

Who should speak to whom?

An empirical study for matching corporate Buying and Selling Center personae

Abstract

This research develops a matching model that assigns those selling personae with the highest source credibility to the corresponding buying personae. The credibility for each match of selling and buying personae is determined using the multi-dimensional criteria trustworthiness, expertise and similarity. The proposed procedure is based on an adapted Quality Function Deployment (QFD) matrix. The model was applied within the context of a typical buying center in the construction industry, specifically the Hilti Group. The adjusted QFD matching model was applied to four different buyer personae based on focus groups with Hilti representatives from different countries. Subsequent interviews with Hilti customers confirmed the results of the QFD matching model and showed a significant fit of the matching of selling personae to all four buyer persona types examined. Methodologically, this research shows the applicability of the proposed QFD matching model based on source credibility in business practice using a real company example. From a managerial standpoint, the findings show the high relevance of integrating independent and therefore external personae into the selling process to increase credibility.

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Motivation & objective

Increasing product complexity (Papenhoff et al., 2022), the desire for customized solutions in the B2B sector (Schlipf & Solloch, 2020), and increasing specialization among customer stakeholders lead, among other things, to a continuous increase in the average number of people in buying centers (BuC) (Cunningham, 2021; Challenger, 2022). This development has a negative impact on the probability of a sale, as decision-making power is thus spread across many participants from different disciplines (Lingquist et al., 2015). Whereas the traditional B2B BuC consisted primarily of the roles of purchaser, decision-maker, as well as user (Cabanelas et al., 2023), and a manageable number of mostly external “influencers” (e.g., engineering firms, consultants, etc.), today's BuC includes more diverse roles, if only because of increased requirements in areas such as digitalization and sustainability.

Therefore, the goal of many companies is to address the individual personae in their customers' BuCs as individually and specifically as possible to optimize the touchpoints with them (Veile et al., 2021). This results in the development of selling centers (SeC) (Siemieniako et al., 2023) and team selling strategies (Rapp & Rapp, 2023). The challenge for this situation is to identify the most effective match between buying and selling personae (Menthe & Sieg, 2018, Moon & Armstrong, 1994). It is crucial to know which personae from the SeC are considered most credible by the individual members of the BuC and should therefore act as contact (Lewinski, 2021; Stiller, 2020).

The aim of this study is hence to create a matching model that assigns the selling personae to the highest source credibility of the corresponding buyer personae and to verify this matching model using a real company example.

Theoretical background & deficit

There are several approaches for matching buying and selling personae (see Fig. 1). A known approach is the matching based on the roles people play within the BuC and SeC. Role models are used in the B2B sector as they provide information about the expected behavior and interests of individuals (Jackson and Sciglimpaglia 1974). The most influential and widely used role model in this field is Wind and Webster's form (Fig. 1, field 1), which defines five roles in the buying center according to their duties (Webster and Wind 1972; Cabanelas, Mora Cortez and Charterina 2023).

A further approach by Puri and Korgaonkar (1991) is a process-oriented matching, which brings together members of the BuC and SeC who play a critical role in the same stages of the sales-buying process and pursue the same or similar goals (Fig. 1, field 2). Papenhoff, Schultz and Welle (2022) complemented with their work, that it is also important to adjust the interaction partners on the hierarchical level to create an exchange between equals.

Moreover, there are approaches that consider the interpersonal level of matching by pairing people with compatible characteristics (Fig. 1, field 3). The personality of the BuC and SeC members and their influence on the people is found by examining demographic, cultural, socio-psychological and behavioral characteristics as well as product-related user behavior.

The “one account manager fits all” approach (Fig. 1, field 4) is derived from the key-account-management philosophy, where one person – the key account manager – is responsible for planning, managing, and communicating with the representatives from major clients (Jones et al. 2013). This approach does not include the complexity of diversified communication with the complete BuC of the customer companies, still requesting multiple roles

and people in the background of the key account manager in order to fulfil the broad customer requirements.

--- Insert Figure 1 about here ---

In summary, the approaches mentioned focus mainly on the similarities between members of BuC and SeC. Either on the similarities between their functional roles within the centers or on the similarities between their personalities. None of the models consider both personal and professional similarities. Most approaches are one-dimensional as they only focus on similarities and do not consider the individual needs of each person involved in the buying and selling process. There is little room for parameters to find a well-defined match for a person with individual characteristics and needs. Furthermore, hardly any of these matching models focus on interactional relationships and consider whether individuals perceive each other as credible and how the statements and actions of one person influence the opinions and behavior of the other. Overall, the mentioned approaches are rather theoretical and challenging to practically apply in a real business context e.g., there is no easy-to-use instruction guide or template available to be used for existing selling centers to identify its perfect matches in a specific company situation.

Methodological approach

In order to positively influence the purchasing process, the selling personae should communicate with those buyer personae that have a major impact on the behavior and opinion of the buyer persona (Lewinski, 2021; Moon & Armstrong, 1994). The effectiveness of a message, measured by the strength of the change in the recipient's attitude, depends largely on the subjectively perceived credibility of the source (Hovland & Weiss, 1951). Just as in influencer marketing, the influencer or selling persona with the highest credibility is the ideal match for a given buyer persona (Crnjak-Karanovic et al. 2023; Kunath et al. 2018). The aim of this matching model is to analyze which selling persona is considered most credible by the buyer persona under consideration. This selling persona should subsequently be used for interaction with the respective buyer persona.

The source credibility model developed by Hovland and Weiss (1951) can be used to assess the credibility of sources. Credibility is described here as a construct consisting of the dimensions *trustworthiness* (1) and *expertise* (2). A source is classified as trustworthy if it reveals a high degree of honesty and sincerity (van der Waldt et al., 2009) and therefore has no intention of not telling the truth (Ohanian, 1990). Expertise has a positive effect on credibility (Arndt et al., 2014), since a high degree of expertise gives the recipient little reason to question the accuracy of the statement (Ismagilova et al., 2020, Kroeber-Riel & Weinberg, 2009) and it can be assumed that the source has useful and substantial information (Bansal & Voyer, 2000). In this context, competence relevance, i.e., the connection between expertise and topic, is of great importance (Berlo et al., 1969). McGuire's (1985) source attractiveness model complements the dimension of attractiveness. Source attractiveness is less limited to physical aspects and comprises, above all, the *similarity* (3) between sender and receiver (McGuire, 1985), e.g., in terms of hierarchical position and personal characteristics (Tomczak et al., 2018).

The three dimensions of trustworthiness, expertise, and similarity are combined in the three-component model and serve to identify and measure source credibility (Ohanian, 1990). Accordingly, the typical senders should show fundamental agreement with the recipients of a message and at the same time distinguish themselves from them through other characteristics (Nawratil, 2006; Halder et al., 2021). To determine the source credibility of the selling personae in relation to the buyer persona, several credibility criteria are examined (see Table 1). The dimension of trustworthiness is divided into the factors of objectivity and measured in terms of

personal benefits (e.g., bonuses) from the sale, and independence, in terms of contractual obligations. The criterion of expertise includes the commercial, technical, and legal knowledge that the persona has due to their job, as well as their application skills regarding the product being sold. The similarity criterion considers functional similarity, which is measured based on the correspondence between the activities and areas of expertise of the selling and buyer personae. Hierarchical similarity is assessed based on the decision-making authority of the personae. Furthermore, the factor of gender (and optionally age) can be compared and matched.

--- Insert Table 1 about here ---

For the comparison of the selling and buyer personae, the structure of the matching model is based on the Quality Function Deployment (QFD) method according to Akao et al. (2003) (Fig.2, left). The QFD is traditionally used in the planning process to optimize product development and quality by assessing customer requirements and then linking them to the functions and technical features of the products. In this way, customer requirements are translated into technical solutions and the corresponding technical product features are prioritized (Hauser & Clausing, 1988; ISO, 2021).

--- Insert Figure 2 about here ---

The result of the adapted QFD method is the BuC-SeC matching model which combines the matching logic while reproducing individual informational needs of different buyer personae (Schlipf et al., 2024). The model uses this assignment and prioritization logic and links the requirements of the buyer persona in the form of the above-mentioned credibility criteria with the characteristics of the relevant selling personae (Fig.2, right). A matrix is created for each buyer persona and weightings (scale 1-10) are determined for the source credibility criteria based on their position, activity, characteristics, and needs. The criteria for the combination of buyer and selling persona are rated on a scale from 0 to 3. The assessment is selected individually for each factor. The criterion of gender is an exception. For this, each selling persona is divided into male and female and ranked with the corresponding percentage of each gender per occupational group of buyer personae. A credibility rating is determined for each selling persona using the weighted average of the criteria. The selling persona with the highest value is considered the most credible and represents the most effective contact person for the buyer persona in question.

Case study: Buying & selling Center of Hilti

The QFD matching model is evaluated using a typical BuC from the Hilti Group in the construction industry. The Hilti Group supplies the construction and energy industries worldwide with products, system solutions, software, and services via a global direct sales network, maintaining intense customer contact and close cooperation between its own SeC and the BuCs of its customers. Here, the members of the BuC are divided into several personae, four of which are examined in more detail in this paper (see Fig. 3). These include the “Buy” persona, representing traditional purchasing and entails procurement processes, purchase decisions and supplier relations. The “Manage Business” persona incorporates business and personnel management and focuses on the steering and development of the company. The typical workers and users of the products are described by the “Work” persona. The “Ensure Safety” persona deals with regulations and requirements related to safety and environmental protection. In workshops with Hilti employees from sales, marketing, and product management, 14 selling personae (see columns of Table 2) were defined, representing different areas of responsibility and including internal and external personae such as influencers, reference customers, and key opinion leaders.

--- Insert Figure 3 about here ---

Study A – Procedure and results QFD matching

The proposed QFD-matching approach was tested at Hilti across two different focus groups over two years from 2023 until 2024 repetitively. The first focus group in 2023 contained three Hilti employees from marketing and sales departments of the German organization. At first, the methodological design was verified. The study was subsequently extended to a second focus group which consisted of two Hilti sales employees from the Hilti organizations in France and Great Britain. The selection of these market organizations is predicated on the principle of comparable cases (Lijphart, 1971) defined by organizational structure, market size and cultural proximity. Since several workshop participants were present at the same time, they were able to discuss their opinions and statements directly and agreed on a common response. This approach yielded clear results that were as objective as possible due to the interpersonal nature of the workshop. Fig. 4 shows an example of a matching model for the buyer persona “Buy” for the German market.

For a given BuC persona, the workshop participants were first presented with the source credibility criteria (field 1, Fig. 4 and Fig. 5) before the selling personae under consideration (field 3, Fig. 4) were defined and transferred to the adapted QFD model. In the use case, the 14 identified selling personae were differentiated according to technical expertise (e.g., service employees, developers (R&D), IT & product managers, product safety officers) and hierarchical position (e.g., sales employees and sales management). The Hilti internal selling personae mentioned above were also supplemented by external personae. Here, a distinction was made according to the hierarchical position (e.g., reference customer users and reference customer managers) and for potential paid influencers, according to the exclusivity of their work for Hilti.

--- Insert Figure 4 and Figure 5 about here ---

The workshop participants jointly quantified the weightings of the criteria (field 2, Fig. 4) and populated the relationship matrix (field 4, Fig. 4) for each of the four buyer personae. This resulted in credibility rankings for the selling personae for each buyer persona. The results (see Table 2) could be viewed, discussed, and compared directly by the respondents.

--- insert Table 2 about here ---

The completed matching models show that the various buyer personae consider different selling personae to be the most credible. This is due to requirements and priorities, which are considered in this model through weightings. So, similarity is a good indicator for perceived credibility. Selling personae often not only achieve high rankings in similarity, but they also have the expertise. In addition, it is evident that the external personae were rated particularly highly, as they demonstrate a strong degree of objectivity and independence, which was highly valued by the workshop participants. For this reason, the selling persona reference customer is the most effective contact person for the buyer personae Buy, Manage Business and Work. Only the buyer persona Ensure Safety perceives an internal selling persona, the “product safety manager,” as the most credible.

The evaluation shows that the ideal composition of the selling center varies depending on the members of the buying center to be reached. Therefore, individual matrices and matches must be created for different buyer personae.

Study B – Customer interviews

To verify the results of the matching model from Study A, existing and potential Hilti customers were interviewed in a complementary study (= Study B). The sample of 13 interviews represented all three buyer personae mentioned above. The guided customer interviews were

conducted directly in front of a Hilti store or by telephone and lasted between 8 and 17 minutes (Ø time 12 minutes). The respondents were asked to rank the given selling personae according to their credibility.

Due to the clarity of the matching results from Study A regarding the hierarchical position (only buyer persona work focuses on the user and application level), Study B no longer distinguished between the user and manager levels of the selling persona reference customer and influencer. In addition, the selling persona influencer was no longer differentiated into exclusive and non-exclusive. The ranking of the selling personae prioritized by the customer interviews can be seen in Table 3 in the right column per BuC persona.

Evaluation

The comparison of the results from Study A and Study B shows a significant agreement of the selection of the selling personae with the highest credibility values for all four buying center personae (see Table 3). The rank correlation coefficients according to Spearman range between the values $0.60 \leq \rho \leq 0.85$ for the four buying center personae, thus showing a strong to very strong correlation according to Cohen (1988). This finding supports the effectiveness of the proposed QFD matching method in a typical buying center in the construction segment of the Hilti Group.

--- insert Table 3 about here ---

Conclusion

The research based on the adapted QFD model could develop and validate a systematic logic for identifying, selecting, and prioritizing the most credible selling personae. The model reveals the optimal match to the corresponding buying personae. The results of the QFD matching methodology in the given case study show that the most effective matches depend heavily on the individual needs, experiences, and initial situations of the selling personae involved. This also means that an individual composition of the SeC leads to greater overall credibility and thus to a more personal approach. From the perspective of the corporate partner, the proposed procedure was practical and concrete to implement in a business environment. Moreover, the matching of selling and buying demonstrated significant alignment with empirical findings from customer interviews across all examined buyer personae. These results suggest that the QFD matching matrix based on source credibility is a robust method for identifying “who should speak to whom” within BuC/SeC interactions in industrial contexts. In this regard, the model provides companies with a valuable matching tool to optimize its communication alignment and, ultimately, the sales process.

Scholarly Implications

The methodology has been tested twice, with data drawn from three international markets, within a single industrial case in one industry. Further validation is recommended in other industries to allow for making this model more robust. This could entail diverse industries, and corporate settings while controlling for ethical biases (Bell & Willmott, 2020). Next, the interview-based data collection should be transferred to a digital model that makes it more easily replicable for companies and that increases the data set. The expected result is an algorithm embedded in a digital interface which practitioners pre-fill with their expectations on the ideal matching. After having applied the selling approach which targets the buyer personae, the logic adjusts the credibility score based on the selling success measured by organizational sales criteria such as net sales, product orders, leads and conversational considerations.

Managerial Implications

This QFD-based logic enables large companies to adapt their customer journey phases (Lemon & Verhoef (2016). Depending on the stage of the sales process and the characteristics of the product, the composition of the buying center and consequently, the most credible matches within the selling center may vary considerably. The results show that independent and therefore external personae, such as key opinion leaders and reference customers should be integrated regularly into the SeC to increase credibility among customers. The findings indicate for Hilti that a customer reference program is a highly promising follow-up for the company to increase their sales chances as reference customers are highly ranked. In digital selling campaigns, customer referrals are considered to increase credibility in product communication. Social media platforms play a vital role for networking and bear high potential for the implementation of a product referral program with selected reference customers.

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Appendix

Table 1. Criteria and factors of source credibility (own source)

Criterion	Factors	
Trustworthiness	Objectivity	Independence
Expertise	Technical Knowledge	Commercial Knowledge
	Legal Knowledge	Application Competency
Similarity	Functional	Hierarchical
	Planning Level (optional)	Gender & Age (optional)

Table 2. Overview of credibility ratings after the workshops with representatives from Hilti Group (own source)

Selling Center	Territory Sales Person	Area Sales Manager	Solution Consultant / Product Manager	Service Personnel	Developer (R&D)	Product Safety Representative	Digital Account Manager	Reference Customer (User)	Reference Customer (Manager)	Exclusive Paid Influencer (User)	Exclusive Paid Influencer (Manager)	Paid Influencer (User)	Paid Influencer (Manager)	Key Opinion Leader
Buy	1.8 5	1.7 2	1.3 0	1.2 1	1.5 3	1.5 5	1.0 4	1.7 1	2.3 5	1.0 4	1.2 6	1.0 4	1.2 8	2.4 1
Manage Business	1.3 5	1.7 0	1.4 0	1.3 4	1.5 5	1.4 2	0.9 1	2.0 1	2.2 3	1.1 7	1.3 2	1.2 2	1.5 4	2.0 6
Work	1.5 8	1.6 4	1.3 8	1.7 6	1.1 2	1.5 7	1.2 6	2.3 3	2.1 5	1.6 9	1.5 1	1.6 9	1.5 1	2.0 6
Ensure Safety	1.5 7	1.6 9	1.5 1	1.6 1	1.6 2	2.0 4	1.0 7	1.8 2	1.9 3	1.3 6	1.4 1	1.3 6	1.4 1	2.0 0
∅	1.5 8	1.6 9	1.4 0	1.4 8	1.4 5	1.6 5	1.0 7	1.9 7	2.1 6	1.3 2	1.3 8	1.3 3	1.4 3	2.1 3

Table 3. Comparison of both studies of buying center persona *Buy*, *Ensure Safety*, *Manage Business* and *Work*; left Study A via Matching Model; right Study B via customer

interviews; *in italics*: external selling center personae; **green**: „best matches“ of highest prioritized personae

□ See next page

W o r k	Study B Customer Interviews	<i>Reference</i> <i>Customer</i>	<i>Key</i> <i>Opinion</i> <i>Leader</i>	<i>Service</i> <i>Personnel</i>	Engineer (R&D)	Territory Sales Person	Area Sales Manager	IT- & Product Manager	Product Safety Representative	<i>External</i> <i>Influencer</i>	Digital Account Manager	$\rho = 0,60$
	Study A Matching Model Average GER, UK, FRA	<i>Reference</i> <i>Customer</i>	<i>Key</i> <i>Opinion</i> <i>Leader</i>	<i>Service</i> <i>Personnel</i>	<i>External</i> <i>Influencer</i> (SM)	Area Sales Manager	Territory Sales Person	Product Safety Representative	IT- & Product Manager	Digital Account Manager	Engineer (R&D)	
M a n a g e B u s i n e s	Study B Customer Interviews	<i>Key</i> <i>Opinion</i> <i>Leader</i>	<i>Reference</i> <i>Customer</i>	Area Sales Manager	Territory Sales Person	Engineer (R&D)	IT- & Product Manager	Product Safety Representative	External Influencer	Service Personnel	Digital Account Manager	$\rho = 0,85$
	Study A Matching Model Average GER, UK, FRA	<i>Reference</i> <i>Customer</i>	<i>Key</i> <i>Opinion</i> <i>Leader</i>	Area Sales Manager	Engineer (R&D).	Product Safety Representative	IT- & Product Manager	External Influencer	Territory sales person	Service Personnel	Digital Account Manager	
E n s u r e S a f e t y	Study B Customer Interviews	Product Safety Representative	<i>Reference</i> <i>Customer</i>	<i>Key</i> <i>Opinion</i> <i>Leader</i>	Territory sales person	Engineer (R&D)	IT- & Product Manager	Area Sales Manager	Service Personnel	<i>External</i> <i>Influencer</i> (SM)	Digital Account Manager	$\rho = 0,81$
	Study A Matching Model Average GER, UK, FRA	Key Opinion Leader	Product Safety Representative	<i>Reference</i> <i>Customer</i>	Area Sales Manager	Engineer (R&D)	Service Personnel	Territory sales person	IT- & Product Manager	<i>External</i> <i>Influencer</i>	Digital Account Manager	

B u y	Study B Customer Interviews	Territory Sales Person	<i>Reference Customer</i>	Area Sales Manager	<i>Key Opinion Leader</i>	IT- & Product Manager	Service Personnel	Engineer (R&D)	Product Safety Representative	<i>External Influencer (SM)</i>	Digital Account Manager	$\rho =$ 0, 81
	Study A Matching Model Average GER, UK, FRA	<i>Key Opinion Leader</i>	<i>Reference Customer</i>	Territory Sales Person	Area Sales Manager	Product Safety Representative	Engineer (R&D)	IT- & Product Manager	Service Personnel	<i>External Influencer (SM)</i>	Digital Account Manager	
	Rank	1	2	3	4	5	6	7	8	9	10	Spearman rank correlation Coefficient.

Figure 1: Approaches to match roles in buying and selling centers: (1) according to Moon & Armstrong, 1994; 2) according to Puri & Korgaonker, 1991; 3) according to Bonoma, 1982; 4) according to Key-Account-Management philosophy (Jones et al., 2005)

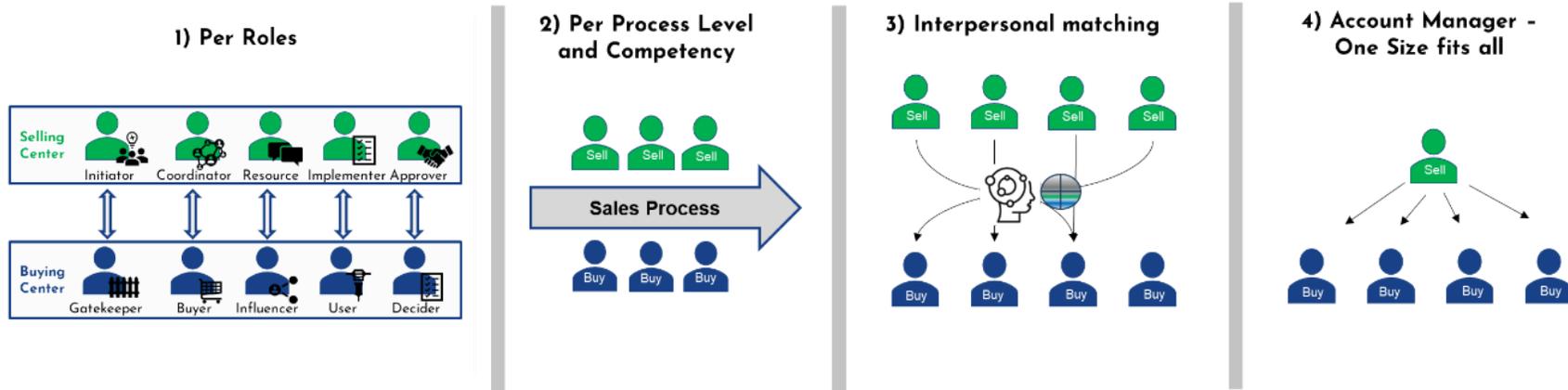


Figure 2: Left: traditional QFD matrix; right: buying center / selling center Matching matrix (own source)

Product x ----- Customer-requirements x_i	Weighting g_i (Scale 1-10)	(technical) Functions & Product Features y_j				
		Solution 1	Solution 2	Solution 3	...	Solution j
Requirements 1						
Requirements 2						
Requirements 3						
Requirements 4						
Requirements 5						
...						
Requirements i						
Technical significance of solution $y_j : \sum g_i * x_i y_j$ for product x						



Buyer Persona x ----- Credibility requirements x_i	Weighting g_i (Scale 1-10)	Possible Selling Personae y_j				
		Selling Persona 1	Selling Persona 2	Selling Persona 3	...	Selling Persona j
Trustworthiness						
Objectivity						
Independence						
Expertise						
...						
Similarity						
...						
Degree of matching of selling persona $y_j : \sum g_i * x_i y_j$ and buyer persona x						

Figure 3: Four selected buyer personae from the construction industry (Image source: Hilti)

Buy



Manage Business



Ensure Safety



Work



Figure 4: Exemplary display of source credibility QFD matching between buying center persona Buy and the possible personae of the selling center for Market Germany

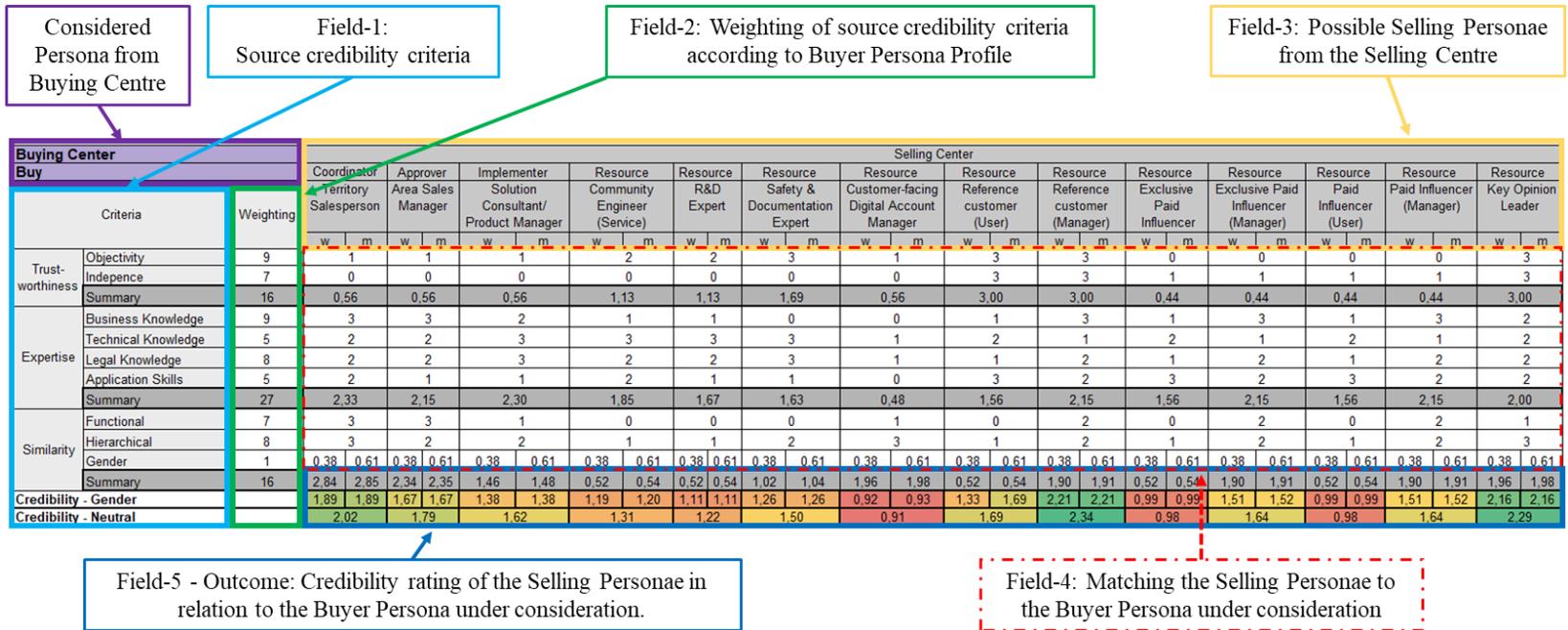


Figure 5. Overview on the source credibility criteria including the evaluation metric of the QFD relationship matrix (see as well Figure 4, field 4).

