible and only at the end you ask yourself, well, is this what the customer wants? So, there is a certain mindset and a culture that does not reward customer centricity at all." Head of marketing (interviewee 4).

Likewise, the innovation manager (interviewee 16) has encountered product-oriented teams that defend product development ideas which may not fully solve market problems:

> "In all our projects, there is a lot of opportunities to interview customers, speak to them directly, co-create with them, collaborate, partner with them. So, there's a lot of different models and different ways that we interact with customers, but the first thing that we need to do is to define and validate the problem with them… because too often, especially with engineers and people who are very product-focused, you can have the situation where you're in love with the idea but not in love with the problem. And so, you're not actually solving someone's problem, you're solving something that you want to bring to life and that's not always what the customer or the end user wants." Innovation manager (interviewee 16).

Hence, product training and technical proficiency were important aspects to address from the technical department's perspective. Whereas commercial experts at top management, marketing, sales, innovation and customer success highlighted a counterproductive product-focus mindset and inefficient communication between technical teams and commercial teams which negatively affect cross-functional alignment.

Regarding roadmap development, a beneficial practice is to ensure product teams communicate roadmaps timely to the rest of the teams, hence marketing is able to develop adequate marketing communications on new features to be used by sales or customer success (CEO, interviewee 2). As customer-facing roles represent customers' voices, they should be involved in product development cycles or in product roadmap meetings. Collaboration processes from product to commercial teams should be precisely understood by everyone (customer success manager, interviewee 11). Moreover, product managers must be able to establish direct customer relationships. For instance, they could conduct customer interviews in order to identify product development needs, either about new potential features or about ongoing product defects (Customer success director, interviewee 9).

The interviewed chief technology officer (interviewee 13) indicated a strong orientation to written communication. They believed that succinct written communication is an alignment tool to be used before verbal discussions:

> "Communication is the key. Specially in the business world it's the written communication. You want it or not, but you need to be a good writer. A good writer means being a concise writer. So, you need to be really good at explaining things in short sentences, cut the fluff and just be very straight to the point… I think the most efficient way to communicate is through writing. If

> you want to communicate core ideas, it should be written down and shared before you actually discuss. I think you will show a lot of alignment problems just with that. So, you can see how if you write well, people will have less questions at the meetings and then conversations will be more constructive already… It's an alignment tool."

Other best practices are ensuring a clear level of understanding from both commercial and technical sides, as well as inviting technical teams to participate in sales meetings:

> "What I did, for instance, I organized meetings directly with the Technical Department and the customer prospect… It came out that the Technical Department was very happy to meet the customers, and they were excellent to explain… so the customer was satisfied." CEO (interviewee 1).

Equally, a customer success manager (interviewee 11) expressed the need to sustain a two-way interaction between customer-facing roles and technical teams:

> "Communicating with the product team about expectations. Essentially, I think the biggest sticking point is not having enough information about the customer, so it's difficult to know how to help them succeed. And most of the time there's very little understanding of what good looks like for a customer. What does that mean for our product? And I think it's crucial when customer success and product [departments] are aligned internally. It's a big part of having that internal alignment of what are we striving for, so that customers succeed with our product and essentially stay as customers." – Customer success manager (interviewee 11).

In that respect, customer success roles can act as an alignment element between marketing, sales and product units:

> "I would still say that marketing and sales aligning with product is also important. I think that the alignment on that side is still developing, and where I've seen the successes is that there is a customer facing team whether it's in customer success or something else acting as a link between marketing and sales and product.
>
> So essentially through customer success collaborating with sales and marketing they can take their input forward to product. For example, the feedback that sales get during their calls about the product... So, they are passing on the message as part of the whole process." Customer success manager (interviewee 11).

From an organizational point of view, the technical success manager (interviewee 14) explained how their business has succeeded in coordinating cross-functional efforts, through the establishment of "interface roles" for alignment between technical and commercial functions. Examples are "tech success role" and "solution consultant role", whose objective is to bridge the gap between product and sales departments. On one hand, tech success is often to support the sales team by crafting sales materials or quite technical responses for the sales team. On the other hand, the solution consultants contribute as follows:

> "One good thing that I have seen is this concept of "solution consultants". Solution consultants are people who know the overall business. They may not be experts like me or my role, and that's not how they are meant to be. They have a very good understanding of that business idea or the business requirement from the customer. The bird's eye view of the business case. And then the solution consultants would be the ones understanding what kind of product we can offer. This concept of solution consultants is a very good bridge at that stage between sales

> and the product side… I miss mentioning that they are part of the commercial team. They have both business and technical know-how to take on questions when it's at that sales phase [pre-purchase phase]".

The innovation manager, who represents a large Finnish technology firm, shared successful alignment elements in their organization. First, their innovation department is organized as follows:

> "In the innovation department, we have 3 core teams: One is innovation execution, which is the team that I am part of, and the main function of innovation execution is to ensure that the projects in innovation move forward and get executed and bring value and business impact.
>
> Second, there is a service design team or new business development team. This team comprises a lot of people who are more on the service design side, UX design, with a lot of business acumen there. So, their main role is to ensure that there is a component of human-centered design in all our programs.
>
> And we also have the deep-tech side. So, we have a lot of engineers who are working with products, but also data engineers and data scientists and architects who work in the digital tech side." Innovation manager (interviewee 16).

Second, their unit plays a key alignment role using a customer-centric approach, collaboration, co-creation, experimentation and failure tolerance:

> "I think our innovation unit has made it very core to how we bring up our new projects. And I believe we are also bringing this idea of bringing the customer voice as the center of the project to other units as well, such as IT and R&D [research and development] where they might not have the same access to customers as we do."
>
> "When sales have struggled selling our design team goes in and they ask: can you tell me more about this problem? Let's map it out. Who is this impacting to? So on and so forth. And then we [innovation department] propose solutions to the problem and co-create with the actual business unit. And then from there it's about experimentation. So, we establish a hypothesis of how we can solve this problem. Now let's test it out. Sometimes it goes well, sometimes it doesn't, and sometimes you know it can take years, so it's not like a quick and easy solution." Innovation manager (interviewee 16).

This innovation unit employs design process models such as the Double Diamond, to brainstorm and co-create more sustainable products. The design workshops are led by the innovation department together with subject matter experts. Everyone participates, from engineering and R&D to sales (Innovation manager, interviewee 16).

5.3 Pre-purchase phase: findings among commercial functions

This section presents barriers and best practices for cross-functional alignment discovered among commercial functions in the pre-purchase phase (marketing and sales).

Table 11. Summary of alignment findings among commercial functions in the pre-purchase phase

Main themes	Sub-themes
Marketing functions' experiences on cross-functional alignment	Silo culture & rivalry Organizational strategy Performance metrics Reward systems Cross-functional collaboration
Sales functions' experiences on cross-functional alignment	Conflict of interests & performance metrics Customer-centric culture Cross-functional collaboration

5.3.1 Marketing functions' experiences on cross-functional alignment

Marketing experts shared barriers and practices related to "silo culture & rivalry", "organizational strategy", "performance metrics", "reward systems" and "cross-functional collaboration", in the pre-purchase phase. These subthemes did not emerge in a linear sequence. Then barriers and best practices are presented in a way that reflects a coherent narrative flow from marketing informants.

Negative perceptions among units prevail in businesses (Marketing specialist, interviewee 5). According to the head of marketing (interviewee 4), the marketing function has not evolved as a key contributor to business results and has stayed trapped within marketing communications. Unfortunately, marketing has been traditionally treated as a supportive function. "There is a certain culture which takes sales in the palm of their hand as the hero of the day, because then the relationship between functions is very unbalanced" (Interviewee 4) as discussed in previous sections. In their opinion, sales and marketing not reporting to the same leader might create greater disconnection. Moreover, inappropriate metrics is a crucial cross-functional element of failure according to the interviewee. Marketing being focused only on vanity metrics causes them to easily get dismissed by sales and other functions:

> "More often than not, I've seen marketing being passionate about the communication aspect, the branding aspect, but not paying attention to the metrics than vanity metrics. And when that happens, it's very easy to get dismissed by sales and other functions which actually do have the advantage of being in touch with customers." Head of marketing (interviewee 4).

Miscommunication and lack of mutual understanding affect cross-functional alignment. Internal frictions occur due to misaligned goals and different views on the concept of "customer":

> "You create already internally frictions because sales do something, marketing do other things. Typically, marketing is tasked with more communication, sales is tasked with commercial objectives, and customer success equally has other objectives. So, when you don't have these different functions under the same roof, goals are different, the view of the customer is different, then the execution is glimpsy." Head of marketing (interviewee 4).

The main recommendation is to clarify contributions and create consensus with sales teams on impactful metrics:

> "When you [marketer] choose the path of communications and brand building, you need to be very precise as a marketer to clarify your contribution, how your work contributes to what? So, you need to be very, very crisp in telling and in agreeing with other functions, sales in the first place. You know, what are the things that we're going to measure and how the things that we are measuring create an impact where to whom". Head of marketing (interviewee 4).

The marketing specialist (interviewee 5) recommended the real need to actively involve key account managers (sales) and even the finance department in the design of marketing promotions, pricing and branding initiatives.

In order to create more connection between marketing and sales, marketers find necessary to participate in joint sales meetings and collaborate with lead nurturing:

> "For sales or marketing to keep communication aligned, I am responsible for the Marketing Division, so I am present in the same meetings. So, I am in those calls. I am in meetings listening and of course whenever need it, we can help from the marketing perspective by participating in these joint calls between sales and marketing. Then we are able to refine marketing materials to support sales in the process." Marketing director (interviewee 3).

Alignment entails not only employees, but the value proposition. From the marketing perspective, message consistency was a highlight. Organizations should ensure the value proposition remains consistent at every touchpoint:

> "Consistency. Whatever the message is about the product, that is consistent no matter in which touchpoint you see on the website, in the video, whatever it is. And that's why I agree with everyone on this. So, they all agree. In the long run, nobody opposes it as we all agreed together.
>
> This industry takes quite a long time, so that's why the importance of consistent message everywhere and making sure that the sales colleagues are repeating the same story, that marketing is repeating the same story, and that engineering is repeating the same story". Marketing director (interviewee 3).

5.3.2 Sales functions' experiences on cross-functional alignment

Sales elite informant shared barriers and practices related to “conflict of interests and performance metrics”, “customer-centric culture” and “cross-functional collaboration”, in the prepurchase phase. These subthemes did not emerge in a linear sequence. Then barriers and best practices are presented in a way that reflects a coherent narrative flow from sales informants.

The most frequent alignment barrier described by sales experts was misaligned revenue goals/interests among functions. As each department has their own different targets, staff do not necessarily consider other departments’ targets. This situation creates a siloed way of working (Head of sales-interviewee 7). As per different revenue interests, sales might be mainly focused on closing deals, while other teams might be interested in savings, safeguarding profitability, delivery capabilities, etc. as mentioned in previous sections:

> “Incentives, KPIs [Key Performance Indicators], bonus plans, all these together also have a lot of influence. If you're looking for best practices or barriers, it means sometimes sales and delivery departments have different incentives, you know, sales normally have revenue targets. The sales guy decides to give a 10% discount out of this €1,000,000 deal for him to get his bonuses and then he goes to Hawaii for an incentive trip. But the delivery guy says “no”, if you are giving 10% out of the sales margin, out of my profitability, the bill drops to 10% and I don't reach my target. You need to balance all this…
>
> The most important thing for the sales director is to get the deal, but the other ones might want to save, safeguard the profitability of this deal or capabilities of the delivery. So KPIs between the organizations or bonus plans should be aligned, or at least understand the KPI of your peer, whether you are part of the same team, or if you are marketing, sales, delivery, finance.” Senior sales manager (interviewee 8).

A method for resolving this issue is to engage finance departments in the design of metrics and compensation systems. Key performance indicators (KPIs), incentives and bonuses must be thoroughly explained, understood and balanced among units, as well as connected to the customer (Senior sales manager, interviewee 8).

A senior sales manager acknowledged that “everybody in the company should act as a “lead generator”, meaning that a marketing mindset plays a key role in revenue generation:

> “The first contact if it comes from someone that is not necessarily aware of the products, they need to have at least a broad understanding about what is the content of this. It's not so obvious to everybody that you should gather the leads, regardless of your function” Senior sales manager (interviewee 8).

The elite informant elaborated further:

> Everybody in the company should understand that the lead generation belongs to everybody. So that could be one remark in this case. Everybody in the company should be a lead generator and have open eyes every time they meet customers or hear something from the customers. If you have support or maintenance guys, you need to educate them to discover the leads and pass those leads into the company.” Senior sales manager (interviewee 8).

Certain uncoordinated actions demonstrate misalignment between sales and marketing teams, such as unjustified marketing campaigns or sales overpromising. According to interviewee 11's experience:

> "Bad cases I have come across is when alignment doesn't happen, like sales and marketing come up with campaigns themselves which aren't necessarily aligned or sales over promises things that don't actually exist." Customer success manager (interviewee 11).

From the sales perspective, another signal of misalignment is when marketers handover low-quality leads due to unknown ideal customer profiles (ICP). This issue was noticed at least by two sales experts and one customer success expert as follows:

> "Another barrier would be marketing also not understanding who to target for example. So that comes also from not speaking to product and from not speaking to sales, to the people that are speaking with the ideal client profiles and with customers." Head of sales (interviewee 7).

> "If we look at the customer journey, from marketing to sales, one of the challenges with marketing is that the leads that you [as sales] get are not necessarily matching the target group… The leads coming from marketing are not necessarily matching your needs [as sales]. So there is always this discussion about lead quality." Sales director (interviewee 6).

> "The main barrier for me it's very difficult to say because marketing [performance] it's quite difficult to measure. Somehow, I feel that marketing sometimes is misaligned. They create so much interest towards the brand, you know, backlinks and yeah, and all the stuff, but they're not relevant. It's just some traffic on the website, but this traffic is not relevant then there is no point. Then let's focus on something else. For example, participate in industry expos which will generate specific interests [leads]." Customer success manager (interviewee 10).

Therefore, marketing and sales teams can practice brainstorming together, not just to augment sales, but to optimize jointly marketing materials that attract ideal customer profiles, as suggested by CEO (interviewee 2):

> "We bounce around ideas and use it as a creative process or brainstorm session? It's not about figuring out how to sell more, but how we can also create content that attracts the ideal type of client. One of the things that I mentioned earlier, alignment is really important because if it's not clear what the objective is, then we deviate from what's important." CEO (interviewee 2).

Thus far, pre-purchase (pre-sale) barriers and best practices regarding cross-functional alignment have been discussed. No major observations on the purchase phase were mentioned by interviewees. In this study, the purchase phase includes the interactions of the customer with the business such as making the purchasing decision, order placement and payment. Post purchase implies multiple critical factors once the client has purchased, such as onboarding, usage experience, support, renewals and loyalty (Lemon & Verhoef 2016, 76).

5.4 Post-purchase phase: findings among commercial functions

This section presents barriers and best practices for cross-functional alignment discovered among commercial functions in the post-purchase phase of customer journeys (sales and customer success).

Table 12. Summary of alignment findings among commercial functions in the post-purchase phase

Main themes	Sub-themes
Sales functions' experiences on cross-functional alignment	Handover (operational efficiency) Customer onboarding & customer experience (CX) Customer retention strategies Conflict of interests & performance metrics Reward systems Strategy alignment
Customer success functions' experiences on cross-functional alignment	Handover (operational efficiency) Fragmented vs unified communication systems Forms of team communication Employee training on recurring revenue Reward systems Cross-functional collaboration focused on churn prevention Co-creation

5.4.1 Sales functions' experiences on cross-functional alignment

This section describes the main barriers and best practices for cross-functional alignment in the post-purchase (post-sales) phase, after parties have settled a purchasing agreement. Sales elite informant shared barriers and practices related to "handover (operational efficiency)", "customer onboarding & customer experience", "customer retention strategies", "conflict of interests & performance metrics", "reward systems", and "strategy alignment". These subthemes did not emerge in a linear sequence. Then barriers and best practices are presented in a way that reflects a coherent narrative flow from sales informants.

Misalignment between sales and delivery functions (customer success) was reported, particularly with respect to miscommunication during transfer of duties, including handover and customer onboarding. After delivery and invoicing, the customer might be unaware of the next steps:

> "Sales do invoice, everything goes smoothly, but then after that the customer doesn't know what happens. So, this seems to be, I don't know, some kind of gap between customer success or the post-sale processes. If customer success doesn't necessarily exist in all companies, there are still post- sale processes in any business. Usually, it is about training. If the company doesn't offer training as part of their offering in the first contract, the customer is potentially left alone, figuring out where to get training.
>
> In best cases there is customer success and there is an onboarding specialist who contacts the customers and makes sure that they have access to the right resources and potentially sells training to them if sales haven't already done that. Now depending on how difficult the software is to use." Sales director (interviewee 6).

It is essential to involve the necessary teams in the sales process. Otherwise, customers might receive different information from previous teams, causing confusion and mistrust (Sales director, interviewee 6). Customer onboarding requires diligent attention to excel at customer experience:

> "Assuming that the product was sold to the correct customer profile, having a good onboarding call always leaves a very good impression for the company and for the client itself, because they feel taken care of, they feel cared, and they feel like the company understands their needs.
>
> So having a good onboarding call, setting clear expectations as well. So, what can they expect from you after they purchase the product? Having a very seamless communication channel. The goal is that they don't encounter issues, right? But if they do have some problem, they know who to call. Whether that's the account manager or their customer success representative or in the support side." Head of sales (interviewee 7).

Adequate onboarding includes providing product training for actual users:

> "Usually, it is about training. If the company doesn't offer training as part of their offering in the first contract, the customer is potentially left alone on. Figuring out where to get training. In best cases there is customer success and then there is an onboarding specialist who contacts customers and makes sure that they have access to the right resources and potentially sells training to them if sales haven't already done that. Now depending on how difficult the software is to use." Sales director (interviewee 6).

As a matter of fact, sales representatives should follow through the whole buying process (Senior sales manager, interviewee 8), whereas the lack of customer nurturing in the post-purchase phase is a missed opportunity (Head of sales, interviewee 7). It breaks the strategic alignment and operations between functions, ultimately affecting negatively efficiency, branding, customer experience and revenue generation as follows:

> "What I see is that how companies grow the most, it's not via new business, but it's more on the account management part of things, on the retention and expansion. So when it comes to customer success, we want to take care of the churn and the barrier in there is that you know who you are selling to, and to make sure that you can deliver, because if you cannot deliver, then that is going to be a barrier that customer success is not going to be able to deliver what was promised and that account is going to churn. So if that happens like a snowball effect with a lot of clients, then of course that it's gonna be a bad look for your company as well because it doesn't look like you are aligned." Head of sales (interviewee 7).

Nurturing client relationships through periodic follow-up meetings should be a top priority:

> "In many cases, in my previous company, if the customer bought the licenses, the licenses were delivered, but for some reason the user didn't start using the software, they potentially didn't get

> a project or something. If we didn't call them, if we didn't follow up on them, they turned because they didn't find any use for the software. So next time you send them the renewal invoice, they say, well, we didn't use it, so we don't need it. Or so there is this, and particularly nowadays when we're selling subscription software, it's very easy to just say we didn't use it, we don't need it, we just churn." Sales director (interviewee 6).

> "Having quarterly calls with the account manager and that client because in there you can explore how they are currently using the tool, how is that making their lives easier, and you can potentially see if they can expand more… And that only happens when they have a good experience with you and they're not going to take their money elsewhere. So that's why taking care of the customers should be the number one priority." Head of sales (interviewee 7).

Reaffirming, interdepartmental conflicting targets were raised as a significant barrier in the post-purchase phase between sales and delivery departments (e.g. customer success). An additional testimony in the software-as-a-service business was how different targets and metrics between sales and customer success encouraged a short-term selling approach instead of motivating sales to bring in long-term customers, as shared by a sales director (interviewee 6). Although sales might fulfill their quota, customer success is traditionally measured with churn rates:

> "In many cases, if you have a very skilled salesperson, he might be able to sell a software that you [the customer] don't necessarily need but he [salesperson] gets a commission because salespeople are looking to reach their target. And that's when you [sales or customer success leaders] run up with problems with post-sales, because that's when the customer realizes that, oh, I bought this expensive software and might not use it.
>
> [In my company] there was a constant discussion between customer success and sales that we need to sell only to customers who are the ideal profile for us. We can't sell to somebody who will churn. But trying to tell this to salespeople was challenging. Because they're measured with different targets or metrics. That's a constant battle. How do you balance that? If you measure sales with just the ACV [Annual Contract Value] that's what you get. And if you measure customer success with churn and NRR [Net Revenue Retention], you're going to end up having high churn rates because you always get these customers who you already know will churn from the beginning.
>
> So that's again something to think about in your business strategy. Do you accept that? or do you want to make sure that you only sell to the ideal customer profile, so you don't get these problems?". Sales director (interviewee 6).

Therefore, leaders must formulate attractive incentives, particularly for salespeople to support customer expansion beyond only closing one-time deals. One strategy to achieve this goal is to define new metrics such as how fast or easy the onboarding process was or how effortless it was to advance the customer forward throughout the customer journey (Sales director, interviewee 6). Another strategy is to establish shared incentives. If a new deal comes as an upsell from customer success, salespeople might desire a piece of "their customer", as well as customer success. To solve this potential conflict of interest, interviewee 7 recommends developing a win-win commission structure. This commission scheme would allow sales representative upselling to new customer accounts and receive e.g. 2% commission out of the sale within 6 months or one year after the sale. Passing that period, the account could be fully transferred to customer success as follows:

> “It's about deciding, do you want sales to just focus on sales and expansion accounts? If so, bring a good commission plan. Make it also attractive for both sales and customer success. Maybe sales can get a small like 2% out of it or something, but it's an acknowledgement. And to keep both departments happy.” (Head of sales, interviewee 7).

Continuing with best practices, it is vital that top leaders formulate alignment in both business strategies: the sales strategy in line with the customer success strategy:

> So that's something you have to think about in your business strategy. Do you accept that? or do you want to work on making sure that you only sell to the ideal customer profile, so you don't get these problems? One thing that is crucial in this is that the leadership is aware of the situation and then they can enforce best practices on how to create your sales strategy so that it actually supports customer success or the post-sale processes. Because if you're working on your sales strategy and your mission is to reach your target you are looking to sell to all the potential that you can get your hands on, right? And that might not be the ideal case when you start looking at the technical implementation and the customer success side of things. So, then you would need to have both customer success strategy and sales strategy somehow aligned. So, these customers don’t churn right away.” Sales director (interviewee 6).

In this way, fragmentation and churn can be prevented while securing recurrent revenue.

5.4.2 Customer success functions’ experiences on cross-functional alignment

The present section illustrates customer success experts’ experiences. For the post-purchase phase, these elite informants shared barriers and best practices related to “handover (operational efficiency)”, “fragmented vs unified communication systems”, “forms of team communication” , “employee training on recurring revenue”, “reward systems”, “cross-functional collaboration focused on churn prevention” and “co-creation”. These subthemes did not emerge in a linear sequence. Then barriers and best practices are presented in a way that reflects a coherent narrative flow from customer success informants.

In the post-purchase phase, adequate customer onboarding, supported by a proper handover, is essential as equally mentioned by sales peers. Customer success (or any delivery function) should become familiar with sales cases in early phases to understand specific customer needs prior onboarding once the purchasing agreement is reached. In their experience, “there has been limited information from the customer facing team and then if a handover hasn't happened, there is confusion. The onboarding process or even customer nurturing isn't as good as it could be” (Customer success manager, interviewee 11). This expert highlighted the need for a seamless handover process from sales to customer success, including handover meetings, cross-functional collaboration and access to detailed customer documentation:

> “I think here again, it's really important that sales and the customer facing team, after-sale, collaborate. So, the best practice I've seen or the cases where it's worked really well is that there's a handover meeting. And that can be weekly sessions where they hand over cases and they fill in a certain criterion, whether it's within a CRM system or other form of documentation, but that the handover is detailed internally. We get a status update, so then it's easy for the customer facing team after the sale to pick it up. And run with it. But that also comes into if there are agreements with customers that are being signed, where are they stored and making sure

> that all the relevant teams have access to that documentation." Customer success manager (interviewee 11).

The interviewee 10 has observed a related best practice in their organization. Handover meetings are organized by the sales team, where successful customer cases and value drivers are presented by the customer success team:

> "About the handover from sales to my operations team, I'm invited to a demo call that sales manager is doing. I'm usually invited to this call, and I share best practices from the industry about other customers, some highlights. I share value drivers because I measure that. I measure customer health every month and usually it's related to customer to value drivers." Customer Success Manager (interviewee 10).

In the same line, a barrier was the existing communication systems fragmentation, which impedes an adequate flow of information between teams:

> "It can be that the sales team or marketing operate with a separate CRM system. But then customer success operates in another one, and that breaks the alignment. So again, having the same tools, collaboration, and feeding information in the loop with each other I think is really important." Customer success manager (interviewee 11).

Different tools, especially at fast-growing businesses, reveal internal silos when having a wider range of disconnected communication tools:

> "Quite often there are different tools... In my experience, companies that are of growing quite quickly, end up with a wider range of tools and I think that comes from working in silos. When you start breaking down those silos, that's when you usually start seeing that they end up using the same tools as well." Customer success director (interviewee 9).

Regarding internal alignment, maintaining a consistent cadence of constant communication was illustrated:

> "I have regular meetings basically with everyone with main stakeholders from different teams. I have week, bi-weekly, every second week, bi-weekly call with our product head. Yes, product, customer success and sales. So basically with team leaders for these three functions, all of us we align and we have a team call, I mean three of us on the call and also in addition to that I have a biweekly one, and one-on-ones because in one-on-ones sometimes you talk about something that you never will talk on a team call. So, I really believe in cadence" Customer success manager (interviewee 10).

An additional form of communication was suggested by a customer success specialist. As the voice of the customer, customer success teams can collect information internally from other departments and share it with everyone in a periodic internal newsletter via email or internal systems (interviewee 12). Customer success teams should be empowered to collect customer sentiments about new feature requests or even educate customers on bugs or specific technical problems (Customer success manager, interviewee 10). In fact, the successful scale-up represented by the customer success director (interviewee 9) "had a pretty good set of product managers that would do customer interviews, either about upcoming features or about bugs that were ongoing in the system. Customer success teams, of course, facilitated those interviews and surfaced the issues to light."

In terms of operational frameworks, the customer success director (interviewee 9) witnessed challenges after introducing a revenue operations strategy (known as RevOps):

> "When the organization started growing, making a bit more sense to scale, the founder and CEO around 2023, a couple of months before I came back from [temporary] leave, the CEO had set up a sort of organization [function] under the chief customer officer. There was also the sales organization which included revenue operations, the chief marketing officer, the chief product officer (development under him), people [human resources] and finance. VP [Vice president] of sales was converted to VP of revenue operations. So, the organizations grew, sales life cycles got longer, and it was more difficult to reach sales targets. Too much work for a CS [customer success] person." Customer success director (interviewee 9).

In fact, employees exhibited insufficient comprehension of the new recurring revenue model. Some sales representatives focused on one-time sales or did not fully understand how the company counted revenue. Thus, the customer director highlighted the need to understand the concept of recurring revenue in a revenue operations (RevOps) strategy:

> "I think the key is having salespersons that understand what recurring revenue really is. You're not just selling a one-time service or hardware, then I think that's a challenge. But once you find them, it's a good balance between customer success and sales. We had those people who were not understanding how we were counting revenue and that what's terrible". Customer success director (interviewee 9).

Moreover, this customer success director advocated the adoption of a collaborative approach to achieve alignment by establishing long-term sales incentives that ensure retention and expansion:

> "I think the right way is to align behind a common goal determined by the company strategy or management team. So, for example, if we have understood that we get the most value out of a specific customer profile, then we should all work together to stick to that profile as much as possible, for example in new sales. Salespeople should also be incentivised to bring in deals that will guarantee the best retention or expansion." Customer success director (interviewee 9).

For the purpose of securing recurring revenue, cross-functional churn discussion and joint action tracking were additional best practices:

> "Every Monday 30 mins, CSMs [customer success managers] had a forum with the head of support and product directors, sometimes the VP of sales to discuss why certain customers were at churn risk and what needed to happen to revert that. Participants would commit to taking actions and would follow up every week on the actions." Customer success director, interviewee 9.

As can be seen, active functions in the post-purchase phase are influenced by prior functions in the customer journey. From the customer success point of view, customer-facing functions require close collaboration with marketing, a function that might be traditionally more involved in the pre-purchase phase:

> "I think the crucial aspect is understanding what kind of leads are generated through marketing, so that we can then transfer feedback between the customer-facing team and marketing and say this is the product market fit, or the product fit isn't strong enough. So, if they're unhappy customers from the very beginning, then you can make tweaks. But also marketing sharing statistics if this x campaign seems to be really working. Is there any additional insight that we

> can kind of find from the from the customer's point of view?." Customer success manager (interviewee 11).

Finally, a useful practice to bridge gaps among interdepartmental silos is coordinating collaborative sessions or workshops using concrete customer research and customer feedback:

> "I think it comes from collaborative sessions. It's not just about meetings but having collaborative sessions where you bring customer insights, like research or customers feedback written in their own words, into a workshop. So having there people really working with feedback from customers. I think this has been a really good way to find that alignment and start thinking about what the processes are we need to have in place, so we make sure that this type of information is processed together."

6 Discussion

The goal of this dissertation was to explore post-pandemic practitioners' views, best practices and barriers impeding cross-functional alignment/integration across the customer journey in two aspects: within customer-facing departments (sales, marketing and customer success) and between customer-facing departments and non-customer-facing departments (product /new product development/support). The customer journey model used for this study is composed of three generic phases: pre-purchase, purchase and post-purchase. This approach is a strategic narrowing to allow a more manageable scope for qualitative analysis.

To address the three research objectives (RO1, RO2 and RO3), the research questions that have guided this master's thesis are the following:

1. What are the best practices and barriers for cross-functional alignment (technical/engineering functions, marketing, sales and customer success) *across the entire customer journey* in B2B technology companies?
2. What are the specific best practices and barriers for alignment (technical/engineering functions, marketing, sales and customer success*) in each phase of the customer journey* in B2B technology companies?

   a. Prepurchase phase (customer awareness and buying intention)

   b. Purchase phase (decision, order placement and payment)

   c. Post purchase (from onboarding to loyalty)
3. What development recommendations can support B2B technology companies to enhance cross-functional alignment?

In order to answer the first two research objectives/research questions, the discussion of findings is presented in two sections. Section 6.1 discusses best practices and barriers of cross-functional collaboration applicable to the entire customer journey. These are presented within the identified 4 core themes. Section 6.2 analyzes the findings by department and per customer journey phase, comparing perspectives among the different functions. Development suggestions are provided in Chapter 7.

6.1 Cross-functional alignment across the customer journey

6.1.1 Organizational leadership

The role of organizational leadership in cross-functional alignment stood out as a particularly influential theme regardless of the function, managerial level or customer journey phase. Four subthemes reflect the conceptualization of organizational leadership in this study: “organizational strategy”, “leadership skills”, “communication & transparency from leaders” and “remote & hybrid management”.

In this study, “organizational leadership” can be understood as a key element to materializing cross-functional alignment, across the customer journey in B2B technology companies. Through functions, participants described organizational leadership as the capacity to inspire, coordinate and harmonize interdepartmental interactions towards a common goal. This organizational leadership must be grounded in the organizational strategy, providing direction for all stakeholders collectively. Key components that appeared crucial, although lacking in many organizations, were the need for a crystal-clear mission and vision, together with clear collective goals defined first at a corporate level.

In the literature, Schein (2010) discusses the strong connection between organizational leadership and organizational culture. Through academic and consultancy work, the author identifies three common sub-cultures in technology companies: operator, engineering and executive subcultures. Each of these subcultures are defined by their education, professional experience and role descriptions. In fact, these three subcultures embody different departments/functions which ideally must be in alignment to operate successfully (Schein 2010, 68). Multiple studies show that the permanence of a business depends on sustaining a sort of balance of relationships between these subcultures, meaning different stakeholders (investors, managers, employees, suppliers, customers, government, etc) (Schein 2010, 75). This view explains the existence of silos and rivalry among different functions, and how cross-functional alignment depends heavily on organizational leadership and culture.

A top-down organizational approach was suggested as a way to cascade the strategy via the heads of department down to lower organizational functions. Nevertheless, experts highlighted the importance of employee’s agency in creating a bottom-up approach where each individual and function at any level contributes to the realization of the company alignment. On an operational level, functions reporting to the same leader can prevent duplicated efforts, minimize communication breakdowns and ensure coherence and consistency of organizational leadership.

The importance of leadership skills cannot be overstated in organization leadership. Lack of people management skills emerged as a critical barrier for cross-functional alignment. Especially in technology companies, strong technological expertise may not be a guarantee for success, as soft skills are fundamental to empowering teams. Managing directors with extensive technical expertise combined with commercial experience could enhance their leadership opportunities for success compared to their counterparts with less exposure to the customer-facing side of businesses.

Lack of internal awareness of each other's units appeared as a challenge. Therefore, this study highlights the need for transparent leadership practices that foster mutual awareness. This finding builds upon an earlier study (Graesch, Hensel-Börner & Henseler 2024, 9) suggesting mutual awareness of each other's tasks as an effective alignment intervention.

Finally, another significant barrier for cross-functional alignment, especially after the pandemic COVID19, is the necessity to lead teams remotely or in hybrid settings. Online interactions interfere in rapport building. The interviewed top leaders and managers prefer in-person interactions to truly connect with colleagues, or at least the right balance between online and offline work settings.

Leaders must adopt not only a new set of remote or hybrid leadership competencies, but continuous leadership development training, including soft skills in remote, hybrid and in-person settings.

6.1.2 Performance management: revenue targets, metrics and rewards

One of the main findings was the essential role of performance management in cross-functional alignment. This aspect, while seemingly evident, is frequently neglected by top leaders. In the context of this study, performance management refers to the process of defining revenue targets, evaluation of performance and reward systems, either financial rewards (bonuses, incentives, etc.) or non-financial rewards such as recognition of all members' achievements.

Three subthemes describe the core theme: "conflict of interest & competition", "performance metrics" and "reward systems".

It was found that some roles, such as sales, might receive privileged treatment due to their tangible contribution to revenue generation, while other departments' contributions are overshadowed. Furthermore, the problem intensifies when organizations operate with conflicting revenue interests/targets and misaligned incentives among units. Therefore, fragmented performance evaluation was found as a critical source of interdepartmental silos. Such internal culture of competition seems to be detrimental to team morale.

One best practice could be avoiding competition between all units and, instead, motivating employees to collaborate towards a unified goal. Leaders play a key role in this respect. This objective is achievable when companies establish unified metrics with reasonable compensation schemes for all stakeholders, according to elite informants. The right metrics and reward systems can potentially start removing silos and barriers across business and technical units.

Thus, some beneficial practices in terms of performance management are as follows: designing shared revenue targets, shared success metrics and attractive compensation plans. When introducing new compensation schemes, leaders should monitor whether the adoption is successful or not and adjust accordingly. A participatory approach can be beneficial. In addition, a crucial component is to ensure employees' efforts are recognized as team success in equal measures.

These findings are consistent with previous research. Kahn (1996) described cross-functional integration a process that requires a profound transformation in organizational culture where departments are strategically aligned "through a shared vision, collective goals and joint rewards" (as cited in Holland, Gaston & Gomes 2000, 236) (section 3.1). Similarly, Kotler, Rackham & Krishnaswamy (2017) recommend sales and marketing departments to share three key aspects: business metrics, revenue targets and compensation systems, with the aim at building cross-functional integration (section 3.6).

6.1.3 Company culture & employee orientation

"Company culture & employee centricity" can be understood in this study as certain behaviors and norms at organizations that influence team collaboration and the effectiveness of cross-functional alignment. More specifically, from the perspective of "psychological wellbeing at the workplace" and "continuous employee development & training".

In the literature, Schein (2010) discusses the strong connection between culture and leadership, as "two sides of the same coin" (p. 22). The author defines culture of groups as:

> "A pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration, which has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems" (Schein 2010, 22).

Concerning psychological wellbeing at the workplace, gatekeeping was revealed as an alignment barrier. As conceptualized by Dr Tessa West, Professor of Psychology at New York University, "gatekeeping is intentionally withholding information from someone" (As citated by Nguyen 13 May 2025). An additional quote by Dr. West: "It's a frog-in-boiling-water behavior at work; if someone gatekeeps, it might take two years to see the pattern of behavior. It can rot cultures from within." Such behavior, either from top management or employees, constrains performance, as well as disrupts trust and group dynamics (Nguyen 13 May 2025).

Therefore, psychological safety in the workplace was accentuated as a basic need for team members. Edmonson (1999, 354) defined psychological safety as “a sense of confidence that the team will not embarrass, reject, or punish someone for speaking up. This confidence stems from mutual respect and trust among team members.” Cross-functional collaboration is more likely to manifest in working environments where everyone feels safe to share opinions and information to fulfill company goals. This approach can benefit both companies and employees, as suggested by elite informants.

A global survey conducted by McKinsey (2021) after COVID-19 found that psychological safety manifests at the highest organizational levels, meaning that leaders possess an opportunity to elevate psychological safety by promoting a positive team climate. An authoritative leadership style could impact negatively psychological safety, while supportive and consultative leadership behaviors augment psychological safety in the workplace. Research has demonstrated that psychological safety influences positive performance, productivity innovation and creativity.

“Continuous employee development & training” surfaced as a best practice. There is specific need for well-being resources, psychological support and professional coaching for employees. In addition, staff expect transparent and supportive environments with continuous development and training opportunities.

These concepts become relevant as the employee-centricity premise was stated as a key guiding principle of this research, addressed previously in the literature review section. Newman (2021, 14, 98) considers an “employee-first” approach as an initial pillar to build customer centricity. In doing so, employees are more likely to surpass standards when they feel empowered and valued. In doing so, consequently, customers will notice the company culture through their interaction with employees, producing positive business results. According to Harvard Business Review (6 December 2023), a successful customer-centric business places employee-centricity at the core of their organizational strategy. Regarding company culture and employee orientation, Tomaskova (2018, 109-110) found that ethics and goodwill show high positive correlation between inter-functional coordination and customer success. Ethics and goodwill refer to how employees identify with the company. This internal identification will reflect positively on the external environment towards the customer (section 3.3).

6.1.4 Customer centricity across functions

The fourth core theme “customer centricity” emphasized by multiple elite informants was narrowed down into key two sub-themes: “customer-centric organizational culture” and “operational efficiency towards customer centricity”. Customer centricity in this research is conceptualized as cross-functional culture and operations substantially grounded on customers’ needs.

Despite the emphasis of some organizations' narrative on customer centricity, nearly becoming a buzzword, actual practices might not demonstrate this priority. For some departments it might be a priority, but a customer focus is not realized in practice in other departments. This lack of customer-centricity was observed in product development. A tendency to create products rewarding with technical aspects was noted by multiple elite informants. Nevertheless, a product-focus approach poses a huge barrier for both interdepartmental alignment and customer experience. As mentioned in the literature review (section 2.1) a paramount concept on customer centricity and customer experience crafted by Apple's CEO in 1997 was: "You've got to start with the customer experience and work backwards to the technology. You can't start with the technology and try to figure out where you're going to try and sell it." (Jobs 12 February 2022). Certainly, such a customer-centric mindset primarily lies within the scope of leadership.

Previous studies have identified these challenges. Technology companies are characterized by the constant need for innovation and new product development (NPD). In such a scenario, cross-functional teams can be particularly challenging as members possess diverse expertise levels, skills and mindset. Projects can fail if poorly managed, hence an effective cross-functional integration is crucial to satisfy customer needs (Nakata & Im 2010, 554). Technical members might prioritize technical attributes, whereas commercial units might focus on customer experience or other non-technical business aspects. Despite these possible tensions, multifaceted teams composed of different functions such as engineering, marketing, finance and design are vital to potentially introduce unique points of view or challenge the status quo (Akerele et al., 2024; as cited in Attah, Garba, Gil-Ozoudeh & Iwuanyanwu 2024).

In terms of "operational efficiency", streamlining the buying process was identified as a vital element for a customer-centric culture. The literature review reminds us that B2B customer journeys are more complicated than B2C customer journeys due to multiple buyers interacting with multiple departments of a brand at the same time, and a weak alignment among departments is a common problem in organizations (Patterson, 2007; as cited in Andersson, Aagerup, Svensson & Eriksson 2024). A best practice currently existing in a successful large Finnish technology company is the principle of being 'easy-to-do-business-with'. This idea coming from the leadership supported both culture and operations to simplify their complex B2B technological offering and enhancing significantly customer experience.

In the same line, a cohesive customer information flow among business units was found to be necessary. Nonetheless, ineffective transferring of customer data across functions, from marketing to delivery tasks, showed up as another barrier to both cross-functional alignment and customer experience. Once more, this problem showed the existence of silos.

In that respect, Newman's framework suggests "Aligning everyone in the direction of travel" to build a customer centric culture. When departments function independently, customers are less likely to receive high-quality customer experience. The organizational structure must foster seamless collaboration across the customer journey, combined with the workforce's eagerness to cooperate across the full chain (Newman 2021, 14). Customers do not perceive companies as separate departments, but experience services at different touchpoints of a journey (Aa 2020, 18-19), as discussed in the literature section. Elite informants asserted that brands are perceived as whole units through customer's lenses. Customers expect unified treatment from any employee; therefore, customer centricity stands out beyond merely a buzzword. According to Aa (2020, 7-19) understanding customer experience at every touchpoint considering the entire customer journey, empowers staff to acknowledge the impact of their own functions on the customer and the business overall.

6.2 Cross-functional alignment by department and customer journey phases

The findings from different customer journey phases revealed a variety of observations across departments.

6.2.1 Alignment between technical and commercial functions

A wide variety of different perspectives emerged from technical and commercial functions. By contrasting their perceptions, it became evident that alignment between technical and commercial teams has an enormous potential for improvement. Product, research & development (R&D), innovation and support departments studied in this dissertation are technical in nature, as they oversee developing new products, enhancing technological offerings or solving customer problems from a technical side. These roles traditionally participate in the initial phase of the customer journey with product development, and at the end of the customer journey with technical support, usage and product improvements.

The need for technical training of commercial teams and technical proficiency were main issues from technical informants' perspective. Positive collaborations among technical colleagues were noted, whereas collaboration between technical teams with commercial teams was described as insufficient.

From customer-facing roles' perspective (managing director, marketing, sales and customer success) a strong product orientation from highly technical colleagues (opposite to customer orientation) remains a significant barrier. However, defending product development ideas which may not fully solve market problems can have a negative impact on revenue generation. Reluctancy to participate in commercial discussions was another barrier. Apparently for some engineers, customer conversations are not necessarily relevant to their role.

A lack of communication from product teams concerning the status of new technological product developments was highlighted as well. A suggested beneficial practice is to ensure product teams communicate roadmaps timely to the rest of the teams and even involve customer-facing roles in product development, as they represent customers' voices. Product managers must be encouraged to establish direct customer relationships and conduct customer interviews to discover customer needs from a technical point of view. In this way, they can support commercial teams, especially in revenue generation of highly technical products.

On one hand, technical peers seem to expect commercial teams to increase their technical proficiency, since the issue might become a blocker for commercial staff to understand customer needs from a technical point of view. On the other hand, commercial teams expect more collaboration and a customer-oriented mindset from their technical colleagues. A counterproductive product-focus mindset and inefficient communication could influence negatively cross-functional alignment.

As best alignment practices, it was suggested ensuring an active two-way relationship dynamic and a mutual understanding of their activities across the customer journey. Commercial teams could be persistent in inviting technical teams to participate in sales meetings.

From an organizational point of view, delivery functions such as customer success could act as a connector between all functions. For instance, customer success peers could collect customer feedback in sales meetings and pass them onto product teams.

Another best practice was establishing "interface roles" to bridge the gap between product and commercial teams. In a successful scale up in Finland, these interface roles are composed of experts with both business and technical know-how to support the sales function and close deals together.

Another proven effective strategy currently in practice in a large Finnish successful technology company is a specific innovation unit composed of engineers and service designers who ensures technical innovations move from concept to reality with a human-centered design approach. This innovation unit employs design process frameworks such as the Double Diamond in design workshops where multidisciplinary teams brainstorm and co-create more sustainable products.

Consistent with the literature review, technical staff might prioritize technical attributes, whereas their commercial peers might focus on customer experience. Despite these possible tensions, multifaceted teams composed of different functions such as engineering, marketing, finance and design, can potentially introduce unique points of view or challenge the status quo (Akerele et al., 2024; as cited in Attah, Garba, Gil-Ozoudeh & Iwuanyanwu 2024). As an example, when developing a new technology-based solution, engineers could suggest innovative technical features, whilst a designer would improve the visuals, and collaboratively, the cross-functional team could produce economically viable and customer-centric solutions (Attah, Garba, Gil-Ozoudeh & Iwuanyanwu 2024).

6.2.2 Pre-purchase phase: marketing and sales perspectives

In the pre-purchase phase, specific perceptions from both marketing and sales were revealed. According to marketing experts, negative assumptions across different teams are prevalent in some organizations, which reflect on silo culture and rivalry. Marketing practitioners struggle to demonstrate the business value of their contributions, being perceived by other functions as a supportive department rather than a revenue generator. In terms of company culture, different departments are treated unequally to the point that sales might be considered “the hero of the day” because of their explicit contribution to revenue, as expressed by a marketing director.

From the sales perspective, some main concerns about marketing surged in this study. Sales teams believe that sometimes marketing campaigns are unjustified and lack a visible impact on revenue generation. What is more, concerning marketing lead generation, sales experts agreed that leads generated by marketing did not match the company’s ideal customer profile (ICP). As being unqualified leads, they do not convert into sales. In addition, there are tendencies from salespeople to make commitments that exceed operational capabilities. In this situation, it was interpreted that sales might be only focused on individual interests and meeting their own targets.

Both sides share the same view that interdepartmental alignment is challenged by misaligned revenue goals. As each department has their own specific different targets/interests, they might ignore other departments’ targets. To tackle these challenges, marketing elite informants recommended ensuring that contributions are clear for all stakeholders and having a consensus on impactful metrics. To create more connection between marketing and sales, marketing professionals find it necessary to participate/being invited to joint sales meetings and support each other with lead nurturing. Finance departments should participate as well.

An additional best practice suggested by sales experts is to engage finance departments in the design of metrics and compensation systems. Next, key performance indicators (KPIs), incentives and bonuses must be thoroughly understood and shared among units, as well as connected to the customer. Notably, sales themselves recognize that “everybody in the company should act as a lead generator”, not only marketing or sales colleagues. Finally, joint brainstorming sessions can be beneficial not just to augment sales, but to optimize marketing materials that attract ideal customer profiles.

These findings align with the research of Kotler, Rackham & Krishnaswamy (2017) who reported two types of discrepancies between marketing and sales teams. The first one is economic conflicts due to uneven budget allocation and competition. Although in the current thesis competition issues primarily stem from incentive misalignment and lack of recognition where some departments are prioritized over others. For instance, sales representatives are rewarded based on short-term revenue, while other units might not even receive rewards.

The second aspect according to Kotler et al. (2017) is cultural conflicts. Each department is traditionally performed by individuals with diverse personalities, goals and a mindset. Marketing professionals are data-driven, guided by project outcomes and have limited customer contact compared to their sales peers. In contrast, sales staff are frequently interacting with clients and eager to close deals. The authors provide specific recommendations to achieve cross-functional integration beyond alignment, such as appointing a chief revenue (or customer) officer, to establish a joint marketing and sales funnel with clear steps, and to develop shared sales and marketing metrics, revenue targets and compensations systems. In this thesis, elite informants emphasized the need for shared targets, metrics and compensation as well.

Yet, cross-functional barriers and best practices have been provided in the pre-purchase (pre-sales) where mainly marketing, sales and product teams interact. No significant findings were noted in the purchase phase. In this study, the purchase phase referred to interactions of the customer with the business such as making purchasing decisions, order placement and payment (Lemon & Verhoef 2016, 76).

6.2.3 Post-purchase phase: sales and customer success perspectives

The post-purchase phase implies the processes once the client has purchased, such as onboarding, usage experience, support, renewals and loyalty (Lemon & Verhoef 2016, 76). Specific barriers and best practices for cross-functional alignment were highlighted mainly by sales and delivery departments (e.g. customer success) which are the functions typically closely interacting in this customer journey phase.

An earlier study by Boghe et al. (2024, 125-126) demonstrates the complexity of combining customer success responsibilities with sales-related activities. The author describes at least four categories of mutual involvement (section 3.6). Each type of collaboration setting comes with obstacles, such as overselling, frustration and tensions due to unequal sales compensation or lack of clarity on customer ownership.

In the current dissertation, once more interdepartmental conflicting targets were raised as a significant barrier in the post-purchase phase between sales and customer success. Although sales might be measured through sales targets, customer success is traditionally measured with churn rates.

The main issue of this model is that different targets and metrics encourage a short-term selling approach instead of motivating sales staff to seek long-term customers.

One strategy to achieve this goal, suggested by sales experts, is to design new metrics that, for example, measure the ease of onboarding processes and measure customer experience throughout the customer journey. Another strategy is to implement shared incentives and develop a win-win compensation structure. If a new deal is closed by customer success after the first sale, the corresponding sales representative should receive a commission % out of the sale within 6 months or one year after the sale. Passing that period, the account could be fully transferred to customer success. Alternatively, customer success experts advocated long-term sales incentives for sales peers that encourage alignment, consequently customer retention and growth.

The literature indicates that customer success management developed in the software-as-a-service field but has rapidly gained momentum in other B2B industries which are transitioning to recurring revenue models (Hochstein et al., 2023; as cited in Kowalkowski & Ulaga 2024). In this thesis, customer success participants emphasized the importance of understanding recurring revenue models in today's business operations. A recurring revenue model provides the advantage of reliable revenue flow, in contrast to conventional one-time sales (Houston 30 June 2024). Most of the customers' lifetime value takes place after the first sale. Despite of this fact, leaders tend to disregard customer success efforts in recurring revenue, such as strengthening customer onboarding, renewals and expansion initiatives (Van der Kooij June 2022). As a matter of fact, retaining existing customers is more cost-efficient than acquiring new customers (Houston 30 June 2024).

In that respect, misalignment between sales and delivery functions (customer success) was reported by sales experts, particularly with respect to miscommunication during transfer of duties, customer onboarding, delivery and customer nurturing. Both sides agreed that, after the purchase is confirmed, some companies might leave the customer unattended and confused about the next steps. To solve this issue, it is essential to involve delivery teams early in the sales process.

There is a need for seamless handover processes from sales to customer success, including structured handover meetings, cross-functional collaboration and access to detailed customer documentation. In this way, delivery teams will be equipped and ready to timely onboard customers. Otherwise, customers might be left confused or skeptical about the brand. Both functions asserted that excelling at customer onboarding is vital for a positive customer experience, including providing proper product training. A solid example was a business where handover meetings are proactively organized by the sales team, where successful customer cases and value drivers are presented by the customer success team.

Regarding long-term customer nurturing, the best practice is to motivate sales professionals to follow through the whole buying process. In fact, nurturing client relationships through periodic follow-up meetings or quarterly calls should be a top priority. A lack of customer nurturing in the post-purchase disrupts the strategic alignment and operations internally, ultimately affecting negatively efficiency, branding, customer experience and revenue generation.

Continuing with best practices of alignment, leaders should be more strategic in aligning both the sales strategy with the customer success strategy. In this way, fragmentation and churn can be prevented while securing recurrent revenue.

From the customer success perspective, a common issue was communication systems fragmentation. For instance, marketing and sales might use different CRM systems, whereas customer success uses a totally different CRM-type of tool. This internal circumstance indicates underlying silo issues which impede an adequate flow of information between teams.

Next, customer success highlighted “cadence” as a best practice to achieve cross-functional alignment in terms of interdepartmental communication: obvious as it may be, having regular meetings with all main team leaders, and one-on-ones conversations to spot obstacles before they escalate.

Cross-functional churn discussions and joint action tracking were additional best practices. Along with the expected customer success’ role in preventing customer churn, other units such as product, support and sales must participate in customer health conversations and jointly propose solutions to target customers at churn risk.

From the customer success point of view, customer-facing functions require close collaboration with prior units in the customer journey such as marketing for lead generation purposes, a function that might be traditionally more involved in the pre-purchase stage. Marketing campaigns can be optimized based on customer insights collected by customer success teams. Likewise, customer feedback should be a fundamental element not only from the customer success department perspective but also serving all functions participating in the whole customer journey. In this respect, a useful practice to eliminate interdepartmental silos is co-creation. For instance, executing collaborative sessions or workshops to process concrete customer research and customer feedback, not only with sales but with the rest of the teams.

6.3 Summary of findings

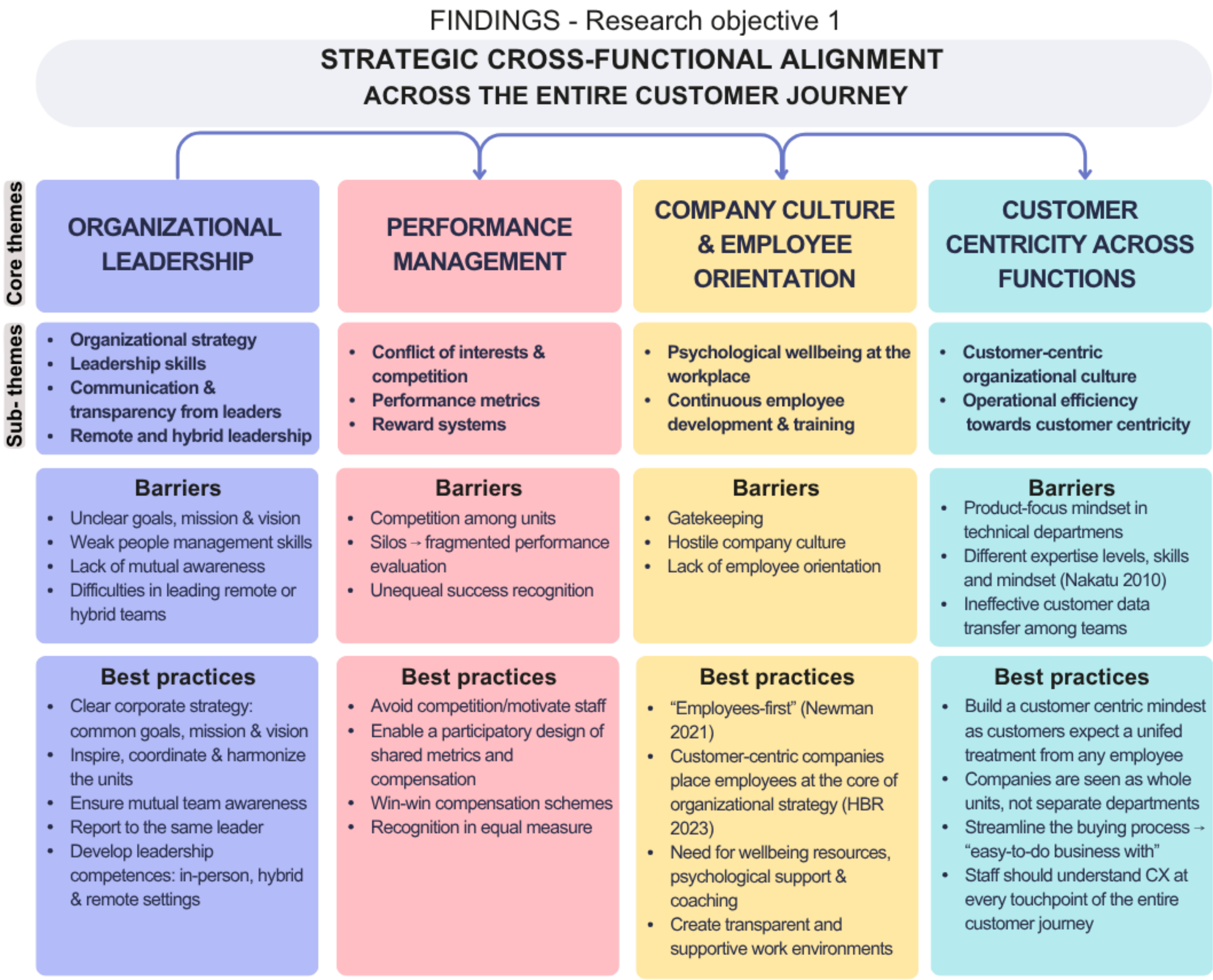


Figure 1. Cross-functional barriers and best practices across the entire customer journey (RO1)

FINDINGS - Research objective 2

STRATEGIC CROSS-FUNCTIONAL ALIGNMENT
BY DEPARTMENT AND CUSTOMER JOURNEY PHASE

Technical & commercial perspectives

Comparative views

Technical experts' perspectives:
- Lack of technical proficiency
- Training for commercial teams is needed

Commercial experts' perspectives:
- Insufficient collaboration
- Product-focus mindset dominance in technical departments
- Reluctance from technical teams to attend commercial discussions
- Lack of communication from technical teams about new product developments or roadmaps

Best practices for cross-functional alignment
- Enhace mutual understanding of activities across the customer journey
- Technical teams to communicate actively roadmaps
- Allow customer-facing functions to participate in product development discussions
- Encourage technical teams to establish direct customer relationships. E.g. customer interviews
- Develop "interface roles"
- Support a human-centered design culture (depending on readiness)

CUSTOMER JOURNEY

Pre-purchase phase

Sales & marketing perspectives

Comparative views

Marketing experts' perspectives:
- Silo culture & rivalry among units
- Sales is prioritized over others
- Struggle to demonstrate contributions to revenue

Sales experts' perspectives:
- Unjustified marketing campaigns
- Unknown ideal customer profiles (ICP)
- Sales are rewarded on short-term revenue

Best practices for cross-functional alignment
- Concensus on impactful metrics
- Support each other in lead nurturing
- "Everyone is a lead generator"
- Involve finance department
- Collective brainstorming sessions
- Shared targets, metrics and compensation
- Designate a chief revenue (or customer) officer (Kotler et al. 2017)
- Define a joint marketing and sales funnel with clear steps (Kotler et al. 2017)

Post-purchase phase

Sales & customer success perspectives

Sales experts' perspectives:
- Miscommunication during transfer of duties (poor handover), customer onboarding, delivery and customer nurturing → negative CX

Customer succes (CS) experts' perspectives:
- Poor handover from sales
- CRM system fragmentation
- Misaligned targets amd metrics → short-term sales

Best practices for cross-functional alignment
- Enhance handover processes
- Excel at customer onboarding, incl. product training
- Customer nurturing with periodic follow-ups
- Formulate better metrics focused on CX
- Formulate shared incentives
- Align units' strategies
- Training on recurring revenue models where needed
- Co-creation: human-centered design approach
- Cadence: regular cross-functional meetings
- Cross-functional churn discussion and prevention
- CS to collect feedback and share it with others
- CS to participate in early phases of customer journey

Figure 2. Cross-functional barriers and best practices by department and customer journey phase (RO2)

7 Conclusions

Cross-functional alignment is a multidimensional and complex issue. Yet the human aspect of leading a business increases the complexity of the topic. Technology companies are composed of talented technically qualified professionals. Nonetheless, aligning technology companies should start by concentrating first on customer experience then improving operations in reverse. Whereas, creating technological offerings and trying to find market-fit afterwards should be avoided. Such a customer-centric view primarily lies within the scope of leadership and encourages the participation of all functions in strategic alignment.

By using a customer journey model, this dissertation was able to reveal a comprehensive overview of existing barriers and best practices for cross-functional alignment in B2B technology companies. To enhance cross-functional alignment, B2B technology companies are advised prioritize competent and transparent leadership, a shared performance management and develop a human (employee/customer) orientation. Moreover, each team member and department can contribute to eliminating silos at operational levels in close coordination and full support from top leaders. Ultimately, cross-functional alignment requires collective efforts.

The thesis concludes that cross-functional transformation requires a special focus on shaping a supportive company culture and leadership, while developing multiple competences: interpersonal skills, business acumen plus a human (employee & customer) centric mindset at all functions and across entire customer journeys. As discussed, there is a strong connection between leadership and culture. Thus, identifying and balancing subcultures' relationships (represented by departments) is possible to minimize conflicts.

As an outcome fulfilling the research objective 3 (RO3), the next section presents development suggestions that leaders and practitioners can consider and adapt to their business contexts to enhance cross-functional alignment. Participatory leadership and design-led organizations are proposed. (Table 13.). Firms are encouraged to build well-organized, collaborative and psychologically safe workplaces at the service of customers, which should ultimately result in everyone's success.

7.1 Development recommendations

Table 13. Development suggestions for decision makers and practitioners (RO3)

Key takeaway	Development recommendations
Invest in leadership development	- Provide staff with regular training programs to develop their capabilities to lead - Provide access to executive coaching for top leaders
Develop and employee-centric approach in participatory and safe working cultures	- Allocate budget for employee continuous training, including access to personal development options, psychological support and business coaching - Build wellbeing intelligence (Bhatti & Roulet 2025)
Develop customer-centricity	- Invest in customer journey management training - Provide such training for both technical teams and revenue teams, including finance and HR - Ensure all stakeholders understand their impact on customer experience at all touchpoints of the entire customer journey
Conduct strategic planning and ensure transparent communication from leaders	- Define a clear corporate strategy: mission, vision, goals and strategies across all units - Align departmental strategies - Ensure functions are aware of the corporate strategy, each other's strategies and responsibilities
Adopt strategic design frameworks	- Implement strategic design tools to envision, inspire, innovate, structure and align businesses (Calabretta, Gemser & Karpen 2021) - Cultivate design thinking and beginner mindset across units (Lewrick, Link & Leifer 2020) - Use data to conduct brainstorming sessions with a strategic design approach
Align targets, metrics and rewards	- Break silos by designing common goals, KPIs, financial and non-financial rewards that promote collaboration, not competition. - Adopt a long-term approach in the design of metrics and rewards - Ensure everyone understands each other's goals, metrics and rewards - Provide success recognition in equal measure among teams.
Use recurring revenue models to align departments and improve CX	- Map customer journeys beyond purchase. E.g. customer success and technical departments. - Align teams across entire customer journeys (CJs) with a closed loop focus: collect feedback from high-value customers and provide it to units at early phases of the CJs (Van der Kooij June 2022)
Ensure CRM communication systems allow seamless customer information transfer across units/customer journey	- Analyze how well integrated the CRM communication systems are among units - Integrate CRM communication systems across functions including technical teams

7.2 Limitations and Future Research

This thesis presents limitations related to qualitative research. Although the total sample size of 16 interviewees fulfilled sample size recommendations, the research design involved smaller sample sizes per department (1-4 participants each). In terms of generalizability (Lim 2025), such small sample sizes per role could have produced results not fully applicable to all B2B technology contexts. Despite that, the research design ensured validity as it provided a comprehensive perspective of a real-life business problem and key insights from industry experts in their specific contexts. This research did not differentiate barriers and best practices within specific technological industries (electronics, mechanical engineering, software, etc.). Elite informants represented a variety of technology companies, with different company sizes, organizational structures and growth stages, ranging from startups to scale-up and mature organizations. Elite informants had different seniority levels and years of experience.

An additional limitation was a potential researcher bias (Lim 2025). The analysis was conducted by a single researcher. Thus, interpretation and analysis of data might have been influenced by the researcher's own bias. To mitigate this possible constraint, the author reflected and reviewed data repeatedly to produce a neutral analysis.

While this dissertation has provided valuable insights into cross-functional alignment, future research could explore perspectives from emerging roles such as chief revenue officers, heads of revenue operations, chief customer officers, customer experience executives and/or service designers. Additional research could expand at understanding the role of finance or human resources (HR) roles in interdepartmental integration. Likewise, cross-functional alignment can be studied at different company growth stages and specific industries in different geographic regions. This qualitative research could be enriched with mixed methods.

7.3 Learning process reflection

Reflecting on the thesis process in terms of project management, I was able to visualize clear objectives and project plan, which I implemented systematically. My original plan was to conduct a development-oriented thesis to enhance the sales function at a B2B software company. Nevertheless, I redirected my investigation towards another relevant practical problem with wider applications.

Once the objectives and research methodology were clear, the implementation progressed smoothly. There was quite a positive response from most elite informants to participate in the interviews, allowing for sufficient data collection. However, manual data analysis of 16 interviews was overwhelming. I underestimated the high workload required on handling raw data, coding and grouping data to present them in a coherent manner. Hence, the data analysis took longer than planned.

After revisiting my data multiple times, eventually I managed to digest and present the findings in a structured way. The research methods fulfilled the three research objectives, while contrasting with the literature review. During the process, the pomodoro technique, music, mind maps/visual summaries and guidance from my supervisor were useful resources to help me advance the thesis.

As own professional learnings, I developed synthesis skills, research design skills, strategic thinking, academic writing, project planning and analytical skills. In terms of soft skills, networking plus interviewing professionals for the first time in my life was a valuable experience to be capitalized in future projects. I gained in-depth knowledge of a real-life business problem, trends and transformation opportunities in the B2B context.

By adopting a holistic approach in my research design valuable outcomes were produced. Throughout the process, I realized that cross-functional alignment is a multidimensional and quite complex issue, which is highly dependent on leadership and culture. Technology companies and their respective leadership roles might be composed of technically qualified professionals; however, extensive technical experience might fall short in orchestrating cross-functional alignment. Leading a business requires multiple competences: technical/strategic competences and a human (employee & customer) centric focus combined with interpersonal skills.

If I had the opportunity to repeat this project, I would pivot certain aspects such as balancing the literature review with leadership theories; interviewing other relevant functions such as finance, HR or emerging roles such as chief revenue officers; improving data analysis planning and using a software analytical tool (e.g. Nvivo) to handle more efficiently large amounts of data. The chosen method had strengths and weaknesses which were already acknowledged in the previous section.

I would like to deeply thank my advisor Aarni Tuomi for his guidance and patience throughout this process. I found this thesis project as a tool, not only for professional but for personal growth since I practiced discipline and perseverance. I am confident that the developed competences will support my career growth as a top leader and/or business owner.

References

Aa, Z. 2020. In the Driving Seat of Customer Experience: With Customer Signals Management. Warden Press. Amsterdam.

Ahuja, P. 31 March 2025. Cross-Functional Alignment Is the Real Growth Engine (And Most B2B SaaS Teams Are Ignoring It). URL: https://www.linkedin.com/pulse/cross-functional-alignment-real-growth-engine-most-b2b-priti-ahuja-j9cpc#:~:text=Sales%20chasing%20one%20buyer%20persona,in%20SaaS%20(But%20So%20Critical) Accessed: June 25 2025.

Aguinis, H. & Solarino, A. M. 2019. Transparency and replicability in qualitative research: The case of interviews with elite informants. Strategic Management Journal, 40, 8, pp. 1291–1315.

Alonso-Garcia, J., Pablo-Martí, F. & Nunez-Barriopedro, E. 2021. Omnichannel Management in B2B. Complexity-based model. Empirical evidence from a panel of experts based on Fuzzy Cognitive Maps. Industrial marketing management, 95, pp. 99-113.

Alston, F. 2014. Culture and trust in technology-driven organizations. CRC press, New York.

Andersson, S., Aagerup, U., Svensson, L. & Eriksson, S. 2024. Challenges and opportunities in the digitalization of the B2B customer journey. The Journal of Business & Industrial Marketing, 39, 13, pp. 160-174.

Attah, R. U., Garba, B. M. P., Gil-Ozoudeh, I., & Iwuanyanwu, O. 2024. Cross-functional team dynamics in technology management: a comprehensive review of efficiency and innovation enhancement. Engineering Science & Technology Journal, *5*, 12, pp. 3248-3265.

Aurini, J., Heath, M. & Howells, S. 2021. The How To of Qualitative Research. Second Edition. SAGE Publications Ltd., London.

Bhatti, K., & Roulet, T. 2025. Wellbeing intelligence: Building better mental health at work. Profile Books Ltd. London.

Boghe, D., Van Vaerenbergh, Y., Teixeira, I. F. & Vancoetsem, B. 2024. Customer success managers' involvement in sales: Taxonomy, frictions, and implications. Industrial marketing management, 122, pp. 119-130.

Bullard, E. 2024. Purposive sampling. EBSCO. URL: https://www.ebsco.com/research-starters/social-sciences-and-humanities/purposive-sampling Accessed: 19 May 2025.

Calabretta, G., Gemser, G., & Karpen, E. 2021. Strategic design: Eight essential practices every strategic designer must master. BIS Publishers. Amsterdam.

Cassell, C., 2015. Conducting Research Interviews for Business and Management Students. Mastering Business Research Methods. 55 City Road, London: SAGE Publications Ltd. URL: https://doi.org/10.4135/9781529716726 Accessed: 1 Aug 2024.

CE Noticias Financieras. 11 December 2024. From cross-border payments to hyper-personalization: What's in store for the fintech industry in 2025. URL: https://www.proquest.com/wire-feeds/cross-border-payments-hyper-personalization-whats/docview/3143618205/se-2 Accessed: 20 September 2025.

Chatelaine, J. 18 December 2024. Top 5 Challenges in B2B Tech Sales and How to Overcome Them. QuickMail. URL: https://quickmail.com/B2B-tech-sales Accessed: 20 March 2025.

Chow, Ch. 14 February 2025. From Data to Delight: Why Hyper-Personalisation Is the Future of Business. Salesforce. URL: https://www.salesforce.com/eu/blog/why-hyper-personalization-is-the-future/ Accessed: 20 September 2025.

Cooperrider, D. L. & Whitney, D. 2005. Appreciative Inquiry. Berrett-Koehler Publishers. San Francisco. E-book. Accessed: 25 July 2024.

Cormack, J., Postăvaru, G., & Basten, G. 2018. Analyzing Qualitative Minigroup Data Using Thematic Analysis. Sage Publications, Inc. London.

Deloitte. 2017. Wealth Management Digitalization changes client advisory more than ever before. United Kingdom. URL: https://www2.deloitte.com/content/dam/Deloitte/de/Documents/WM%20Digitalisierung.pdf#page=10.00 Accessed: 21 June 2024.

Doheny, J. 2025. Six Steps To B2B Customer Experience Excellence. B2B International. URL: https://www.b2binternational.com/publications/six-steps-to-b2b-customer-experience-excellence/ Accessed: 10 January 2025.

Edmonson, A. 1999. Psychological Safety and Learning Behavior in Work Teams. Administrative Science Quarterly, 44, 2, pp. 350-383.

Ellis, S. & Brown, M. 2017. Hacking Growth. Hacking growth: How today's fastest-growing companies drive breakout success. Virgin Books, New York.

Ewim, C. P., Achumie, G. O., Adeleke, A. G., Okeke, I. C., Mokogwu, C. 2024. Developing a cross-functional team coordination framework: A model for optimizing business operations. International Journal of Frontline Research in Multidisciplinary Studies, 4, 1, pp. 15–34.

Finn T. & Downie A. 20 December 2024. Customer experience trends for 2025. IBM Consulting. URL: https://www.ibm.com/think/insights/customer-experience-trends Accessed: 19 April 2025.

Fließ S. & Kleinaltenkamp M. 2004. Blueprinting the service company: Managing service processes efficiently. Journal of Business Research. 57, 4, pp. 392–404.

Goswami, M. 2021. Challenges and solutions in integrating AI with multi-cloud architectures. International Journal of Enhanced Research in Management & Computer Applications ISSN, pp. 2319-7471.

Graesch, J.P., Hensel-Börner, S. & Henseler, J., 2024. Customer success management through alignment of marketing, sales and IT. Industrial Marketing Management, 120, pp.1-14.

Harvard Business Review. 6 December 2023. Why a Customer-Centric Business Must Be an Employee-Centric Business. URL: https://hbr.org/sponsored/2023/12/why-a-customer-centric-business-must-be-an-employee-centric-business Accessed: 26 August 2025.

Hayes, Ó. & Kelliher, F. 2022. The emergence of B2B omni-channel marketing in the digital era: A systematic literature review. The Journal of Business & Industrial Marketing, 37, 11, pp. 2156-2168.

Hennessey, J. 18 June 2024. Future Trends in B2B Customer Journey Mapping with Emerging Technologies. URL: https://breadcrumbs.io/blog/future-trends-in-b2b-customer-journey-mapping/?utm_source=chatgpt.com Accessed: 19 April 2025.

Holland, S., Gaston, K. and Gomes, J. 2000. Critical success factors for cross-functional teamwork in new product development. International Journal of Management Reviews, 2, 3, pp. 231-259.

Homburg, C. & Tischer, M. 2023. Customer journey management capability in business-to-business markets: Its bright and dark sides and overall impact on firm performance. Journal of the Academy of Marketing Science, 51, 5, pp. 1046-1074.

Houston, M. 30 June 2024. Why Recurring Revenue Is Your Business's Secret Weapon. URL: https://www.forbes.com/sites/melissahouston/2024/06/30/why-recurring-revenue-is-your-businesss-secret-weapon/ Accessed: 25 October 2025.

Jagodič, G., & Milfelner, B. 2022. The role of B2B marketing strategy, ICT B2B marketing support, and service quality in market orientation – Performance relationship: evidence from three European countries. Cogent Business & Management, 9, 1, pp. 1-28.

Jobs S. 12 February 2022. Start with Customer Experience. URL: https://www.youtube.com/watch?v=QGIUa2sSYFI. Accessed: December 15, 2024.

Kang, M., Lee, G., Hwang, D. W., Wei, J. & Huo, B. 2021. Effects of cross-functional integration on NPD success: Mediating roles of customer and supplier involvement. Total quality management & business excellence, 32, 13, pp. 1515-1531. doi:10.1080/14783363.2020.1736543

Karlson, L. C. 2015. Corporate Value Creation: An Operations Framework for Nonfinancial Managers. John Wiley & Sons, Inc. New Yersey. E-book. Accessed: 12 November 2021.

Kotler, P., Rackham, N., & Krishnaswamy, S. 2017. Ending the war between sales and marketing. Harvard Business Review OnPoint. Originally published in July–August 2006.

Keszey, T. & Biemans, W. 2016. Sales–marketing encroachment effects on innovation. Journal of business research, 69, 9, pp. 3698-3706.

Koch, C. 2023. Importance of the Perceived Quality of Touchpoints for Customer Journey Analysis – Evidence from the B2B Sector. Electronic Commerce Research, 23,3, pp. 1515–38.

Kowalkowski, C., & Ulaga, W. 2024. Subscription offers in business-to-business markets: Conceptualization, taxonomy, and framework for growth. Industrial Marketing Management, 117, pp. 440-456.

Kumar, P. (15 November 2023). Unleashing success: How experiential marketing and omnichannel strategies work hand in hand. Business World, Retrieved from https://www.proquest.com/magazines/unleashing-success-how-experiential-marketing/docview/2889890408/se-2 Accessed: 16 September 2025.

Larsson-Broman, H., Ejenäs, M., & Bayat, E. 2021. Research Report 2021. The future state of sales. Top 10 trends shaping the future of sales. Mercuri International Research. Sweden.

Ledro, C., Nosella, A., & Dalla Pozza, I. 2023. Integration of AI in CRM: Challenges and guidelines. Journal of Open Innovation: Technology, Market, and Complexity, 9, 4, pp. 1-13.

Lemon, K. N., & Verhoef, P. C. 2016. Understanding Customer Experience Throughout the Customer Journey. Journal of Marketing, 80, 6, pp. 69–96.

Lewrick, M., Link, P., & Leifer, L. 2020. The design thinking toolbox: A guide to mastering the most popular and valuable innovation methods. John Wiley & Sons, Inc. New Jersey.

Lim, W. M. 2025. What is qualitative research? An overview and guidelines. Australasian Marketing Journal, 33, 2, pp. 199-229.

Madruga, R. P., Hilton, B., Hochstein, B., Navarro, L. L. L., Silva, É. R. & Haddad, A. N. 2024. Comparing and contrasting customer success management and relationship marketing. Cogent business & management, 11, 1, pp. 1-25.

Majchrzak, A. & Wang, Q. September-October 1996. Breaking the Functional Mind-Set in Process Organizations. Harvard Business Review. URL: https://ssrn.com/abstract=2537034 Accessed 3 March 2025.

McKinsey & Company. 11 February 2021. Psychological safety and the critical role of leadership development. URL: https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/psychological-safety-and-the-critical-role-of-leadership-development Accessed 17 August 2025.

McKinsey & Company. 15 December 2021. B2B sales: Omnichannel everywhere, every time. URL: https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/b2b-sales-omnichannel-everywhere-every-time Accessed: 17 April 2025.

McKinsey & Company. 2021. Embracing the B2B omnichannel opportunity. URL: https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/embracing-the-b2b-omnichannel-opportunity-in-2021 Accessed: 19 April 2025.

McKinsey & Company. 17 July 2023. What is psychological safety? URL: https://www.mckinsey.com/featured-insights/mckinsey-explainers/what-is-psychological-safety Accessed 17 August 2025.

McKinsey & Company's annual global B2B pulse: Five omnichannel strategies companies are using to boost market share by 10+ percent: Omnichannel-first companies are seeing a growth multiplier effect 2x that of their peers. (13 April 2023). NASDAQ OMX's News Release Distribution Channel. URL: https://www.proquest.com/wire-feeds/mckinsey-amp-company-s-annual-global-b2b-pulse/docview/2800205049/se-2 Accessed 18.9.2025

McKinsey & Company. 9 December 2024. All about teams: A new approach to organizational transformation. URL: https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/all-about-teams-a-new-approach-to-organizational-transformation Accessed: 8 February 2025.

Nakata, C. & Im, S. 2010. Spurring Cross-Functional Integration for Higher New Product Performance: A Group Effectiveness Perspective. The Journal of product innovation management, 27, 4, pp. 554-571.

Narver, J.C. & Slater, S.F. 1990. The Effect of Market Orientation on Business Profitability. Journal of Marketing, 54, 4, pp. 20-35.

Newman, M. 2021. The Power of Customer Experience: How to use customer-centricity to drive sales and profitability. Kogan Page Publishers. London; New York.

Nguyen, J. 13 May 2025. How to prevent gatekeeping from taking hold in your workplace. Australian HR Institute. URL: https://www.hrmonline.com.au/culture-leadership/prevent-gatekeeping-from-taking-hold-in-your-workplace/

Oliveira, E.A.D., Pimenta, M.L., Hilletofth, P. and Eriksson, D., 2016. Integration through cross-functional teams in a service company. European Business Review, 28, 4, pp. 405-430.

Omeihe, K. O., & Harrison, C. 2024. Qualitative research methods for business students: a global approach. SAGE Publications Limited. London.

Osterwalder, A., Pigneur, Y., Bernarda, G., & Smith, A. 2014. Value proposition design: How to create products and services customers want. John Wiley & Sons, Inc. New Jersey.

Pimenta, M. L., da Silva, A. L. & Tate, W. L. 2016. Characteristics of cross-functional integration processes: Evidence from Brazilian organizations. The international journal of logistics management, 27, 2, pp. 570-594.

Plotkin, C. L., Stanley, J., Harrison, L., & García de la Torre, V. 12 September 2024. Five fundamental truths: How B2B winners keep growing. McKinsey & Company. URL: https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/five-fundamental-truths-how-b2b-winners-keep-growing Accessed: 17 September 2025.

Purmonen, A., Jaakkola, E. & Terho, H. 2023. B2B customer journeys: Conceptualization and an integrative framework. Industrial Marketing Management, 113, pp. 74–87.

Reed, J. 2006. Appreciative inquiry: Research for change. Sage publications. United States of America.

Ruud W.H., Klaus, P. & Wetzels, M. 2023. There is a secret to success: Linking customer experience management practices to profitability. Journal of Retailing and Consumer Services. Elsevier,73, C, pp.

Schein, E. H. 2010. Organizational culture and leadership. Fourth edition. Jossey-Bass. San Francisco.

Shams, S. M. R., Tsoukatos, E., Vrontis, D., Weber, Y., Demetris Vrontis, Evangelos Tsoukatos, & Yaakov Weber. 2018. Business Models for Strategic Innovation: Cross-Functional Perspectives. Routledge. United Kingdom.

Singh, B., & Kaunert, C. 2024. Future of digital marketing: hyper-personalized customer dynamic experience with AI-based predictive models. In Revolutionizing the AI-digital landscape. Productivity Press.

Singh, K., Rajawat, A. S., Goyal, S. B. & Waked, H. N. 2025. A Blockchain-Based Intelligent Framework for Secure and Sustainable Knowledge Management in Organizational Systems. Procedia Computer Science, 258, pp. 2899-2908.

Sladdin, C. & O'Sullivan, D. 17 February 2025. Market Guide for Customer Journey Analytics & Orchestration. Gartner, Inc. pp. 1-41.

Swinscoe, A. 19 December 2024. 15 Customer Experience Predictions For 2025. Forbes. URL: https://www.forbes.com/sites/adrianswinscoe/2024/12/17/15-customer-experience-predictions-for-2025/ Accessed: 18 January 2025.

Tomaskova, E., 2018. Interfunctional coordination and its influence on customer success. Open Economics, 1, 1, pp.105-114.

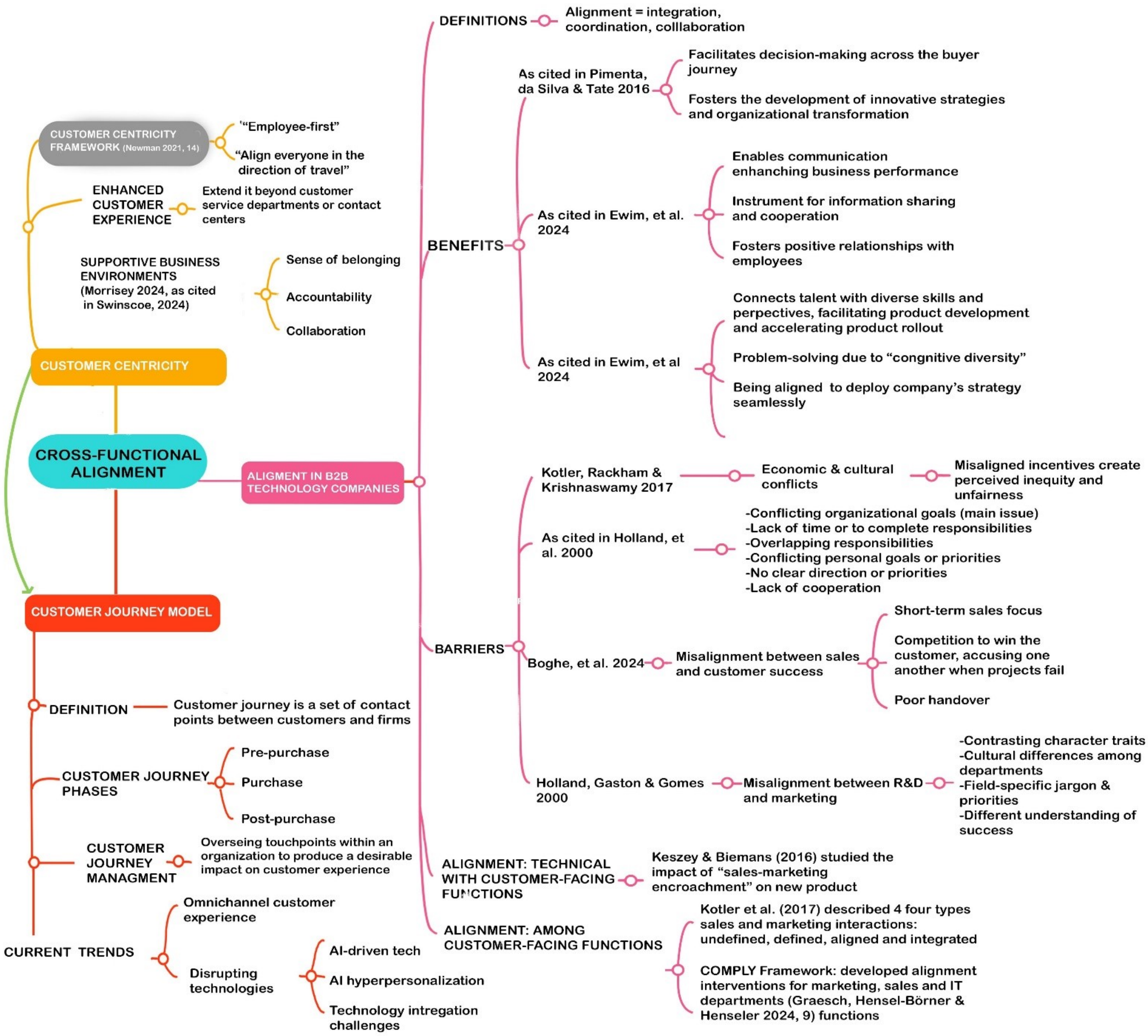
Teknologiateollisuus. 23 December 2024. Tietoa toimialasta (Information about the Technology Industry). URL: https://teknologiateollisuus.fi/talous-ja-tilastot/tietoa-toimialasta/ Accessed: 28 January 2025.

Van der Kooij, J. J. June 2022. The operating model for recurring revenue. Winning By Design. Pp. 1-16.

Viebrock, S. 2025. Overcoming B2B Tech’s Scaling Challenges: What You’re Missing. O8. URL: https://www.o8.agency/blog/strategy/scaling-success-b2b-overcoming-common-challenges-for-growth Accessed 21 March 2025.

Appendices

Appendix 1. Summary of the literature review



Appendix 2. Profile of elite informants

Elite informant number	Function/role	Professional background and/or expertise
Interviewee 1	Chief Executive Officer	Master of Business Administration. Background in business in private tech companies, mainly in charge of marketing and sales departments. CEO and Board member of SMEs.
Interviewee 2	Chief Executive Officer	CEO and co-founder of a software company. Ex-Google with experience in marketing.
Interviewee 3	Marketing Director	Global head of marketing, communications and customer experience at an industrial manufacturer. International marketing experience in 5 different countries: UK, Finland, Italy, Spain and Mexico.
Interviewee 4	Head of Marketing	Master of Business Economics and Business Administration. Head of marketing, working in large industrial technological large in the past 10 years. Previous experience also in digital marketing agencies.
Interviewee 5	Marketing Specialist	Bachelor of business administration. MBA candidate. Professional experience in B2B and B2C marketing in large corporations and SMEs.
Interviewee 6	Sales Director	Master of Business Administration, certificated Business Coach with over a decade of experience in B2B sales. Background in engineering. Currently Director of software sales.
Interviewee 7	Head of Sales	Bachelor's degree in international relations. Master's degree in business administration, with over 13 years of experience in sales. In software sales for 9 years as an account manager and most recently as head of sales.
Interviewee 8	Senior Sales Manager	Master of Business Administration with around 30 years of sales and consulting management experience in large technological corporations.
Interviewee 9	Customer Success Director	Background in engineering (telecommunications). Professional experience in commercial roles, mainly customer success. Last role, customer success director in a scale-up technology company.
Interviewee 10	Customer Success Manager	Leading post sales functions (customer success and support) in a growing technology company for around 7 years. IT background. Performed for many years as a sales manager for many years in a large technology corporation.
Interviewee 11	Customer Success Manager	Over 15 years of experience combining research methods across more than 200 customer experience and digital development projects in the Nordics, Asia and the UK. Performing customer success roles in the last years.
Interviewee 12	Customer Success Specialist	Five years of experience as a customer success specialist.

Elite informant number	Function/role	Professional background and/or expertise
Interviewee 13	Chief Technology Officer	Education background, in computer science and cyber-security. Working for more than 10 years in the tech field in different roles as a software engineer and engineering manager in large tech companies. Currently CTO in a startup.
Interviewee 14	Technical Success Manager	Background in programming. Master of Business Administration. Experience in business analytics and system implementations. Currently working as a technical success manager, involved in technical implementations and product development.
Interviewee 15	Technical Support Manager	Telecommunications engineer since 2000, focused on technical troubleshooting, incident management and implementation of new systems.
Interviewee 16	Innovation Manager	Master of Business Administration. Experience in marketing communications in a startup and currently performing as innovation manager at a large renowned Finnish technology company with over 60,000 employees worldwide.

Appendix 3. Interview guide

The objective of this interview is to understand cross-functional alignment in B2B technology companies, particularly best practices and barriers for alignment between sales, marketing, customer success and product departments, across the customer journey.

“Customer journey” refers to every touch point the whole company has before attracting a customer, when converting a customer, and post-purchase processes.

QUESTIONNAIRE

1. Could you please tell me about your experience in your field?

SPECIFIC QUESTIONS ABOUT BEST PRACTICES AND CHALLENGES PER PHASES OF THE CUSTOMER JOURNEY

To structure our conversation, I will use the concept of customer journey as explained earlier. Feel free to share your experiences in a specific company or in multiple companies depending on your experience.

2. *Pre-purchase. When organizations* capture, educate and nurture potential customers:
    - What are the **practices that have been successful** for the alignment between departments in this pre-purchase phase?
    - What are the **barriers/challenges of alignment** between departments?
3. Purchase. When customers make the purchasing decision, order placement and payment:
    - What are the **practices that work well** to ensure a successful alignment between departments in the purchase phase?
    - What are the barriers/challenges of alignment?
4. Post-purchase. Once the client has purchased. Delivery processes.
    - What are the **practices that work well** to ensure a successful alignment between departments in the post purchase phase?
    - What are the **barriers/challenges** of alignment in this phase?
5. Is there anything else you would like to share?

Probes (if needed depending on the conversation flow)
- Can you tell me a bit more about that?
- Can you give an example(s)?
- What do you mean by that term?
- What made it successful?
- What was the outcome?
- Can you explain the process/structure a bit more?
- Can you share an example when you faced this challenge?
- Can you share an example when there was a successful cooperation between units?
- Can you describe a specific event or time when…?
- Why do you think that is?
- How did you feel about that?

Thanks for your participation!