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Title

**Leveraging Business-to-Business Relationships by Using Digital Partner
Relationship Management (PRM) Solutions**
Case Study and Practical Implementation Framework

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Abstract

This master's thesis investigates the requirements for Partner Relationship Management (PRM) solutions to effectively support B2B sales partnerships. The study uses a mixed-methods approach that combines literature review, market research, and expert interviews to gain insight into the characteristics of PRM solutions and the needs of B2B partnerships. The study focuses on the case study of Kässbohrer Geländefahrzeug AG, a German manufacturer of all-terrain vehicles. The results are presented in the form of a framework that serves as a practical implementation guide for B2B companies. The findings indicate a combination of general and specific requirements that should be met when implementing a PRM system. These findings suggest that in addition to collaboration, communication, business software and interfaces, industry-specific criteria need to be given special attention. The characteristics of niche markets, the form of sales organization, and after-sales service are three segments that need to be assessed before implementing a PRM solution in a B2B company. The study contributes to PRM research by providing insights into actual PRM solutions and their functionalities. It highlights the specific requirements of a B2B company working with channel partners. It also provides practical implications for B2B companies considering the use of a PRM solution.



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In this master's thesis, the generic masculine form is used for readability and simplicity. This choice is made solely for practical reasons and does not imply any gender bias. All references to persons and roles should be understood to include all genders equally.

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List of Abbreviations

in alphabetical order

AI: Artificial Intelligence

BFSI: Banking, Financial Services, and Insurance

CAGR: Compound Annual Growth Rate

CRM: Customer Relationship Management

E. G.: For Example (Exempli Gratia)

ERP: Enterprise Resource Planning

FAQ: Frequently Asked Questions

I. E.: That Is (Id Est)

KGF: Kässbohrer Geländefahrzeug AG

KPI: Key Performance Indicator

PRM: Partner Relationship Management

ROI: Return on Investment

RRP: Recommended Retail Price

SCM: Supply Chain Management

SCT: SNOWsat Configuration Tool

SME: Small and Medium-sized Enterprises

SOQ: Set of Questions

SRM: Supplier Relationship Management

USD: United States Dollar

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1. Introduction

In the modern business environment, the effectiveness of business-to-business (B2B) relationships can be the linchpin of market success. As digital technologies evolve, they influence how companies manage their relationships with dealers and other partners. Partner Relationship Management (PRM) solutions have emerged as important tools in nurturing these B2B relationships, ensuring they are productive and mutually beneficial. In 2020, the global partner relationship management market was valued at USD 54.82 billion with an expected compound annual growth rate (CAGR) of 16.2 % from 2021 to 2028.¹ These numbers reflect the increasing demand for digital solutions for managing complex business relationships with channel partners (i. e. distributors), end customers and other third parties. PRM solutions help in managing and analyzing partner interactions and data, streamlining processes, and improving communication, which are essential for sustaining long-term business relationships.

In B2B economics, relationship management plays an important role. Companies aim to nurture and optimize their relations with different group of business partners and stakeholders, such as customers, distributors, suppliers, investors, and many more. With the advent of digitalization, several software tools for managing business partner relationships entered the scene. The most widespread and established solutions include those pertaining to Customer Relationship Management (CRM) and Supplier Relationship Management (SRM). Traditionally, there was only limited prevalence of Partner Relationship Management (PRM) in comparison to CRM and SRM, but there is a notable expansion in this domain. PRM solutions have a strong strategical focus. They are considered a “[...] set of methods, tools, strategies and web-based capabilities” used for automating regular partner processes, enhancing partner satisfaction, optimizing costs, and increase revenue through sales enablement.² On a practical level, there is often confusion between PRM and Customer Relationship Management (CRM) solutions. However, there is a main difference between PRM and CRM, which lies in the target of the solutions. To put it simply, PRM solutions are used by companies working with distribution channel partners (“indirect sales”), whereas CRM is used by companies that are directly selling to end customers (“direct sales”). There are different functionalities resulting from the distinction between PRM and CRM. While CRM focuses on understanding customer

¹ Grand View Research (2020). Partner Relationship Management Market Size, Share & Trends Analysis Report By Component, By Service (Managed Service, Training & Consultation), By Deployment Type, By Organization Size, By Application, By Region, And Segment Forecasts, 2021 – 2028. URL: <https://www.grandviewresearch.com/industry-analysis/partner-relationship-management-market-report> (accessed on June 18th, 2024).

² Chatterjee, S., Chaudhuri, R., Vrontis, D., and Kadić-Maglajlić, S. (2023). Adoption of AI integrated partner relationship management (AI-PRM) in B2B sales channels: Exploratory study. *Industrial Marketing Management*, Vol. 109, pp. 164-173.

behavior and providing tailored services to increase loyalty, PRM solutions aim to support and enable channel partners during the entire business relationship.

PRM solutions began to emerge in the late 1990s, when the World Wide Web entered the mainstream business world. Despite the technological advances of the past decades, the core functionalities of PRM solutions have remained the same. Automation of regular processes, a unified database for improved forecasting and analysis, and partner training modules are just a few of the features mentioned in early PRM studies and still found in today's PRM solutions.³ However, new technologies have revolutionized traditional PRM practices with the introduction of customizable solutions for dedicated partner management and the use of artificial intelligence (AI) to improve business performance.⁴

Recent studies show that PRM solutions are mostly used by companies from the banking, financial services, and insurance (BFSI) or IT and telecommunication sector. Despite the important role of PRM solutions, manufacturing companies appear to be reluctant to effectively deploy these systems.⁵

This study is intended to serve as a practical guide to implementing PRM solutions for manufacturing companies working with distribution channel partners. It bridges the gap between PRM theory and real-world applications. The research is guided by the following research question: What are the necessary requirements for digital Partner Relationship Management (PRM) solutions to effectively support the relationships between business-to-business (B2B) companies and their dealers? To answer the research question, a mixed methods approach is adopted. The study starts with literature review to gain a clear understanding of PRM solutions, their objectives, and key functionalities. In addition, the market research presents current PRM solutions and their functionalities. In the main part, a case study with expert interviews is used to shed light on the requirements for a PRM solution. The results of the literature review, the market research, the expert interviews will be combined and used to answer the research question and to develop a practical implementation framework.

³ Moon, S., Suh, E., and Hwang, H. (2002). A Study on a Partner Relationship Management (PRM) Solution. APDSI Conference. Retrieved from: <http://gebrc.nccu.edu.tw/proceedings/APDSI/2002/papers/paper181.pdf> (accessed on March 1st, 2024).

⁴ Chatterjee et al. (2023).

⁵ Grand View Research (2020).

The framework presents various requirements for PRM systems prior to the implementation. PRM systems must support and enhance collaboration and communication with dealers. This can be achieved, through training modules to enhance dealer enablement. PRM establishes and measures specific goals, tailored to the key processes and information exchanged between manufacturer and dealer. PRM systems must be compatible with other solutions, such as ERP systems or sales and analytics tools. All PRM solutions offer API and interfaces to ensure integrability.

The study highlights additional requirements for PRM success, especially in B2B niche markets. Niche markets are characterized, e. g. by higher technical complexity of products. Niche manufacturers have other the organizational structures than mass or consumer goods markets. Therefore, PRM systems must be tailored to the specific characteristics of the respective industry or company, necessitating preliminary investigations and analyses for successful adaptation. The same applies to the internal sales organization. To date, very few PRM studies have included the after-sales service area, so this research contributes to this previously underrepresented aspect of PRM. This research contributes to both theoretical and practical advancements in Partner Relationship Management. Theoretically, it synthesizes and enriches the academic literature by identifying the specific needs of PRM systems in the B2B manufacturing context. Practically, the findings and implementation framework could guide B2B firms in selecting and implementing PRM solutions that are more aligned with real-world needs, thereby improving their effectiveness and acceptance within distributor relationships.

1.1 Research Question and Structure of the Thesis

Companies have been using PRM solutions to manage their business partnerships for more than 20 years. The evolution of digital technology opens new opportunities to improve B2B interactions. Among the abundance of digital tools available, such as Customer Relationship Management (CRM) or Supplier Relationship Management (SRM), PRM solutions are experiencing a growing interest from the business and research communities. A review of the literature reveals numerous studies examining PRM solutions from their emergence in the early 2000s to the most recent studies on AI-powered PRM. Despite the attention from academics, there is still little research on the actual use of PRM systems. Few studies provide insights from end-users, their perspectives on PRM, and their expectations of functionalities.

This master's thesis aims to fill this gap by assessing how digital PRM solutions need to be set up to enhance B2B partnerships with distributors. In this study, the examination of PRM

solutions has two parts. The first part focuses on the strategic, functional, and technological setup of PRM solutions. It examines the requirements of potential end users with respect to these three dimensions. The second part of the setup focuses on the implementation of PRM solutions. It aims to develop a practical framework for the implementation of PRM solutions in B2B companies. The research question is therefore formulated as follows:

What are the necessary requirements for digital Partner Relationship Management (PRM) solutions to effectively support the relationships between Business-to-Business (B2B) companies and their dealers?

The answer to the research question and the information gathered within this study are transferred into a comprehensive guideline for B2B companies, supporting them in the implementation of PRM solutions. Therefore, the objective of the study is formulated as follows:

Development of a practical framework for the implementation of PRM solutions.

This study uses qualitative methodology. Qualitative methods are often used in social, political, or economic research. Compared to quantitative methodologies, qualitative research “discovers and explores” new areas, instead of “testing what is already known”.⁶ While in quantitative research, hypotheses on pre-existing theories are tested and validated, qualitative research aims to generate concepts for exploring and understanding the research area.⁷

The methodology employed in this study combines various approaches and is divided into three parts. First, literature review is used to explore the characteristics of PRM solutions and their occurrence in academic context. The literature review begins with an explanation of the emergence of PRM solutions, delineating their core functionalities that remain essential throughout the evolution of the technology. The theoretical foundations of PRM solutions are supported by a comparative analysis with Customer Relationship Management (CRM) and Supplier Relationship Management (SRM). The comparative analysis focuses on the functionalities and objectives of PRM and CRM.

The literature review on PRM in the B2B context summarizes the state-of-the-art definitions of PRM and the ways it is used to improve manufacturer-distributor relationships. It also provides

⁶ Flick, U. (2018). *An Introduction to Qualitative Research*. 6th Edition. London: SAGE Publications. pp. 3-6.

⁷ Ibid.

an overview of the academic approaches used in this research area, describing the methodologies employed and the distinct research contributions of each study reviewed. This bird's-eye view of PRM solutions provides a comprehensive analysis of methodologies, analytical approaches, and findings. In addition, this exploration helps to identify gaps in the current research and sets the stage for the research.

Second, three PRM solutions currently available on the market are analyzed to understand the functionalities of PRM solutions and their use in business. Online research is conducted to identify popular PRM solutions. Three solutions are selected, serving as examples for PRM solutions. The selected PRM solutions are compared with focus on their core functionalities.

Third, expert interviews are conducted to understand how stakeholders from a B2B company collaborate with distributors. By combining insights from literature review and expert interviews with practical instances, the research ensures the validity of findings and makes them more accessible. Furthermore, this methodological approach reduces potential researcher bias.⁸ The results are used to develop a framework, that should guide B2B companies in implementing PRM solutions.

The research design of this study ensures addressing the essential aspects required to answer the research question. The research question thus provides the framework and objectives for the research design. The objective is to combine and operationalize the results of the three information sources (literature review, market research, and expert interviews) to use them to answer the research question and to develop an implementation framework. The following illustration depicts the methodological approach of the study:

⁸ Muskat, M., Blackman, D. and Muskat, B. (2012). Mixed Methods: Combining Expert Interviews, Cross-Impact Analysis and Scenario Development. *Electronic Journal of Business Research Methods.*, Vol 10, pp. 9-21.



Figure 1. Structure of the Study. Own Illustration.

The thesis concludes with a critical evaluation of the findings and their implications for B2B firms. The chapter discusses the contribution of the findings to the PRM literature and provides recommendations for further research.

1.2 Delimitation of the Scope of Investigation

The purpose of this thesis is to explore the requirements for digital PRM solutions to support relationships between B2B companies and their distributors. Despite the thorough research employed, including literature review, expert interviews, and market analysis, there are several limitations to the scope of the study.

The literature review provides comprehensive definitions of PRM, focusing on channel partnerships, i. e., distributors, and dealers. Of course, B2B companies have other business partnerships, such as with their suppliers. Supplier Relationship Management (SRM) is a broad research and business area, that encompasses multiple partners in the supply chain.⁹ An introduction to SRM is provided in this master’s thesis but is not considered in a larger field.¹⁰ Therefore, the scope of investigation is limited to B2B distribution partnerships.

⁹ Lalit, K. P., Sushanta, T., Aishwarya, D. (2020). A causal relationship among the key factors of supplier relationship management: a fuzzy DEMATEL approach. International Journal of Procurement Management. DOI: <https://doi.org/10.1504/IJPM.2020.10023779>

¹⁰ Correa, H. (2015). Enterprise Resources Planning. In: Wiley Encyclopedia of Management, Vol. 10. John Wiley & Sons: Hoboken, New Jersey.

The second limitation of the research is the case study examined in his study. The methodology uses a single case, leading to specific limitations. The findings may not be generalizable across different industries, markets, or companies. Moreover, the market research conducted is limited. The evaluation of three PRM solutions provides important insight but does not represent the entire market. Limitations of both the expert interviews and the market research are reflected in the general applicability of the implementation framework. The practicality of the framework may be limited to scenarios similar to the case study and require adaptation or re-evaluation to address other industries or different business strategies. This study aims to understand and frame the requirements for effective digital PRM solutions in B2B contexts.

However, the limitations outlined above suggest caution in the general application of the findings and provide fertile ground for further research. Future studies should aim to expand the sources of the literature review, include multiple case studies from different industries, and explore the implementation of the framework in different organizational settings to enhance its robustness and applicability.

2. Literature Review: PRM Foundations

This chapter discusses the theoretical foundations of Partner Relationship Management (PRM) in existing literature. It starts with the presentation of PRM definitions, from its emergence in the early 2000s to more recent studies. The chapter explains the concept of channel relationships. It compares PRM to Customer Relationship Management (CRM) and Supplier Relationship Management (SRM). It presents the core components and functionalities of PRM solutions.

The public and academical interest on PRM started to grow in the early 2000s. In this period, Internet usage increased among the public and became standard in enterprises.¹¹ One of the pioneer companies to offer PRM solutions is ChannelWave Software Inc. In 1999, Dan Housman, Director of Solutions at ChannelWave, published a comprehensive whitepaper, introducing PRM as follows: “Partner Relationship Management (PRM) uses the Internet, both

¹¹ Leiner, B. M., Cerf, V. G., Clark, D. D., Kahn, R. E., Kleinrock, L., Lynch, D. C., Postel, J., Roberts, L. G., and Wolff, S. (1997). A Brief History of the Internet. Internet Society. Retrieved from <https://www.internetsociety.org/internet/history-internet/brief-history-internet/> (accessed on February, 18th, 2024).

the World Wide Web and e-mail, to provide integrated solutions to the challenges of vendor/partner communication.”¹² These challenges are namely:

- Flood of information resellers receive from their vendors
- Short product lifecycles making it hard to keep up with training and product information
- Cost and time intensive recruitment and onboarding of new resellers
- Lack of transparency between the channel partners

Housman introduces web-based PRM solutions as being the key to addressing these challenges.¹³ Only three years later, Moon et al. (2002) present a study on a Korean PRM solution. They describe PRM as “[...] the business strategy supporting the dynamic relationships, which establish the demand networks. PRM is able to extend sales, marketing, customer service and other enterprise business functions to partners to foster more collaborative channel partner relationships.”¹⁴ Zablah et al. (2005) propose a conceptual model, explaining why channel partners accept or reject the adoption of emerging PRM technologies by their suppliers. They define PRM as “an assortment of web-based tools – designed to enhance the efficiency and effectiveness of coordination efforts between channel partners [...]. These tools [...] enable channel dyads to better manage interdependent activities and resources by providing for the continual exchange of relevant information [...] and automating numerous tasks related to channel process flows [...]”¹⁵

Several years later, research is still focusing on PRM, although the attention has shifted from explaining the fundamentals to measuring the effects of PRM on business performance. Argawal and Singh (2014) present an index for measuring the successful implementation of PRM solutions in the Indian automotive industry. They provide a definition of PRM as follows:

*“PRM is being considered as a business strategy, as a technology, as a value-creating strategy and as a system, with the main focus on building and maintaining value-laden relationships between the manufacturer and its channel partners and its ultimate goal is to enhance customer satisfaction level and increase profitability.”*¹⁶

¹² Housman, D. (1999). Partner Relationship Management (PRM) for Enhanced Extended Enterprise Team Selling. White paper. Cambridge, MA: ChannelWave Software. Retrieved from https://mthink.com/legacy/www.crmproject.com/content/pdf/CRM1_wp_housman.pdf (Accessed on February, 18th, 2024).

¹³ Ibid.

¹⁴ Moon et al. (2002).

¹⁵ Zablah, A.R., Johnston, W.J., and Bellenger, D.N. (2005). Transforming partner relationships through technical innovation. *Journal of Business & Industrial Marketing*, Vol. 20 No. 7, pp. 355-363.

¹⁶ Agarwal, A. and Singh, D. (2014). Partner Relationship Management (PRM) Index: An Innovative Approach For Enhancing Channel Partner Relationships. *Journal of Internet Banking and Commerce*, Vol. 19 No. 1, pp. 171-189.

The most recent definition of PRM stems from Chatterjee et al. (2023), who explore the adoption of AI-PRM in B2B sales channels. The authors refer to PRM as a “computer-mediated capability, a set of reliable systems, practices, procedures and tools that a firm uses to efficiently execute channel sales, by interacting with and managing relationships with channel partners (i.e., resellers), their customers, and other third parties.”¹⁷

Summarizing these definitions, which span 24 years of technological advance, it is noteworthy that there are several core components that have not changed over time. First, PRM is defined as a combination of business strategy and technology. Understanding PRM requires the assessment the objectives of companies using these solutions. Second, PRM is considered from the outset to be a web-based technology. PRM research asks how the Internet and digitalization contribute to achieving the objectives. The third core component of PRM solutions is their intention to manage channel relationships. The following table depicts the three core components for PRM definitions elaborated in this chapter.

Partner Relationship Management (PRM) – Key Components		
Combines business strategies and technologies	Based on the Internet	Connects channel partners

Table 1. PRM Core Components.

2.1 Distribution Channels

The management of distribution channel partnerships is an essential element of PRM. Stern and El-Ansary (1992) describe distribution channels as “[...] pathways of product, information, and contract flow between the first producer and final customer.” This definition emphasizes the multifaceted flows within channel partnerships, including the physical product and the important information and contractual agreements.¹⁸ Kotler and Keller (2016) define distribution channels as “[...] sets of interdependent organizations involved in the process of making a product or service available for use or consumption by the consumer or business user.”¹⁹ This definition highlights the complex network of entities that participate in the delivery of goods and services from the manufacturer to the end user. The general objective of managing channel relationships is to create shared value and mutual benefits for all parties

¹⁷ Chatterjee et al. (2023).

¹⁸ Stern, L. W., & El-Ansary, A. I. (1992). *Marketing Channels* (4th ed.). Prentice Hall.

¹⁹ Kotler, P., and Keller, K. L. (2016). *Marketing Management* (15th ed.). London: Pearson Education, Inc.

involved.²⁰ These could be, e. g., cost reduction or lead time improvements. To establish and nurture partner relationships, each step of the partner journey must be considered. Argawal and Singh (2011) describe the stages of channel relationship building, referring to Pelton et al. (2002). There are three stages in the process of partner relation development:

- Select and explore,
- Expand and maintain
- Evaluate

The first phase includes the selection of partners according to specified criteria, such as sales and marketing capability, and logistical issues. In the second phase, the objectives shared between the partners are specified. The third phase, describes the ongoing performance measurement, including numbers like profitability, reputation, timely delivery, product quality, etc.²¹ PRM solutions support companies and their partners in each stage of the channel relationship development process and beyond. The objective of using PRM solutions is to ensure “[...] sound communication mechanism, profit maximization, channel partner related data from partner touchpoints, reduced order cycle time, tracking actual product performance, partner retention, cost reduction, and adequate growth of all the companies involved in the relationship.”²²

Challenges

There are several challenges that can arise in channel partnerships. In their pioneer work, Moon et al. (2002) name a list of potentially arising channel issues, PRM solutions must handle:

- Communications
- Training
- Visibility
- Recruiting
- Mindshare
- Channel conflict
- Profitability.²³

²⁰ Agariya, A. K., and Singh, D. (2011). What Really Defines Relationship Marketing? A Review of Definitions and General and Sector-Specific Defining Constructs. *Journal of Relationship Marketing*, Vol. 10 No. 4, pp. 203-237.

²¹ Ibid.

²² Ibid.

²³ Moon et al. (2002).

Moon et al. (2002) do not elaborate these challenges in more detail, which is why further challenges in sales channel partnerships are presented. In B2B partnerships, the focus is on joint economic success, which is why costs are an important issue. Manufacturers often face high transaction costs. Transaction cost analysis (TCA) allows companies to measure the costs associated with economic transactions, including establishing, maintaining, monitoring, and managing relationships between partners. As manufacturers expand their reach to more markets by using channel partners, the investment in sharing and updating product information, onboarding, and communicating with partners increases. This task is particularly challenging in international markets, where lack of physical proximity, language barriers, and intercultural differences add to transaction costs. Well-established partner relationships with local distributors help overcome these challenges and reduce transaction costs.

Another challenge for OEMs is limited knowledge of their end customers. Dealers or distributors, who interact directly with customers, often have a better understanding of their needs and challenges. Their first-hand experience with products in the field gives them a knowledge advantage over manufacturers.²⁴ This creates an asymmetry in the channel partnership that impacts sales performance.²⁵ Moreover, the accelerating pace of change in market demands and customer expectations can be seen as a challenge for manufacturers. Manufacturers must adapt their product and service offerings and make them available to dealers in a short period of time.²⁶ The objective of using PRM solutions in distribution channels is to address the aforementioned challenges with the ultimate goal of leveraging the satisfaction of all parties involved.

Distributor satisfaction

Distributor satisfaction is found to be beneficial for business outcomes and is therefore considered a PRM objective.²⁷ Jonsson and Zineldin (2003) examine factors that contribute to distributor satisfaction in the Swedish lumberjack industry. Using literature review, they present a series of factors and assess their impact on the perceived level of satisfaction among lumberjack distributors. These factors include:

²⁴ Staus, A. and Becker, T. (2012). Attributes of overall satisfaction of agricultural machinery dealers using a three-factor model. *Journal of Business & Industrial Marketing*, Vol. 27 No. 8, pp. 635-643. DOI: <https://doi.org/10.1108/08858621211273583>

²⁵ Anderson, E., and Weitz, B. (1989). Determinants of continuity in conventional industrial channel dyads. *Marketing Science*, Vol. 8 No. 4, pp. 310-323.

²⁶ Vlachopoulou, M., Manthou, V., and Folinas, D. (2005). Partners Relationship Management of e-Logistics Networks. *Asia Pacific Journal of Marketing and Logistics*, Vol. 17, No. 3, pp. 41-50.

²⁷ Golara, S., Dooley, Kevin J., Mousavi, N. (2021). Are Dealers Still Relevant? How Dealer Service Quality Impacts Manufacturer Success. *Production and Operations Management*, Vol. 30 No. 10, pp. 3560-3578.

- Communication
- Adaptation
- Reputation
- Coercive and non-coercive power
- Cooperation
- Relationship bonds
- Dependency
- Relationship benefits.

The findings indicate that reputation, cooperation, and relationship benefits are the most influential factors for dealer satisfaction. Reputation is the extent to which a company is perceived as being honest and interested in its partners and customers.²⁸ Positive reputation enhances dealer satisfaction. Conversely, a negative reputation can damage to partner relationships. Cooperation and relationship benefits are inextricably linked to each other. Business partners collaborate with the objective of achieving mutual goals. These goals can be strategical or financial. For example, collaborative decisions affecting the product, purchasing, supply, or marketing strategy can lead to competitive advantages or to the optimization of overall channel efficiency.²⁹ The other factors identified by Jonsson and Zineldin (2003) in their literature review are not found to significantly influence dealer satisfaction.

Nevertheless, the authors conceptualize trust and commitment as potential mediators for dealer satisfaction. Trust and commitment are influenced by communication and mutual adaption (of processes or products). There is no association between relationship bonds and dependency and dealer satisfaction. However, the level interdependence between the partners has an impact on dealer satisfaction. Even in partner relationships with low perceived satisfaction, relationship bonds, either technical, timing, or legal/economic, function as "exit barriers" and contribute to the continued involvement of partners in the relationship.³⁰

Another study on distributor satisfaction presented by Hu (2011) emphasizes the need for an ongoing analysis of partnerships. Discovering shortcomings at an early stage allows

²⁸ Jonsson, P. and Zineldin, M. (2003). Achieving High Satisfaction in Supplier-Dealer Working Relationship. *Supply Chain Management*, Vol. 8, pp. 224-240. DOI: <http://dx.doi.org/10.1108/13598540310484627>

²⁹ Ibid.

³⁰ Ibid.

manufacturers to develop strategies to overcome them. The author identifies key factors that lead dealers to experience their partnerships as being successful. These are namely satisfaction, cost savings, information sharing, and sharing of both risks and benefits.³¹

In summary, PRM solutions are web-based tools used to leverage the efficiency and profitability of dynamic channel partner relationships. They connect manufacturers and channel partners, supporting the individual stages of the relationship building process. PRM solutions facilitate communication and data exchange by streamlining the processes occurring between the involved parties. Doing so, they assist manufacturers in overcoming the challenges within channel partnerships. As distributor satisfaction has found to be predictive for channel partnership success, PRM solutions aim to contribute to fulfilling partners' needs and demands. Several studies elaborate the factors influencing distributor satisfaction. Reputation, cooperation, and relationship bonds are some of these factors, a PRM solution should support. Moreover, communication, mutual adaptation of processes and products, and ongoing analysis of the partnership are relevant considerations.

2.2 PRM Functions

The preceding chapter presents an overview of the fundamental principles of channel partnerships, along with the objectives that can be attained through the utilization of PRM solutions. This section concentrates on the specific functions of PRM as delineated in the extant academic literature. Although there are comprehensive definitions on PRM solutions as well as studies focusing on PRM implementation, only a few scholars deliver information on actual PRM functionalities.

PRM pioneer Housman (1999) suggests several PRM core functions, categorized in three segments: channel program management, lead management, and sales productivity tools.³² Channel program management describes the management of the entire partner lifecycle. Starting with recruitment functions, PRM solutions standardize and automate the onboarding of new partners by providing automatic partner sign ups and online partner qualifying. This function includes the automated creation of individual plans, which are the baseline for further channel processes. Manufacturers set individual objectives for distributors, track their progress, and define next actions. Storing the entirety of partner-related data on a centralized

³¹ Hu, Y. (2011). Research on construction of partner channel relationships between manufacturers and retailers. DOI: <https://doi.org/10.1109/AIMSEC.2011.6010279>.

³² Housman (1999).

platform allows manufacturers to analyze the effectiveness of entire channel programs and campaigns. Channel program management also includes profile management. Detailed partner profiles provide manufacturers with transparency about partners and their performance. They allow for customizing shared content and optimizing forecasting.

The second category presented by Housman is lead management. Lead management covers the entire journey of a lead, starting with lead consolidation. The consolidation of leads from different sources facilitates subsequent processing. PRM solutions automatically transform all leads into the desired outcome. Subsequently, the leads are scored, i. e. ranked based on pre-defined criteria, and prepared for further actions. Another objective of lead management is to assign them to the most suitable partner, based on geographic criteria or lead criteria. Lead management enhances lead follow-up rates by facilitating lead procedures through standardization and automation. Furthermore, streamlining the entire lead process helps optimize marketing efforts, resulting in enhanced marketing effectiveness and reduced costs per lead.

The third category presented in Housman's essay pertains to sales productivity tools. These PRM functions automate channel management and lead partner sales activities towards revenue-generating activities. Housman proposes five categories of sales productivity tools:

- Forecasting
- Selling procedures and methodologies
- Publishing and personalization
- Literature fulfilment
- Pricing and quoting.

PRM forecasting provides manufacturers with real-time data, including orders, inventories, and demands. It assists in the optimization of warehouse processes, facilitating improvements in inventory management and the avoidance of overstocking. Consequently, PRM forecasting has significant financial advantages. The PRM system enables the targeted optimization of individual reseller accounts, with the objective of identifying areas for improvement and enhancing channel performance. The publishing and personalization module provides distributors with the ability to access product information and updates on the platform. This PRM feature operates as a self-service, thereby reducing distribution times and ensuring that resellers are kept apprised of the latest information. The pricing and quotation function enables

vendors to share their price lists with their vendors, with the possibility of editing them rapidly, entering bespoke prices, and interacting independently of their ERP systems.

The core PRM functions presented by Housman are reiterated in a subsequent study conducted by Murtaza and Shah (2004). The study presents channel program management, lead management, and sales productivity tools as main PRM functionalities. The authors choose a technology-driven approach to PRM. They emphasize the impact of Web services, based on XML and data exchange, in improving efficiency and information exchange among business partners.³³ These studies establish the foundation for understanding PRM as a technology-driven platform between manufacturers and partners in the distribution channel.

Another early list of essential PRM functions is presented by Mirani et al. (2001), including:

- Lead management
- Partner profiling
- Fund management
- Training
- Order management
- Report generation
- Content management³⁴

These considerations are refined a year later by Moon et al. (2002). The authors present lead management and partner profiling as the most critical PRM functions. They describe lead management modules as being “[...] designed [...] to accelerate the movement of high-potential leads to most appropriate partner and to enable better tracking and follow-up of these lead opportunities. Other lead management functions include lead capturing, recording, tracking, routing, rerouting, and accountability.”³⁵

Partner profiling includes “[...] functions for automating the generation, analysis and reporting of partner information, such as corporate demographics, geography, specialties, clients, points of contact, certification status, partner service preferences, territorial coverage, customer base,

³³ Murtaza, M. & Shah, J. (2004). Managing Information for Effective Business Partner Relationships. *IS Management*, Vol. 21, pp. 43-52. DOI: <https://doi.org/10.1201/1078/44118.21.2.20040301/80421.7>

³⁴ Mirani, R., Moore, D., Weber, J.A. (2001). Emerging Technologies for Enhancing Supplier-Reseller Relationships. *Industrial Marketing Management*, Vol. 30 No. 2, pp. 101-114.

³⁵ Moon et al. (2002).

and lines carried.”³⁶ The authors also mention the automation of back-office functions as essential to streamlining and managing channel partners.³⁷ In their case study on Bizentro, a Korean provider of business software solutions³⁸, the following PRM modules and main functions are presented:



Figure 2. PRM Core Modules and Functions as presented by Moon (2002). Author's Illustration.

Since Moon et al. (2002) consider lead management and partner profiling to be the most relevant PRM functions, other Bizentro functions are not explained in depth.

The promotion module supports partner marketing activities. Promotion includes a content management tool partners can use to create campaigns, including customized funds as incentivization. The commerce module facilitates the ordering of products and empowers the distributors through self-service. Moreover, the electronic product catalogue allows for flexible adaptations in prices and configurations. The communication module includes the efficient distribution of knowledge, which is considered essential for partnership success. “Community module provides a simple interface to customize various business groups who have the same interest, problems, and target to sales.”³⁹

More recent studies reveal less about the functions of PRM. This gap is to be closed in this paper through market research, i.e. the analysis of three current PRM providers.

³⁶ Ibid.

³⁷ Ibid.

³⁸ Bizentro (2024). URL: <http://www.bizentro.com:8080/> (Accessed on May 5th, 2024).

³⁹ Ibid.

2.3 PRM and Supplier Relation Management (SRM)

As outlined in the previous chapter, PRM is concerned with the formation and maintenance of distribution channel partnerships. To enhance comprehension of the intricacies of business partner relationships, this chapter presents Supplier Relationship Management (SRM) as the counterpart from the purchasing perspective of businesses. To gain a comprehensive understanding of business partnerships, it is essential to consider the entirety of the supply chain. Supply Chain Management (SCM) involves all activities, stages, and connections within an enterprise that are necessary for the creation and distribution of a product or solution to the end customer.⁴⁰ Supply chains encompass the development and management of integrated logistics chains (material and information flows) across the entirety of the value creation process, from the initial extraction of raw materials through the various processing stages, all the way to the final consumer.⁴¹ Chopra (2019) presents different business partners involved in the supply chain. A supply chain is defined as comprising all parties, whether directly or indirectly involved, in the fulfillment of a customer request. The supply chain encompasses not only the manufacturer and suppliers, but also transporters, warehouses, retailers, and even customers themselves.

It is important to recognize that most supply chain stages involve multiple actors.⁴² Consequently, supply chains are regarded as complex partner networks rather than linear flows. Figure 3 depicts the stages of an automotive supply chain."⁴³

⁴⁰ Wen-Ming, C. (2003). A Model for Integrated Sales Plan in Baosteel's Supply Chain Management. Baosteel Technology.

⁴¹ Gabler Wirtschaftslexikon (2018). Supply Chain Management (SCM). Retrieved from <https://wirtschaftslexikon.gabler.de/definition/supply-chain-management-scm-49361/version-272597> (Accessed on February 8th, 2024).

⁴² Chopra, S. (2019). Supply Chain Management. Strategy, Planning, and Operation. Harlow: Pearson Education Limited, p. 15.

⁴³ Ibid.

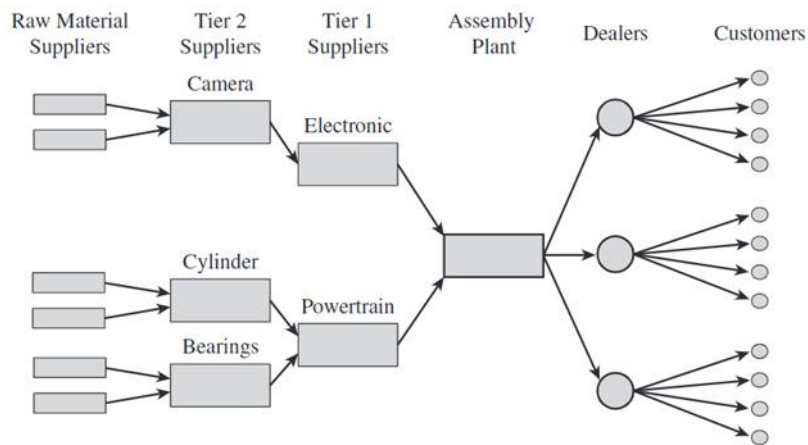


Figure 3. Stages of an Automotive Supply Chain. In: Chopra (2019). *Supply Chain Management. Strategy, Planning, and Operation*. p. 16.

The management of relationships within the supply chain is a complex yet essential task. There is a substantial body of research within this field. A review of the literature reveals three distinct perspectives on SRM. The initial perspective is centered upon the technological aspects of SRM. SRM solutions encompass a range of technological tools designed to streamline and integrate processes with suppliers. These include interfaces for automated connection, electronic catalogs, electronic marketplaces, tenders, and auctions.⁴⁴

The second perspective focused on a comprehensive and systematic approach to the design and management of the entire supplier relationship. This perspective encompasses strategic SRM processes, such as product group management, and proposes an overarching supply strategy and product group strategy. In this perspective, the roles of purchasing controlling and spend analysis are redefined. Furthermore, a systematic integration of the design and management of the supplier relationship necessitates a systematic focus on objectives and a comprehensive approach to procurement performance management.⁴⁵

The third perspective of SRM is aligned with the second one. This perspective emphasize the relational aspect of supplier-manufacturer partnerships. It encompasses behavioral aspects, such as the mutual understanding of the partnership or power-based dealings with suppliers, as well as the processes for managing the supplier relationship, in particular communication. The objective of supplier relations is to establish long-lasting partnerships. Therefore, the

⁴⁴ Heß, G. (2017). *Strategischer Einkauf und Supply-Strategie – Schrittweise Entwicklung des strategischen Einkaufs mit der 15M-Architektur 2.0*. Wiesbaden: Springer Gabler.

⁴⁵ Ibid.

classification of suppliers, supplier development, and the establishment of shared goals are important, while technology plays a subordinate role. Figure 4 illustrates the various tools utilized for the management of disparate partner relations within the supply chain.

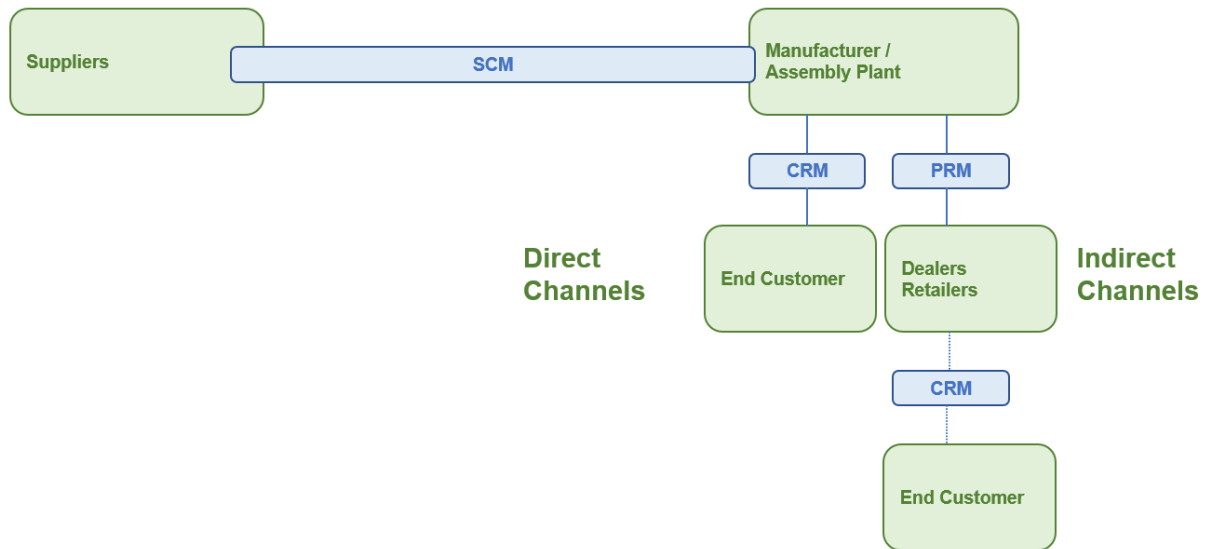


Figure 4. Tools used for managing different partner relations within the supply chain. Author's Illustration.

SRM tools are used to managing business partnerships with tier 2 and tier 1 suppliers. SRM objectives are:

- Increased overall efficiency of supply chains
- Cost reduction
- Product quality improvement
- Strong and sustainable relationships with suppliers.⁴⁶

To achieve these goals, SRM tools comprise a range of functions that are targeted at different stages of the relationship. They assist organizations in the selection of suppliers, using qualification criteria to ensure that suppliers meet specific requirements. The selection process is in some cases even automated through SRM tools, thereby saving time, and maintaining high quality standards.⁴⁷

⁴⁶ SAP (2024). SAP Supplier Relationship Management (Version 7.0 EHP4 SP18). URL: https://help.sap.com/docs/SAP_SUPPLIER_RELATIONSHIP_MANAGEMENT/5cd86364e18a49c6a01a79557b61416a/45aced6c6cc0450a9b16fba0b851332.html (Accessed on May 2nd, 2024).

⁴⁷ Ross, D. F. (2015). Distribution Planning and Control. Managing in the Era of Supply Chain Management. Springer New York. pp. 457-534.

Once a supplier relationship is established, SRM tools assess the performance of suppliers on a continuous basis. Key performance indicators (KPIs) are used to evaluate a range of factors, including quality, costs and prices, reliability, and service. These KPIs facilitate more accurate forecasting and production planning. If a supplier declines in performance, the manufacturer is can intervene at an early stage.⁴⁸ The management of contracts is another central SRM function. SRM stores supplier contracts, so manufacturers receive an overview of the agreements and conditions that pertain to them. Modern SRM solutions include automated processes for the renewal and termination of contracts.

A further important role of SRM solutions is the management of risk and compliance. By incorporating all supplier data, SRM tools indicate the financial stability of suppliers and the risks they may face. The information enables manufacturers to identify potential supplier risks and to guarantee compliance with legal and regulatory requirements.⁴⁹

The presented SRM functions are aligned with the strategic and controlling perspective. In the context of routine business processes, SRM solutions provide buyers with the tools to effectively collaborate with their suppliers, e. g. through the automation of recurring orders. Interfaces between SRM and other systems are important for ensuring the success. Consequently, the majority of SRM systems provides multiple interfaces. Being connected to the Enterprise Resource Planning (ERP) system, SRM systems identify critical quantities and initiate orders automatically. The display of order progress enhances transparency and facilitates more effective planning for the manufacturer. SRM systems support price negotiations with suppliers. Some SRM solutions even perform negotiations solely within system.

There are similarities and differences between PRM and SRM, which are presented hereinafter. Both PRM and SRM use digital technologies to build, deepen and optimize relationships with external business partners. They support all phases of the partnership journey, from initial partner selection to continuous analysis and optimization using KPIs. The objective of both PRM and SRM is to simplify communication and collaboration. The systems automate and streamline core processes to save time and generate transparency. Both systems have interfaces that allow them to be easily integrated into other software solutions

⁴⁸ Ibid.

⁴⁹ Ibid.

and IT systems, such as ERP systems. Both PRM and SRM have a strategic aspect and are geared towards long term and mutual growth of the partners.

The differences between PRM and SRM are mainly due to the focus of the solutions. While PRM focuses on managing relationships with distribution or sales partners, SRM focuses on managing relationships with suppliers. This results in differences in the characteristics of the systems, e.g. in the objectives. PRM objectives include increased sales, expanded market presence, improved partner satisfaction and reduction of channel conflicts. SRM objectives include reduced procurement costs, on-time deliveries of high-quality materials, minimized supplier risks and innovation through supplier cooperation.

The following figure illustrates the commonalities and differences between PRM and SRM solutions. It must be noted that this comparison is not complete, as there may be other similarities or differences on a more detailed functional level. The assessment of SRM tools is not part of this study.



Figure 5. PRM and SRM. Comparison. Author's Illustration.

2.4 PRM and Customer Relationship Management (CRM)

Companies have two options for getting products to the end customer: direct and indirect channels. In a direct channel, the manufacturer interacts directly with the customer, e.g. through local stores or online stores. In direct channels, customer relationship management

(CRM) solution connect the manufacturer to its customers. This chapter analyzes CRM and compares it to PRM, as PRM and CRM are often confused.

Becoming popular in the 1990s, there are numerous CRM definitions.⁵⁰ Rigby et al. (2002) describe CRM as a tool, which “[...] allows companies to gather customer data swiftly, identify the most valuable customers over time, and increase customer loyalty by providing customized products and services.”⁵¹ Kumar and Reinartz (2006) define CRM as “[...] the strategic process of selecting the customers a firm can most profitably serve and shaping the interaction between that company and these customers with the goal of optimizing the current and future value of the customers for the company.”⁵² A more recent definition is provided by Gartner:

*“CRM is a business strategy that optimizes revenue and profitability while promoting customer satisfaction and loyalty. CRM technologies enable strategy, and identify and manage customer relationships, in person or virtually. CRM software provides functionality to companies in four segments: sales, marketing, customer service and digital commerce.”*⁵³

The four main components described in Gartner’s definition of CRM tools are also presented in the study of Zajačko et al. (2019). The authors define CRM as

*“[...] integrating and coordinating marketing, sales, and customer service into a unified and comprehensive approach to each customer’s care. It technically includes the possibility to use all available communication channels, knowledge bases or web portals.”*⁵⁴

They suggest four main modules as “the usual building of a complex CRM system”:

- Sales Force Automation (SFA)
- Marketing Automation (MA)
- Field Service Automation (FSA)
- E-business (EB)

⁵⁰ Moon et al. (2002).

⁵¹ Rigby, D., Reichheld, F., and Scheffer, P. (2002). Avoid the four perils of CRM. Harvard Business Review, Vol 80, No. 101-6, p. 108.

⁵² Kumar, C., and Reinartz, W. (2006). Customer Relationship Management: A Database Approach. New York: John Wiley.

⁵³ Gartner (2024). Customer Relationship Management. URL: <https://www.gartner.com/en/information-technology/glossary/customer-relationship-management-crm> (Accessed on February 8th, 2024).

⁵⁴ Zajačko, I., Klačková, I., Kuric, I. (2019). CRM systems – from theory to practice. International Scientific Journal, Vol. 7 No. 3, pp. 97-100.

Sales force automation (SFA) is a fundamental component of CRM. SFA encompasses the centralized storage of unified customer and lead information, which serves as the foundation for a multitude of sales-related activities. It facilitates the management of prospective customers (and leads) and existing customer relationships. It provides insights into KPIs, such as lead times and customer contact rates, which are essential for sales performance analysis.

The automation of marketing activities (MA) is regarded as “the heart of CRM.”⁵⁵ The creation of individual target audience groups based on selection criteria constitutes a key aspect of MA. The audience groups are utilized to create customized campaigns, addressing the specific needs of a distinct customer group. MA enables users to assess the efficacy of their campaigns and offer insights into customers, their behaviors, and their preferences. MA unifies various customer communication channels, e. g. email, phone calls, and print media.

Field service automation (FSA) supports the customer service team by streamlining after-sales processes. For instance, service hotlines are supported through digital service channels and self-service modules, e. g. frequently asked questions (FAQs).

E-business (EB) has become an increasingly significant aspect in the past years. In accordance with the definitions, CRM e-business automates the “execution of business transactions in electronic form”⁵⁶, including online shops and social selling.

It is notable, that the analysis of Salesforce, one of the most popular CRM solutions in 2023⁵⁷, reflects these exact four core elements in their portfolio range.⁵⁸ To strengthen the understanding of the underlying functions of these modules, exemplary Salesforce functions are presented in the following.

Sales	Marketing	Service	Commerce
Sales Engagement	Marketing Analytics	Self Service Experience	Digital Storefronts
Sales Programs	B2B Marketing Automation	Agent and Mobile Worker Productivity	Customer Acquisition and Loyalty

⁵⁵ Ibid.

⁵⁶ Ibid.

⁵⁷ Grand View Research (2020).

⁵⁸ Salesforce (2024). URL: <https://www.salesforce.com/?ir=1> (Accessed on March 3rd, 2024).

Sales Data	Personalization	Customer Service AI	Order Management
Sales Analytics	Marketing AI	Field Service	Embedded Commerce App

Table 2. Overview of Exemplary Salesforce CRM Functions as of May, 2024.

The Sales module aims to automate and accelerate sales processes. The platform unifies all customer data and messages from different sources (e-mail, social media) and creates automated workflows for more efficient customer communication. With the help of AI, the CRM provides recommendations on next actions, with the goal on leveraging sales opportunities.⁵⁹

The Marketing module is used for the creation of targeted and customized campaigns, that reach customers across various points of sales. It uses data analytics and AI to optimize the content precisely and contribute towards lead generation.⁶⁰

The Service module focusses on two objectives. First, it allows service workers, both in the office or in the field, to access customer data quickly and optimize their service actions through AI-recommendations. Second, it helps companies to create digital (self-)service points for their customers, such as chat bots or self-service centers.⁶¹

The Commerce module supports companies in creating web shops to distribute their products and optimize the customer experience through AI-based individualization and product suggestions. By offering standardized embedded apps for commerce, Salesforce enables their customers to create additional points of sales.⁶² CRM solutions support companies in reaching their customers and optimizing the customer journey. They use customer data, geographical data, or behavioral data retrieved from different point of sales to generate recommendations and boost individualization.

Both PRM and CRM are digital technologies used to increase sales performance and revenue and establish long-term relationships with buyers. Usually, CRM solutions are used by companies with direct sales channels, thus their main target group are end customers. This

⁵⁹ Salesforce (2024). Sales Engagement Platform. URL: <https://www.salesforce.com/products/sales-engagement-platform/> (Accessed on May 5th, 2024).

⁶⁰ Salesforce (2024). Marketing. URL: <https://www.salesforce.com/products/marketing/> (Accessed on May 5th, 2024).

⁶¹ Salesforce (2024). Service. URL: <https://www.salesforce.com/products/service/> (Accessed on May 5th, 2024).

⁶² Salesforce (2024). Commerce. URL: <https://www.salesforce.com/products/commerce/> (Accessed on May 5th, 2024).

main distinction is reflected in the different functionalities of the systems. CRM includes functionalities, that focus on personalization throughout the customer journey with the overarching goal of improving customer satisfaction and loyalty. As customers are not considered business partners, classical PRM modules, such as training, usually do not occur in CRM solutions. Instead, self-service functionalities play an important role, such as automated chat bots, that help customers seeking answers for commonly asked questions. Providing an interface to the end customer, CRM solutions also often integrate e-commerce functions, such as digital storefronts or web shops. The advantages of these integrations are an automated and standardized order management, and the possibility of personalizing shopping experiences through data analysis. The following figure depicts the different functions and target groups of PRM and CRM.



Figure 6. Comparison of PRM and CRM Functionalities. Author's Illustration.

2.5 Overview of Existing Studies on PRM in B2B Environments

As previously stated, a substantial body of research has been conducted on the utilization of PRM solutions within B2B contexts. This chapter builds on the theoretical foundation and definitions presented in the initial chapter by providing a comprehensive overview of the academic approaches employed within the PRM domain. To avoid repetition, the studies presented in the initial chapters will not be included in this chapter. For a detailed overview of all PRM studies, please refer to the table in the appendix [Overview of PRM Studies].

After establishing a general understanding of PRM solutions, as done by Moon (2002) and Murtaza and Shah (2004), other scholars have shifted the focus from the general concept of PRM towards the factors, that lead to successful PRM implementation. Zablah et al. (2005) introduce a conceptual model to explain why downstream channel partners (i. e. resellers or distributors) accept or reject new PRM technologies. The model explains how the perceived fairness and the perceived effectiveness of a technology influence the channel partner's willingness to adopt or reject it.

Perceived fairness is affected by the following factors:

- Level of alignment of the new technology with the changing business environment
- Dealers' perception of the influence or persuasion executed by their suppliers
- Overall nature of the relationship
- Costs and benefits involved with the adoption of the new technology

Perceived effectiveness was affected by these factors:

- Contribution of PRM solutions towards collaboration and the exchange of information
- Perceived facilitation of selling, service, and order management
- Improvement of customer service,
- Improvement of general customer satisfaction
- Level of conflicts caused by the new solution.⁶³

Exemplary cases are used to support the ideas of the model, however, as the model is not tested and validated with real data, the study is limited to its theoretical contribution.

Park et al. (2015) measure the influence of PRM on the key elements of successful partner relationships, namely the quality of a PRM system, the informational value delivered through the system, and the contribution of PRM systems for establishing mutual trust between the partners. The study indicates the link between business strategy and technological quality and efficacy of PRM systems.⁶⁴

Argawal and Singh (2014). Provide further answers to the question, "What makes PRM implementation successful?". Focusing on the Indian automotive sector, they develop a PRM

⁶³ Zablah, A., Johnston, W. & Bellenger, D. (2005).

⁶⁴ Park, C., Chang, B. & Kang, P. (2015). Analysis on Key Success Factors for Partner Relationship Management. Korean Management Science Review, Vol. 32, pp. 45-56. DOI: <https://doi.org/10.7737/KMSR.2015.32.4.045>

index based on satisfaction, trust, communication, collaboration, and environmental factors. They found that the quality of communication and the level of experienced trust are beneficial to the perception of the partner relationship. The development of the PRM index by Argawal and Singh is the first step towards quantifiable metrics in PRM research and therefore has a remarkable impact on this field of study.⁶⁵

The degree of satisfaction with business partner relationships is a critical factor in the successful implementation of PRM solutions. Consequently, several studies examine the potential of technology to enhance the quality of B2B relationships. In their study on CRM and PRM solutions, Barac et al. (2017) assess the way e-business models shape the dynamics of interaction between B2B electronic media partners. They demonstrate that customer-centric CRM solutions are inadequate for the requirements of B2B relationships. In order to involve a greater number of stakeholders and to enhance the perceived quality of the relationship, PRM solutions must possess the capability to manage intricate relationships. Furthermore, the authors consider factors beyond the technological domain of PRM. For instance, their findings indicate that social events or personalized services enhance the perception of benevolence.⁶⁶

Storey and Kocabasoglu-Hilmer (2013) assess the effects of PRM solutions on partner network performance from the perspective of relationship dynamics. They show that PRM systems' relationship and fulfillment capabilities, together with governance mechanisms, (e. g. certification controls) affect partner trust, commitment, and satisfaction. The findings indicate that relationship capabilities enhance trust, whereas fulfillment capabilities paradoxically diminish commitment. Formal governance mechanisms diminish the beneficial effects of relationship capabilities, while informal support services offset some of the adverse effects of fulfillment capabilities. These observations underscore the necessity to customize PRM systems to align with specific performance expectations and to comprehend the impact of existing governance mechanisms on PRM system efficacy.⁶⁷

The most recent technological developments in the field of PRM studies are presented by Chatterjee et al. (2022, 2023). The study investigates the integration of artificial intelligence

⁶⁵ Agarwal, A. and Singh, D. (2014).

⁶⁶ Barac, D., Ratkovic-Zivanovic, V., Labus, M., Milinovic, S., Labus, A. (2017). Fostering partner relationship management in B2B ecosystems of electronic media. *The Journal of Business & Industrial Marketing*, Vol.32 No.8, pp. 1203-1216. DOI: <https://doi.org/10.1108/JBIM-02-2016-0025>

⁶⁷ Storey, C. & Kocabasoglu-Hilmer, C. (2013). Making partner relationship management systems work: The role of partnership governance mechanisms. *Industrial Marketing Management*, Vol. 42, pp. 862-871. DOI: <https://doi.org/10.1016/j.indmarman.2013.05.019>

(AI) into PRM. Results show that AI-PRM improves business relationships and enhances business performance⁶⁸, facilitating faster and more accurate communication. Furthermore, AI-PRM enriches the services provided to partners, fostering a heightened sense of involvement and, consequently, improved business performance on both sides.⁶⁹

The methodologies employed in these studies encompass a range of techniques, including literature reviews, case studies, market analyses, and various forms of quantitative analysis, such as exploratory and confirmatory factor analyses. The selection of studies exemplifies the multifaceted approaches to this research area, offering a comprehensive range of insights from theoretical explorations to empirical validation.

2.6 Summary of Findings from Literature Review

This chapter discusses the theoretical foundations of PRM, which are essential to understanding the following chapters and the market research, case studies, and framework development conducted in them.

The chapter starts with the general characterization of PRM. Several existing definitions from the academic and business context are presented and compared. All PRM definitions agree on three characteristics: They characterize PRM as a combination of business strategy and technology, that is fundamentally web-based and designed to connect channel partners. Because streamlining and optimizing channel partnerships is the main purpose of PRM solutions, channel partnerships are examined in more detail in this chapter.

Channel partnerships are used for the indirect distribution of products or services. There are different stages in the development of channel partnerships. Starting with the selection of channel partners, the relationship building process continues with the expansion and maintenance stage and ends with the continuous evaluation and optimization of the partnership. There are certain challenges arising in channel partnerships, that PRM systems address. These challenges include channel conflicts, e. g. poor communication or lack of training, the reduction of transaction costs, the lack of geographic proximity or language barriers, and the gap in manufacturers' knowledge of the characteristics and preferences of their end customers. In addition to overcoming these challenges, another goal of PRM systems is to increase channel partner satisfaction. The chapter presents various factors that lead to

⁶⁸ Ibid.

⁶⁹ Chatterjee et al. (2023).

higher dealer satisfaction, such as reputation, cooperation and relationship bonds, or communication and mutual adaptation. Adherence to and achievement of these factors are key PRM objectives.

To comprehend the way PRM systems facilitate the attainment of these objectives, this chapter assesses the functions of PRM presented in literature. A core function of PRM is lead management, which encompasses the administration, monitoring, and allocation of potential leads to suitable partners. Moreover, the management of partners partner profiling functionalities is another central function of PRM. Partner profiling contains all available data and KPIs for each partner, facilitating comparability and identifying areas for improvement. In addition to lead management and partner profiling, sales productivity tools and communication modules are other central PRM functions. It is noteworthy that the extant literature does not contain current information on PRM functions. The research gap concerning the range of functions will be addressed in the following chapter using market research.

In addition to the fundamental concepts of PRM, this chapter elucidates the distinctions between PRM and related disciplines, namely SRM and CRM. There are certain commonalities between the systems, including the strategic aspect and the utilization of technology to optimize business relationships. However, there are also notable differences in terms of their respective areas of application. While PRM is utilized in indirect sales to manage distribution partnerships, CRM is used in direct sales and manages the relationship with end customers. In contrast, SRM encompasses a different area of the supply chain, namely the management of business relationships with suppliers. The comparison serves to facilitate a more nuanced understanding of PRM solutions, which will be examined in greater detail in the subsequent chapters.

The final section of the literature review presents an overview of the current state of research on PRM solutions. In addition to the historical overview and the general PRM definitions introduced at the beginning of this chapter, this section addresses various research approaches employed in this field. It presents an array of studies, including those addressing PRM implementation and the development of indices for measuring PRM success. The most recent studies examining the impact of artificial intelligence on PRM systems are also discussed. This chapter presents a scientific basis for PRM research and provides a framework for future research endeavors. Given the paucity of extant examples of common PRM solutions, their range of functions, and their concrete application in B2B companies, this

master's thesis intends to make a contribution to current PRM research and offer practical insights into the use of PRM systems.

3. Market Research

In this chapter, market research of PRM software is performed to assess the characteristics of PRM solutions and their contribution towards the enhancement of B2B partnerships. In the preliminary study, an introductory market research of available PRM tools has been conducted, presenting four PRM software applications and their key features. Namely, these PRM solutions are Salesforce, Zoho, HiFive, and GlassHive.⁷⁰ Besides from Salesforce, all tools assessed in the preliminary study focus on customers from the IT or telecommunication industry. As the company treated in the case study is a manufacturing company, it may have different challenges than industries with non-physical products.

For this reason, another market research is conducted. Software marketplaces, like Capterra or G2 facilitate market research. Capterra was used for the analysis done in the preliminary study, but it focusses on the German market, so the present study relies on G2, providing a more international focus. G2 is one of the leading marketplaces for B2B software.⁷¹ It ranks software and services using an algorithm, that includes user reviews and data from online sources and social networks. The result of this analysis is the G2 Score. The G2 Score compares products based on two main components: Satisfaction and market presence. Satisfaction scores are derived from user surveys, focusing on ease of use, quality of support, and other user-focused metrics. Market presence scores incorporate review counts and third-party data such as employee counts and growth, derived from LinkedIn and other platforms, social media engagement statistics, and web presence.⁷² The G2 Score offers a data-based foundation for decision-making. Nevertheless, it must be noted that G2 is a company, selling marketing solutions to customers. To boost visibility in the list, software providers can register a profile, subject to charge. Therefore, complete independence cannot be obtained. The market analysis done in this study will use G2, as it represents an approach for choosing business software, and the solutions are presented as real-life examples.

⁷⁰ cf. Mönig, L. (2024).

⁷¹ G2 (2024). About us. URL: <https://company.g2.com/about> (Accessed on April 3rd, 2024).

⁷² G2 (2024). Research Scoring Methodologies. URL: <https://documentation.g2.com/docs/research-scoring-methodologies> (Accessed on April 3rd, 2024).

Using G2 for PRM market research brings up 99 results.⁷³ The results are sorted by G2 Score, popularity, or satisfaction. Moreover, there are filters for segmentation by business size, rating, language, and features.⁷⁴ The results are shown either in a list or in the G2 Grid®. The G2 Grid® maps the products according to their G2 Score (satisfaction; market presents) and therefore consists of four quadrants:

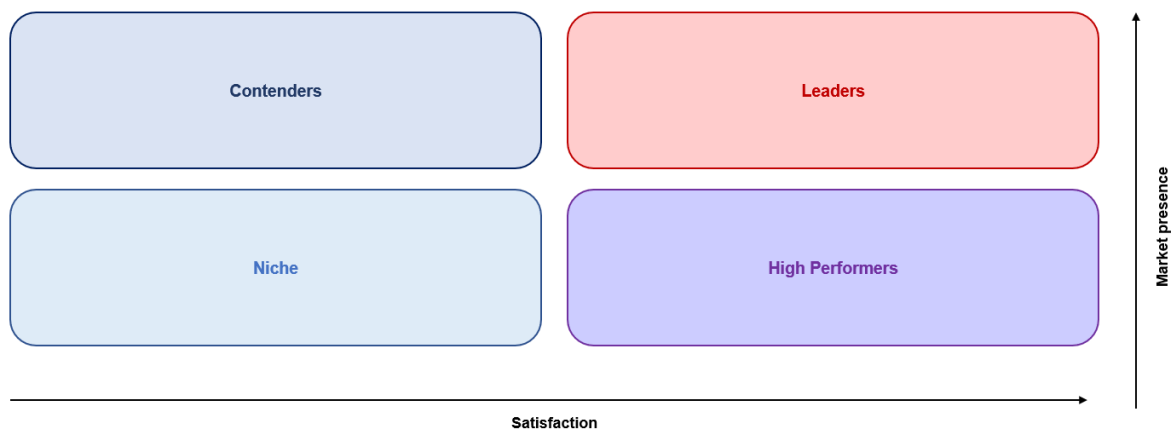


Figure 7. G2 Grid map. Author's Illustration.

Contenders refer to products, that have a strong market presence, but less user satisfaction. They are well-established and widely adopted but might have areas to improve upon according to user feedback. The *Leaders* quadrant contains products, that score high in both market presence and user satisfaction. They are recognized for comprehensive features, significant market share, and positive feedback from users, making them “top choices” in their category. *Niche products* are those with lower market presence and user satisfaction scores compared to others. They may serve specific needs, catering to a smaller segment of the market. The fourth quadrant, *High Performer*, refers to products that rank high in user satisfaction but have a smaller market presence compared to Leaders. They are highly valued by users for their features and performance, making them strong in their category for specific user needs.⁷⁵ The G2 Grid® for the PRM research contains 33 out of 99 results for PRM software, representing the tools with the most reviews.

⁷³ G2 (2024). Partner Management. URL: <https://www.g2.com/categories/partner-management> (Accessed on April 3rd, 2024).

⁷⁴ Ibid.

⁷⁵ Ibid.

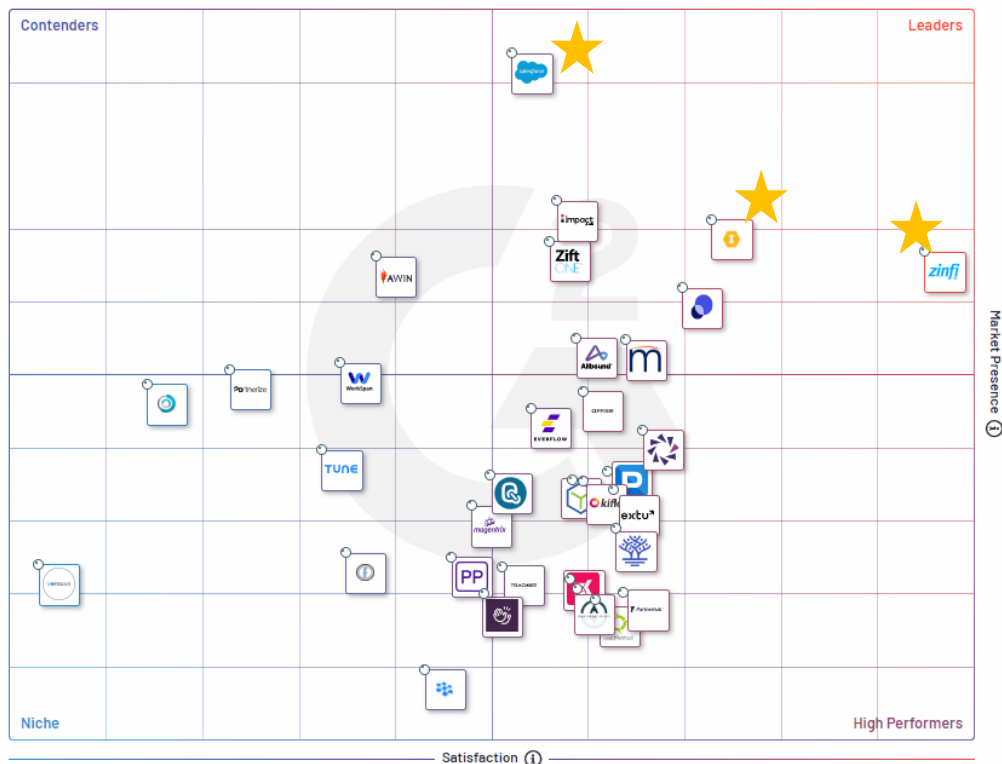


Figure 8. G2 Grid for PRM solutions. Screenshot, April 2nd, 2024.

This chapter analyzes three of the PRM software solutions marked in the G2 Grid® screenshot (Figure 8). The first PRM tool assessed is Salesforce, as it has the strongest market presence and is named the market leader for both CRM and PRM solution in various independent reports. The second tool considered in this analysis is ZINFI, which according to G2 has the highest user satisfaction. The third tool assessed is Impartner, which ranks between Salesforce and ZINFI in terms of user satisfaction and has a slightly stronger market presence than ZINFI.

The subsequent analysis follows a clear structure. Each PRM tool is presented according to its individual structure, core functionalities, and pricing. The key modules of each tool are explained in more detail to provide an insight into the real-world use of PRM. The chapter concludes with a direct comparison of the PRM solutions and their features.

3.1 Salesforce Inc.

Salesforce Inc. is one of the leading providers of software used for business applications.⁷⁶ Starting with the development of a CRM solution in 1999, the company went public in 2004.⁷⁷ Today, the company has over 73,000 employees worldwide. Their current annual revenue, as of January 2024, is reported at USD 34.9 billion.⁷⁸ At their 2023 annual investor meeting, the company reports the total addressable market at USD 300 billion by 2026, with a 13 % CAGR.⁷⁹ These numbers reflect the significance of Salesforce as a provider for business software applications and lead to the question of what makes their solutions so popular.

Structure

Salesforce centers their complete product portfolio in the Salesforce Customer 360 suite. The suite includes the product categories sales, service, marketing, commerce, data cloud, productivity and communication tools, automation, and development tools. The Customer 360 approach offers companies customized solutions, tailored for specific business needs. Customers can pick from the suite categories and can choose between various solutions.

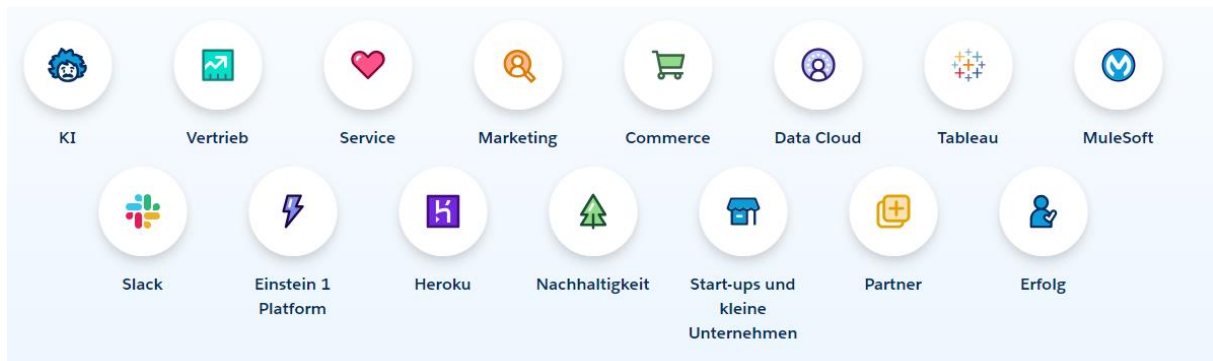


Figure 9. Salesforce Customer 360 Cloud. Screenshot, April 2nd, 2024.

⁷⁶ Grand View Research (2023). Customer Relationship Management Market Size, Share, & Trends Analysis Report, By Component, By Solution, By Deployment, By Enterprise Size, By End Use, And Segment Forecasts, 2024 – 2030. URL: <https://www.grandviewresearch.com/industry-analysis/customer-relationship-management-crm-market> (Accessed on April 3rd, 2024).

⁷⁷ Hillenbrand, T. (2004). Salesforce Börsengang: Der Partymeister räumt ab. SPIEGEL Wirtschaft. URL: <https://www.spiegel.de/wirtschaft/salesforce-boersengang-der-partymeister-raeumt-ab-a-305572.html> (Accessed on April 3rd, 2024).

⁷⁸ Salesforce (2022). 2022 Investor Update. URL: <https://investor.salesforce.com/about/default.aspx> (Accessed on April 3rd, 2024).

⁷⁹ Salesforce (2022). Investor Day 2022. URL: [https://s23.q4cdn.com/574569502/files/doc_presentations/2022/FY23-Salesforce-Investor-Day-2022-Sept-21-\(1\).pdf](https://s23.q4cdn.com/574569502/files/doc_presentations/2022/FY23-Salesforce-Investor-Day-2022-Sept-21-(1).pdf) (Accessed on April 3rd, 2024).

Functionalities

Given this modularity, there is no "out-of-the-box" Salesforce PRM solution with a set of core capabilities. However, on a dedicated landing page, Salesforce presents several PRM capabilities, each of which addresses different PRM objectives:⁸⁰

- Personalization and individualization of content
Salesforce emphasizes the high degree of customization in its solutions. The Experience Builder uses a company's CRM data to customize and personalize the PRM interface for each partner. This individualization is reflected, for example, in "tailored online learning paths" that each partner goes through during the onboarding phase, depending on his or her level of knowledge.
- Increase in productivity
Salesforce uses AI-powered, automated workflows to increase channel partner productivity. For example, the Marketing Automation feature provides pre-built content and entire customer journeys that partners can use to optimize lead generation. AI-based workflows are also used to capture leads and process orders.
- Increase in ROI
Salesforce helps companies optimize channel ROI by measuring and analyzing partner performance in real time. The software also provides self-service capabilities that allow partners to ask questions directly (FAQs, live chat, articles).

Salesforce offers onboarding processes for partners and sales teams on their *Trailhead* platform. In the onboarding phasis, dealers learn how to use the system, they obtain information about sales processes, KPIs and rewards. Dealers, who already work with the company, can access training courses for sales or soft skills.⁸¹ The individual onboarding process for dealers, follows a pre-defined onboarding structure, and can be customized according to specific needs or focusses. Companies can see which dealer has completed the onboarding process or certain training courses.⁸²

⁸⁰ Salesforce (2024). Partner Relationship Management. URL: <https://www.salesforce.com/de/products/partner-relationship-management/> (Accessed on April 3rd, 2024).

⁸¹ Salesforce (2024). Trailhead. <https://trailhead.salesforce.com/de> URL: (Accessed on April 3rd, 2024).

⁸² Salesforce (2024). Partner Relationship Management.

Once the onboarding has been completed, continuous dealer engagement is fostered with the *Experience Builder*. This feature allows companies to share new information with their dealers, based on their individual data, e. g. promotions, marketing content, or training content. Using *Channel Service*, dealers can quickly access information through articles, Q&A platforms, or live chat with experts. Salesforce offers a comprehensive performance tracking, including territory management, comparison of real-time data with planned numbers, and individually adjustable targets.⁸³

To boost partner's sales and marketing efforts, Salesforce uses AI-based workflows, available both as standard templates and customized versions. Companies can define individual customer journeys for their dealers and supply them with co-branded marketing material to support them in generating leads. For facilitating sales processes, Salesforce offers automated order entry and order processing. The application includes the management of leads, opportunities, the use of real-time data and dashboards for forecasting or reporting, and the automation of workflows and standard processes, such as quotation.

Due to the modular design and application of the software, it cannot be ruled out, that there are further PRM features. The Salesforce website suggests additional products for further PRM optimization, such as functions for automated generation of quotes and contracts, or predictive intelligence for leveraging sales. But Salesforce's PRM functionality is not limited to its own products. Salesforce is committed to integrating with third-party solutions. With Salesforce AppExchange, the software allows for the integration of third-party solutions, or apps.⁸⁴ The portfolio of Salesforce can be further customized by integrating third party solutions via an API. Over 7,000 "apps and experts" are available for connection on the Salesforce AppExchange Platform.⁸⁵ Through *Salesforce App Exchange*, these features can be supplemented by other applications, for example the *CPQ tool* (quotation and contract tool), or AI-based sales prediction tools (*Einstein AI*).⁸⁶

In a whitepaper, Clayelle Wolf, Senior Director for Partner Marketing Offerings at Salesforce, explains how Salesforce helps companies driving customer success. She suggests three

⁸³ Salesforce (2024). Sales Performance Management. URL: <https://www.salesforce.com/de/products/sales-performance-management/> (Accessed on April 3rd, 2024).

⁸⁴ Salesforce (2024). Products. URL: <https://www.salesforce.com/products/> (Accessed on April 3rd, 2024).

⁸⁵ Salesforce (2024). AppExchange. URL : <https://appexchange.salesforce.com/> (Accessed on April 3rd, 2024).

⁸⁶ Salesforce (2024). Einstein AI Solutions. URL: <https://www.salesforce.com/products/einstein-ai-solutions/> (Accessed on April 3rd, 2024).

solutions, based on AppExchange, which contribute to excellent partner performance. Namely, these solutions are: *Accelerate Launch*, *Partner Marketing Center*, and *AppExchange Marketing Program*.⁸⁷

- *Accelerate Launch* focusses on early-stage partners, providing them with self-learning resources and best practices, e. g. for positioning or messaging. The application aims to increase the efficiency of onboarding and training processes.
- *Partner Marketing Center (PMC)* is a comparable solution, not only for early-stage partners, but for all partners. PMC encompasses a customizable library of sales and marketing assets for partners. Customer data provided by Salesforce shows, that partner companies were able to save 45 percent of their time for preparing a marketing campaign and could increase the campaigns click-through-rate by 21 percent compared to previous campaigns.⁸⁸
- *AppExchange Marketing Program* is directed at marketing partners directly working with Salesforce, supporting them in generating campaigns and use analytics.⁸⁹

Pricing

Salesforce pricing depends on the selection of modules. For Partner Relationship Management, Salesforce indicates a package for the “complete PRM solution”. In this package, pricing is based on logins and members: \$10 per login or \$ 25 per member (USD / month, billed annually). The different between members and logins is the frequency of use: “Members are for frequent users. Logins are for infrequent users.”⁹⁰ Salesforce states, however, that there are additional products and third-party integrations depending on individual needs, that are not covered in the PRM package pricing.

⁸⁷ Wolf, C. for Salesforce (2024). 3 Proven Tools to Drive Customer Success. URL: <https://appexchange.salesforce.com/learn/3-proven-tools-partners-use-to-drive-customer-success> (Accessed on April 3rd, 2024.)

⁸⁸ Ibid.

⁸⁹ Salesforce (2024). AppExchange Marketing Program. URL : <https://appexchange.salesforce.com/mktcollections/curated/appexchange-marketing-program-amp> (Accessed on April 3rd, 2024).

⁹⁰ Salesforce (2024). Pricing: Partner Relationship Management. URL: <https://www.salesforce.com/products/experience-cloud/pricing/partner-relationship-management/?d=cta-body-promo-28> (Accessed on April 2nd, 2024).

3.2. ZINFI Technologies

In the G2 Grid, ZINFI PRM ranks the highest for customer satisfaction. Founded in 2007, ZINFI Technologies Inc. currently employs around 200 people.⁹¹ On their website, ZINFI does not provide detailed company information, but focusses on their solutions instead. According to RocketReach, a company data base platform, the annual revenue of ZINFI Technologies Inc. was at USD 34 million (as of April 6th, 2024).⁹²

Structure

ZINFI claims their unique selling proposition is creating “hyper-personalized”, automated workflows for partners, customized to individual needs and objectives.⁹³ Therefore, this chapter dives deeper into the ZINFI modules, as they provide valuable insights about PRM functionalities. ZINFI consists of six core functionalities:

- Onboard
- Enable
- Market
- Sell
- Incentivize
- Accelate⁹⁴

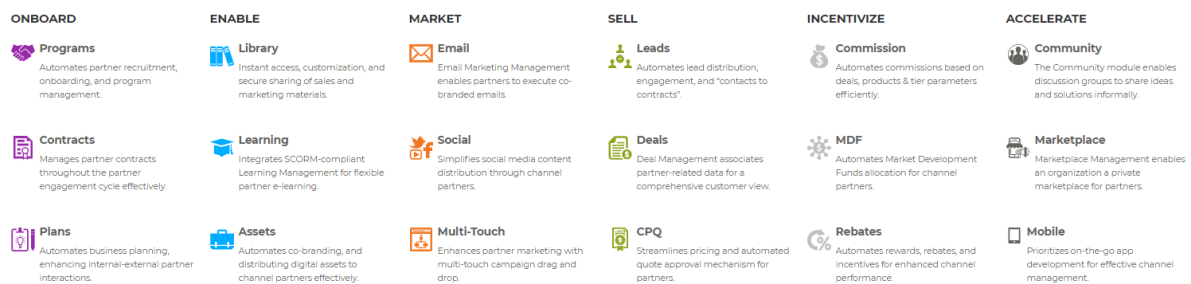


Figure 10. Overview of ZINFI functions. Screenshot, May, 3rd, 2024.

⁹¹ <https://www.linkedin.com/company/zinfi-technologies/about/>

⁹² RocketReach (2024). ZINFI Technologies Inc. URL: https://rocketreach.co/zinfi-technologies-inc-profile_b5c47af4f42e0dfe#:~:text=What%20is%20the%20annual%20revenue,was%20%2434%20million%20in%202024 (Accessed on April 2nd, 2024).

⁹³ Ibid.

⁹⁴ ZINFI (2024). About us. URL: <https://www.zinfi.com/about-us/> (Accessed on April 3rd, 2024).

ZINFI *Onboarding* module consists of three sub-modules: *Programs*, *Contract Management*, and *Plans*.⁹⁵

- *Programs* module provides management and visibility into the partner engagement cycle from initiation to ongoing development of channel partners. The module enables organizations to customize partner programs by account or individual contact, categorize them into different types based on program type and accreditation, and manage them through priority-based tiers with specific tasks and requirements. It offers features for promoting partners, automating their progression through program levels, and tracking their completion of tasks and overall progress. Additionally, the system allows for the configuration of partner profiles, assignment of training materials, and updates on program status through automated notifications, all aimed at enhancing the engagement and efficiency of partner management within the platform.⁹⁶
- *Partner Contracts Management* module automates the managing of partner contracts across different regions and partners. It allows for digital contract management, integrating eSign technologies to facilitate the process. Automated alerts notify partners of new contracts and manage the lifecycle of each contract including expiration and compliance reporting. Moreover, the module includes management features for overseeing contract signees and group associations, enabling efficient handling of contracts within a multi-level channel partner ecosystem.⁹⁷
- *Partner Business Planning* module is designed to automate and support the creation and approval of business plans within a multi-level channel partner ecosystem. This module enables the setup, submission, and approval of business plans through an online form system, complete with system alerts to notify partners of new template availability. It facilitates the integration of marketing plans into business plans and manages their progress through an automated multi-level approval process. The module offers comprehensive reporting features that provide insights into the marketing activities and overall business planning efforts of channel partners.

⁹⁵ ZINFI (2024). All Products. URL <https://www.zinfi.com/products/#allproducts2> (Accessed on April 3rd, 2024).

⁹⁶ ZINFI (2024). Partner Onboarding Management. URL: <https://www.zinfi.com/products/partner-relationship-management/partner-onboarding-management/> (Accessed on April 3rd, 2024).

⁹⁷ ZINFI (2024). Portal Contracts Management. URL: <https://www.zinfi.com/products/partner-relationship-management/partner-contracts-management/> (Accessed on April 3rd, 2024).

To support their customers in enabling their partners, ZINFI *Enablement* module offers three features: *Content Library Management*, *Partner Learning Management*, and *Co-branded Assets Management*.⁹⁸

- *Content Library Management* supports companies in enabling their partners through resource management and process automation. The content is shareable across multiple channels and can be customized based on parameters such as country and language, supporting targeted marketing efforts. Partner's sales processes are aligned with the buyer's journey, by providing sales teams with relevant content at the appropriate stage in the sales funnel. This functionality is complemented by Business Intelligence reports, that provide insights into sales interactions, further aiding in the optimization of content strategy. Deep links facilitate the sharing and tracking of content by generating direct access links for documents and categories. These links can be used in marketing campaigns and are accessible to non-ZINFI users as well, expanding the reach and usability of content outside the immediate partner network.⁹⁹
- *Partner Learning Management Plus (LMS+)* contains the functions *Certifications Management*, *Courses and Materials Management*, and *Assessments Management*. It allows companies to set up certification programs integrating compliant e-learning standards, to ensure that training is accessible and relevant to various channel sales, marketing, and technical teams globally. The *Courses and Materials Management* function enables organizations to organize and manage educational content, which simplifies the learning process for partners and ensures they meet their training objectives. The *Assessment Management* feature allows companies to evaluate their partners proficiency and progress according to customized assessments. Companies can track individual progress and recognize partners who might need further support.¹⁰⁰
- *Co-branded Asset Management* facilitates the organization and distribution of digital marketing assets across a global partner network. It allows administrators to upload and manage various assets, configure co-brandable zones, and set asset validity periods. The system supports multilingual content, enabling localized management and

⁹⁸ ZINFI (2024). All Products.

⁹⁹ ZINFI (2024). Library Management. URL: <https://www.zinfi.com/products/partner-portal-management/library-management/> (Accessed on April 3rd, 2024).

¹⁰⁰ <https://www.zinfi.com/products/partner-relationship-management/partner-learning-management/> (Accessed on April 3rd, 2024).

customization of assets to meet regional needs. Additionally, the application incorporates advanced metadata management and a multi-level approval process for asset updates, ensuring controlled access and compliance with brand standards.¹⁰¹

In their *Marketing* module, ZINFI helps companies to support their partners in organizing and performing marketing campaigns on different channels. The module encompasses three features: Co-brandable e-mail creation, multi-touch campaign creation, and social media content distribution.¹⁰² As in the other ZINFI functions, partners can access a content library, which allows them to create customized content, tailored to the brand design and content guidelines. Manufacturers can review the performance of their partners marketing campaigns.¹⁰³

The ZINFI *Sales* module consists of three sub-modules: *Leads*, *Deals*, and *Configure Price Quote (CPQ) Management*.

- *Partner Leads Management* distributes leads across the partner network. All leads are collected within the “shark tank”, before they are assigned to suitable partners or groups based on predefined criteria. Integration with CRM platforms allows for synchronization of data, ensuring all lead information is up-to-date and consistent across systems. Key functionalities of this module include the setup of specific follow-up times for leads, or automated system notifications to remind partners of pending tasks, thereby optimizing lead engagement. Different access levels for leads based on partner level or administrative rights enhance data security. The feature includes tools for global lead scoring, which helps prioritize leads based on their potential value, and dynamic reporting, that offer insights into the effectiveness of lead management processes at every stage of the sales funnel. Automated review and approval mechanisms for opportunities and deals help companies to track and support their partners in maintaining high standards of quality and consistency in sales practices.¹⁰⁴
- *Deal Registration Management* centralizes deal registrations and referrals. The system allows companies to manage deal-related data, e. g. contacts, records, and deals, in

¹⁰¹ <https://www.zinfi.com/products/partner-portal-management/co-branded-assets-management/> (Accessed on April 3rd, 2024).

¹⁰² ZINFI (2024). All Products.

¹⁰³ Ibid.

¹⁰⁴ ZINFI (2024). Partner Lead Management. URL: <https://www.zinfi.com/products/partner-relationship-management/partner-lead-management/> (Accessed on April 3rd, 2024).

one view. It includes functionalities such as customizable deal registration criteria and workflows, depending on the needs of the business. The module integrates with CRM systems via specialized connectors that ensure real-time synchronization and updates, enhancing the flow of information between the PRM system and the partners' CRM. A reporting feature provides insights into the sales pipeline.¹⁰⁵

- *Configure Price Quote (CPQ) Management* automates and streamlines pricing and quoting processes for channel sales. Organizations can set and adjust discounts dynamically, based on real-time changes in market conditions. The CPQ system enables detailed tracking and management of quotes sent out by channel partners, offering insights into the sales efficiency, and improving forecast accuracy. It supports multilingual and localized setups, making it effective for managing international sales operations. The system includes tools for generating and managing purchase orders and invoices, integrating financial processes into a single platform that enhances transactional accuracy and reduces the potential for errors.¹⁰⁶

The ZINFI functionalities presented illustrate how the PRM solution supports companies in working with their partner, from initial recruitment and onboarding, through supporting them in marketing and sales activities. It provides valuable insights into the use of a PRM system, the functionalities involved and the way both companies and partners can benefit from it.

Pricing

ZINFI does not indicate pricing on their website, which according to Online Marketing Rockstars (OMR) is a usual practice for software companies.¹⁰⁷ To obtain information about the pricing, interested users are asked to request a quotation. ZINFI offers both the options for starting with a sales call or receiving a personalized demonstration.

3.3 Impartner

The third tool assessed in this market research is Impartner. Founded in 1997, the company was former known as TreeHouse Interactive until their relaunch in 2015.¹⁰⁸ Impartner only

¹⁰⁵ ZINFI (2024). Deal Registration. URL: <https://www.zinfi.com/products/partner-relationship-management/deal-registration/> (Accessed on April 3rd, 2024).

¹⁰⁶ ZINFI (2024). Configure, Price, Quote. URL: <https://www.zinfi.com/products/partner-relationship-management/configure-price-quote/> (Accessed on April 3rd, 2024).

¹⁰⁷ Online Marketing Rockstars (2024). ZINFI. URL: <https://omr.com/de/reviews/product/zinfi/pricing> (Accessed on April 2nd, 2024).

¹⁰⁸ Baldino, G. (2015). TreeHouse Relaunches as Impartner PRM. URL: <https://channelvisionmag.com/treehouse-relaunches-as-impartner-prm/> (Accessed on April 2nd, 2024).

presents little company information on their website. Their headquarters is in Utah, United States and Impartner has two other sites in Paris and London.¹⁰⁹ Estimated on base of their LinkedIn profile, the company has between 200 and 500 employees.¹¹⁰

Structure

The Impartner platform covers the entire process from partner recruitment to continuous support and monitoring of the partner activities. The following image represents the portfolio alongside the partner journey.

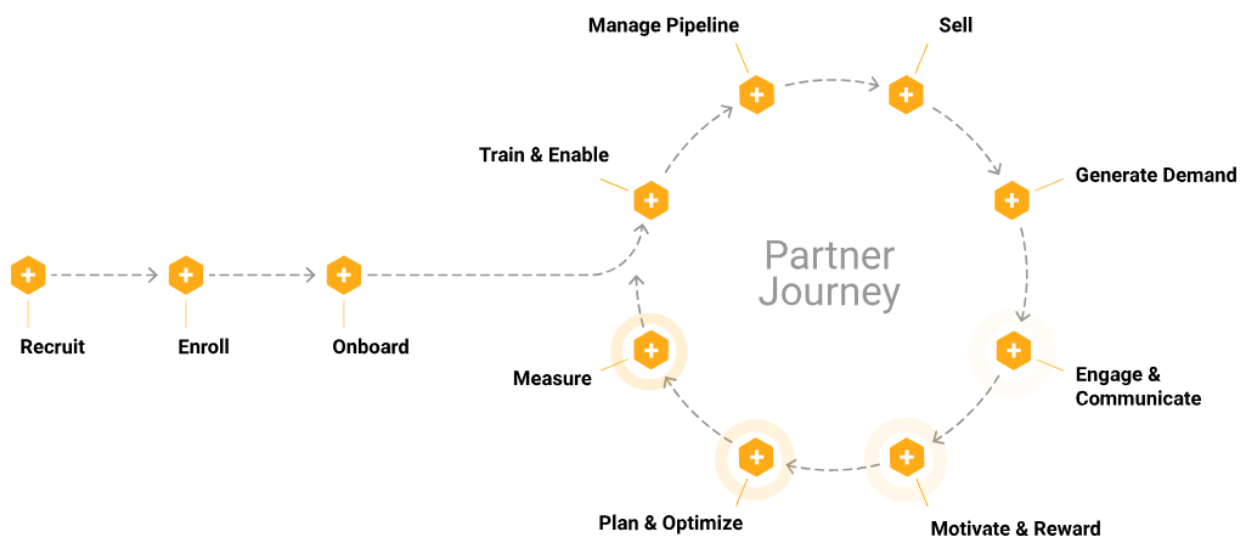


Figure 11. Impartner Partner Journey. Screenshot, April 3rd, 2024.

By covering the entire partner journey, Impartner chooses a holistic PRM approach to. What is remarkable in the analysis of features presented above, is the high degree of individualization inherent to the single steps of the partner journey. To gain a better understanding of how Impartner is working, in the following, the modules *Train and Enable*, *Manage Pipeline*, and *Measure* are presented in more detail as an example:

- *Train and Enable* module aims to assure partners' sales enablement through customized training. Companies create individual training programs, which are individually assigned to partners. Companies can adapt partner's PRM access based on their individual training progress. Using on-demand certification programs helps

¹⁰⁹ Impartner (2024). Contact. URL:<https://impartner.com/contact/> (Accessed on April 2nd, 2024).

¹¹⁰ <https://www.linkedin.com/company/impartnersoftware/about/> (Accessed on April 3rd, 2024).

qualifying partners to develop sales and service skills and maintain the standards on the desired level. Training and certification goals serve as an incentivization for partners and provide an overview about partners' enablement progress. Impartner reports, that partner training and enablement drives up to 48 % increase in sales.¹¹¹

- *Manage Pipeline* module encompasses lead management. All partner leads are streamlined on a central platform, allowing vendors to distribute them among the partner networks. Leads are assigned to partners based on criteria, such as time to closure, certifications, or verticals delivered.¹¹² The platform enhances partner collaboration, e. g. when one partner is responsible for sales, and another one for after-sales service. The module integrates with Salesforce, as the aim is to provide a singular system of record for all lead data. With the overview of partner leads, vendors access relevant business data for optimized forecasting. Numbers can be broken down to stages or partners to identifying possible hurdles and managing them.¹¹³
- *Measure* is a reporting and analytics tool. It allows users to create individual dashboards for partners, providing account overviews, average deal sizes, registration rates or velocities as well as the overall program and partner-specific ROI. Business Intelligence is used for preparing statistics. The module can be integrated in other business applications, such as CRM, LMS, or ERP, being able to share the data within the organization.¹¹⁴

Pricing

As the other two PRM investigated in this market research, Impartner follows a SaaS business model. They offer four different pricing packages for their PRM solution, ranging from *Emerge* to *Enterprise*. The packages include various solutions. For example, *Emerge* does not include the Journey Builder, and the Business Planning module is only available for the two most extensive packages.¹¹⁵ The prices are not indicated on the website, but must be requested via form. Impartner also offers a ROI calculator, that should help companies calculate their potential ROI using the PRM solution.

¹¹¹ Impartner (2024). Partner Training and Certification. URL <https://impartner.com/partner-training-and-certification/> (Accessed on April 3rd, 2024).

¹¹² Impartner (2024). Lead Management. URL: <https://impartner.com/lead-management/> (Accessed on April 3rd, 2024).

¹¹³ Ibid.

¹¹⁴ Ibid.

¹¹⁵ <https://impartner.com/request-prm-pricing/> (Accessed on April 3rd, 2024).

3.4 Success Stories

This chapter provides insight into the real-world usage of PRM. Therefore, several success stories of companies using PRM solutions are presented hereinafter. The examples are retrieved from the ZINFI and Impartner websites. Salesforce does not provide distinct PRM success stories. The success stories explain why and how companies use PRM. It must be noted that the majority of success stories represents companies from the IT, software, or BFSI sector. Even if this selection is not statistically representative, it indicates that PRM solutions are more often used in those industries, than e. g. in automotive or SME.

Example 1 – Lead Generation (ZINFI)

The first example represents an UK based telecommunication company, that is acting as a reseller for a global IT solution provider. The company faced the challenge of handling the entire sales and marketing with only a small team.¹¹⁶ Using ZINFI, their objective was to generate leads through e-mail campaigns directed at the education sector and converting them into sales. After the onboarding and training phasis, the reseller used the content provided on the platform and the automated campaign functions of the software to send a co-branded lead campaign to selected contacts, segmented by distinct data characteristics. The results were 2,500 e-mails sent within four weeks of campaign duration, with satisfying opening, and click-through rates, and qualified appointments which led to a number of actual sales.¹¹⁷

Example 2 – Marketing (ZINFI)

The second example represents an US manufacturer of cellular polyvinyl chloride (PVC) building products, selling through an “extensive” dealer network.¹¹⁸ The sales team has over 40 people working with dealers and direct customers. The manufacturer was dissatisfied with the channel marketing performance. Partners reported limited marketing resources, and they lacked both expertise and time to setup effective campaigns. The manufacturer introduced the PRM solution with the objective of strengthening the brand awareness. The company prepared content and made it accessible to targeted dealers on ZINFI. Using the platforms’ functions, they created customized e-mail campaigns addressed to both dealers and customers. Besides the marketing activities, the manufacturer also started to streamline and assign leads on the platform. In addition, they launched training on products and sales strategy. The combination

¹¹⁶ ZINFI (2024). Success Story. URL: <https://www.zinfi.com/documents/Spotlight-on-Partner-Success-Story-Global4.pdf> (Accessed on April 3rd, 2024).

¹¹⁷ Ibid.

¹¹⁸ ZINFI (2024). VERSATEX Success Story. URL <https://www.zinfi.com/documents/success-stories/VERSATEX-Success-Story.pdf> (Accessed on April 3rd, 2024).

of marketing support, central lead management, and dedicated training increased partner activities. The manufacturer reported more transparent sales processes, increased effectivity of salespeople and sales strategies, and an “immediate” ROI.¹¹⁹

Example 3 – Onboarding (Impartner)

This success story presents a Dutch SaaS cloud banking platform provider. The company has over 900 employees and is spread over 65 countries, serving customers like banks, fintech, telecommunication providers and more. Across all regions, the company lacked standardized onboarding processes. They had no structured enablement or marketing processes and were not able to monitor partner performance. Partner Management was “[...] largely manual and lacked measurable metrics. Partner enablement was sporadic, and assets were often sent via email rather than a centralized platform.”¹²⁰ Impartner accompanied the implementation progress and offered a comprehensive PRM solution, consisting of features like an automated Journey Builder, personalized Content Management, dynamic forms and workflows, and a Learning Management System. The PRM was integrated and combined with other applications, such as a CRM and a contracting tool. The company doubled the number of deals registered by partners (+ 105 %) and reported a 154 % increase in partner portal logins.¹²¹

This study aims to provide a practical reference for PRM solutions. The examples presented show how companies are using PRM. These examples focus primarily on marketing support and lead generation. Other examples are not shown due to space limitations. From a scientific perspective, it would be beneficial to examine how companies utilize AI-PRM (Salesforce). Regrettably, Salesforce does not provide any illustrative examples of PRM usage at the time of this master’s thesis. Subsequent research should address this gap by investigating companies that have implemented AI-PRM.

3.5 Conclusion

The analysis of three exemplary PRM solutions, which are currently available on the market, provides insight into the real-world use of PRM solutions. Their commonalities, and differences will be analyzed in the present chapter, including potential advantages and disadvantages. The chapter ends with a summary of the PRM market research.

¹¹⁹ Ibid.

¹²⁰ Impartner (2024). Impartner Mambu – Case Study. URL: <https://impartner.com/resources/case-studies/impartner-mambu> (Accessed on April 3rd, 2024).

¹²¹ Ibid.

The first solution presented in this chapter, Salesforce PRM, has a high international recognition due to the widely spread use of their CRM solution. Salesforce PRM chooses a modular approach with a customizable design. Instead of selling pre-defined PRM products, Salesforce offers singular PRM modules and functionalities. The modular design helps adapting the PRM solution to individual requirements. Salesforce uses AI and algorithm-based automation technology to increase the efficiency of standardized business processes and offer predictive statistics for their users. Another advantage of Salesforce is its openness towards third-party integrations. *Salesforce AppExchange* allows the integration of third-party apps, amongst them potential competitors, such as ZINFI. Therefore, Salesforce extends existing corporate software ecosystems without replacing them. The modular design, the use of latest technology, and the high degree of integrability are Salesforce advantages, making PRM available for companies from different industries, different sized partner networks, and different level of digitization. On the contrary, the missing standardization makes it hard for companies to get an overview of the full range of functionalities. Salesforce implementation projects require a lot of attention and resources to ensure the right combination of modules and functionalities. Choosing the wrong combination of modules could lead to a misfit of software and objectives, resulting into decreased return on invest (ROI) and users neglecting the system. Moreover, the integration of third-party systems requires comprehensive technological know-how, not only related to Salesforce technology, but also to other systems. Companies willing to implement must ensure to plan their resources accordingly.

The second tool introduced is ZINFI. ZINFI consists of six core modules, including onboarding, enablement, marketing, sales, incentives, and growth acceleration. They specialize in providing "hyper-personalized" partner workflows. ZINFI modules are individually configurable, and the software is open for third-party integrations. The advantage of ZINFI is its clear feature structure, which gives the end customer an overview of the available solutions. The modules are clearly described, making it to identify the project scope. However, hyper-personalization brings both benefits and risks to PRM users. It offers the possibility to respond precisely to the needs and requirements of individual partners. At the same time, hyper-personalization could lead to a lack of comparability between partners, making it difficult for users to get an overview of individual performances. In addition, creating individual workflows for each partner can reduce the efficiency of PRM. Hyper-personalization is useful for groups of partners with similar needs.

The third PRM solution presented in this chapter is Impartner. Impartner’s solution portfolio covers the entire partner journey, from the recruitment phase to continuous monitoring and optimization. This holistic approach is a key advantage of the system. It allows optimization potential to be tapped at every stage of the partner process. Like the other two solutions, Impartner focuses on personalization and customization, especially with regard to training content in its Learning Management System (LMS).

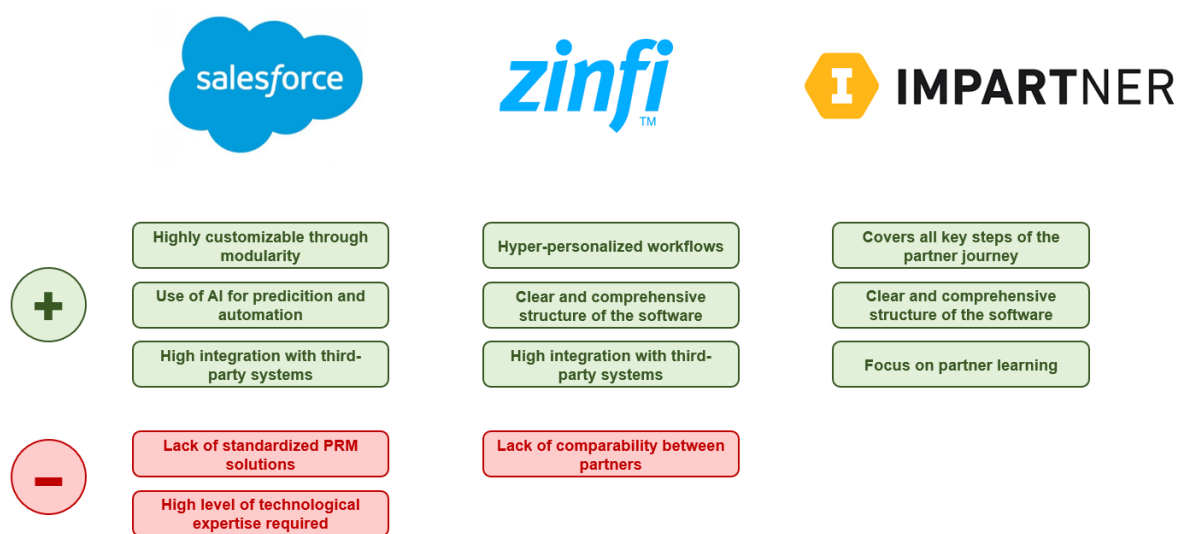


Figure 12. Salesforce, ZINFI, Impartner. Advantages and Disadvantages. Comparison. Author's Illustration.

The three PRM solutions assessed in this market research have similar core functionalities. They aim to cover the whole partner process, beginning with the onboarding (or even recruitment) phase. Sales enablement through learning modules is a standard component of each PRM. Moreover, content libraries containing co-branded marketing material is used to facilitate the partners’ marketing efforts and maintain a unified brand standard. Another central aspect of PRM solutions is central lead management. By integrating the PRM software with CRM software, all partner leads are collected and visualized on a shared platform. Companies can distribute and assign leads to their partners and have full overview. Issues can be identified and controlled, e. g. through the dynamic adaption of discounts.

The modularity of PRM systems underlines the importance of assessing the individual requirements before implementing a solution. At the same time, the modular composition of PRM tools makes it difficult to calculate the project budget or the ROI before assessing the requirements the PRM tool must meet. Third-party integrations are always an addition to PRM.

PRM often goes hand in hand with CRM, and can be integrated with marketing automation tools, contracting tools, or ERP systems. Interfaces and integrations therefore must be considered within the implementation process right from the beginning. Companies willing to implement PRM must have a business software architecture plan to ensure all integrations are considered.

The following table compares the functionalities of Impartner, ZINFI, and Salesforce based on the Impartner Partner Journey presented in Chapter 3.3 *Impartner*. This structure covers all important dimensions of PRM. It is evident that the systems have a high degree of overlap in the main areas, such as the automation of sales and marketing. In this comparison, Salesforce offers the fewest solutions. This may be due to several factors. It is possible that Salesforce does simply not provide solutions for these areas, or that the solutions are integrated with third-party providers and therefore not included in the Salesforce portfolio.

Phase	Impartner		ZINFI		Salesforce	
	Feature Description	Objective	Feature Description	Objective	Feature Description	Objective
Recruiting	Addresses potential partners using web pages and e-mail campaigns	Automated support for companies in recruiting partners				
Enrollment	Automated application and approval process for partners	Facilitating selection and approval of partners, providing easy application structures for candidates				
Onboarding	Automated, consistent, and repeatable onboarding process		Includes partner recruitment, onboarding and program management automation, automated contract management and planning tools	Integration of new partners in the firm's ecosystem, increased efficiency through automation, leveraging partner engagement by contract management, data-driven adaptation	Automated onboarding process and partner training	Shorten the onboarding process and reduce onboarding costs

				of business strategies		
Training & Enablement	Personalized and customized training content for individual partners, certifications	Enabling partners to perform, focusing on individual needs to get the best results from each partner	Sales and marketing library, e-learning system	Partner training, elevation of partner's sales and marketing capabilities, skills, and knowledge		
Pipeline Management	Deal registration, synchronization with CRM	Transparency, resolving channel conflict	Automated lead distribution, deal management tools, CPQ (configure, price, quote) functionality	Supporting partner's sales processes, streamlining price and quote processes	Collaborative management of leads and orders, automation of sales processes (quotation, order registration, order processing, invoicing)	Facilitate lead distribution and support partners in standardized order processes, increasing their velocity and accuracy
Selling	Content library for sales and marketing material	Enabling co-brand or white labeling, providing sales teams with unified tools	E-mail marketing management, content distribution, campaign and event management	Support partner's marketing efforts through co-branding and co-creation		
Demand Generation	Generating lead campaigns using "through channel marketing automation" (TCMA)	Support partners in generating leads and optimize ROI			Sharing predefined customer journeys, marketing material, and co-branding items with partners	Support partners in lead generation across different marketing channels
Engagement & Communication	Providing customized company news and social media content	Enhance communication with partners and keep them up to date	Community module for exchange of ideas and communication between partners, marketplace management, mobile apps	Fostering exchange of ideas between the partners, providing fast and easy access to marketplace modules	Supply of product information, Q&A and live experts across all partner channels	Support partners in answering questions across different devices and channels
Motivation & Rewarding	Presentation of benefits and rewards, visualization of progress of rewards	Motivating partners through incentives and gamification	Automated commission calculations and market development funds allocation, management of rebates	Foster channel performance		

Planning & Optimization	Creating business plans, setting goals and objectives, tracking progress	Motivating partners by setting clear goals, transparency of business revenues and performance			Real-time tracking of channel partner ROI and performance	Increase ROI through transparent access to partner channels
Measurement	Analysis and reporting tool, capable of delivering customized reports	Helps identifying areas for improvements				

Table 3. Comparison of PRM Functionalities.

4. Case Study: Kässbohrer Geländefahrzeug AG

To understand how B2B companies and their dealers collaborate, and how a PRM solution could support them in enhancing their partnership performance, this chapter investigates the experiences and perspectives of different stakeholders from a German manufacturing B2B-company. The case study uses expert interviews to shed light on the processes occurring between vendors and dealers, as well as potential challenges. Moreover, relevant topics for the implementation framework are identified in this chapter. This chapter therefore functions as the linking element between the results from literature and the knowledge about PRM functions, which is obtained in the previous chapters, and the development of the implementation framework to be done in the following chapter. It is the first step of transferring the findings from theory into the real business world.

Kässbohrer Geländefahrzeug AG (KGF) is a manufacturer of off-road vehicles. Founded in 1969, the company has its headquarters in Laupheim (Germany) and five subsidiaries in the United States, Austria, France, Italy, Austria, and Switzerland, as well as several service outlets in Europe and in the United States. In 2024, over 800 employees work for the company. The annual turnover is at approx. 350 million Euro. The product portfolio of KGF is divided into three divisions. Their main business is the sales of snow grooming vehicles under the *PistenBully* brand. Selling snow groomers started in 1969 and, by 2024, *PistenBully* has established itself as global market leader (market share > 65 %). The *PistenBully* division is completed by software solutions (*SNOWsat*) and training courses for ski resorts (*PRO ACADEMY*). The second division is the sale of beach cleaning machines under the *BeachTech* brand. Since its start in 1991, *BeachTech* has become the global industry leader (market share

> 30 %). The third and newest division of KGF is the *PowerBully* brand. Being part of the company since 2014, *PowerBully* are tracked carrier vehicles sold in the North American Utility industry. In 2022, *PowerBully* launched a new generation of vehicles determined for the construction industry. Across all three divisions, Kässbohrer Geländefahrzeug AG has an export share of 98 %. Besides their subsidiaries, the company works with over 110 dealers and service partners in over 60 countries worldwide. The following diagram illustrates the distribution structure of Kässbohrer Geländefahrzeug AG.

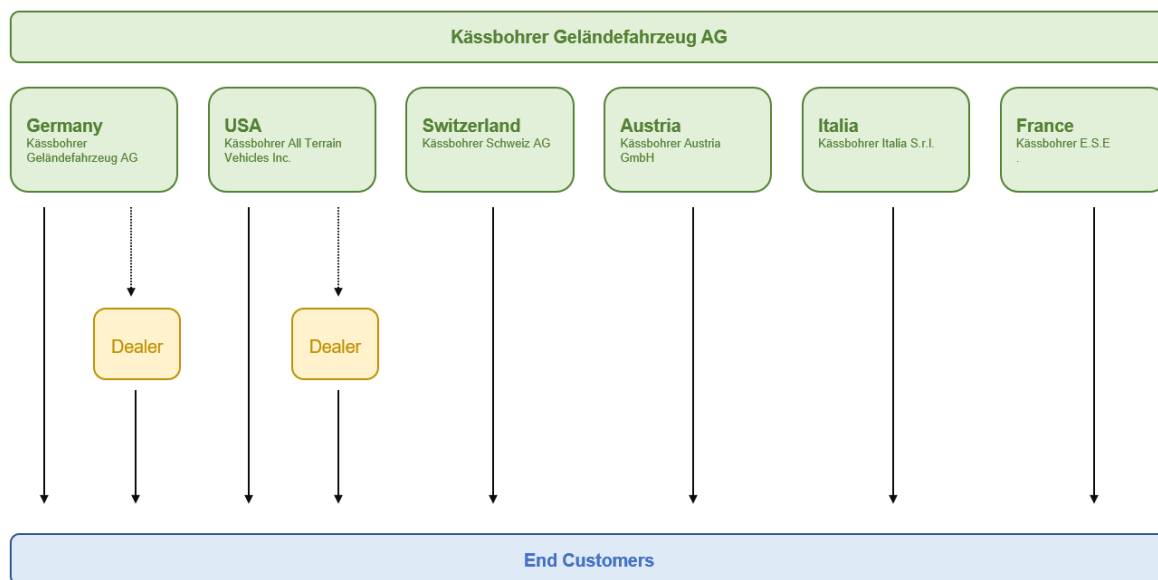


Figure 13. Distribution Strategy of Kässbohrer Geländefahrzeug AG. Authors Illustration.

The illustration shows that the company directly sells in Germany, and in the markets of their subsidiaries. In the United States, additionally, dealers are used to support the proprietary sales team. The three brands *PistenBully*, *BeachTech* and *PowerBully* are largely distributed by different dealers. While there are numerous dealers who only sell *PistenBully*, *BeachTech* and *PowerBully* are complementary to other products. In addition, the *PistenBully* dealer network has been existing for over 50 years and the *BeachTech* dealer network for 30 years, while the *PowerBully* dealer network is currently being established, therefore, the entire dealer network is expected to grow over the next years.

Due to the high export share of 98 % and the extensive collaboration with dealers, the importance of PRM for KGF's business success is evident. However, the company differs not

only in its industry affiliation and size, but also in terms of the number of partners and the high complexity of the products from previous PRM examples. Literature review and market research, show that PRM functions are often utilized by companies in the BFSI, telecommunications, or IT sectors. There are also some examples from the automotive industry. KGF sells 800 vehicles per year, which is significantly lower than the quantities in the automotive industry or the number of contracts closed in the BFSI and IT sectors. The number of dealers is also significantly lower than in the examples. Therefore, the goal of this case study is to determine the requirements for PRM systems from the perspective of a medium-sized manufacturer and to assess to what extent these are covered by the previously identified characteristics and functions of PRM systems.

Currently, KGF uses a CRM system (SAP C/4) to manage customer and dealer data. Additionally, a *Sales Portal*, based on Microsoft Sharepoint, is being developed to provide documents and information to dealers and the internal sales team. Moreover, dealers have access to other software solutions, such as the training platform "PRO ACADEMY" and the SNOWsat ticketing system, through which software errors can be reported. The expert interviews aim to shed light on current challenges, such as general collaboration with dealers and the use of systems.

4.1. Methodology

To explain the methodological approach of the case study, this chapter provides the theoretical background for the following steps: Operationalization, development of the interview questions, selection of the interviewees, and data analysis.

Expert interviews are a qualitative research method used to obtain specific knowledge and experiences from experts in a particular field. The objective of expert interviews is to collect detailed information on a certain topic, that goes beyond superficial data. In the early phase of research, expert interviews help generate hypotheses. In later phases, they are used to validate research findings. Talking to experts has numerous advantages in qualitative studies. Expert interviews are dynamic, and each interview follows an individual process. Nevertheless, there are effects within the interaction, which occur more frequently. Kaiser (2021), pertaining to Vogel (1995), presents four common interaction effects for expert interviews, presented in the following table:

Interaction effect	Description
Iceberg effect	A situation of mistrust, which originates in the lack of perceived knowledge of the interviewer. If the interviewer does not appear as an informed co-expert, respondents withhold information.
Paternalism effect	Often arises in expert interviews, that are characterized by different level of status, or the perception of unpreparedness of the interviewer. This situation is dominated by the expert educating the interviewers.
Back coupling effect	Roles are switched within the interview situation: The interviewee asks questions to the interviewer. Queries for understanding are usual and should be answered by the interviewer, but if the conversational constellation turns around, the interviewer must counter steer.
Catharsis effect	Overt self-staging of the interviewee, including statements of personal, or organizational problems with no relation to the research topic.

Table 4. Interaction Effects of Expert Interviews after Kaiser (2021).

The presented effects are threats to the interview's success and can be avoided by profound preparation and deep-reaching research prior to the interview. If one of the effects occurs during the interview situation, the interviewer uses the interview guide to redirect the conversation.¹²²

Quality criteria

Like quantitative research, qualitative research must meet specific criteria to ensure scientific quality. In scientific research, internal and external validity, reliability, and objectivity are the most common quality criteria.

¹²² Kaiser, R. (2021).

- Internal validity describes the extent to which a study establishes a causal relationship between the variables being investigated. It addresses the question of whether the observed effects are genuinely due to the manipulation of the independent variable and not due to other confounding factors.
- External validity refers to the extent to which the results of a study can be generalized to other settings, populations, times, and measures. It determines the applicability of the study's findings outside the specific context in which the study was conducted. There are three forms of external validity: Population validity (the extent to which the findings can be generalized to the broader population), ecological validity (the extent to which the findings can be generalized to different settings and environments), and temporal validity (the extent to which the findings can be generalized over time).
- Reliability refers to the consistency and stability of the measurements obtained in a study. A reliable measure produces similar results under consistent conditions. There are different types of reliability: Test-Retest reliability describes the consistency of a measure over time., inter-rater reliability describes the extent to which different raters or observers give consistent estimates of the same phenomenon, and internal consistency is the degree to which items within a test or instrument measure the same construct.
- Objectivity describes the extent to which the research findings are free from the influence of the researcher's personal biases, emotions, or subjective interpretations. It is crucial for ensuring the credibility and independency of the research. Objectivity can be reached by using standardized procedures for data collection and analysis to reduce bias and using reliable instruments for measurement.

In addition, there are other quality criteria in qualitative research, such as credibility. Credibility is established by using multiple data sources or methods to check the consistency of the results. For example, by combining, different interview partners, document analysis and observations.¹²³ Another quality criterion of qualitative research is the transferability of the results. Transferability is achieved, for example, by providing contextual information about the study. This information enables other researchers to apply the findings to similar contexts. Documenting the entire research process, including data collection, analysis, and interpretation, also ensures that decisions are traceable and therefore dependable (Criterion

¹²³ Flick, U. (2018).

of dependability).¹²⁴ Researchers must ensure that the quality criteria are met. The interviews to be conducted in this study will be developed based on the quality criteria presented.

4.1.1 Methodological Considerations on Operationalization

Kaiser (2021) describes the process of operationalization as “[...] the transmission of research question into cultural context of the respondent.”¹²⁵ Operationalization is a multilevel process, in which the research question is systematically narrowed down into smaller fragments. Kaiser (2021) suggests a four-step process, that combines conceptual (substantiating the research question) and instrumental (developing interview questions) processes.

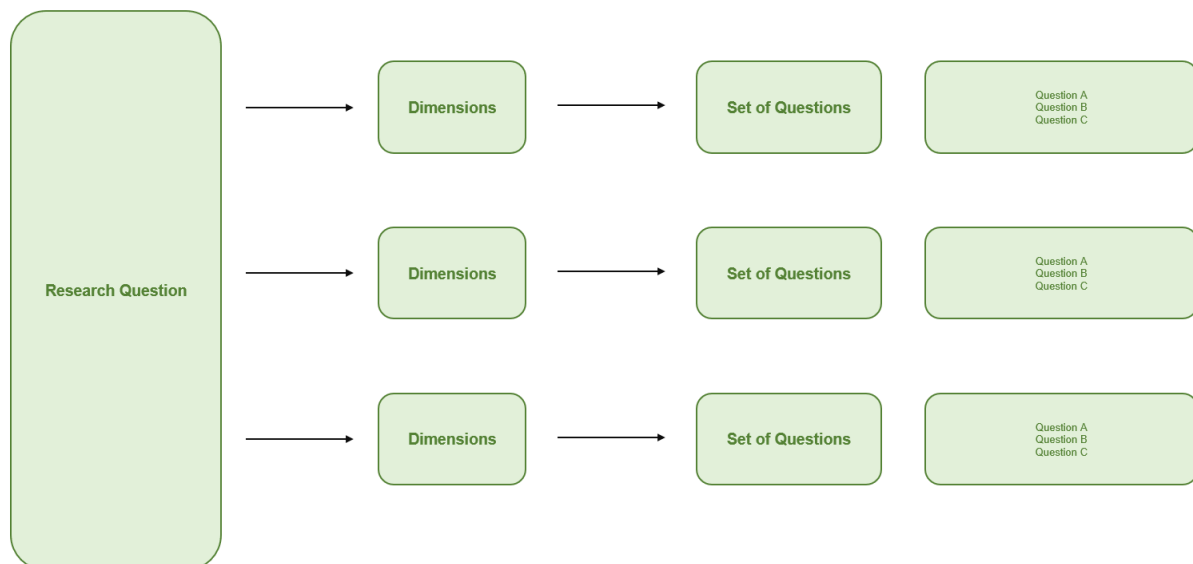


Figure 14. Schematic Illustration of the Operationalization Process. Author's Illustration.

In the first step, the research question is divided into sub-dimensions, the characterize the phenomenon. Each dimension contains various sets of questions, that explore the dimension. Each set of questions, contains several questions, namely, the interview questions.

4.1.2 Methodological Considerations on the Development of the Interview Guideline

The interview guide plays an important role for the performance of expert interviews. It translates the overall research questions and the information gathered in literature review into specific interview questions. The interview guide sets the structure for the expert interview.

¹²⁴ Lincoln, Y. S., & Guba, E. G. (1985). *Naturalistic Inquiry*. California: Sage Publications.

¹²⁵ *Ibid.*

The number of questions involved determines the length of the interview. There is no standardized approach for finding the appropriate number of questions, as this decision is influenced by the research topic, the research goal, and the pre-existing information.¹²⁶ It should be long enough to cover all the important topics but short enough to keep the interview focused and manageable for both the interviewer, and the interviewee.¹²⁷ Scholars must seek to keep the logic of argumentation comprehensible for their interviewees. This can be reached in different ways. The order of interview questions follows their expected relevance for answering the research questions. Another approach is the thematic order based on the contextual structure derived from literature review. A common method is to sort the interview questions from more general questions towards specific questions. There are expert interviews that involve various dimensions of a research topic. In some cases, researchers use more than one interview guideline. This approach helps them to keep focus on receiving the required information from the right persons, instead of putting everything into one guideline, which could lead to chaos, and confusion.¹²⁸

Specific interview questions are formulated based on the thematic set of questions. Kaiser (2021) distinguishes different types of questions with individual functions during the interview.

- Introductory questions briefly introduce the topic and ask interviewees for their individual perspectives on certain issues. They are given the opportunity to explain their expertise or previous involvement with the topic.
- Direct questions ask for concrete information or knowledge
- Indirect questions, which ask for opinions or personal assessments.

In addition, there are structural, interpretive, and specific questions designed to elicit specific answers or to steer the conversation in a desired direction. The final interview guide should include a mix of question types, while remaining flexible to accommodate changes in the interview situation.¹²⁹

¹²⁶ Ibid.

¹²⁷ Ibid.

¹²⁸ Ibid.

¹²⁹ Kaiser, R. (2021).

4.1.3 Methodological Considerations on the Selection of Interviewees

Due to their specialized knowledge and experiences acquired within years of research or practice in a distinct field, the information delivered in expert interviews is not available in literature. The selection of the interview partners in expert interviews has a significant influence on the outcome and must be carefully considered. There are various selection criteria, for example:

- Specialization in the subject area
- Experience in the field of research
- Availability and willingness to participate
- Communication skills

The final point, communication skills, is crucial because expert knowledge is only valuable to a research project if the expert can convey information in an effective manner.¹³⁰

4.1.4 Methodological Considerations on Data analysis

Kaiser (2021) proposes a multi-step thematic content analysis for the analysis of qualitative expert interviews, which serves as a guide for the data analysis.¹³¹ The first version of the transcript contains the raw version of the data (Transcript 1). In this version, the conversation is recorded and transcribed 1:1. This includes filler words, pauses in the conversation or small talk, that has nothing to do with the actual interview. In the first step, the "summary" (Kaiser, 2021), this protocol is reduced to content that is relevant to answering the research and interview questions. The summary also represents the first coding step, in which the data is divided, i. e. coded, into relevant and irrelevant information. The edited content undergoes an explication process to ensure the comprehensibility of the data. This includes, for example, adjusting the grammar and vocabulary used, as well as explaining terms or facts that did not appear in the preparation of the interview.¹³²

The transcript now created (Transcript 2) is used for further processing of the data. However, it is important to save Transcript 1 along with the raw data and any audio recordings of the interview. Important information that is only expressed in the subtext, for example, may be lost when the transcript is cleaned up. Feelings expressed through voice pitch, tone of voice, or

¹³⁰ Kaiser, R. (2021).

¹³¹ Kaiser, R. (2021).

¹³² Ibid.

comments are often not included in the second version of the transcript. However, they may be needed later in the evaluation process, so it is useful to save them. In the case of the present study, no audio recordings were made. The raw data is available on request. Transcript 2 data is available in the attachment.

Coding

The next step of the thematic content analysis is coding. The transcripts are transferred into a structured form. The respondent's answers are mapped to each question in a spreadsheet. As this is a semi-structured interview, questions may be added or omitted (e.g., if the required information has already been provided in a previous question). Added questions are noted in the table and coded specifically as they relate to individual interviews. In the first step, the content is coded deductively. This means that they are assigned to the categories that were formed based on the operationalization. Since the dimensions (D) are too abstract, the set of questions (SOQ) are used for deductive coding.¹³³ The table used in this step has the following structure:

Question	Answer	Respondent	SOQ 1	SOQ 2	SO3

Table 5. Structure of Table for Analysis.

Typically, deductive coding is not sufficient to comprehensively structure the content from expert interviews. Due to the open conversation situation and the possibility of deviating from the interview guide, new categories emerge from the responses, which can then be used for clustering. This is referred to as inductive coding. The new categories are added to the table after the complete deductive assignment. It is important to consider the granularity of the categories. Not every piece of information is suited for introducing a new category. In general, topics become new categories when they are mentioned by multiple interviewees or if they relate to answering the research question in a broader sense.

By merging and structuring the responses, the spectrum of different perspectives on identical questions becomes apparent. Additionally, agreements and discrepancies within the categories (SOQ) become evident. Identifying these agreements and discrepancies is crucial for the later interpretation. It enables the generation of categorical core statements and highlights aspects that need to be addressed through follow-up questions with the interviewees

¹³³ Ibid.

or through extended or renewed literature research. Core statements, for instance, formed based on consistent responses, may also need to be enriched with additional information. Kaiser (2021) refers to this as the "expansion of the data basis."

The enriched and expanded data are now used for theory-driven analysis and interpretation. They are placed in the research context, meaning they are examined concerning the research question and existing knowledge. This disciplinary reference is a central part of the operationalization and ensures that the data analysis maintains its relevance to the research project.¹³⁴

4.2 Practical implementation

This chapter describes the practical implementation of the methodological steps explained before. It starts with the operationalization, thus, the translation of the research question into research dimensions. Based on the results from operationalization, the questions comprised in the interview guidelines are developed. Further, this chapter describes the selection of interviewees in the case study and the description of the sample. The chapter closes with the explanation of the performance of interviews.

4.2.1 Operationalization

The research question of this study is "What are the necessary requirements for PRM solutions to effectively support B2B companies and their dealers?". The research question comprehends two dimensions. The first dimension refers to "PRM solutions", and the second dimension refers to "B2B partnerships with dealers". PRM solutions have been examined in the literature review (*Chapter 2 Literature Review: PRM Foundations*) and the market research (*Chapter 3 Market Research*), the expert interviews focus on the area: "B2B partnerships with dealers". Based on the PRM definition used in this study, B2B partnerships with dealers are regarded from a strategical, functional, and technological perspective: "PRM is considered a "[...] business strategy, a technology, a value-creating strategy and [...] a system, with the main focus on building and maintaining value-added relationships between the manufacturer and its channel partners [...]."¹³⁵

¹³⁴ Ibid., p. 110f.

¹³⁵ Agarwal, A. and Singh, D. (2014).

Strategic perspective

The emphasis on the strategical role of PRM solutions, demonstrates the need for investigating the strategical aspects of B2B companies. Therefore, the first sub-dimension contains distinct set of questions concerning the strategic aspects of distribution partnerships.

Functional perspective

The functional sub-dimension aims to find out how salespeople collaborate with dealers in daily operation. The analysis of communication and processes occurring between vendors and their dealers helps to determine the required functionalities of PRM.

Technological perspective

The third sub-dimension covers the technological aspects, that ensure a seamless implementation of the system. Critical issues, such as data security are covered within these interviews.

At this point, the conceptual operationalization of the interview guide is complete. To transform the conceptual guide into a practical tool that can be used in the interview situation, instrumental operationalization is required.

4.2.2 Development of the Interview Guideline

Based on the operationalization, three distinct interview guidelines are used in the interviews. Each guideline focus on a perspective presented before, thus, strategic, functional, and technological perspectives. Every guideline contains eighteen questions, including three introductory questions, twelve questions related to the specific perspective and the use of PRM solutions, and two closing questions. The questionnaire is attached in the appendix. The following illustration depicts the structure of the interview guide used in this study:

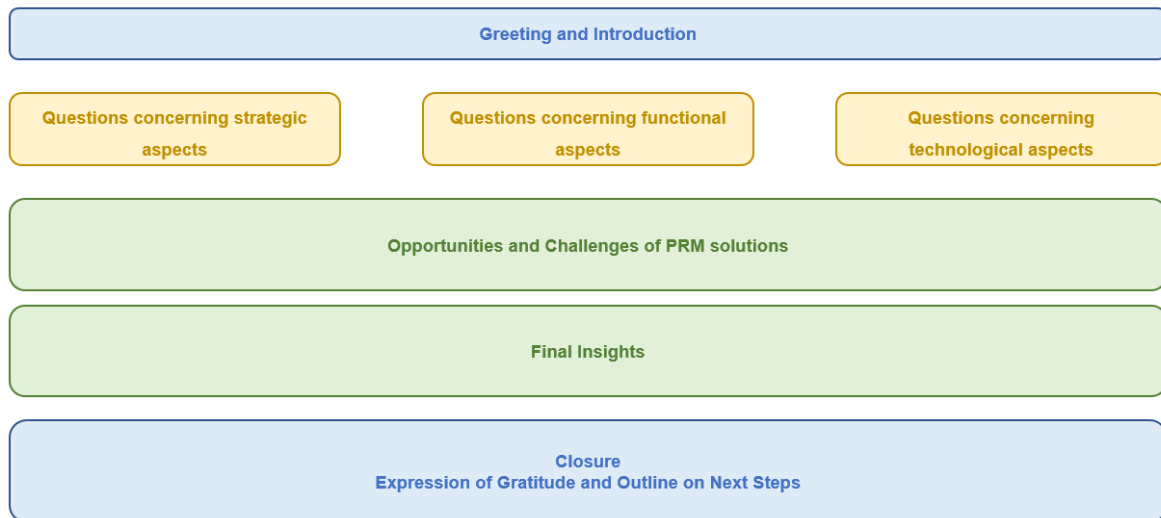


Figure 15. Conceptual Overview of the Structure of the Interview Guideline. Author's Illustration.

The elements colored in yellow represent the individual set of questions for each perspective:

- The strategic perspective of the expert interviews focuses on the overall importance of dealer relationships for the operational business. It assesses the factors that lead to overall satisfaction within dealer relationships and addresses possible challenges.
- The functional perspective assesses requirements related to the functionality and features of PRM solutions. Questions include the general communication between manufacturer and dealer, the use of communication channels, and standard processes.
- The technological dimension examines privacy considerations and the capabilities of a PRM system for its successful implementation in the organization. For reasons of readability, the questions are not listed here.

The interview guidelines and the complete operationalization table can be found in the appendix.

The elements colored in blue represent the formal interview sections. They have no influence on answering the research questions, as they focus on the exchange of information between the interviewer and the interviewee. The formal parts include the greeting of the interviewee, the outline of the study and the research objectives and the introduction of the interviewee, as well as the closure. The presentation of the outline of the study and the research objectives

support the participant's understanding of his role and manages his consent to provide information. Because some of the information shared in expert interviews may be personal or confidential, the researcher must be transparent about the use and protection of data. He must also confirm anonymity and inform participants of the method used to transcribe the interview. The interviewee must consent to the transcription and storage of his answers and to their use in the research context. This does not only comply with legal requirements, but also creates an environment of trust and professionalism.¹³⁶ As it does not contribute towards answering the objectives of research, ages, gender identities, or other socio-demographic variables were not collected. Instead, participants were asked to present themselves, their position in the company, and their prior experience with PRM solutions.

The structure of the expert interviews is determined by the division into the strategic, functional, and technological dimensions, with three interview groups ("S", "F", and "T") and different set of questions (SOQ) for each group. As explained in the previous chapter, this segmentation is chosen to align with the broad definition of PRM systems and to address the question of the distinct requirements from different viewpoints. The structure of the interviews is therefore as follows:

	Group S	Group F	Group T
SOQ 1	Collaboration with dealers	Collaboration with dealers	Business software
SOQ 2	Strategic partnerships	Communication with dealers	Implementation
SOQ 3	PRM Tools	PRM Tools	PRM Tools

Table 6. Overview of SOQs asked in the Interview Groups.

Group S and Group F assess the general collaboration with dealers. The set of questions involve questions like *“In your opinion, what characterizes a successful dealership?”* and *“What are the biggest challenges in collaborating with dealers?”*. These questions are identical for both groups. Other questions are targeted to the respective functions of the respondents, such as *“How do you select new dealers? Are there criteria or standard processes?”* in Group S, or *“How many dealers do you work with?”* in Group F.

In SOQ2, Group S answers questions about strategic partnerships and the goal setting. Questions are, e. g., *“What influence do partnerships have on corporate strategy?”* and *“How*

¹³⁶ Ibid.

do you set common goals with your dealers?". For Group F, SOQ2 examines the way the respondents communicate with their partners. In this group, SOQ2 involves questions like *"Which channels do you use to communicate with your dealers?"*, *"What topics do you regularly discuss with dealers?"*, and *"Which processes take place between you and your dealers?"*.

Due to their different roles with focus on IT and technology, for Group T, SOQ1 and SOQ2 do not involve dealer-related questions. Instead, SOQ1 asks about types of already used business software: *"What types of business software are used at Kässbohrer today - especially in sales?"* and *"What criteria play a role for you when selecting the software?"*. SOQ2 asks for experiences made within implementation processes: *"How should a PRM solution integrate with the existing IT infrastructures and business systems?"* and *"Which implementation steps do you think are important to properly introduce a new system?"*. The two questions of each SOQ serve as examples for the questions asked.

SOQ3, asking about PRM tools, is identical for all three interview groups. The questions asked are: *"How could a digital PRM tool support you?"* and *"What challenges or risks do you see when using such a tool?"*. Finally, all participants were asked to submit comments or questions.

4.2.3 Selection of Interviewees and Description of Sample

The respondents interviewed in this case study are employees of KGF. Respondents are selected based on the criteria presented in *Chapter 4.1.3 Methodological Considerations on the Selection of Interviewees*. Different groups of interviewees are approached:

- Persons from the upper and middle management to represent the strategical perspective
- Persons, who are in regular contact with dealers to represent the functional perspective
- Persons from the IT department to represent the technological perspective

Selecting interviewees from different departments contributes to ensuring the access to specialized knowledge and experience in the multidimensional research area. Moreover, the approach fosters the credibility of the study, as one of the quality criteria.¹³⁷ The selected persons are contacted via e-mail, using Microsoft Teams, or personally and are asked whether they would participate in the study. The interview request delivers main information, such as a brief introduction into the research topic and the objective of the study. It is explained, why the

¹³⁷ Ibid.

person had been contacted and asked to participate as an expert. The interview request also contains information about the expected duration of the interview, that was estimated in a pre-test, the recording, transcription, and storing of data. The participants are informed about their anonymity and the use of their answer for academic purposes only.¹³⁸ If the selected persons agree to participate in the interview, time and date are set for the interview.

Nine out of twelve contacted persons agree to participate in the interviews. The other three persons decline the request for personal and timely reasons, such as e. g. holidays. The nine respondents represent the three dimensions as follows:

Group of respondents	Respondent code	Business division
Strategic (Group S)	R1S	Management
	R2S	Management
Functional (Group F)	R1F	Sales
	R2F	Sales
	R3F	Sales
	R4F	Sales
	R5F	Sales
Technological (Group T)	R1T	Business Applications (IT)
	R2T	Business Applications (IT)

Table 7. Overview of Respondents.

To ensure anonymity, participants in this study are given coded names. These are constructed as follows: The letter "R" stands for "respondent" and the sequential, ascending numbering indicates the order in which the interviews were conducted. The letter S, F, or T at the end of the code indicates the interview group. Thus, participant "R1S" is the first participant to be interviewed in the strategic interview group.

The two respondents in the strategical dimension (hereinafter called "Group S") have positions in the upper or middle management and are responsible for the strategic direction of the company. The five respondents in the functional dimension ("Group F") are employed in the sales team. Their function encompass sales representatives, as well as sales support

¹³⁸ Ibid.

managers and sales assistants. By diversifying the range of functions, the answers potentially involve a broader spectrum of processes or touchpoints with dealers. At the same time, they represent potential internal interfaces or connections, that should be considered. The technological dimension ("Group T") involves two participants from the IT department, which are engaged with business applications in daily use. Moreover, respondents have experience in other software implementation projects.

4.2.4 Performance of Expert Interviews

The interviews are conducted over a period of six weeks in April and May 2024. A pre-test is carried out prior to the main interview phase. Pre-tests are used to review the interview guide, assess the respondent's understanding of the questions, and avoid misunderstandings. In addition, pre-tests support researchers in recognizing incomprehensible questions or illogical interview structures. Moreover, the pre-test measures the duration of the interviews. The assessment of these factors is essential for the success of the interview. Participants lose attention if the interview guideline is too comprehensive or if the duration is too long, reflecting in the results. Moreover, the pre-test is used for testing tools and software for recording, transcription, and data storage.

Pre-tests must represent the interview situation as realistically as possible. The pre-test is conducted with a participant of the functional group and takes place in a physical meeting. During the pre-test, the first version of the functional interview guideline is used. The pre-test reveals a good comprehensibility of the interview guideline. Two questions are eliminated after the pre-test, as they were identical with other questions. Moreover, two questions in the specific question part are switched in their order. The respondent of the pre-test suggests providing more detailed information about PRM prior to the interview. The introduction of the main interviews, therefore, contains additional information. Pre-testing the transcript software reveals several issues and leads to the selection of another transcript software, namely, Otter.ai, a tool that uses AI to transcribe and summarize meeting notes or conversation protocols.¹³⁹ In case of interviews conducted via Microsoft Teams, the Teams CoPilot integration is used for transcription. The pre-test takes 35 minutes, indicating a duration of 30 to 45 minutes for the main interviews.

¹³⁹ <https://www.otter.ai> (accessed on June 3rd, 2024).

One week after the pre-test is conducted, the main interviews are performed. Six out of nine interviews are conducted in physical presence, three interviews are conducted via Microsoft Teams. The physical interviews take place in a separate meeting room, so the interview would not be disturbed.

After the welcoming, the respondent is handed out a printed information sheet, that contains the following information on the objective of the thesis, a short introduction into PRM solutions, information about data recording and storing, indicated duration of interviews. The respondent is asked to confirm the recording and transcription of the interview. The interview questions are asked according to their order in the interview guidelines.

In the beginning, participants are asked to present themselves and to describe their role in the organization. Before delving to the specific questions, each participant is asked whether they have heard of, or used PRM solutions before. The main interview part contains specific questions according to the respective respondent group. The semi-structured and open form of the guideline allows for eventually changing the order, e. g. when a respondent unconsciously provides an answer to questions occurring later in the interview questions. Sometimes, specific questions are added to obtain more detailed information on certain topics. After the main interview questions have been asked, the respondents can add comments on the research topic, or address questions towards the interviewer. The interviews close with the expression of gratitude and the goodbye.

The software records the entire interview. Afterwards, the recordings are directly transcribed. Doing so ensures to include the entire content of the interviews, facilitating a comprehensive analysis of the interviews. The transcription is used for data analysis hereinafter. The transcripts are then processed in MS Word. AI is only used occasionally to make the text passages easier to understand. The transcriptions can be found in the appendix.

4.3 Data Analysis

The data analysis of the expert interviews follows the process presented in *Chapter 4.1.4 Methodological Considerations on Data analysis*. The categories used for analysis are based on the structure of the interview guidelines developed in *Chapter 4.2.2 Development of the Interview Guideline*, hence, the strategic, functional, and technological perspectives, with three

interview groups and different set of questions (SOQ) for each group. This structure presents six categories for analysis:

- Collaboration with dealers
- Strategic partnerships
- Communication with dealers
- Business software
- Implementation
- PRM tools

Naturally, in qualitative content analysis new categories can emerge during the analysis of expert interviews. As described in Chapter 4.1.4 *Methodological Considerations on Data analysis*, this is called the inductive method.¹⁴⁰ The inductive categories are presented in Chapter 4.3.7 *Additional Inductive Categories*.

Following the first methodological step of data analysis, the information is extracted from the singular transcriptions and is moved into an excel sheet for a better overview.

	Respondent	Collaboration with dealers	Communication with dealers	PRM Tools	Other
	Ja, ich kenne PRM-Lösungen in der Theorie, zum Beispiel durch Salesforce, aber ich habe selber noch nicht mit ihnen gearbeitet.			x	
Q4	Jetzt geht es um die generelle Zusammenarbeit mit den Händlern. Wie viele Händler betreust du?				
	Wie gesagt, Spanien, Island, Japan und Osteuropa. In Osteuropa ist es Polen, Tschechien und Slowakei. Also insgesamt sechs Stück.	x			
	Ich betreue 13 relevante Händler, mit denen ich regelmäßig in Kontakt stehe. „Relevant“ bedeutet hier, dass ich regelmäßig mit ihnen in Kontakt bin, im Gegensatz zu anderen, die vielleicht alle zwei bis drei Jahre mal auftauchen und was kaufen wollen, mit denen aber sonst kein regelmäßiger Kontakt besteht.	x			
	Ich stehe nicht direkt in der Auftragsabwicklung, daher habe ich keinen festen Rhythmus für den Kontakt mit den Händlern. Meistens stehe ich in Kontakt, wenn neue Produkte eingeführt werden, neue Produktinformationen verfügbar sind oder verkaufsfördernde Maßnahmen anstehen, für die Materialien verteilt werden müssen. Das kann variieren – manchmal öfter im Monat, manchmal einige Monate gar nicht. Insgesamt sind es etwa 10 Händler, mit denen ich regelmäßig in Kontakt stehe.	x			
	Acht.	x			
	Wir haben acht europäische Händler, von denen ich sieben betreue.	x			
Q4+1 (R2F)	Das heißt, Du hast eine unterschiedliche Kontakt- und Kauffrequenz bei Deinen Händlern?				
	Ja, mit den 13 bin ich wirklich regelmäßig in Kontakt und wir tauschen uns beispielsweise zum Markt aus, da hat man bestimmt jede zweite Woche mindestens einen Berührungspunkt. Mit anderen ist das seltener, da hast Du vielleicht einmal pro Jahr oder sogar alle zwei Jahre nur Kontakt.	x			
Q5	Was kennzeichnet für dich eine erfolgreiche Handelspartnerschaft?				
	Eine erfolgreiche Handelspartnerschaft ist durch ein hohes Maß an Vertrauen zwischen den Händlern und uns gekennzeichnet. Dazu gehört eine gute Kommunikation, also dass man z. B. nicht zwei Monate auf eine Antwort per E-Mail warten muss und auch, dass der Händler aktiv Informationen an uns weitergibt, zum Beispiel wenn etwas nicht funktioniert. Das erfahren wir manchmal erst über Umwege und viel zu spät. Es ist auch wichtig, den Markt zu kennen, dazu gehören auch Besuche und ein regelmäßiger Austausch.	x	x		

Figure 16. Answers of Functional Interview Group in Coded Version. Appendix: “Interviews_Coded”.

This step is referred to as coding. Coding means that the transcribed statements are fragmented, i. e., taken out of context of the full interview. During coding, the content is further reduced to answers, that are relevant to answering the interview questions. In this step, the

¹⁴⁰ Ibid.

names of the participants are rendered anonymous. These measures allow for a full focus on the content of the statements. The fragmented statements are now assigned to the core categories presented above. Responses that don't fit into a category are marked "other".

The analysis of the "other" answers leads to the introduction for three additional, inductive categories: Niche Markets, Sales Organization, and Service. In the next step of coding, the coded fragments are transferred into another table and are assigned to the categories. In this table, both deductive and inductive categories are included. Moreover, the answers from the three interview groups are presented all in one.

Respondent	Collaboration with dealers	Implementation	Communication with dealers	PRM Tools	Sales Organization	Strategie	Service	Business Software	Niche markets
R2F									Klar, wenn du dann diese großen Länder nimmst, machen die auch schon mal 16 im Jahr aber das, aber das sind eher zwei bis drei einzelne, große Länder, der durchschnittliche BeachTech Händler macht vermutlich zwei oder drei Fahrzeuge im Jahr
R2F									Das ist schwierig, im Durchschnitt sind es wirklich so zwei bis drei Fahrzeuge.
R1F	Das hängt davon ab, in welchem Status sich der Händler befindet und wie selbstständig er arbeiten kann								
R1F			Da gibt es höchstens Diskussionen über Bezahlung						
R1F			Die Händler und Kunden kennen das System, da geht es eher um neue Funktionen.						
R1F	In Japan ist es anders, da fangen wir bei Null an.								
R1F			Da müssen wir den Händler befähigen, das System zu verstehen und verkaufen zu						
R1F	Da spielt die Kultur eine wichtige Rolle, weil die Japaner nichts verkaufen, was sie nicht verstehen.								
R1F			Jetzt fangen wir nochmal ganz von vorne an, mit Schulungen, Präsentationen und Besuchen vor Ort, bei denen wir auch gemeinsam Kunden besuchen						
R2F	Viele unserer asiatischen Partner haben Angst vor Blamage, wenn sie sich mit dem Produkt nicht auskennen.								

Figure 17. Coded Answers assigned to Deductive and Inductive Categories. Appendix: "Interviews_Categorized".

The table depicted in Figure 17 contains 437 individual statements assigned to the categories. The full table can be found in the appendix of this paper. The yellow marked categories are considered inductive categories.

In the subsequent chapters, each category is analyzed individually. The results presented in this chapter will be used for the framework development in Chapter 5 *Framework Development*. The chapter ends with the critical discussion of limitation of results.

4.3.1 Collaboration with dealers

The category "Collaboration with Dealers" examines how KGF works with dealers, the criteria that characterize a successful dealer partnership, and challenges in working with dealers. The respondents are in contact with an average of eight to ten dealers. The frequency of contact varies. While there is daily contact with some dealers, there are dealers with whom there is only contact every two years, especially in the beach cleaner product area. The frequency of

contact depends on the activity of the dealers, but also on their level of dependence, i. e., the extent to which they rely on the support of the manufacturer. The level of development and the qualification of distributors is also named one of the key challenges and will be explained later.

Being asked about what marks a success collaboration, communication is one of the most frequently named success criteria. Communication should be rapid, initiated by both parties, and allow for regular sharing of experiences. Further communication characteristics are examined in detail in *Chapter 4.3.3 Communication with dealers*. Other criteria named influential to success are trust, willingness to compromise, and a cooperative relationship are: *“To me, a successful partnership is one in which there is give and take, effort on both sides, and shared goals.”* (R5F). Moreover, respondent report the dealer’s constitution as an important criterion for success. Partners should have access to the market and to customers and they should know the market well. They should share their market knowledge with the manufacturer for continuous development and adaptation of products to market needs. Some dealers have other related products in their portfolio. For many respondents, a well-trained sales force and customer-oriented, professional after-sales service are crucial: *“The partner should be solvent, have a well-trained and networked sales force, and be able to provide top-notch service.”* (R2S).

Due to the high degree of specialization of the products, such as beach cleaners or snow groomers, the geographical location of the dealer is also important to quickly reach the customer physically for sales or service issues: *“It is important [...] that a dealer is close to the beach and likes to work on the beach in order to present our products to the customer.”* (R2F). However, cultural differences, time differences and language barriers also challenges named in the interviews. KGF is active in the Asian market, so the sales force must adapt to certain factors, be it in the timing of meetings, the choice of language for presentations, or cultural awareness. Several interviewees point out that Asian dealers only feel confident when they can answer all questions about a product and do not want to “lose their face” in front of the customer. Training and support is especially important for them.

As mentioned above, dealer independency or the level of dealer development are further challenges. Respondent R1F describes this challenge in a statement:

“It depends on the status of the dealer and how independently he can work. In Spain, we have a very experienced dealer, so it's quite easy. At most, there are discussions about payment and invoices. The dealers and customers know the system, it's more about new

functions. It's different in Japan, where we start from scratch. We must enable the dealer to understand the system and be able to sell it How does the system work? What advantages does it offer?"

Not only the different levels of dealer dependency are challenging to the company, but also there is a lack of overview of dealer development: *"I [...] lack direct insight into the skills of the dealers. Some [...] are very professional, and some are not. I [...] lack the insight and foresight to see how much these dealers need my support."* (R3F). Moreover, respondents report a lack of standardization in working with dealers. There are different ways of organization within the company, not only between the product segments, but also within these areas: *"There are few standards in working with dealers today. Much depends on the area sales manager or account manager and how the dealer is set up."* (R4F). The sales organization, which is named as one of the reasons for the lack of standards, is described in the inductive sales organization category (*Chapter 4.3.7 Additional Inductive Categories*).

Another challenge in the collaboration is the lack of target agreements within the dealership. Many dealers have no fixed goals or metrics to achieve. As a result, dealer performance cannot be measured. Today, there are no standard incentive models, only singular ones: *"I think we could unlock a lot more potential. So, we do not have any incentive models [...] At most, there are special cases in certain countries."* (R4F).

New challenges that will be relevant in the future include the shift in strategical positioning, transferring oneself from being a product provider to being a solution provider. Moreover, the market environment has become increasingly dynamic. This dynamic is being accelerated by technological trends such as vehicle electrification, which is bringing new competitors into the market. Another challenge is the generational change in customers, as the new generation of decision makers is more aware of KPIs than in the past. The challenges lead to an increasing complexity of products and market relationships that need to be covered in a PRM system.

4.3.2 Strategic partnerships

The strategic aspect of B2B partnerships, which is examined in respondent group S, has three sub-dimensions. It covers the design and development of strategies, objectives, and KPIs. First, respondents are asked about corporate strategy and product strategy. Respondents draw a distinction. While corporate strategy is independent of dealerships, distributors have

significant influence on product strategy. Feedback and market insights provided by local dealers influence further development:

“Dealers are the gateway to the market. They know what the market wants and needs, and they have a great influence on product strategy. Their feedback has a strong impact on development.” (R2S), *“Every retailer is an important input provider for the market in which they operate.”* (R1S).

To share the strategy with dealers, it is important to formulate clear and understandable objectives for the distributors. All actions executed by the manufacturer must be linked to these targets to be understandable. Goals and objectives are a central aspect of strategic partnerships. It has already been established that KGF currently does not set specified targets for dealers. In the future, however, respondents aim to set goals for their dealers, e. g., deriving from individual market requirements. Goals must be achievable in the respective market and for the respective dealer. Understanding the market and the predominant customer types is crucial to the formulation of goals. Therefore, goals must be developed collaboratively rather than set top-down. Respondents emphasize the need for dealer enablement and incentivization to achieve their goals.

To measure the achievement of goals and the performance of distributors, certain metrics need to be introduced. The most frequently named KPIs in the interviews were turnover, sales units, and margin per dealer and per market. Moreover, the measurability of the service is important. For example, the number of open service tickets or processing times can be indicators for measuring dealer performance. Another key metric is response time (time to react), i. e., the time it takes to process service tickets and provide solutions. The issue of service is discussed in detail in the corresponding subsection. In addition to the general sales KPIs, other metrics are named relevant, such as customer satisfaction, sales efficiency, service availability, spare parts availability, or professionalism in quoting.

4.3.3 Communication with dealers

Communication with dealers is examined in interviewee group F, as these respondents are in regular contact with dealers. First, the contact modalities are examined, i. e., the frequency of contact and the communication channels used. On average, the respondents are in contact with the distributor two to three times a week. This frequency also depends on how independent a dealer is in his work (*see Chapter 4.3.1 Collaboration with dealers*). There are also seasonal differences. As the products are specially used in either winter or summer,

contact is more intensive during the peak periods. In one product area, a dealer network is just being established, so there is still very intensive weekly contact. Today, communication mainly takes place via email. In addition, telephone, MS Teams, and WhatsApp are used for quick communication, urgent queries or the exchange of images and videos. A "Sales Portal" was recently introduced to improve and standardize communication. It will be presented in Chapter 4.3.4 *Business software*.

All respondents report similar communication content, with the qualification and level of dependence of the dealer, again, being a critical factor. Communication includes sharing product information and value propositions, distribution of presentations, marketing materials and promotions, and market-specific topics. These market-related topics support full market development in untapped markets as well as development of existing markets and individual customers. In addition, recommended retail price (RRP) information and the negotiation of prices and discounts are part of the communication. Respondents emphasize the need for two-way communication:

"I expect regular reports from the dealer on market activity and competition, for example, what competitors are doing, how our competitors are positioning themselves, how they are pricing. On the other hand, our dealers can expect us to support them with benefit arguments for new products, recommendations on organizational structure and price lists." (R4F).

Communication includes forecast and budget processes. Today, these are mainly carried out manually or by email. At defined times of the year, dealers are asked to submit their planning. This is usually done via an Excel file that is sent by email. The manufacturer's salesforce must transfer the data to SAP, the central ERP system. The manufacturer also sends reminders of deadlines by which the plans must be submitted. Orders are processed in a similar way. The dealer sends his configuration requests by email or discusses them with his account manager. Some departments offer an Excel document as a configuration aid, but this is not a company-wide standard. Respondent R4F describes the different processes, depending on the qualification of the dealer:

"The very strong dealers [...] get their price lists and that's it. They know their buying terms and don't need a separate quote; they send us an order for the items they want. We fill the order and send them an order confirmation. For less strong dealers who are still unsure about the product [...], we create an offer based on the dealer's request,

which we discuss with them and advise them on what else they can offer their customers.” (R4F).

In dealer communication, sharing market and competition information also plays a central role in the communication between dealers and manufacturers. Since dealers are the link to the market and end customers in indirect sales, the manufacturer is dependent on information, for example feedback on the products. Information on the price structure on the local market and on the activities of competitors also are critical for the respondents. Moreover, training and dealer enablement are core elements of dealer communication. Respondents agree that it is their responsibility to train dealers: *“We need to enable the dealer to understand the system and be able to sell it.” (R1F)*. Training materials are currently delivered either in the Sales Portal or on the PRO ACADEMY online platform. On-site training, either directly at the (end) customer's location or at the headquarters, is also part of the company's training offer.

Being asked about challenges, respondents name the lack of feedback from dealers, leaving the company in the dark about whether messages have been received and understood. Other communication challenges include the language barrier, that often occurs in online meetings, especially when there are many participants. In some cases, a translator attends meetings to translate between the sales representative and the dealers. Respondents report, that translation interferes with empathy and the ability to gauge how the other person received what was said.

Another communication challenge is the high degree of specialization of the products, which requires a precise analysis of the situation on site. For example, the selection of a beach cleaner model depends on the nature of the sand. Dealers seek help of the manufacturer's salesforce to understand the "consistency of the sand" by sending a photo or video via WhatsApp or email, so the salesperson can recommend a suitable model. Dealers with less product knowledge need more support in preparing quotations. In these cases, the manufacturer and dealer discuss configuration options and technical requirements for specific products. However, the company's products differ in their level of standardization. While some products, such as PowerBully for the construction industry, have limited configuration options, customers and dealers can choose from a wide range of options for other products. Software products require a thorough understanding of the product to provide the best possible advice to customers.

In summary, the communication between KGF as a manufacturer and the dealers includes the following topics and related challenges:

- The distribution of communication and marketing material as well as sales-promoting content, e. g., presentations.
- The exchange of information about markets and customers, as well as the discussion of specific individual measures for their further development.
- Training and one-on-one consultations, possibly on the fly when the dealer is at the end customer's site.
- Quotations and orders are created with a high degree of manual effort.

4.3.4 Business software

Interview group T is asked about the business software the company currently uses. However, numerous respondents from the other groups also refer to the software applications in use. Analyzing the business software serves as a primary indicator towards software architecture and provides important information about the interfaces that a PRM system must have to be successfully implemented.

At KGF, a variety of business software is used. C/4, an SAP solution, is used as CRM, providing an interface to SAP. However, individual users report that they are not satisfied with the range of functions and the user interface. The CRM manages both customer and dealer data equally; there is no distinction. The SAP interface is relevant because the company uses SAP as an ERP system for overall business processes, ranging from sales through budget planning and controlling, as well as production and procurement planning. Sales also uses other systems for data management and information storage. The team works with the Microsoft 365 suite, which includes SharePoint and OneDrive in addition to the usual Office applications. The interviews show, that, e. g., Excel spreadsheets are used for many processes between the manufacturer and the dealers. OneDrive is used to store team files and market information. File storage also takes place in "ELO" (short for Electronic Leitz Folder, a software solution from the manufacturer of the same name). ELO is also linked to SAP to ensure order-related documents can be stored there. SmarTeam is used for Product Data Management and Product Lifecycle Management. Data analysis and reporting is done either with QlikSense or based on existing data visualized with PowerBI, another Microsoft application.

In after-sales, Jira and Confluence are used for project management and cross-site collaboration. Jira is a ticket system used by customers, dealers, subsidiaries, and own

employees to report errors with the products, especially with software solutions. Dealers are also connected to Jira, for example when it comes to jointly processing service issues. Confluence is the project management tool used in the service division. The SNOWsat configuration tool (SCT) stores customer software data. In case of an error, the information about the underlying configuration supports troubleshooting. Moreover, SCT data can be used for reporting and analysis, both internal and those sent to the customers.

The manufacturer's service team uses the ticket system for after-sales. Another self-developed service tool is SNOWsat Maintain, a digital platform that both end customers and dealers can access and receive vehicle-specific documents such as maintenance instructions. The spare parts shop, that can be accessed by the dealers, is also connected to the ERP system via an interface. Since after-sales service plays an important role in the company, the topic is covered in a separate subsection. SNOWsat Maintain has a double role. As a product, it allows maintenance management for customers. Vehicles are registered in the tool with all their relevant information, such as type and unique identification number, operating hours, and additional equipment. The user has an overview of the entire fleet, its maintenance status, and the TCO. As a service tool, KGF uses the information from SNOWsat Maintain for troubleshooting and analysis. Moreover, service-related information or documents, e. g., operating manuals, are shared on this platform. The PRO ACADEMY training platform provides training for employees, dealers, and customers. The PRO ACADEMY is an online training platform, offering training courses to end customers, dealers, and internal staff. As SNOWsat Maintain, it is a product and business tool at the same time.

Standard systems of well-known vendors such as SAP are supplemented by proprietary solutions. The recently launched Sales Portal, mentioned in *Chapter 4.3.3 Communication with dealers*, plays a central role. The tool provides dealers and subsidiaries with product information, sales promotion tools and knowledge. Content includes sales strategies for new dealers, event announcements, go-to-market strategies, and results from workshops, such as personas or market segmentation. The Sales Portal also includes self-developed tools, such as the Profitability and TCO calculator, to support sales of the software solutions. R3F explains the aim to the Sales Portal:

“The Sales Portal is designed to improve and standardize the skills of our global sales team. We want to share the knowledge of the sales team, improve communication, and create more transparency. The portal contains various elements along the sales process, such as key questions for new customers to establish standardized processes. It also

provides access to product documents, brochures, flyers, photos, videos, event announcements, go-to-market strategies, workshop results, personas, and market segmentation. An important area is sales information, a [...] "newsletter" for all sales teams. This provides information about new products before the season, or which product currently requires which software version. Doing so ensures everyone has the same knowledge at the beginning of the season. The Sales Portal also contains internal topics that mainly concern sales, such as processes between the head office and our subsidiaries.” (R3F).

The target audiences of the Sales Portal include the internal sales force, the sales staff of the subsidiaries, and the dealers. Service personnel also has access to the tool. Different levels of permissions ensure that users see only the content relevant to their specific group. Dealers, for example, are treated different from branch employees: *“There are certain topics that we discuss with our subsidiaries, but not with the dealers. [...] We have also been unable to integrate some dealers because they are classified as critical on certain issues.” (R3F).*

The challenge in implementing a PRM system is the large number of different business software systems in use today:

“It is a great challenge to become aware of this diversity and to visualize and differentiate it [...] we have too many secondary systems.” (R3F)

“If we introduce an additional new tool, there is a risk that it will just be another one of many tools, that no one will really understand what it is for, and that it will not be introduced properly.” (R5F).

Due to the variety of systems, integrations are important not only on the manufacturer's side, but also on the dealer's side. It is emphasized that dealers who work with several manufacturers may use a variety of different systems: *“The tool must also be able to be integrated on the dealer side. Some of our dealers work with large construction equipment manufacturers and they certainly have their own tools. Interfaces must be created.” (R5F).* Additionally, the organizational differences between the company's own sales force, their subsidiaries, and their distributors are a challenge in today's collaborative environment. This is discussed in more detail in the Sales Organization chapter.

4.3.5 Implementation

Respondent group T is asked questions about implementation processes. The implementation process starts with the definition of the goal and the requirements for the software. The interviews show that the user perspective has often been neglected in the past. Costs and technology were the main drivers for new solutions: *“We often neglected the user perspective when selecting software. Projects were very much driven and initiated by the board and IT.”* (R2T). When defining requirements, it should also be checked whether the goals can be achieved with existing systems. To ensure that the functions contribute to achieving the defined goals, the requirements catalogue should be developed jointly by IT and the business area.

As discussed in Chapter 3 *Market Research*, interfaces play a central role in the implementation of PRM solutions. The responses from the expert interviews show that interfaces are required for SAP, CRM, and Microsoft 365. By connecting the PRM system to the ERP system, automatic workflows for ordering processes can be set up. Respondents hope that this will reduce manual effort, provide transparency for dealers, and save time. However, interfaces are also named one of the biggest challenges in the implementation process: *“I think the biggest risk is integration with other tools. We already use many tools in sales, such as SAP and C4.”* (R5F).

In addition, the availability and quality of data deriving from other systems, influences the success of a software implementation. The quality and maintenance of master data is another challenge named in the expert interviews. Cleaning and standardizing existing data is a time-consuming implementation step that is critical to the success of a software project: *“We are constantly faced with the challenge that the raw or master data we need to analyze metrics is not good enough, complete, or just plain wrong.”* (R1T).

Lack of employee adoption is also a challenge cited by many respondents. There are many reasons why employees do not accept new software solutions: Employees are often unclear about the purpose of a new tool. Change management is an important issue. If users do not feel involved or adequately informed, their willingness to accept a new tool decrease. To increase adoption, new solutions must facilitate work. Training is also necessary to familiarize employees with a new tool. KGF already uses many tools, so it is necessary to differentiate new tools from existing systems. To address these challenges, sufficient resources are

required for implementation: *“Such a project can last for several months or even years [...] This requires not only IT resources, but also resources from all departments involved.”* (R1T).

4.3.6 PRM Tools

All three interview groups were asked about functions they would like to include in a PRM system to support them in their daily work. In terms of functionalities, respondents want to share presentations, sales pitches, and marketing materials with dealers. They also want feedback capabilities for dealers. The PRM system should also include the ordering and planning process and transfer them to the ERP via an automated workflow. Since vehicle production takes place at specific times around the year, respondents request an automated reminder when forecasts must be submitted. To document dealer communication, respondents request automated recordings, for example of calls. In addition, there should be the option to add notes to contacts. Some respondents suggest moving the entire with dealer communication to the PRM: *“There should [...] be a chat function and [...] a virtual meeting room where you can meet and [...] exchange ideas with different dealers at the same time.”* (R2F). The inclusion of services and after-sales as well as the associated tools is also relevant for the respondents.

Respondents see PRM tools as a central source of information for their own sales force and dealers. Dealers should be able to access pricing and product specifications to provide independent and comprehensive advice to their customers. A product roadmap should also be included in the PRM system, generating transparency on the availability of products for dealers. Personal information, such as birthdays, improve collaboration and should be included. Data required for planning and forecasting is particularly important, e. g. market and competitor information, purchasing terms and conditions, and dealers' forecast or closed deals. The monitoring of KPIs plays a central role. Respondents want to measure and compare dealer performance. Targets such as revenue, systems sold, and new customers acquired should be automatically tracked and analyzed. The respondents also want to measure pre-defined goals and make suggestions for goals or individual support based on the performance evaluation: *“The solution should [...] measure dealer performance and [...] provide suggestions on how to improve it.”* (R2S).

A topic frequently mentioned in all respondent groups, is the classification of dealers. Measuring dealer performance provides the manufacturer with information on the level of

independence and development of the dealer. Doing so, account managers recognize which dealers require more support and which dealers are working independently.

In addition to dealer classification, respondents also require different levels of confidentiality. PRM should be able to assign different levels of authorization, e. g., to dealers and their own sales staff. Different authorization and confidentiality levels are also related to data protection. The information stored in a PRM system can be sensitive or confidential and must therefore be protected. The risk of phishing and unsafe public networks is particularly high in Asian markets. In these countries, there are additional technology requirements because the Internet is not available everywhere. Therefore, the PRM solution should be accessible even with poor network connection and using mobile devices and mobile data.

As described in previous chapters, the respondents see risks in the integration with other systems and in the acceptance of a new system by the workforce. Most respondents think that a PRM system could support their work with dealers and help reduce the effort on both sides: *“It would allow us to manage information more efficiently and ensure that everyone is up to date.”* (R2F).

4.3.7 Additional Inductive Categories

In addition to the analysis of the main categories deductively created in the operationalization, the surveys reveal three additional categories that need to be examined to answer the research questions:

- Requirements resulting from the "niche market" situation
- Form of the internal sales organization
- After-sales service as an important collaboration area

Niche markets

Niche markets are specialized segments of the market, focusing on a specific group of consumers with distinct needs, preferences, or characteristics. Niche products contain challenges, that need to be addressed when implementing PRM solutions.

Technical complexity

As previously mentioned, the technical complexity of the products is high, and the degree of standardization is low. There is no “one solution fits all”; and the sales force must select the

suitable solution for the customer from a portfolio. Sales support delivered through PRM can only cover these requirements to a limited extent. Because of the complexity of the products, dealer training is particularly important.

Dealer focus

Another characteristic of niche brands is that many dealers have other products in their portfolio, e. g. complementary products or products from larger companies. The respondents describe that the challenge of keeping the dealer's focus on selling KGF products: *"In the BeachTech area we are in an extremely niche market and for many dealers it represents less than one percent of their sales."* (R2S). Dealers focus on higher-margin products because they cannot balance the effort required with the expected ROI. PRM must make sales of niche markets as simple as possible. Focus is often only achieved through the intrinsic motivation of the dealer or incentive models.

Sales processes

In niche markets, also sales processes are different. Sales in the municipal sector, which is present in all three product areas of the case study, are often conducted through public tenders. In tenders, a request is published from a public or governmental institution, setting out various specifications the product must meet. Vendors can bid on a request for proposal, and a committee decides about the "winner" of the contract, regardless of well-trained salesforces or convincing sales documents. Because tenders are often issued without prior announcement, both the distributor and the manufacturer must respond quickly and submit their bids. This requires good coordination between the parties, extensive product knowledge and quick access to the documents to be submitted. One interviewee describes the situation with tenders for the BeachTech product range:

"80 to 90 percent of our sales are made through public tenders. Ideally, [...] you know about future projects and the situation on site. You know that there will be a tender [...], so you are reasonably prepared [...] he [the dealer] will inform you once the tender has been activated." (R2F).

Sales organization

The second additional category contains the importance of analyzing the prevalent sales organization. Before implementing a PRM system, the fundamental structure of intra- and inter-company cooperation must be examined. At KGF, three sales entities work together: the dealers, the subsidiaries, and the internal sales team at headquarters.

Dealers

Not all dealers are organized in the same way. For example, some dealers have exclusivity for a certain region in which they operate. There are dealers for whom this territory is concentrated in one country, while other dealers serve several countries at the same time. As mentioned in the previous chapter, some dealers have other products from other manufacturers in their portfolio. There are also dealers, especially in the snow grooming business, who exclusively sell the PistenBully products. Individual dealers sell several or all KGF products in different industries. Dealers who exclusively sell Kässbohrer products are more dependent on the manufacturer to a different extent than dealers for with other main products. Also, the dealers' financial power, the number of units sold per year and their market shares vary. The larger the dealers' market share and the more important the market, the more likely the involvement of the dealer in strategic decisions.

Subsidiaries

In countries, that are considered strategically important markets, KGF has subsidiaries. These are in North America, France, Italy, Austria, and Switzerland. Although the subsidiaries play a similar role in sales, they have different competencies than dealers: *"Subsidiaries are more closely integrated with [...] the headquarters. They are involved in various management rounds and strategy development, as they are responsible for a large volume of sales and are experts for the respective market"*. (R1S). At the same time, they are fully dependent on the headquarters, both legally as strategically, as they don't have any other products in their portfolio. In North America, due to the large size of the country, the subsidiary itself works with dealers. In this case, all dealer support is handled by the subsidiary and the headquarters is only involved to a limited extent. The special role of subsidiaries must be considered when implementing a PRM system. Subsidiaries currently receive more information than dealers, for example in the Sales Portal.

Internal sales organization

The analysis of the internal sales organization is particularly important. The sales department takes care of dealers, subsidiaries, and direct customers. Contact with a dealer is often made through an account manager. In addition, the sales department is currently divided internally: Each product area has its own sales manager. Moreover, there are product management and after-sales departments, as well as product specialists in each segment. This division leads to complications in working with dealers, as several respondents report:

- *"The dealer asks me for software, the vehicle from the regional sales manager, spare parts from a third colleague, and training in the PRO ACADEMY. The dealer [...] negotiates with each person individually, instead of someone on our side having overall responsibility for the deal."* (R4F),
- *"Dealers sometimes had several contacts with us, which led to confusion."* (R5F),
"There are often salespeople between me and the dealers, which makes direct communication even more difficult." (R2F).

Before implementing a PRM tool, therefore, the internal organizational structure must be clarified, as this respondent states: *"For me, a tool is only supportive if we ourselves know our organizational structure, know how we want to work together [...] a digital tool supports that organizational structure."* (R4F).

After-sales service

The third additional category, which is introduced based on the expert interviews, is the service area. Unlike other products, local after-sales service is of great importance for manufacturers selling vehicles or machines. At KGF, most dealers are responsible for the customer service. However, there are situations in which they rely on the manufacturer's service, for example in the case of serious errors, errors in new products, or software updates. There are various service level agreements that contractually regulate support in the event of a service issue. These include, for example, response times in peak season or the assumption of costs. Since dealers have different service level agreements, these must be considered in the PRM development. As mentioned in Chapter 4.3.4 *Business software*, there are special service tools that must be connected to the PRM. The spare parts shop, which is already connected to the ERP, must also be integrated into the PRM to offer partners a seamless experience without media disruptions and multiple logins. Finally, service metrics are also important for evaluating dealer performance, including time to react, service and spare parts availability, or vehicle downtime.

5. Framework Development

In this chapter, a practical framework for the implementation of PRM solutions is developed. A framework serves to provide a structured representation of complex relationships. Frameworks

aim to connect different theories, concepts, or ideas to offer a structured approach to one or more areas of knowledge.¹⁴¹

5.1 Methodological Considerations

This chapter presents the methodological background of the framework development. After describing the methodology, the framework is designed based on the results of the interviews. The components are described in detail to provide an overview of the requirements to be considered before PRM implementation.

There is extensive literature available on frameworks. Cumming (2014) describes the process of framework development and states, that framework development “[...] does not necessarily depend on deductive logic to connect different ideas.” He distinguishes between hypothesis-oriented, assessment-oriented, action-oriented, problem-oriented, and theory-oriented frameworks.¹⁴² Binder et al. (2015) differentiate between eco-centric frameworks, integrative frameworks, policy frameworks, and vulnerability frameworks.¹⁴³ It should be noted that the classification of frameworks is often done deductively, while the design and development direction of a framework largely depend on its objective. For example, theory-oriented frameworks establish the connection between paradigms, generalist theories, and application cases, whereas hypothesis-oriented frameworks serve to verify previously established, concrete assumptions. Partelow (2013) describes frameworks as “bridging tools for knowledge synthesis and communication.” He distinguishes different abstraction levels of knowledge, e. g. paradigms, theories, models, and cases. Frameworks are centered between paradigms and specified theories and aim to “synthesize” ideas from different approaches. Partelow considers two possible methods of framework evolution:

- Top-down
- Bottom-up.

In the deductive top-down framework development approach, paradigms or large theories are narrowed down into a more specified construct with descriptive or prescriptive character, providing the basic vocabulary needed for explanations made within the context of paradigm. In the inductive bottom-up framework development approach, specific empirical observations

¹⁴¹ Partelow, S. (2023). What is a framework? Understanding their purpose, value, development and use. *Journal of Environmental Studies and Sciences*, Vol. 13, pp. 510-519. DOI: <https://doi.org/10.1007/s13412-023-00833-w>

¹⁴² Cumming, G. S. (2014). Theoretical Frameworks for the analysis of socioecological systems. In: Sakai, S., Umetsu, C. (Eds.): *Social-Ecological Systems in Transition*. Springer: Japan. DOI: <https://doi.org/10.1007/978-4-431-54910-9>.

¹⁴³ Binder, C. R., Hinkel, J., Bots, P. W. G., and Pahl-Wostl, C. (2013). Comparison of frameworks for analyzing social-ecological systems. *Ecology and Society*, Vol. 18 No. 4, p. 26. DOI: <http://dx.doi.org/10.5751/ES-05551-180426>.

or cases are consolidated and transformed into a broader context. A third approach of framework development is abduction. In abduction, singular or a few observations are gathered. The most likely cause is inferred as the conclusion. However, this approach only leads to probable conclusions. Partelow introduces four iterative mediating processes, that are used for framework development and application. For framework development, these are (1) empirical generalization and (2) theoretical fitting, for framework application these are (3) hypothesizing and (4) application:

- In (1) empirical generalization, existing empirical data is reviewed and put into the context of broader phenomena, paradigms, or concepts
- In (2) theoretical fitting, observations are associated with existing theories and hypotheses
- (3) Hypothesizing means to generate hypothesis on the research subject. The results from (1) and (2) may serve as a guideline in this process
- In (4) application, empirical observation based on the newly generated hypothesis are made

The author presents a meta-framework to demonstrate the conceptual role of frameworks in the scientific context. The meta-framework is used to obtain comparability between different frameworks and their values. Moreover, it is used to present information about the positioning of the framework.¹⁴⁴

¹⁴⁴ Partelow, S. (2023).

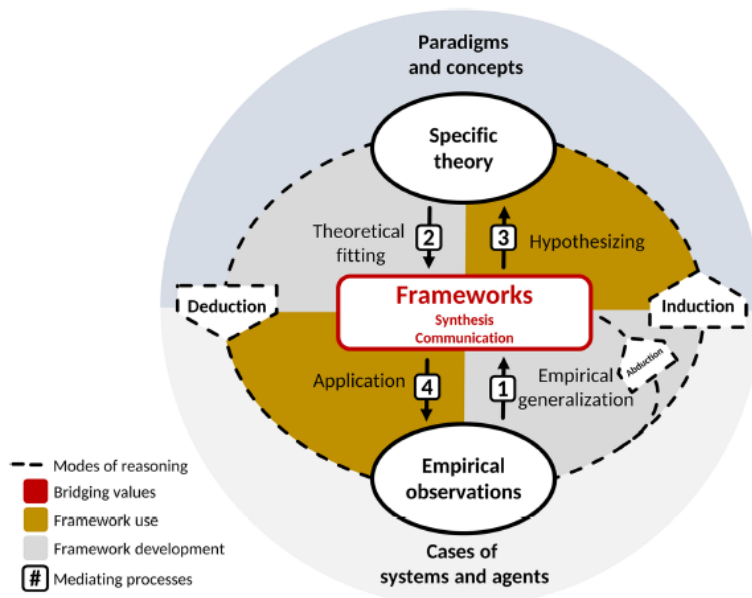


Figure 18. Frameworks. Theoretical Embedding. Partleow (2018).

Partelow describes the challenge to place frameworks in a scientific, measurable context and addresses the lack of standardization for frameworks in science. Methodological gaps and deficiencies result in heterogeneous frameworks, that often are scarcely intersubjectively comprehensible.¹⁴⁵

To overcome these methodological challenges, the present framework development is embedded in Partelow's methodological considerations. The execution of the suggested development process steps does not guarantee comparability or scientific validation, but helps in characterizing the framework and its intended applications. First, the positioning of the framework is evaluated. The framework is developed as part of this master's thesis on the use of PRM solutions in the B2B context. The considerations are based on previous literature review, a PRM market research and empirical data from expert interviews in an exemplary B2B company, serving as a case study. The values that are important during the development of the framework emphasize scientific accuracy, practicality, and relevance to practice. The framework should be easily understandable and guide B2B companies in the implementation process. To ensure transparency and traceability, every step of the development process is clearly documented and justified to ensure intersubjective comprehensibility. The framework

¹⁴⁵ Ibid.

is embedded in the field of PRM systems, specifically in the context of B2B relationships and sales partnerships.

5.2 Framework Design

The implementation framework developed in this study consists of eight main components and several sub-dimensions. There are three deductive components. Deductive means, that they originate from theory and specified interview questions. The deductive components are Collaboration, Communication, and Business Software, together with Interfaces. Moreover, there are four inductive components. Inductive means, that these components derive from the information occurring within the discourse of this study. They are closely linked to the case study presented and may be different for other cases. The inductive components are Niche Markets, Sales Organization, Service, and, as a result from both deductive and inductive categories, Challenges.

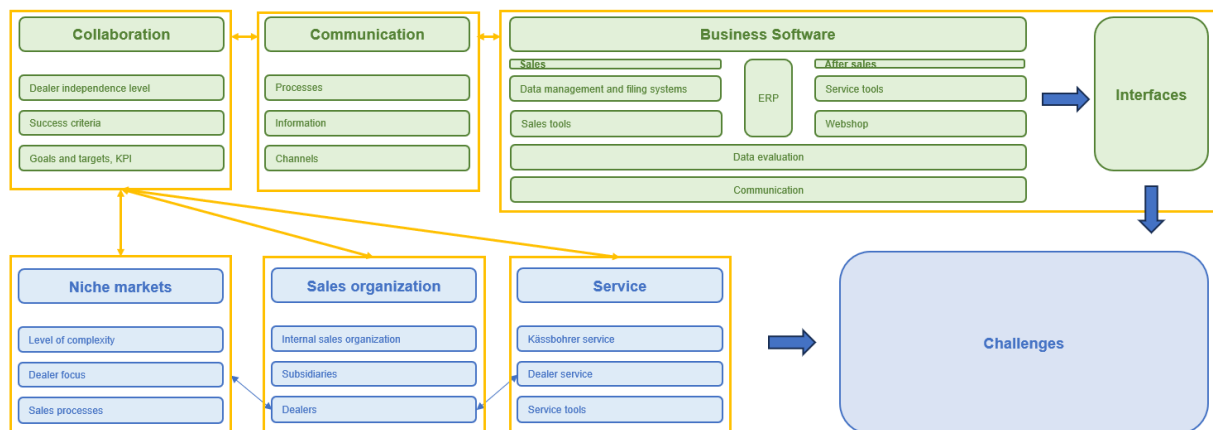


Figure 19. Overview of the Framework. Author's Illustration.

The illustration depicts the overall structure of the framework. For reasons of readability, the subdimensions of the framework components are not presented into more detail in the figure. In the following, each component and their respective subdimensions is delineated and explained with regards to the research questions. In contrast to the data analyses conducted in

Chapter 4 4.3 Data Analysis, the components contain summarized information from all three sources.

5.3 Collaboration

Collaboration component consists of three subdimensions: Level of dealer independence, success criteria, and goals and targets.

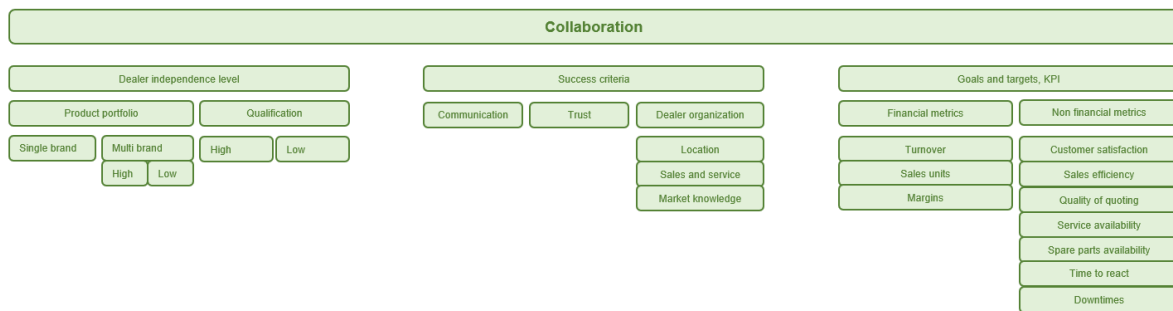


Figure 20. Collaboration component. Author's Illustration.

Dealer independence level

The level of dealer independence is a criterion, which significantly influences the partnership. In *Chapter 2 Literature Review: PRM Foundations*, the foundations of PRM and channel partnerships are presented. Channel partnerships are defined as “sets of interdependent organizations”.¹⁴⁶ Jonsson and Zineldin (2003) present dependency as a factor influencing dealer satisfaction.¹⁴⁷ Dependency has various aspects. First, dealers who only one brand or one product are more dependent on the manufacturer than dealers, who have a wider portfolio, selling products from other companies as well. The higher ROI a dealer expects from a product, the more dependent he is on the manufacturer. The second factor influencing dealer

¹⁴⁶ Kotler, P., and Keller, K.L. (2016).

¹⁴⁷ Jonsson, P., and Zineldin, M. (2003).

dependency is the qualification of the dealer. The better trained a dealer is, the more independent he is in selling the manufacturer's products without requiring support.

- PRM solutions should focus on dealer training and dealer enabling to increase independent sales.

Success criteria

There is plenty of research on success criteria within business relationships. In the literature review, dealer satisfaction¹⁴⁸, reduced transaction costs¹⁴⁹, and sharing of risks and benefits¹⁵⁰ are presented as examples. Also in the interviews, communication and trust are named as the most important success criteria. The findings align with the results from literature review.

- PRM solutions must facilitate and optimize communication by reducing manual processes.
- PRM solutions must enhance transparency.
- PRM solutions must contribute to the establishment of trust between the partners, or at least, may not reduce the level of trust.

Another success criterion deriving from the expert interviews is dealer organization. The products in this case study are used in particular areas, e. g., in the mountains or at the beach, so the geographic location of the dealer is important for the manufacturer. Distributors should be able and willing to reach their end customers in an appropriate time for sales and service issues. The market research shows, that some PRM tools integrate partner recruiting based on criteria:¹⁵¹

- PRM solutions should support targeted recruiting campaigns by limiting the campaign audience to companies, that fulfill certain parameter, e. g., geographical location, or sales and service organization structures.

Not only in geographical regards, but also in their knowledge, dealers should be close to their markets. As Staus and Becker (2012) state, dealers have an advantage when it comes to

¹⁴⁸ Ibid.

¹⁴⁹ Staus, A., and Becker, T. (2012)

¹⁵⁰ Hu, Y. (2011).

¹⁵¹ <https://impartner.com/>

knowledge about customers and their needs.¹⁵² Manufacturers rely on dealer knowledge and feedback to adapt their products and strategy to the markets' needs:

- PRM solutions should support companies in selecting dealers according to their market access.
- PRM solutions should foster the exchange of market-related data and information between the manufacturer and the dealer.

Goals, targets, and KPIs

The goals and objectives of B2B partnerships derive from the success criteria and the form of collaboration. There are financial and non-financial metrics. Financial metrics include turnover, units sold per year, sales, and margins. However, in the interviews, non-financial metrics are considered even more important. In the sales area, these are customer satisfaction, sales efficiency, and improved quality of quoting. In the service area, important KPIs are the availability of service and spare parts, reaction times, and downtimes of the vehicles. These metrics and targets serve as the foundation for KPI monitored in the PRM solutions.

- PRM solutions must include both financial and non-financial KPI for sales and service.

5.4 Communication

The second deductive framework category is Communication. Communication is considered essential for PRM in numerous studies and the expert interviews. Market research shows communication modules as a central function of PRM solutions.¹⁵³ In this framework, Communication is constituted from three subdimensions: processes, information, and channels.



Figure 21. Communication Framework Component. Author's Illustration.

¹⁵² Staus, A., and Becker, T. (2012)

¹⁵³ Moon et al. (2002).

Processes

Considering processes is crucial for PRM implementation, as PRM intends to automate and streamline processes occurring between the business partners. To ensure the holistic integration of business processes into the PRM solution, these must be analyzed prior to the project. The expert interviews reveal several processes, such as sales support processes, processes related to planning, forecasting and controlling, ordering, production, service, dealer enablement, and information exchange:

- PRM solutions must regard all processes occurring between business partners, including processes that are not directly related to sales, e. g., planning and forecasting or production and procurement processes.
- Prior to PRM implementation, business processes must be analyzed across all divisions.

Information

Information exchanged between manufacturers and dealers are product-related information, market or competitor information, information on individual customers, sales argumentation, terms and conditions, pricing and discounts, feedback, and challenges:

- PRM solutions must provide all the relevant information in B2B partnerships.
- PRM solutions must allow for two-sided information exchange; manufacturers share product and sales information with dealers, on the contrary, dealers share market and customer information, or feedback.

Channels

Communication channels are the third subdimension of this framework component. Identifying current communication channels is an important step in framework implementation. Each channel has distinct functions and advantages. E-mails they overcome time differences and allow sharing information by forwarding messages. WhatsApp is used for spontaneous support requests, or for exchanging multimedia. Microsoft Teams is used for meetings with multiple

persons in different locations. Phone calls and personal meetings are important to maintain the interpersonal relation of the business partnership:

- PRM solutions should incorporate and improve the advantages of traditional communication channels, enabling communication independent from time and location, or quick and easy data exchange from one mobile device to another.

5.5 Business Software and Interfaces

The third deductive framework component deals with business software and interfaces. The integration with other systems and interfaces are inherent to all PRM solutions examined in the market research. Analyzing the business software architecture is necessary before implementing a new software. The following figure shows a of the overall KGF software architecture as an example. It serves as a foundation for the definition of interfaces required for PRM implementation.

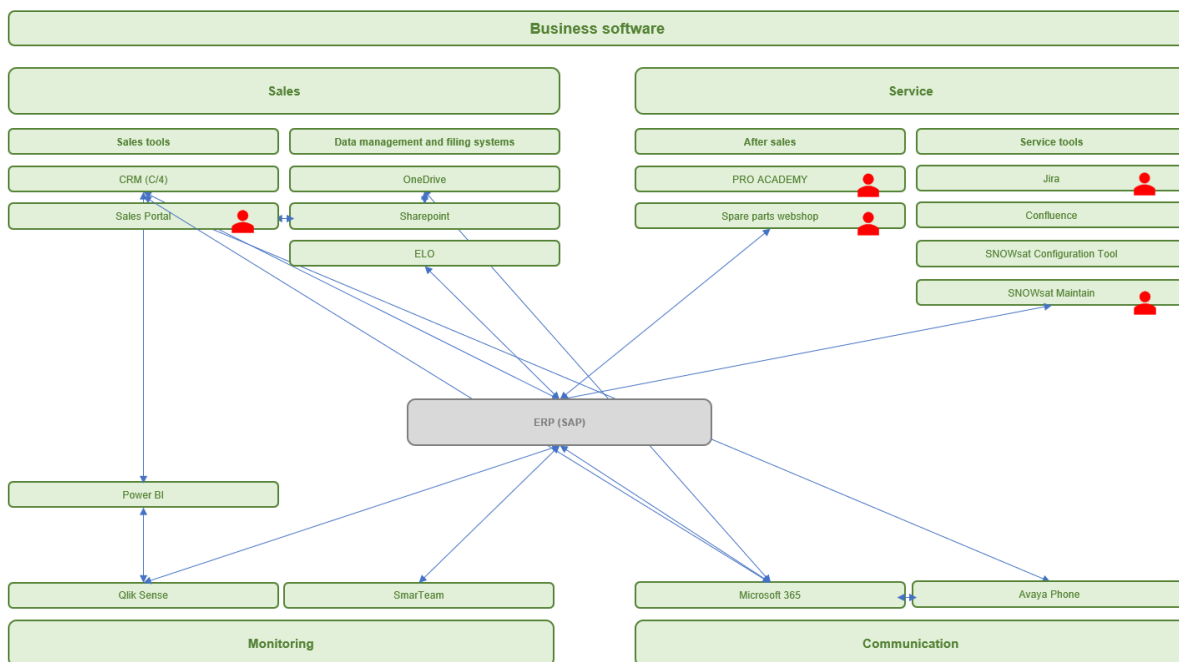


Figure 22. Business Software Framework Component. Author's Illustration.

The business applications analyzed in this context are categorized in four subdimensions: Sales software, service software, monitoring, and communication. It is evident that SAP, as the ERP system, plays a central role in interconnecting the different types of software. Tools, that can be accessed by dealers, are marked with a red icon.

Sales

In the sales subdimension, distinction is made between sales tools and data management and filing tools. The central sales tool is the CRM tool with has ERP interfaces and stores all the data from dealers and end customers. The Sales Portal is a website based on Microsoft Sharepoint, that is used to share product and marketing information with dealers and subsidiaries. Software tools used for data management and filing are OneDrive, Sharepoint, and ELO. Sales tools are closely linked to communication tools. Channels have been explained in the previous chapters, so communication tools are not presented in detail here.

After sales

After sales tools are important for offering additional revenue after the product is sold. The spare parts webshop is an e-commerce platform, where dealers and customers can purchase spare parts for their vehicles. It is connected to the ERP, as warehouse stock, individual dealer discounts, and history of purchases are important for the shop. The subdimension of service tools also includes tools used for internal service organization, such as ticket systems, project management tool used in the service division and data used for troubleshooting and reporting. Data from all sources are monitored and analyzed for causes of budget and controlling. The tools used for these purposes are Qlik Sense and SmarTeam. Microsoft Power BI is used to visualize data.

The analysis of business software has implications for PRM implementation as follows:

- Analyzing the prevalent business software applications is mandatory before setting up the implementation project. This step requires both timely and professional resources and must encompass all business areas.
- PRM implementation should aim to reduce the number of systems used. Neither dealer nor own sales employees can work efficiently, if they must access to numerous systems. Moreover, a high number of business applications can lead to inconsistency in data and disrupt processes.

It is evident, that there is high attention on interfaces in PRM context. Not only the results from the interviews, but also the market analysis reveals the necessity for third-party integrations. The PRM solutions analyzed in this study, Salesforce, ZINFI, and Impartner, each allow for integrations. In summary, the required interfaces identified in this study are:

- ERP
- CRM
- Office software, e.g. Microsoft
- Data management and filing systems
- Service tools
- Tools used for corporate analysis
- After-sales tools
- E-commerce solutions
- Training tools
- Project management tools
- Ticket systems
- Customer tools
- Communication tools

It must be noted that these interfaces only represent a brief excerpt of interfaces required in the case study. In PRM implementation, a thorough analysis must be conducted before selecting the software, as the interfaces may be determinant and should, in some case, be discussed with experts.

5.6 Niche markets

The first inductive component is niche markets. There are three main characteristics for niche markets.



Figure 23. Niche Markets. Inductive Framework Component. Author's Illustration.

Complexity of products

First, B2B niche products have complex technologies. Second, niche products often lack standardization. This leads to an enhanced need for training and support from the manufacturers:

- PRM solutions must encompass training for their dealers, enabling them to sell technically complex products.
- FAQ sections, direct service contacts, or chatbots in PRM support dealers in finding answers to questions arising in the field.
- PRM solutions with configuration tools, led by questions such as “what are conditions on site” may help distributors selecting the right option rather than bare product catalogues.

Dealer focus

The second subdimension in the niche market component is the dealer focus. As explained in the *Chapter 5.3 Collaboration*, dealer focus relies on different criteria, e. g., their level of dependence, and their product strategy (single brand or multi-brand). As these considerations have already been laid out, they will not be repeated in this chapter. However, since the case study represents a niche manufacturer, dealer focus is to be mentioned in this context. Implications for PRM implementation are as follows:

- PRM should incorporate incentivization functionalities, that support manufacturers in motivating their dealers, even if expected margins are lower than for other products.
- PRM must be easy to understand, to access, and to use, as dealers with little focus on the product may not be willing to invest too much into getting used to the system.
- Use of PRM solution should not involve high costs for dealers, as they may not be willing to pay for it.

Sales processes

The third subdimension of niche markets is the different structure of sales processes. Public procurement is highly regulated to ensure transparency, fairness, and accountability. Authorities are required to follow strict procedures, publish tenders publicly, and provide equal opportunity for all potential suppliers. Private procurement, on the other hand, has more flexibility and is subject to internal company policies rather than external regulations. Tender processes are typically more formal and involves multiple stages, including pre-qualification, tendering, evaluation, and awarding contracts. These stages are designed to be transparent and open to scrutiny. Contracts are often awarded based on a combination of factors, including cost, quality, and the supplier's ability to meet public policy objectives.¹⁵⁴ For manufacturers, this has different impacts. Sales processes take longer than compared to private, or other B2B

¹⁵⁴ Thai, K. V. (2009). *International Handbook of Public Procurement*. Boca Raton: Auerbach Publications, Taylor & Francis Group.

sales. Instead of convincing a customer by using sales and benefits argumentations, meeting the pre-defined criteria, competitive costs, and legal aspects are determinants for the success of sales. The influence of the salesperson or dealer is less, compared to usual sales contracts:

- The characteristics of selling in the public sector must be regarded in the PRM implementation.
- PRM should support dealers in participating in tenders, by providing them with the needed information in the required conventions.
- Differences in international tenders and public procurement processes must be considered.

5.7 Sales organization

The second inductive component refers to the sales organization of the companies using PRM. It must be noted that the example presented in this master's thesis is specific the case study. There are various other entities that can play a role between manufacturers and their partners, e. g., different branches, group divisions, joint ventures, or other kind of inter-firm cooperations.



Figure 24. Sales organization. Inductive Framework Component. Author's Illustration.

In the case study, three entities are involved in the sales organization: The company's own sales personnel, their subsidiaries, and their dealers. Each entity is organized in a different way, and the structure of organizations, as well as their interplay are considered determinants for PRM implementation. Internal structures must be considered in PRM implementation, as they massively influence the way PRM is used.

- Prior to a PRM implementation project, the internal collaboration structure must be analyzed.

- PRM solutions must consider and support internal collaboration to boost their efficiency.
- The analysis of internal organization must include other business areas, such as after sales, or product development, as well.

Internal sales team

The internal sales team serves direct customers, dealers, and subsidiaries.

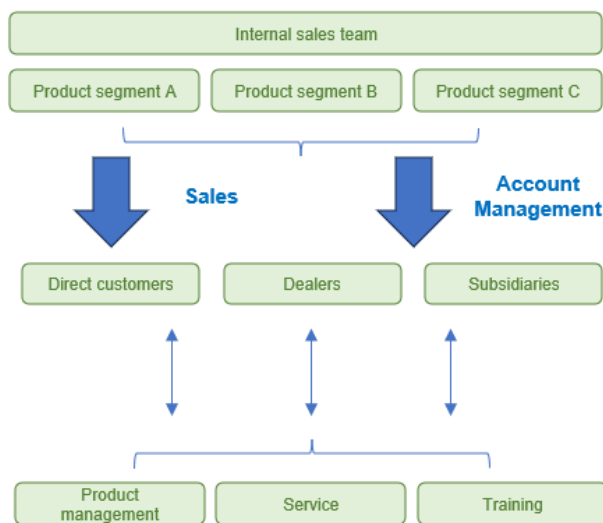


Figure 25. Internal Sales Organization on the Example of the Case Study. Author's Illustration.

Subsidiaries

In the case study, the subsidiaries are focused on providing sales and service in the most important markets. Although they fulfill similar tasks as dealers, there are core differences: The subsidiaries are fully owned by the headquarters and therefore, have a very high level of dependence. At the same time, they are more integrated in the headquarters' strategical processes and decisions, e. g., in product development:

- The role of company organizations, as well as their legal consequences, must be considered in PRM implementation.

Dealers

The third entity to be considered are the dealers. As described before, there are different ways of dealership. Some dealers have territorial exclusivity to a certain geographical area. Often, exclusivity goes along with a minimum number of required sales, fixed in the dealer contract.

In other markets, the manufacturer works with different distributors. Some partners focus on one region, while others supply multiple regions. Finally, the size of the partner, their market share, and financial power are predicting the cooperation, as they, e.g., determine the level of required support.

- In PRM implementation, the sales organization of the partners must be regarded.
- Legal aspects, regulating e. g., the possession of customer knowledge, must be considered when implementing PRM solutions.

5.8 Service

It is necessary to integrate all business areas into PRM. Service plays an important role, especially in the off-highway segment. In the case study, service is offered through both the manufacturer and the partners. Mostly, the local partners are responsible for the on-site service in their respective customer area, whereas the manufacturer service forms the backbone. Service responsibilities, such as lead times, support levels, or cost strategies, are regulated in so called “Service Level Agreements” (SLA). The SLA is a contractual basis for regulating the service processes between manufacturer and partner.

- PRM solutions must include after-sales and service.
- The SLA content must be regarded in the initial PRM implementation phase to understand about the different roles and responsibilities in the service area.

As described in the business software component, there are various tools used in the context of service, with also must be integrated in the PRM software.

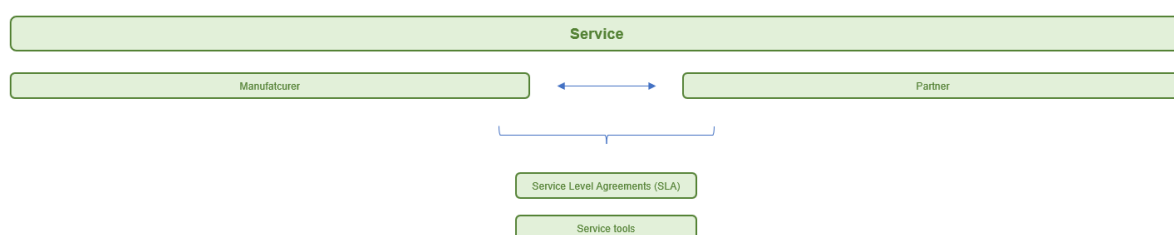


Figure 26. Service. Inductive Framework Component. Author's Illustration.

5.9 Challenges

There are different challenges resulting from the framework components and, for successful PRM implementation, it is important to be aware of them. Before implementing a PRM solution, challenges in the internal organization must be addressed. For PRM to be effective,

acceptance of the internal sales organization is essential. Internal collaboration processes must be established, and the PRM solution must support these structures, instead of turning it the other way around. Second, the differences within business partner relationships must be considered. Especially in niche markets, dealer communication and processes are influenced by the level of interdependency between dealer and manufacturer. Often, communication or selling processes are not standardized, but occur spontaneously, posing a challenge to PRM implementation. To overcome this challenge, analyzing the business environment and interviewing stakeholders can be powerful tools.

The complexity of products determines the content of communication and required support or training; it must be considered it when implementing a PRM solution. Depending on the type of product, multiple teams or stakeholders must be involved in PRM, e. g. after sales and service teams. The challenge, therefore, is to identify all important stakeholders and to ensure their participation in the PRM application. The integration of multiple groups leads to another challenge related to PRM implementation. Usually, the more teams and processes involved, the higher the number of business software systems already in use. In the case study, it becomes evident, that there is a lot of existing software in use. It is a real threat for PRM success to seamlessly integrate with, support, or replace other systems. Thorough analysis of the company's software architecture is a crucial step before implementing a PRM system. Doing so, it is important to not only concentrate on the supplier's side, but also ask partners about their solutions already in use. Manufacturers should strive to provide their partners with single sign-on solutions, which also integrate with other programs they may use. Both the multitude of systems on the supplier and partner side highlight the importance of interfaces required in the PRM solution.

Finally, also legal aspects need to be considered when implementing a PRM solution. Data privacy and security must be ensured, according to geographically applicable law. Moreover, the information shared in PRM solutions should not violate contractual matters.

6. Discussion

This master's thesis focusses on Partner Relationship Management in the B2B context and the requirements it must meet to leverage partnership success. PRM is used in indirect sales channels, where manufacturers collaborate with third parties, such as dealers, or distributors, for selling their product to the end customers. These partnerships involve several goals and challenges, which are outlined in the literature review provided in this study. For

manufacturers, the advantages of collaborating with distribution channel partners include reduced transaction costs and access to markets that they would otherwise be unable to access independently. Channel partners are the link to local markets, bridging geographical, cultural, or language barriers. They have a big influence on the sales performance of internationally operating manufacturers. Therefore, distributor satisfaction is an important factor leading to channel success.

In the B2B economy, potential challenges hinder dealer satisfaction. Poor communication, lack of training, and perceived unfairness of goals or rewards reduce dealer satisfaction, resulting in lower sales performance. PRM solutions are a combination of business strategies and web-based technologies, with the overall goal of increasing the efficiency of channel partnerships.

There has been a great deal of research on PRM since the early 2000s, which is also reviewed in this study. The academic work presented in this study represents the last 20 years of PRM research. PRM solutions emerged at the same time as the Internet became available to a wide audience, both individuals and businesses. It is noteworthy that some of PRM's core considerations were made in the earliest stages of its history and have not changed to this day. For example, the importance of communication and training modules, or the focus on process automation for increased efficiency of partner relationships. Digitization has always been a part of PRM, and several of the definitions presented in this study include technology as a foundational element. In addition to its technological foundation, there are other core elements of the PRM definition. PRM solutions are defined not only as a software solution, but also as a complex set of business strategies that govern collaboration between companies. Cited authors put different focus in their work. While early papers focus on the general description of PRM solutions, other scholars provide ideas on how to measure PRM success or acceptance. The latest publications include the integration of artificial intelligence into PRM solutions.

Although existing PRM research covers many different aspects, it provides limited insight into how PRM is being used in modern organizations. To fill this gap, this study examines three current PRM solutions - Salesforce, ZINFI, and Impartner. The research aims to understand the functionalities included in PRM solutions and how companies are using them to manage their partner relationships. The results show that modern PRM solutions focus on the entire relationship journey between manufacturers and their partners. Starting with recruitment support and onboarding modules, PRM solutions streamline all the processes that take place

between companies, such as lead management, training and certification, or the sharing of marketing assets. They also include comprehensive performance measurement based on predefined KPIs. It is noteworthy that the PRM solutions reviewed have a high degree of customization. Rather than offering defined solutions, they offer different modules that can be combined according to specific needs. The modules are also highly customizable to ensure that they meet the inter-individual needs and characteristics of partners. In addition to their own modularity, third-party integrations and interfaces are a core element of PRM solutions, allowing them to connect to other tools such as CRM and ERP.

The study includes success stories for each of the PRM solutions evaluated. They help to answer the research question, as there are few case studies presented in the literature review. Analyzing the different cases presented in the success stories, it becomes clear that PRM solutions are mainly used in the IT, BFSI and telecommunications industries. Companies that choose PRM tend to have hundreds of partners and short sales cycles. The examples presented in this study give an idea of why companies are using PRM. Some companies want to improve channel marketing, while others want a single source of information for all partners. Recruiting, onboarding, and training partners is also seen as a key function of PRM solutions.

The results from both the literature review and the market analysis provide comprehensive knowledge about PRM solutions. However, these findings usually relate to companies in the above-mentioned industries. It is in the author's interest to examine the extent to which these findings apply to other B2B companies, especially in the manufacturing industry. T

The case study of KGF is presented to put the findings into a different context. The selected company differs from most companies using PRM solutions. With 800 employees worldwide, KGF is significantly smaller than the companies presented in the previous market research. The sale of all-terrain vehicles for special applications also differs from the products described in the success stories. KGF has an extensive international dealer network with 110 distributors worldwide and exports 98 percent of its products, which qualifies it for PRM research. Expert interviews are conducted to explore KGF's requirements for a PRM solution as an example of an SME B2B company. Based on the literature and previous findings, three interview groups are formed to provide a strategic, functional, and technological perspective on PRM implementation. The responses are consolidated into various categories. These categories are then transformed into a framework.

The objective of the framework is to theoretically connect the findings from theory and the results from the expert interviews. It consists of several components, of which some are deductive, and some are inductive. Deductive components are based on literature review and represent dimensions investigated within the expert interviews. The deductive components used in the framework are

- Collaboration
- Communication
- Business software and Interfaces

Inductive components originate from the answers of the interviews. Compared to deductive components, they are directly related to the case study observed, and might therefore be different for other companies. The inductive framework components are

- Niche markets
- Sales organizations
- Service.

The prevalence of these inductive components indicates the need for an individual assessment of a company's particular organizational structure, sales structure, and market conditions before implementing a PRM solution. While there are common aspects to PRM, the requirements for successful implementation can be highly individualized based on the company, its sales structure, and the characteristics of the products and solutions being sold.

6.1 Answer to the Research Question

To answer the research question, "What are the necessary requirements for digital Partner Relationship Management (PRM) solutions to effectively support the relationships between Business-to-Business (B2B) companies and their dealers?" the information from the framework is utilized.

First, PRM solutions must facilitate collaboration and communication between manufacturers and their distributors. Both academic research and real-world experience show that these two factors are critical to improving the performance of distribution partnerships. In this context, the role of dealer enablement is central. It is recommended that PRM solutions integrate dealer training to increase the independence and capability of distributors to sell products or solutions. As a result, the need for vendor support can be reduced. The integration of training modules into PRM facilitates the standardization, efficiency, and transparency of dealer enablement.

In addition to training and enablement, the facilitation of daily communication and communication processes is critical to the success of PRM. To ensure that the PRM solution optimizes and streamlines communication between manufacturers and dealers, it is essential to assess the content and nature of the communication prior to implementation. The level of dealer autonomy, the complexity of the products, the nature of the sales process, and other factors influence the type of communication that PRM needs to support. This may include real-time communication or multimedia exchange. In some cases, PRM solutions must include or at least integrate with traditional communication channels that cannot be replaced, such as email, messaging applications, or conferencing tools.

PRM solutions should facilitate a two-way exchange of information, enabling manufacturers to disseminate product, sales, and market data to dealers, while also allowing dealers to provide feedback and market insights. Furthermore, it is crucial to examine the entirety of the processes occurring between manufacturers and distributors, extending beyond those directly related to sales. This encompasses not only planning and forecasting, dealer performance KPI management, procurement, and production, but also post-sales processes. A PRM solution must consider and integrate these processes, if not facilitate or even automate them, to guarantee comprehensive support for the partnership.

The importance of a holistic approach to PRM solutions leads to another important requirement for successful PRM implementation. In today's economy, a large number of different software solutions are used in different business areas. Before implementation, a thorough analysis of existing business software applications (e.g. ERP, CRM, data management, communication tools) is mandatory. PRM solutions must aim to reduce the number of systems in use by integrating or replacing existing systems to ensure consistency and efficiency. The PRM system should support interfaces with ERP, CRM, office software, data management systems, service tools, e-commerce platforms, training tools, project management tools, ticketing systems, customer tools, and communication tools. This ensures seamless information flow and business continuity. Market research has shown that current PRM solutions offer a high degree of integration and numerous interfaces with other software applications currently in use. However, analysis of the software architecture on both the manufacturer and distributor side is an essential step to be taken before implementing PRM software. The ability to integrate with other systems not only predicts the efficiency and therefore the success of PRM solutions but is also crucial for user acceptance.

Answering the research question addressed in this master's thesis, it becomes evident that there are not merely general prerequisites pertaining to PRM solutions. The case study of a B2B manufacturer of all-terrain vehicles offers insight into additional considerations regarding the characteristics of the market, the company's distribution structure, the nature of dealerships, and the products themselves. The case study illustrates the existence of distinctive challenges pertaining to niche markets, particularly in the context of complex product technologies and non-standardized products. This consequently gives rise to a heightened necessity for comprehensive product data and partner training, in addition to responsive support mechanisms, such as FAQs or chatbots.

The varying levels of focus among dealers represent another aspect of niche markets. In the company assessed in the case study, the partners exhibit disparate organizational structures. For instance, some dealers concentrate on a single brand, while others maintain a multi-brand portfolio. Additionally, there are discrepancies in territorial coverage, with some partners holding exclusive territories and others operating in a more expansive manner. PRM solutions should be designed to accommodate the diverse organizational structures of dealer entities. This includes the provision of an array of process templates, key performance indicator (KPI) models, training resources, and incentive structures tailored to the specific needs of each dealer.

A further defining feature of niche markets is the reduced standardization of sales processes. The technological sophistication of the products and the higher investment volumes involved result in sales processes that are more complex and time-consuming than those in B2B environments, with multiple stakeholders involved. It is of particular importance to plan sales volume considering the longer supply times associated with specialized parts. In B2B environments, certain sales processes may entail public procurement procedures. In such cases, regulatory requirements and specific facts may carry greater weight than the abilities of a sales manager. PRM solutions should facilitate the implementation of any sales process by ensuring the accessibility of pertinent data to all relevant parties.

The findings of this study demonstrate that the implementation of PRM solutions is contingent upon a comprehensive examination of both internal and external sales organizations and processes. The specific networks and business environments in which companies operate give rise to distinctive requirements and challenges for PRM solutions. To respond effectively

to these requirements and challenges, PRM systems must possess the flexibility and customizability to align with existing processes and structures, rather than introducing new ones. Furthermore, after their initial implementation, PRM systems must demonstrate flexibility and the capacity to adapt to changing customer needs, changing processes, or changing technologies.

6.2 Challenges and Limitation of the Research

This study uses a mixed-methods approach, combining literature review, market research, and expert interviews to develop a PRM implementation framework. This chapter describes the challenges of each step, the measures to address them, and the limitations of methodology.

6.2.1 Limitations of the Literature Review

The initial challenge is to define the establish a general understanding of PRM. Chapter 2.5 *Overview of Existing Studies on PRM in B2B Environments* provides an overview of existing studies on PRM in B2B environments, offering insights into the current state of academic research on PRM. Most studies focus on the effects of PRM after its implementation. Only a limited number of publications delineate the full spectrum of functions, and the way companies utilize these systems. Furthermore, some of the related papers were published 10–20 years ago. Given the advent of new technologies and big data, these papers could be outdated in 2024. This master's thesis addresses the identified a gap in PRM research by providing insights into the functionalities and requirements for PRM solutions in real-world implementation scenarios, using a mixed-methods approach.

The comparison presented in Chapter 2.3 *PRM and Supplier Relation Management (SRM)*, merely serves to strengthen the comprehension and delineation of PRM. It does not offer a thorough compared analysis, which is a limitation to the literature review. Subsequent studies should prioritize a more thorough examination of the comparison between SRM and PRM, as they are presumed to be similar.

6.2.2 Limitations of the Market Research

The market analysis presented in this study is limited to three PRM solutions, so it does not provide a complete overview of the PRM market. The selected solutions represent a segment of available options, potentially overlooking other solutions that could offer diverse insights and functionalities. The assessment of PRM solutions is made based on information available on the websites of the PRM providers. As corporate websites present the companies in the best

way possible, the information have promotional character and do not cover potential challenges or “downsides” of the systems.

It is a challenge to obtain information about the price structure of the solutions, as they have a high degree of modularity, influencing the final price. Test or demonstration access, as well as pricing information are available to companies upon request; however, this information has not been obtained during this study, due to the effort involved and the resources available.

6.2.3 Limitations of the Case Study

A case study is performed to put focus on the pre-implementation phase and obtain information about collaboration within B2B sales partnerships. In the case study, employees of a manufacturer of off-road vehicles are interviewed about their current approach to dealer collaboration and their expectations towards PRM. Based on literature review, three interview groups are created: Strategic, functional, and technological.

The interview questions are developed based on the results of the previous chapters, including the categories that are found to be important for business partnerships. The questionnaires have a few limitations. Even though they are pre-tested and undergo a scientific operationalization process, they do not comply with empiric standards. The items from the questionnaire are not measured or weighted, and interdependencies were not tested. The questionnaire for group T, the technological perspective, does not dive as deep as possible into PRM technology, as this topic has been neglected in the first chapters. The questions used in this study should undergo empirical testing in further studies to prove the operationalization.

The number of nine respondents is relatively low. Especially the number of participants in the strategic and technological focused interview groups are very small. Recruiting the participants for the expert interviews was a challenge to the study. Several prospective interviewees indicate a lack of time to participate. Reasons for this were the seasonal fluctuations in business activity and the multitude of ongoing projects within the company. The IT department also experiences a surge in conversions and new technology launches. The results of the interviews are therefore not statistically significant and may not have external validity. The findings of this study are indicative and have not been empirically validated. In the interviews, some of the interviewees expressed uncertainty, as none of them had prior experience working with PRM solutions and were therefore unable to assess the full range of functions. The desire

to "...see or try out such a system" is expressed on several occasions. To address this issue, subsequent studies should provide a more comprehensive examination of the functions and applications of PRM in the introduction. The inclusion of visual aids, such as screenshots, videos, or test systems, would facilitate a more effective understanding of PRM solutions among participants.

While these gaps in knowledge have resulted in a bias in the evaluation of the use of PRM solutions, the responses from the interviews offer valuable insights into the dynamics of working with retailers. During the evaluation, it proves difficult to group the highly specific responses, which were tailored to the individual business area or specific product features, and to synthesize them at a higher level. The challenge was addressed by introducing inductive categories. The diversity of the responses indicates that additional factors must be considered during PRM implementation, thereby making a significant contribution to the existing research.

6.2.4 Limitations of the Framework

The study concludes with the presentation of results within a framework. The framework's applicability is limited by its reliance on expert interview data. It addresses the research question by delineating essential requirement categories for PRM solutions. The case study and resulting framework concentrate on the pre-implementation phase. To assess the applicability of the framework components must be evaluated in a real-world example. A further limitation of the study is the absence of a dealer perspective. To provide a comprehensive reflection of the requirements of a PRM, it would be beneficial to consider the collaboration and interface from the perspective of the dealer. Due to the limitations of scope and time, the trading partners were not surveyed in this study. It would be advantageous for subsequent studies to address this gap.

6.3 Conclusion, Practical Implications and Outlook for Further Research

This master's thesis contributes to PRM research. It fills a research gap by focusing on the requirements phase before PRM implementation. By assessing requirements from various perspectives, the study deepens the knowledge on collaboration between manufacturers and distribution partners. This PRM study is the first to focus on a niche provider in the manufacturing B2B sector. In the market research, the examples of the presented PRM providers show that the systems are primarily used in the BFSI, telecommunications, or IT

sectors. Unlike these industries, the case study investigation highlights the specifics of B2B niche markets:

- The products are technologically complex and have a low degree of standardization in end-customer consulting
- The technical complexity underscores the importance of dealer training, as already established in the literature review
- There are different types of distribution partnerships, and in niche areas, manufacturers often struggle for the attention and resources of dealers, especially when they have other, higher-margin products in their portfolio
- Unlike insurance and financial products, after-sales service plays a crucial role in the collaboration with partners in the automotive and mechanical engineering sectors and must therefore be considered in PRM implementation

All the insights gained in this study expand the established catalogue of requirements for PRM solutions. Integrating the new categories in PRM implementation ensures PRM to be successfully used in medium-sized companies with specialized products.

The results of this master's thesis also highlight the importance of an intensive analysis of internal structures before PRM implementation. This includes the analysis of the existing software architecture. The company presented in the case study uses a variety of systems, particularly in sales. Knowledge about the systems allows for the creation of interfaces, that are essential for the successful use of the PRM system. Companies must integrate the PRM system into the existing structure. They must decide which tasks are performed in PRM and which other systems are supported or replaced by PRM. These considerations must be made before the implementation. The interviews show that the lack of acceptance is one of the greatest risks in PRM implementation. Moreover, it is necessary to examine the internal collaboration before PRM is implemented. The success of a system is depended upon its ability to integrate with and provide support for the existing structures. The analysis of internal collaboration forms determines the processes that are to be streamlined in PRM.

The presented results and the categories of the framework contribute to current research by opening new dimensions of Partner Relationship Management. This master's thesis has practical relevance for companies. It delivers fundamental PRM information and explains the differences to their systems, such as CRM and SRM. Thereby it aids in the selection of a

system, that fits the business model. The market research outlines the basic modules and functionalities of modern PRM systems, which are not covered in the existing literature. In addition, this study provides an overview of dimensions have not been considered in PRM research before.

The framework serves as a guideline for companies, that plan to implement PRM systems. It suggests conducting surveys and analyses in advance to build and implement a PRM system. Subsequent studies should further explore the results of this study and the components presented in the framework. Although there are numerous studies on PRM systems, currently, there are no dedicated studies on the use of PRM in SMEs or niche markets. Furthermore, the presented components should be tested in subsequent implementation. For instance, the presented PRM solutions should be examined considering the developed requirements. The solution with the best fit should be selected and implemented to then verify the results with real participants, either in a test system or a live system. Additionally, future research should include the perspective of dealers, as mentioned in the limitations. The used questionnaire or the components of the framework serve as a basis for the survey. However, the question concepts should be empirically validated before replicating the study. Future research can also build upon this.

Dynamic markets, new technologies, and innovative business models continuously change the way companies collaborate with dealers. Therefore, the research area of Partner Relationship Management will continuously evolve and grow with new conditions.

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Other tools

Transcription tool

- Otter.ai, URL: <https://otter.ai/>

Translation tools

- DeepL Write, URL: <https://www.deepl.com/de/translator>
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Artificial Intelligence

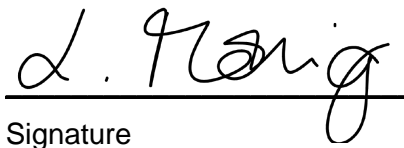
- Chat GPT 4.0 for assistance in formulation and translation

Declaration

I hereby declare that I have prepared the present final thesis independently, have not submitted it for examination purposes elsewhere, have used no sources and aids other than those stated, and have marked literal and analogous quotations as such, and consent to the examination using anti-plagiarism software.

Ulm, 08.08.2024

Location, Date



Signature

Appendix

Tables

Table : Overview of PRM Studies

Table : Operationalization

Table : Interview Guideline

Table : Interviews Coded

Table : Interviews Categorized

Interviews

PDF: Interview Introduction

PDF: Interview Transcripts