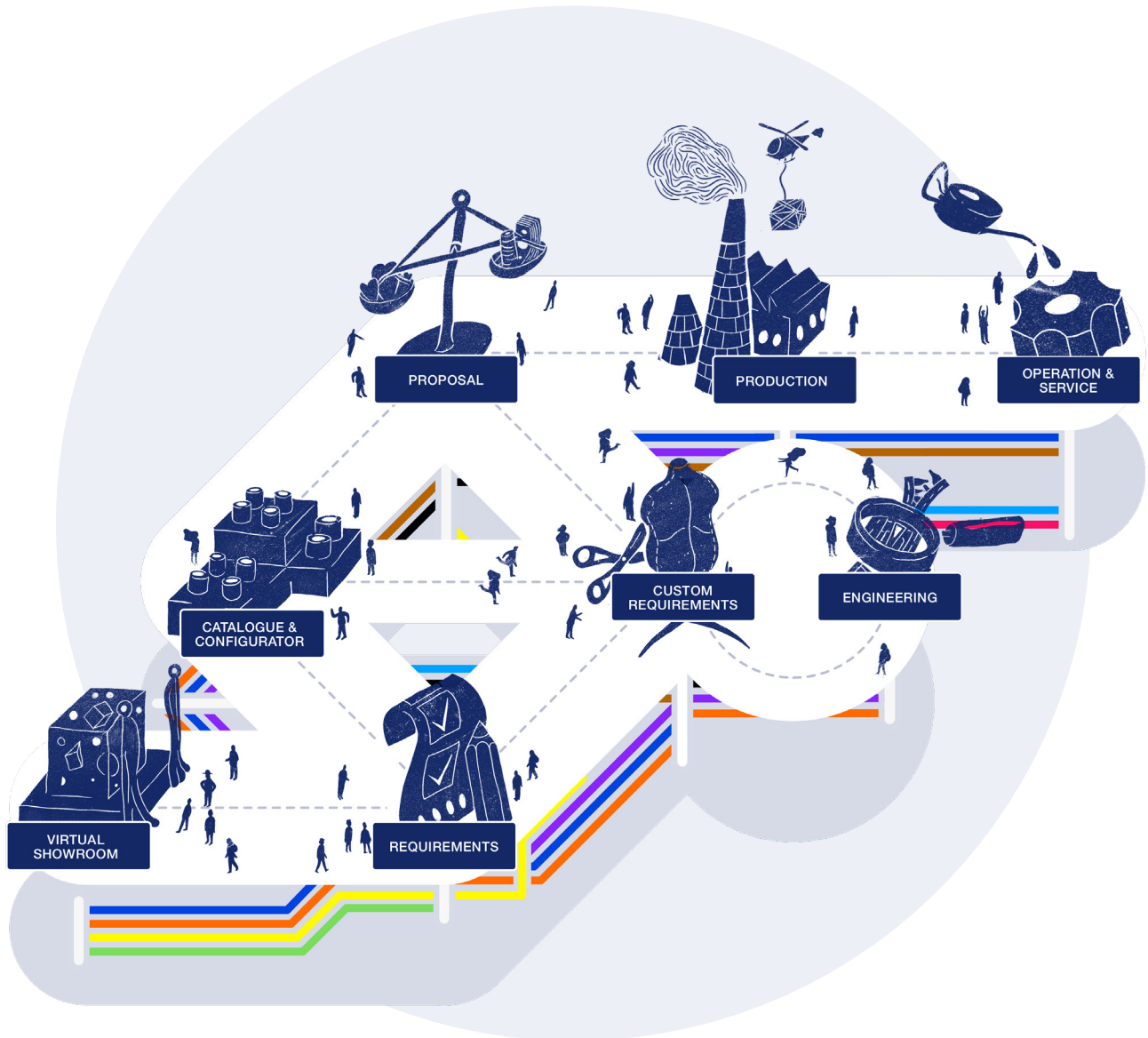


## Smart Sales

What does your future sales process look like?



# Connected product data and customer centricity lead to a smart digital sales process

Designing a digital and data-driven sales process and making it smart, step-by-step: this white paper illustrates for specialists and managers in the sales departments of B2B companies how to use connected product data to successfully plan, implement and apply digital consistency for marketing, sales, engineering, production and service. It enables you to inform your customers around the clock, provide holistic advice and accelerate the sales process.



Downloads available in English and German



Via Intelliact  
[intelliact.ch/smart-sales](https://intelliact.ch/smart-sales)



Via Eyekon  
[eyekon.ch/smart-sales](https://eyekon.ch/smart-sales)

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# Smart Sales:

## The Digitalization of Sales Communication in B2B

A wide range of quality products and a high degree of customisation in production are what distinguishes and defines Swiss industry. As development continues, business and sales teams face new challenges, and better commerce solutions are required. This is where the “Smart Sales” concept comes in.

Those who step into their customers’ shoes know how their customers think, what they expect and what their requirements are. Companies that understand the needs and habits of their customers can build trust and establish long-term cooperation. The path to customer loyalty is challenging and requires consistent and personalized services across all touchpoints (points of contact between the customer and the product or company), including channels such as web shops and catalogs. High-quality products may bring satisfied customers, but they do not create loyalty per se – the quality of the service plays a decisive role in this.

### **Better service for a consistent customer experience**

Only companies that manage to create cohesive processes and consistent product data can coordinate customer requirements across the various communication channels in a targeted manner. Services, such as comprehensive advice or timely information, become part of a customer experience.

For this reason, the digitalization of sales communication will be increasingly in focus, not only in the business-to-customer (B2C) environment. In order to meet growing customer requirements in the business-to-business (B2B) environment as well, manufacturing companies are increasingly focusing on intelligent sales processes (“smart sales”) and are designing the sales process in a digitalized form for their customers.

The following figure illustrates a typical process and the data landscape on two levels. The upper level shows which roles and areas are affected by the digitalization of the sales process. The lower level shows the “data backbone”.

## Digitalization of the Sales Process



Figure 1: Digitalization of the sales process with roles involved (user needs) and assets (data or PLM backbone) they interact with.

### Smart Sales explained briefly

First, the Smart Sales concept drives the continuous improvement of communication processes. Furthermore, product data are integrated across their master systems so that they can be used to support sales, especially in web applications.

Thanks to the interlinking of information in regards to customer, sales, development, production and service, data silos are eliminated. Teamwork is now possible; all company staff can call up the information relevant to them at the right time. Information is made consistently available internally, and to the customer. This makes the customer self-sufficient and better able to carry out an interaction on their own terms – the customer only contacts the sales department when the level of knowledge is highly specific or advanced. This considerably reduces the communication labor, while supporting the customer in their decision-making process.

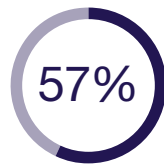
## The current status

More and more studies show that although B2B buyers are mainly online, the digitalization of B2B sales is still in its infancy, despite “Industry 4.0”. Networking with the customer has not yet been professionalized – this is the finding of the large-scale representative survey “The digital future of B2B sales”, conducted by Roland Berger and Google Germany (see source at the end of the document: Roland Berger GmbH, 2015). In contrast, however, the nearly 3,000 sales managers surveyed affirm how important the digitalization of the sales process is for the success of a company.

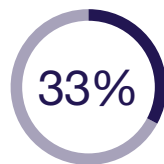
The following statistics make it clear how much potential lies in the digitalization of the sales process:



**60 percent** of the companies surveyed believe that digitalization is taking place not only in internal operations (e.g. production), but also in sales organizations, and will therefore be crucial for success.



**57 percent** are aware that customers have already decided on a product before the first contact with a sales representative is made. This makes it clear that a company should offer the best possible service from the first interaction, before communication with customers occurs.



It is striking that **33 percent** of the companies surveyed do not offer online ordering. Their customers only have the option of having products configured or individually adapted and ordered via personal contact over email or telephone.

# New challenges for manufacturing companies

Companies must quickly bring increasingly complex products to market, offer a broad product range, and take into account individual customer modification requests. The need for communication for sales is increasing – but the necessary tools are often inefficient, outdated or nonexistent.

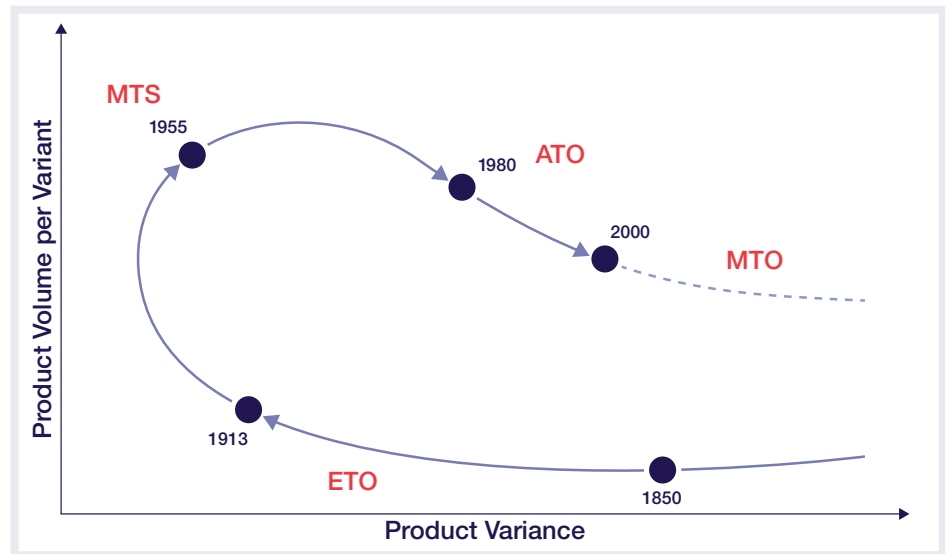


Figure 2: Trend towards Make-to-Order (MTO) – customer-individualized products. (Source: Yoram Koren "The Global Manufacturing Revolution")

The trend towards customized production (Make-to-Order, MTO for short) and the consequent high product variance, places high demands on industrial companies, especially sales teams that have an important intermediary function. On the one hand, they must be familiar with all variants and combination possibilities of their own products, and the general conditions of production. On the other hand, they must understand the customer's requirements in detail and translate individual wishes into products, prices, production times, etc.

## Complex communication and data silos

The challenge of sales professionals is skillful coordination and communication. They must efficiently mediate between engineering feasibility and customers requirements in order to find and present the best possible solutions. Of course, it is ideal if the solution is a configured standard product or a product consisting of standard components. However, where the customer's needs cannot be met with existing stock, individual solutions are required, and communication becomes more challenging – especially since the underlying structures and data silos often do not allow for a seamless flow of information.

In most cases, this is due to the fact that instead of integrated data, there are “departmental silos” on all levels (see Figure 3). Employees enter data in various systems that are not connected to each other. For example, the Sales department records customer requirements, but this information is not available for Engineering or other teams. This results in misunderstandings, errors and decreased quality. As a consequence, Sales and Engineering contact each other several times a day to exchange information or clarify questions. Customers notice when they are asked to provide their data several times or are confronted with long response times.

### A Typical Sales Process – Today

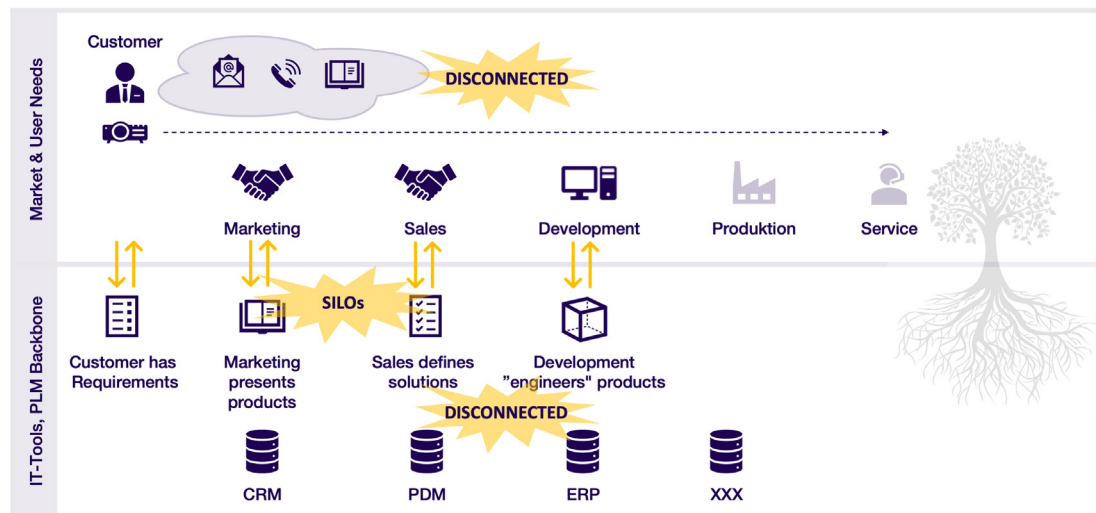


Figure 3: A sales process as an isolated solution (silo thinking)

### Addressing customer needs and potential frustrations

Customers expect the procurement of products to be as uncomplicated as possible, even in B2B. Behind the “business” in B2B are individuals who make decisions, and these decisions are at least partially shaped by personal B2C experiences. When shopping online for consumer goods (on Amazon, Zalando, etc.), people have grown accustomed to a high level of convenience. Communication via Skype, Whatsapp, or Zoom suggests everyone can and should be reachable at any time (cf. Roland Berger GmbH, 2015).

However, many digital tools involved in the B2B process have been built up as silo-applications over the years along with the entire IT-landscape, and are therefore not flexible enough to meet changing customer needs. If an online shopping experience turns out negative, be it due to lack of user-friendliness on the interface or a product that does not meet requirements, frustration arises. This must be prevented at all costs.

So how can companies act in this area of tension between increased complexity and new customer expectations? How can customer frustration be replaced by enthusiasm?



# The Smart Sales Concept: integrating product data, making the sales process consistent and user-friendly

In the B2B sales process of the future, all information will be centrally accessible, up-to-date, and available where it is needed. The sales process will be designed to be consistent and customer-centric – through the integral interplay between technical and communication disciplines.

Data integration and user-centric touchpoint design go hand-in-hand for the digitalization of sales communication. For this reason, the product data specialists at Intelliact and the 360° digital agency Eyekon have joined forces and developed a coherent concept that not only demonstrates the existing potential in B2B sales, but is also fully achievable.

## Integrating product data

In order to create competitive advantages via networked product data, it is not enough to optimize individual silos. Data silos must be broken down and integrated in order to optimize communication, especially between customers, Marketing, Sales and Engineering.

### A Typical Sales Process – Tomorrow

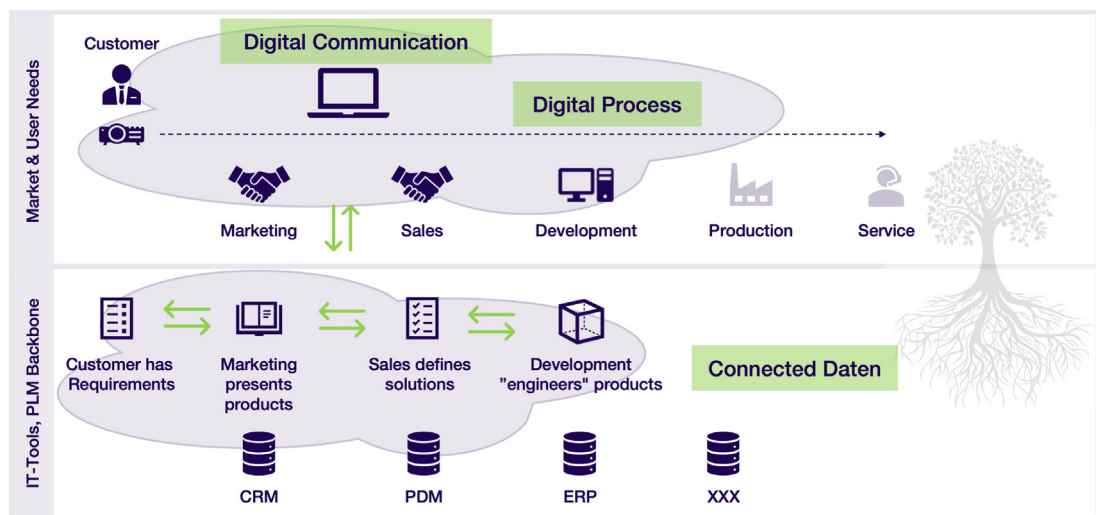


Figure 4: Integrated product data for a smart digital sales process

The aim of the Smart Sales process is first to integrate data between company systems. In this way, customer requirements entered in the sales system can be joined with the solutions and visualizations of the engineering department (see lower level of Figure 4). Next, this consolidated information must be made available in a usable form to the customer, Marketing, Sales and Engineering, in order to enable digital communication (see upper level of Figure 4). Smart Sales makes data and information centrally available and connects them with product data from the Product Lifecycle Management (PLM). As a result, all those involved in the

sales process can access the information, saving unnecessary communication between departments, and iteration cycles can be avoided.

### **Customer Experience Design (UI/UX-Design)**

Even in the user interface, no (positive) user experience is possible without consistent product data. Here, it is also important to design the communication between human and machine in a form that creates clarity, maps processes logically and makes operation intuitively comprehensible. Particularly in the case of internal company tools, high-quality interface design can significantly improve the reception of the application and the efficiency of the processes.

The customer's expectations of the process must be analysed using Customer Experience Management and defined specifically for each touchpoint: what experiences does my customer want to have at the individual interaction points? What is the deciding factor for the successful conversion from prospective customer to convinced customer? In the future, more value will be created in sales. In sum: perfect customer communication and support on the outside, lean and efficient processes on the inside.

Customer Experience Design and PLM – neither are new in and of themselves. What makes the Smart Sales concept a novelty is its digital interdisciplinarity. At the intersection of technology and communication, strategy and design, internal and external perspective, a state-of-the-art complete solution is created and applied to the sales process in B2B in order to digitalize it sustainably and successfully.

# Smart Sales in practice: the consistent digital Customer Journey

It is imperative that the digital sales process is geared to the needs of all the users. In the complex B2B environment these are the customer, and sales and marketing teams. A practical example shows how these different roles can be united.

Smart Sales can be roughly divided into two areas: on one side, the surface-level Customer Journey, on which all steps of the participants are depicted – shown below as touchpoints with connecting paths. On the other side, there is the data traffic running underground – represented as a subway network.

The sales process is converted to a Customer Journey with six consecutive steps and designed to be consistent. On the surface level (front-end), the structure and preparation of information (communication, information architecture, user-friendliness) is uncompromisingly oriented to both the needs of the customer and the sales/marketing department.



Figure 5: Touchpoints on the Smart Sales Customer Journey

Data must be able to be exchanged unhindered between the individual touchpoints of the Customer Journey. With the “Data Subway” (or PLM backbone), continuous communication between touchpoints and directed presentation of information for the various users is achieved. Data and information are recorded digitally and consistently and linked with each other – from the customer, via Sales to Engineering and ultimately also in areas such as logistics, production and service.

## Smart Sales Data Subway

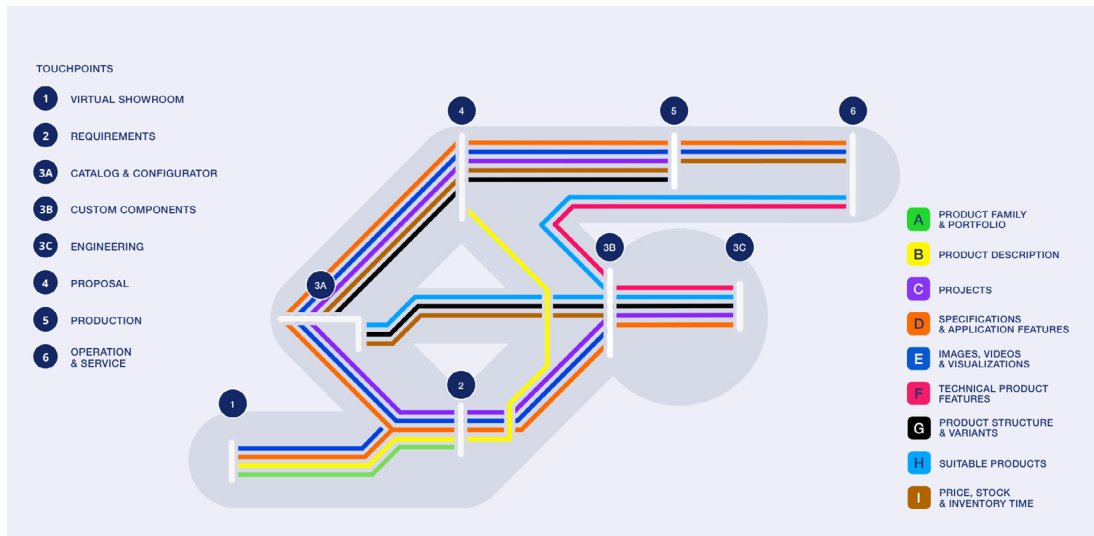


Figure 6: Data Subway

Thanks to the Data Subway, data from typical enterprise systems such as PDM, ERP, CRM, etc. are available at the individual touchpoints of the Customer Journey. Together, the connected data from the backend and the user-centered creation at the front-end enable the continuous Smart Sales Journey.

## Smart Sales Journey Map



Figure 7: The digital sales process (surface) is supported by the data/PLM backbone (underground) with consistent product data and information

## The touchpoints of the Smart Sales Journey in detail

The individual steps of the digital sales process are illustrated below using a fictitious example.

1. Customer contact begins in the showroom. Customers see and experience the product.
2. In the second step, customers note their requirements in order to find, configure or individualize the best possible products.
3. In the third step of the sales process, two paths can be taken: the customer can choose between a standard configuration with standard components (3A) or an individual variant configuration (3B), in close cooperation with the engineering department (3C).
4. In the fourth step, different product variants can be compared transparently with each other, advantages and disadvantages identified and price differences made clear. The customers send their project proposal and confirm the purchasing contract before the order process is officially initiated.
5. At this point, the digital sales process is complete, because the product is produced in the fifth step and delivered in the sixth step. The production utilizes the existing product specific data, documentation, 3D models.
6. Once the product is in use, it may need to be serviced, spare parts may need to be procured and documentation should remain available. Additional value is added by upgrades or accessories that can be provided for the product.

## Fictional Example: Bicycle Case

The way the Smart Sales Journey could appear in practice is illustrated below using the example of a bicycle manufacturer. The illustrations for the individual steps are shown in the left-hand column with the Customer Journey. The top right-hand side of the illustration demonstrates what the customers see – the user-centered creation of a website (front-end), for example. At the bottom right, Product Lifecycle Management/PLM (back-end) is listed, broken down by data and systems relevant to the respective phase.



Figure 8: Showroom – possible starting point of a consistently designed Customer Journey

### Step 1 - Virtual Showroom: making products tangible

It is valuable if products are available in an attractive, innovative, digital format at an early stage of the decision-making process; this way, interested parties can obtain extensive information about the product portfolio. The sales/marketing department can present the advantages of the products interactively and demonstrate how it can meet customer requirements. The entrance-point (here into a website) functions as a digital showroom. High-quality videos convey both information and emotions. The customer can view products as 3D models, “play” with parameters and have a live demo shown. The creation of shopping experiences (especially in the B2B environment) and requirement-based pre-sales processes (e.g. via requirements capture, real-time assistance, configurators, etc.) are the focus here. The required assets such as characteristics, descriptions and prices come from the data or PLM backbone (see Figure 8, lower right-hand side).

An additional advantage of digitized processes is that online activities in the showroom can be measured and analyzed using analytics programs. This allows companies to learn from their customers, and which needs currently prevail in the market. This information helps to optimize the showroom or the product range. Options such as “customers with similar requirements bought this product” can provide orientation and improve the buying experience.

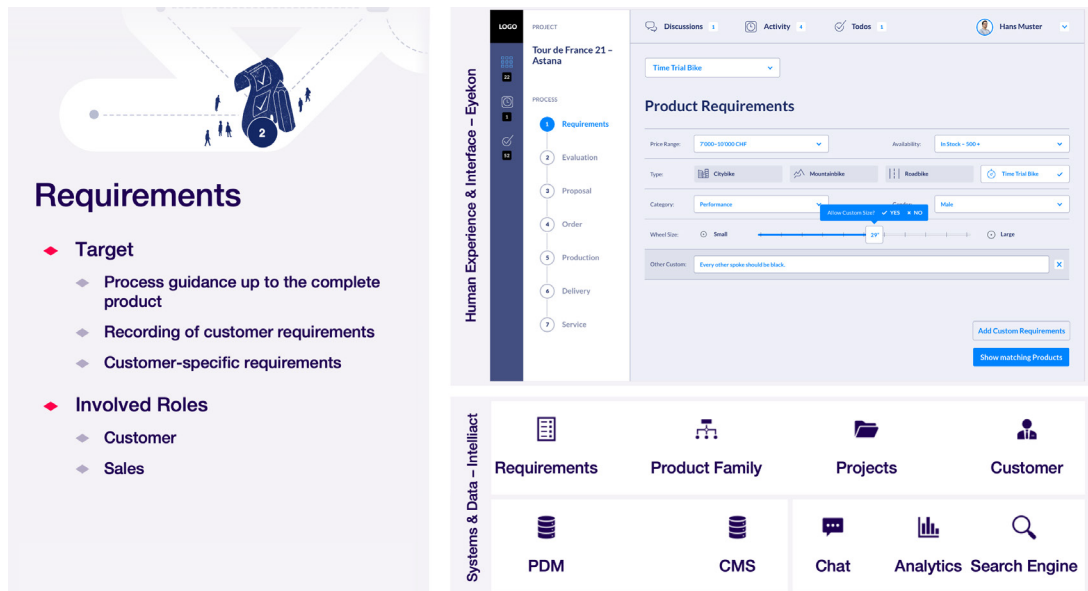


Figure 9: Requirements – in the consistently designed Customer Journey

## Step 2 - Requirements: receive requirements in an uncomplicated way

Once customers have decided on a supplier/brand and product type, this step of the sales process includes the customer requirements. The sales department must understand how the customer wants to use the product. For example: does a cycling team need bikes for mountain routes, flat stages or time trial races?

If this process takes place in a structured digital form, proposals for products can be automatically created from standard components based on the customer's requirements (see step 3A). If, on the other hand, the requirements cannot be fully met by standard components, modifications are necessary (see step 3B). In this way, step 2 "Requirements" acts as a division point that guides the customer to the next step of the Smart Sales Journey based on their needs.



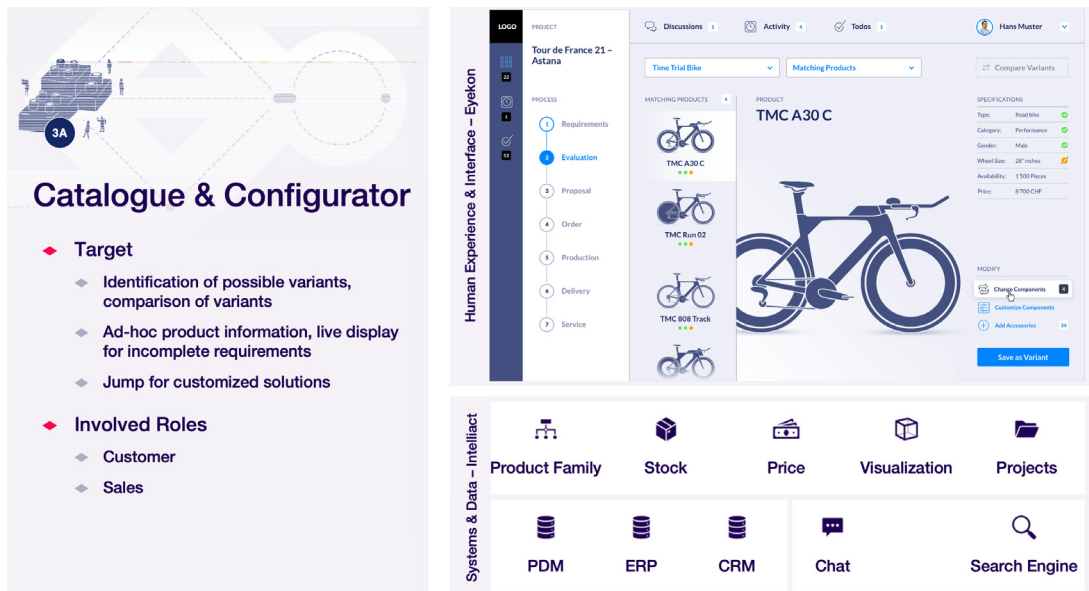


Figure 10: Configuration – in the consistently designed Customer Journey

### Step 3A - Catalogue & Configurator: Configure product with standard components

If the requirements from step 2 can be met with standard components, this is the point where the components are determined. In the configurator, customers individualize their products by narrowing down their choices in product families until they have various configured products to choose from. An overview of prices, stock availability, and technical specifications helps in the decision.

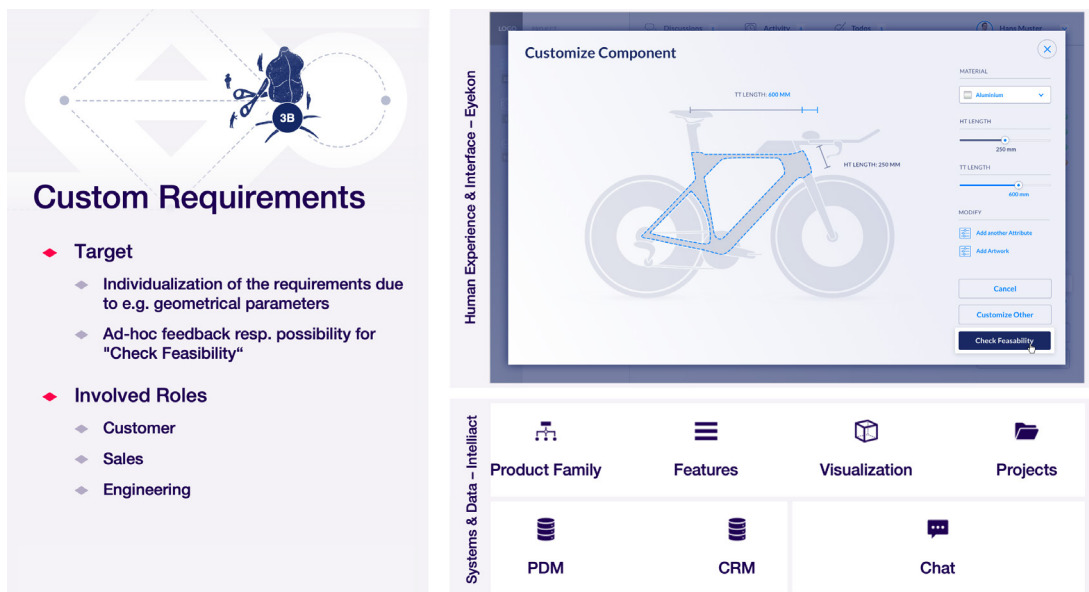


Figure 11: Custom Requirements – in the consistently designed Customer Journey

### Step 3B – Custom Components: receive modification requests for customized components

Where standard components reach their limits, requests for modifications for special designs are taken up. Customers can see in the bicycle product overview which components they can adjust – for example, the bicycle frame in the case above. Modification options are displayed using pre-defined



parameters. CAD information from the development department helps validate to what extent compatibility is guaranteed, for example with the product family.

In this phase, Engineering can already be involved in the sales process. If the extended requirements and modification requests for custom products are recorded in a structured way, this allows efficient digital communication between customers, Sales and Engineering. In this way, the number of iteration cycles can be reduced, especially during feasibility studies in cooperation with the engineering department. Statements on altered factors such as performance values, prices and delivery times are quickly centrally available.

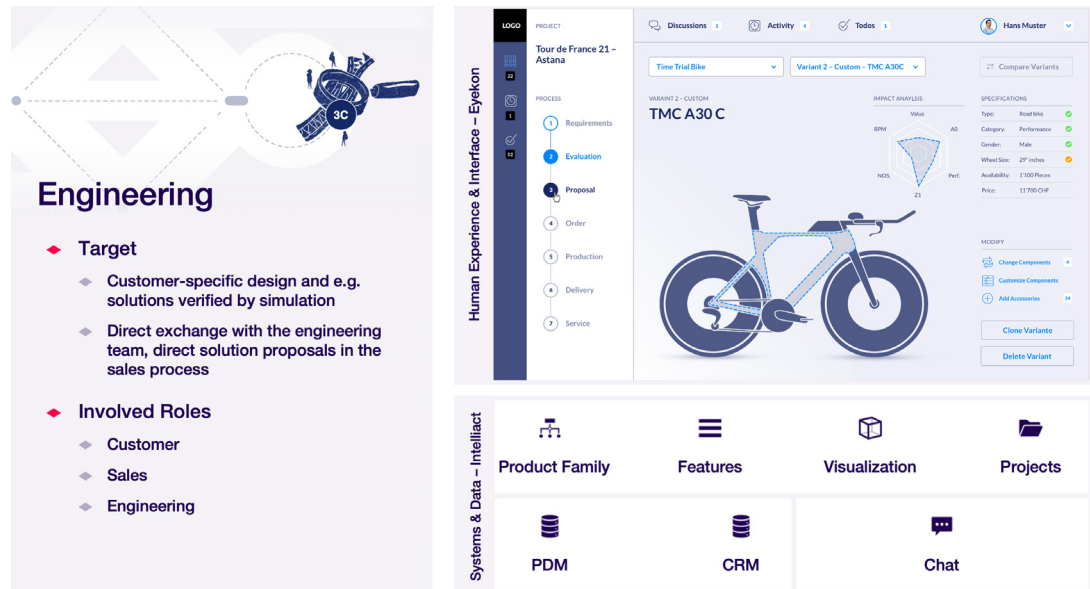


Figure 12: Engineering – in the consistently designed Customer Journey

### Step 3C – Engineering: developing a customer-specific solution

Using the parameters in the fictitious example, the load of the special frame can now be calculated. The customer decides on the configured product or develops their custom solution further together with the engineering department. Their requirements are collected, checked and approved. They can still adjust further parameters based on desired changes. In the system, customers can duplicate their variant and work on it further.

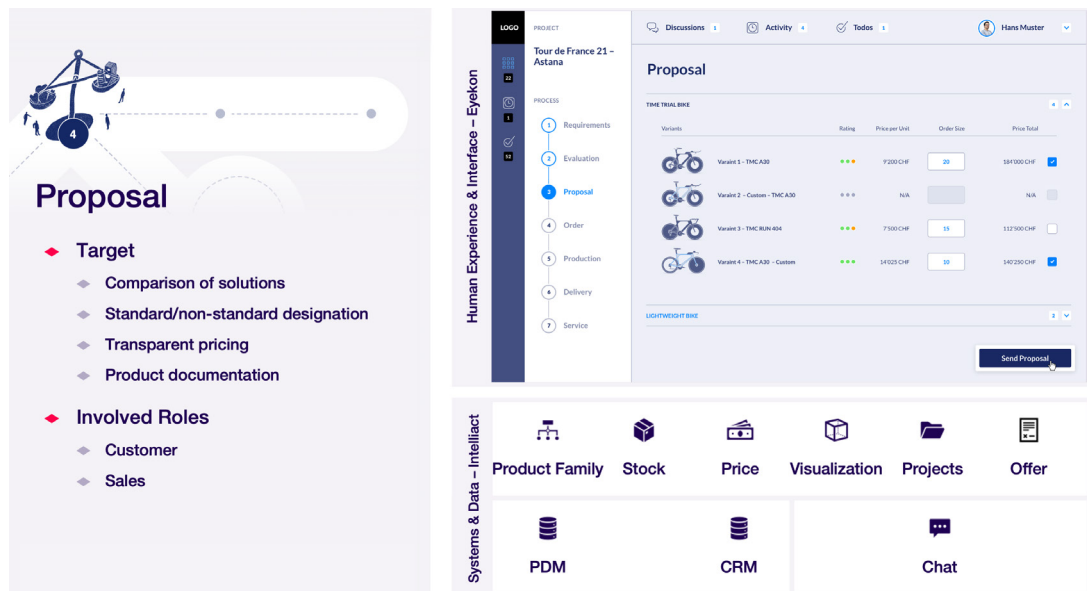


Figure 13: Proposal – in the consistently designed Customer Journey

#### Step 4 - Proposal: from offer to order

Customers receive a proposal with a summary of their order and an overview of their saved product variants. The overview shows them the current status of the project, such as components still to be specified, pricing and delivery times. Open tasks or inquiries are handled by the engineering or sales departments.

The product then goes on to production (Step 5 - Production), where customers can follow the progress of production thanks to available data. Once the product has been delivered, the Smart Sales Journey moves on to the maintenance area (Step 6 – Operation & Service), depending on the product type. Here too, the digitalization of communication relating to maintenance, documentation, upgrades or accessories leads to increased efficiency.

As this fictitious example shows, in a smart – digitally integrated – sales process, customer requirements and changes or updates can be monitored at any time. This is particularly important if change requests are still being made after the order has been placed. Recognizing the impact of new requirements and being able to communicate these quickly and effectively to both the customer and the teams involved in the project is crucial, as these changes could bring about additional costs.

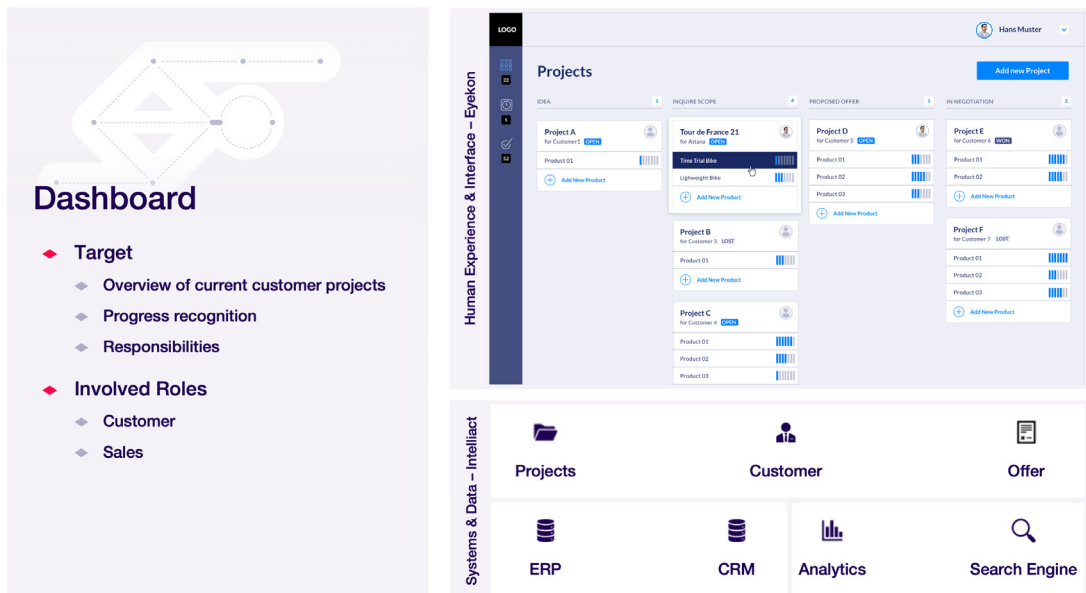


Figure 14: The Sales Dashboard

### Everything comes together in the Sales Dashboard

Clear communication at each step of the process is one of the essential tasks of Sales (marketing/sales); at the same time, it is just as important and challenging to maintain an overview of the overall process and the current status at all times. This is possible with a continuous Customer Journey, where all essential information from the individual steps converge in an internal Sales Dashboard. Here, Sales can track progress at a glance. This significantly simplifies status tracking within a project, but also the simultaneous support of several projects and customers.

#### Would you like to have the slides of the Bicycle Case as a separate file?

The Bicycle Case serves as proof of concept for Smart Sales. We would be pleased to provide you with the corresponding document, including high-resolution images of the individual steps – and if you are interested, we would be glad to arrange a personal meeting to discuss it further. Please send your inquiry directly to Uwe Leonhardt ([leonhardt@intelliact.ch](mailto:leonhardt@intelliact.ch)) or Thomas Egloff ([egloff@eyekon.ch](mailto:egloff@eyekon.ch)). Further contact details are at the end of the document.



# Customer benefits gained from the digital sales process

**Speed, transparency and expertise: these are the main demands from customers in the B2B sales process according to a McKinsey study.**

What are the benefits of the smart digital sales process? The value proposition for customers is broadly diversified. Four typical advantages that arise for customers from the digitalised sales process are as follows:

## **1) 24/7 Inform digitally**

B2B customers, as private consumers (B2C), are also used to obtaining information globally and around the clock – regardless of the availability of sales staff. They receive product information and the ability to compare promptly, without having to search each separate piece of information from the variety of products and parts themselves.

## **2) Matching products**

Customers can find, compare and order the right product based on their requirements. When choosing their product, they gradually narrow down the variety until it fits their needs. Or they make individual adjustments to an existing product. When customers digitally change their requirements, they directly see the impact on the product, price and delivery times. Through coordinated guidance through the selection and configuration process, customers are sure they are ordering the right product. The result: *enthusiasm instead of frustration*.

## **3) Comprehensive advice**

Customers expect detailed information about products/components, automatic suggestions for configured products, transparent prices and fast delivery times. Consultation can still take place in person, but information such as a customer's history can be centrally recorded and retrieved in the digitalized sales process. Product requirements do not have to be documented multiple times. The sales department keeps the most up-to-date product information available for the customer, e.g. upcoming changes or even current stock levels, and can thus provide the customer with the best possible advice.

## **4) Accelerated purchasing process**

Smart Sales allows us to offer the best possible products thanks to digitalised processes and integrated and consistent data – independent of the existing knowledge of individual people. This makes it possible to combine the highest quality standards with fast, reliable and transparent services and order processing.

# Internal company benefits gained from the digital sales process

**A smart digital sales process accelerates processes and creates an outstanding service culture, which ultimately subconsciously increases the customer's qualitative perception of the products.**

When product data is integrated with customer data, Smart Sales also brings special benefits internally:

## **Distribution (Sales Department)**

Instead of navigating over the phone between the customer and the engineering department to clarify what is wanted and what is feasible, as was previously the case, the sales department now sees directly in the dashboard which customer requirements have a direct influence on the product, on product components or options. The latest data from the development department can be viewed at any time and the sales department is supported internally so that the customer receives the right products from the standard range as quickly as possible. Thanks to intelligent data-linking and user-friendly interfaces, the customer can independently access the desired information, relieving the sales department of the burden of communication (especially with standard questions). In this way, a large part of the process is given over to the customer without frustrating him.

## **Engineering & Development**

Engineering has the advantages of efficient and targeted distribution, because the requirements of the customer are also available to the development department. The knowledge of product requirements is a decisive factor in quickly identifying where customer-specific adaptations are necessary and what influence this will have on the product. If a product is modified (and released), this data is automatically updated in all applications right through to service. Fewer iteration cycles and less communication between Sales, Development and customers are required, since customer requirements and variant specifications are managed centrally. The company creates a clear and sustainable communication between the departments and thus an optimal cross-team collaboration.

## **Production**

Central data collection and management gives the production team a comprehensive understanding of the product and ensuing processes. The entire product documentation and relevant requirements are available in their most current form. For instance, 3D models or 2D drawings can be viewed directly by the production department.

# Summary

## and factors for success

The sales process of the future is smart. On the path to transformation, a number of fundamental factors determine success.

With Smart Sales, the potential of digital sales communication is fully utilized. Everyone involved benefits – the customers, and the various teams, which can offer high quality personalised service thanks to the integrated customer requirements. With dynamically customizable configuration options, Smart Sales allows transparent and comprehensible pricing that responds to customer requirements. Intelligently networked data ensures that all company departments have access to the latest information. The transparency and clarity for all those involved in the process significantly contributes to the higher quality of the products.

The digital Customer Journey from Smart Sales will contribute more than ever before to optimal customer decisions. The integrated systems in the background will automatically guide a customer from their individual starting point, and lead them on the right path. This will create a new type of digital sales experience in B2B that inspires rather than frustrates – a fact that will be apparent when you switch to Smart Sales.

### Success factors for Smart Sales

For Smart Sales to be successfully implemented in the company, certain conditions are necessary:

- **Holistic thinking:** Smart Sales is the result of interdisciplinary cooperation and can only succeed with a holistic approach.
- **User-centred action:** If users are always in focus during the project, an inspiring result is achieved. For this, research is necessary to understand the users, and continuous testing is essential to create the best solutions for them.
- **Agile approach:** Several small steps instead of a few big ones – with iteration loops and the rapid development of prototypes (Minimal Viable Product, MVP), the best result for all involved is achieved.
- **UI/UX Design:** Design in the service of User Experience (UX) and User Interfaces (UI) leads to maximum usability and joy of use in the application.
- **Data maintenance:** In the end, the customer also benefits from orderly, structured data. For this, the willingness to break open your silos is absolutely necessary.
- **Pioneering spirit:** The will to be a pioneer, one step ahead of the competition creates unique selling propositions (USP).

# Recommended action

**Take the first step towards Smart Sales now – with a vision based on your specific situation.**

Smart Sales projects are typically implemented by marketing, sales or digitally-focused project management teams. A product / customer matrix is used to determine which products can best be complemented by Smart Sales.

The Smart Sales process typically requires various data sources along the Customer Journey. It is therefore important to consider what data from which sources must be made available.

If you have an idea of how this could work for you, then it is time to sit down with Eyekon & Intelliact so we can work out the Customer Journey for your customers, and specify the necessary technical implementation with your systems and data.

**Are you interested in a solution that goes beyond a single application?**

Make your organization ready for a “smart” future and contact us. We would be happy to show you how we have already implemented the Customer Journey for other clients. Further contact details are at the end of the document.

# Our references

We are proud to have helped several customers to design a digital and data-driven sales process and to lead them step-by-step to Smart Sales – with positive reactions: at the “Best of Swiss Web Award”, our innovative collaboration has already won several awards.

We will gladly provide you with further information on our references upon request. Please contact us: [kommunikation@intelliact.ch](mailto:kommunikation@intelliact.ch) or [hello@eyekon.ch](mailto:hello@eyekon.ch).

## Bereits realisierte Projekte (Auswahl):



### Product catalog for customers and product information system:

- Getting quickly to the right product
- Product-related consulting
- 
- Integrated with internal processes
- Data are based on internal enterprise systems



### Product catalog/shop for customers:

- Getting quickly to the right product
- Improved visibility in the market
- 
- Integrated with internal processes
- Data are based on internal enterprise systems





## Intelliact & Eyekon: Product Data meets Customer Experience

The Smart Sales concept was developed by the digital experts at Intelliact and Eyekon, based on emerging market needs. It encompasses a symbiosis of user-centered creation on the front-end and product lifecycle management in the back-end.

This partnership specializes in solving complex challenges in the B2B/industry sector in an integrative manner – involving an interdisciplinary team that has already won several awards. Including, amongst others, the Best of Swiss Web Award 2019 in the fields of technology, digital commerce and innovation.

# Company profiles in brief

## Intelliact AG

As an independent consulting and implementation service provider, Intelliact is specialized in creating added value with product data. Companies achieve competitive advantage not only through their products, but increasingly also through their product-related and customized digital services in sales, marketing, development, production and service. Consistent and well-organized product data form an essential basis for this.

Intelliact AG was founded more than 20 years ago as a spin-off of the ETH in Zurich, and supports companies from the mechanical and systems-engineering industry in depicting and mapping their product data continuously and consistently throughout the entire product life cycle.



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## Eyekon AG

Eyekon is a 360° digital agency for user-centered innovation and design. We work at the intersection of human, brand and machine, finding sustainable solutions that take you forward. Our interdisciplinary team and agile processes ensure that digital products and services are brought to market faster. Eyekon stands for user-centered creation, holistic consulting and digital craftsmanship in Swiss quality. We have been known and recognized for innovative and award-winning work since 1995.



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