AMERICAN MARKETING ASSOCIATION

# Commentary: Toward Formalizing Social Influence Structures in Business-to-Business Customer Journeys

Journal of Marketing
2021, Vol. 85(1) 98-102
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DOI: 10.1177/0022242920974669
journals.sagepub.com/home/jmx
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**Editor's Note:** This commentary is a companion piece to "Traveling with Companions: The Social Customer Journey," part of the JM-MSI Special Issue on "From Marketing Priorities to Research Agendas," edited by John A. Deighton, Carl F. Mela, and Christine Moorman. A list of articles and commentaries appearing in the Special Issue can be found at http://www.ama.org/JM-MSI-2020.

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Hamilton, Ferraro, Haws, and Mukhopadhyay (2021; hereinafter HFHM) build on extant research on customer journeys to conceptualize the pivotal role of social influence. HFHM (p. 69) recognize "the changing and pervasive role of social influence throughout the consumer decision making process" and that the extant literature focuses on individual customer journeys such that the focus is on "isolated consumers as decision making units." With this observation, HFHM's goal is "to create a more 'accurate' journey map" to conceptualize and elucidate the "social customer journey." The authors achieve this goal by defining social others and theorizing the changing role of social others across the customer journey stages while laying out the case of joint journeys "wherein two or more customers journey occur together"—that is, "traveling companions."

HFHM focus on the business-to-consumer (B2C) customer journey, but they recognize the importance of social others in the business-to-business (B2B) customer journey. Specifically, HFHM (2021, p. 73) rely on Sheth (1973) to suggest that in B2B "decision making can be viewed through the lens of joint customer journey as there are often several individuals playing a role in the decision-making process." Indeed, B2B marketing is social by definition as it "encompasses the activity of building mutually value-generating relationships . . . between organizations . . . , [and] the many individuals within them" (Grewal and Lilien 2012, p. 3). However, the B2B literature has evolved beyond the joint decision-making model to examine buyer–seller relationships (e.g., Dwyer, Schurr, and Oh 1987) and buyer/seller networks (e.g., Gupta et al. 2019). Despite this, B2B research typically receives far less attention from marketing scholars (e.g., Grewal and Lilien 2012), and the literature on customer journeys is not an exception.

We build on HFHM to highlight unique challenges in studying social customer journeys for B2B firms. We start by describing the various stages of a B2B customer journey and underscore the multiplicity of social influence at various stages of the journey. We then develop three novel elements (*n*-ad, *m*-hierarchy, and *p*-*s* social influence structures), which serve as concepts to study the nature and impact of social influence on the buyer side, seller side, and buyer–seller interface. In the process, we raise specific questions for future research. Before concluding, we also stress the need for research in B2B social customer journey related to structural dynamics and key performance indicators.

## B2B Customer Journeys: Multiplicity of Social Influences

We begin by adapting these B2C customer journey stages in HFHM for the B2B context. As an illustrative example, an energy company pursuing oil and gas exploration and production operations across many sites maintains an on-site production crew on a 24/7 basis. If the energy company decides to outsource on-site hospitality and catering functions, what steps should it go through to search for, finalize, and work with a facilities management supplier? A typical B2B customer journey such as this is comprised of nine steps: need activation and consideration, information search and shopping process, purchase/buy, billing/payment, delivery/install/setup, usage/consumption, maintenance/repair/resolution, disposal, and repurchase/rebuy/new buy (Best, Mittal, and Sridhar 2021).

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This energy and the facility management seller will have multiple influencers on the buyer and seller sides at each stage of this journey. For example, finance, procurement, and site managers serve as influencers on the buyer side during the information search and shopping process stage, while project management and sales and bidding serve as influencers on the seller side during the same stage. It is important to understand the role of the influencers, the multiplicity of influences they exert within their organization and on the other party, and how this role and these influences change across the customer journey. The multiplicity of social influences in B2B buying is pervasive, as in B2C, but the social dynamics may be more complex given each influencer has a different vantage point of the organization's objective function, which they jointly seek to achieve. In the next section, we take steps toward formalizing the social influences in B2B customer journeys to stimulate future research in this important area.

## Formalizing Sources of Social Influence in B2B Customer Journeys

We demarcate social influences in B2B markets into those within buyer-firm stakeholders and those within seller-firm stakeholders as well as those reflecting relationships between buyer stakeholders and seller stakeholders. B2B buying tasks involve many internal buyer-firm stakeholders with diverse functional backgrounds, such as finance, procurement, research and development (R&D), and production. Similarly, B2B selling involves many internal selling-firm stakeholders with diverse skill sets such as sales and bidding, project management, and safety (Best et al. 2021). The nature, roles, skill sets, and influence of these stakeholders change through the stages of customer journey for both the buyer and seller firms. For example, an oil and gas company creates a buying committee with members from finance and procurement, as well as a site manager. Procurement vets legal hurdles and contract terms to produce the request for proposal. Finance approves the budget, and supplier search begins with ongoing feedback from site employees.

We introduce three concepts to capture the social influence structure within buyer firm and within seller firm: *n*-ad social structure, *m*-hierarchy social structure, and primary-support (*p-s*) social influences. We introduce each with an eye toward exposing how each may impact the journey and future research opportunities.

### *n-ad Social Structures*

At each stage of a B2B journey, stakeholders arrive at important decisions on behalf of the buying/selling organization. To understand such decision making, we need to conceptualize the extent of social influence among these decision makers. We capture links among equals with the concept of *n*-ad social structures, such as a dyad between two individuals or a triad among three individuals. For example, in Panel A of Figure 1, we depict a simple 3-ad structure among finance, procurement, and site manager, who might come together on the buyer side during the information search stage. In Panel A, three bidirectional arrows capture three different bidirectional social influences among the individuals.

What does *n*-ad tell us about social influence in the buying/selling firm? As *n* increases, more stakeholders have a similar level of influence on the decision at a customer journey stage. The benefit of increasing *n* for the buying firm is that the decision is evaluated from multiple vantage points that might reduce decision risk, while the downside is that decision-making costs increase. An important question to ask is what is the right level of *n* that balances risks and costs at each stage of customer journey? Does the buying situation (rebuy/new-buy) moderate this effect? For the seller, knowing the *n*-ad buyer structure provides valuable information about buyer's revealed trade-off between risks and costs. Specifically, if the buyer chooses a large *n*, the seller might infer that the buyer is risk averse and that, therefore, risk-mitigating seller strategies (e.g., customized communication for each buyer stakeholder) might be fruitful. Further, the buyer's *n*-ad structure should inform the communication strategy of the seller. Knowing the elements in the buyer's *n*-ad, the seller should infer the actors/experts it needs to persuade the buyer. For example, if the seller knows that the site manager is part of the *n*-ad, the seller would need to provide detailed information on execution of facility management services and might want to include a service employee in its own *n*-ad to interface with the buyer. Thus, the *n*-ad structure of the buyer informs the *n*-ad structure and the associated communication strategy of the seller.

Currently, we know little about the *n*-ad structures of buyers/sellers across journey stages. Unanswered questions include the following:

- Why and how do buyers choose *n*-ad structures at each stage of the customer journey? Antecedents could include extent and nature of risk (e.g., internal/external, supply/demand), cost drivers, and buyer characteristics (e.g., size).
- How and why do *n*-ad structures change across stages of customer journey in B2B firms, and how do these structures influence buyer efficacy (e.g., coordination costs, bargaining power, profitability) across customer journey stages as needs change?
- Given a particular *n*-ad buyer structure, how and why should a selling firm develop its *n*-ad structure across customer journey stages to satisfy customer needs and optimize account profitability? Answering this question could help sellers plan the appropriate *n*-ad structures *ex ante* to enhance performance.

### *m-hierarchy Social Structures*

Most organizational structures have embedded hierarchies, which rank individuals according to status or authority. Typically, the lower-ranked employee supports and advises the higher-ranked employee, either within or across functions. To enrich and capture

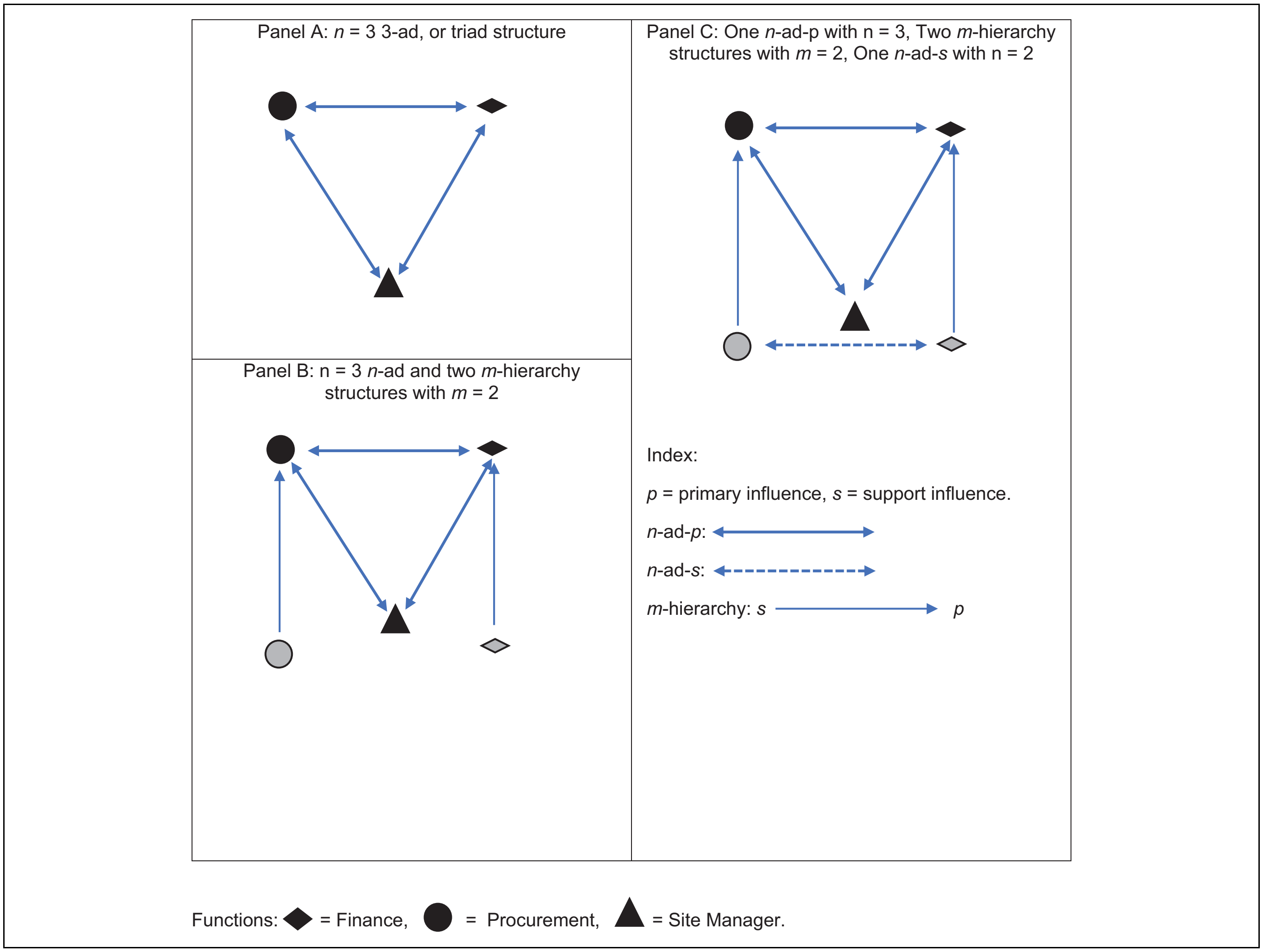
Panel A: *n* = 3 3-ad, or triad structure
Panel B: n = 3 *n*-ad and two *m*-hierarchy structures with *m* = 2
Panel C: One *n*-ad-p with n = 3, Two *m*-hierarchy structures with *m* = 2, One *n*-ad-*s* with n = 2
Index:
*p* = primary influence, *s* = support influence.
*n*-ad-*p*:
*n*-ad-*s*:
*m*-hierarchy: *s*
*p*
Functions: ◆ = Finance, ● = Procurement, ▲ = Site Manager.

**Figure 1.** Illustrative example of *n*-ad and *m*-hierarchy structures.

*Notes*: Panel A represents a simple 3-ad or triad structure to depict relationship among three functions (finance, procurement, and site manager) such that the bidirectional arrow suggests similar level of primary social influence roles at this stage of customer journey. Panel B replicates this three-ad structure and adds two 2-hierarchy structures for finance and procurement, indicated by unidirectional arrows and lighter shaded diamond and circle. Panel C replicates Panel B and adds a support 2-ad influence between lower hierarchy finance and procurement employees, indicated by dotted bidirectional arrows. Thus, the *n*-ad influence can be *n*-ad-*p* (as in the upper triad, solid bidirectional arrows) or *n*-ad-*s* (as in the lower dyad, lower bidirectional arrow).

hierarchical social influences within buying and selling firms, we supplement the *n*-ad social structure with the notion of *m*-hierarchy social structures. In Panel B, we augment the triad *n*-ad social structure in Panel A by introducing two 2-hierarchy social structures for finance and procurement (indicated by lighter-shaded diamond and circle, respectively). The unidirectional arrow from the lighter-shaded circle to the darker-shaded circle indicates that a lower-ranked procurement employee supports and advises the higher-ranked procurement employee for this customer journey stage. The addition of *m*-hierarchy to *n*-ad increases the fidelity with which we can assess information flow and social influence within buying and selling firms.

So how does the inclusion of *m*-hierarchy enrich understanding of social influence in the buying firm? When *m* increases, the levels of hierarchy increase (e.g., if *m* goes to three for procurement, then we have three levels of procurement employees). Further, when the number of *m*-hierarchy structures increase, a larger number of higher-ranked employees are supported by lower-ranked employees (e.g., in Panel B we have two 2-hierarchy social structures, one for finance and one for procurement).

As *m* increases, the benefit for the buying/selling firm is that the information-processing burden on top-ranked employee in the *m*-hierarchy decreases, and the decision quality should improve. Essentially, if a top procurement employee has support from a lower-ranked procurement employee, the top employee can focus on strategic aspects (such as their negotiations with their *n*-ad connections in finance and site manager) rather than administrative activities. However, an increase in *m* not only increases the costs (of an additional employee), it might also result in information loss due to miscommunication through the ranks.

An important question, therefore, is this: What is the appropriate balance of *n* and *m* at each stage of customer journey for buying and selling firms? As *n* increases, coordination and information sharing costs across the *n*-ad structure increases, and the complexity faced by top-ranked employees increases; thus, increasing complexity necessities the need for *m*-hierarchy support. However, as *m* increases, costs and potential for information loss increases as well. Further, an increase in *n* increases the need for hierarchal support across several top-ranked employees in the *n*-ad; as a result, the number of *m*-hierarchy structures increase. Therefore, the interplay between *n*-ad and *m*-hierarchy across the customer journey stage and for buyer/seller outcomes at various journey stages remains an open research area. Understanding drivers (e.g., contract size), moderators (e.g., buyer competitive market position), meditators (e.g., buyer risk tolerance), and outcomes (e.g., costs) of this interplay for customer journey stages would be insightful.

Further, the buyer's interplay of *n*-ad and *m*-hierarchy social structure should inform the *n*-ad–*m*-hierarchy structure choice and strategy formulation for the seller. To what extent and how should the seller's communication strategy focus on *n*-ad top-ranked buyer employees as opposed to the lower-ranked *m*-hierarchy employees? In certain situations (e.g., product-service provision situations such as brand guides and social media audits), targeting the lower-ranked *m*-hierarchy employees (e.g., millennial employees) might be beneficial, while in other situations, (e.g., getting qualified for RFP), targeting top-ranked *n*-ad employees is more crucial for the seller. Other research questions include the following[1]:

- What is the appropriate buyer *n*-ad–*m*-hierarchy social structure for each customer journey stage? Some journey stages (e.g., need activation) involve lower decision risk but higher need for due diligence than other stages. Understanding the interplay between risk (due diligence) and the associated *n*-ad–*m*-hierarchy social structure would benefit theory development and provide managerial insights.
- Given a particular *n*-ad–*m*-hierarchy buyer structure, how and why should a selling firm develop its *n*-ad–*m*-hierarchy structure across customer stages journey to satisfy customer needs and optimize account profitability?

## p-s *Social Influences*

In many buying/selling firms, lower-ranked employees interact to form their own *n*-ad social structures (e.g., an assistant procurement manager might interact with an assistant finance manager). Such interactions among lower *n*-ad social structures can influence higher *n*-ad interactions and (indirectly) the eventual outcomes across customer journey stages. To conceptualize these *n*-ad social structures across levels of buyer/seller hierarchies, we introduce the concept of *p-s* social influences. We define *p* or primary social influences among top-ranked *n*-ad and *s* or support social influences among lower ranked *n*-ad social structure. We provide an illustrative example in Panel C of Figure 1, which replicates Panel B and adds a support 2-ad influence between lower hierarchy finance and procurement employees, indicated by dotted bidirectional arrows. Thus, we differentiate between primary *n*-ad among top-ranked employees (i.e., *n*-ad-*p*, as in the upper triad, solid bidirectional arrows) and support *n*-ad among lower-ranked employees (i.e., *n*-ad-*s*, lower bidirectional arrow for the lower dyad).

How does the inclusion of *n*-ad-*s* social structure enrich our understanding of social influence in the buying/selling firm?[2] As *n* increases for *n*-ad-*s* social structure, the resolution of many administrative and tactical issues occurs at the support level as opposed to the primary level. Such resolution reduces cognitive load in the *n*-ad-*p* structure and enables efficacious decision making for top-ranked employees. However, as *n* increases for the *n*-ad-*s* social structure, the potential for information loss across the *n-m-p-s* structure increases, which might increase the risk of suboptimal decisions. Any miscommunication among *n*-ad-*s* employees might go unnoticed until a subsequent customer journey stage. Theoretically, as *n* increases for *n*-ad-*s* social structures, the potential for free riding and blame gaming could increase given the difficulty in tracking down information flow and social influence in a complex network.

An important question is this: What is the appropriate balance of *n*-ad-*p*, *m*-hierarchy, and *n*-ad-*s* social structures at each stage of customer journey for buying/selling firm? For example, should the *n*-ad-*s* social structure exactly mirror the *n*-ad-*p* structure? For the 3-ad-*p* triad structure in Panel C, using a 3-ad-*s* structure would imply that finance, procurement, and the site manager at the primary level influence one another, as do their counterparts at the support level. Such a structure would reduce information loss because three-way communications occurs at primary and support levels. However, such a structure does introduce redundancies due to duplication of *n*-ads and thus alter organizational cost structure for the journey stage. How these trade-offs play out remains unexplored.

Extant B2B research only studies an aggregate conceptualization of these social influence structures and therefore does not distinguish between *n-m-p-s* structures or consider the impact of customer journey stage. For example, Gupta et al. (2019) study how within-seller network density (i.e., the ratio of actual connections within selling organization to maximum number of connection possible within selling organization) influences seller account profitability. However, Gupta et al. do not differentiate between *n-m-p-s* structures and thus cannot shed light on when and how *n*-ad-*p*, *m*-hierarchy, or *n*-ad-*s* dominates.

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[1] Many research questions parallel those posed by HFHM, such as the following: (1) How are conflicts within the selling firm at different stages of the customer journey reconciled? and (2) What are the sources of power and social influence within the selling firm at each stage of the customer journey?

[2] We hope it is evident that our earlier discussions on *n*-ad apply for the *n*-ad-*p* social structure.

Although we focus on *n-m-p-s* social structures in B2B firms, some concepts might also be relevant for B2C journey research. For example, when a consumer looks to purchase a high-ticket item, they may consider inputs from other household members, thereby creating *n*-ad social influence structures. To the extent that consumers use shopping assistants (e.g., human, AI) to help them reduce information burden, they create *m*-hierarchy social structures. However, *n*-ad-*p* and *n*-ad-*s* structures are not as relevant to B2C markets, as consumers' assistants seldom interact with one another. B2C sellers already account for the notion that consumers engage other household members and shopping assistants while making purchase decisions. If sellers understand customers' *n*-ad–*m*-hierarchy structures (e.g., decision maker, spouse, and AI), and how they change during journey stages (e.g., only decision maker makes the final purchase decision, but the other *n*-ad actors engage in information search), they can tailor their communications. Thus, we hope that our conceptualization of *n-m-p-s* social structures in B2B firms also spurs future B2C research.

## Additional B2B Social Journey Questions

The richness of B2B customer buying and the three elements of social structure (i.e., *n*-ad, *m*-hierarchy, and *p-s*) raise at least two additional research topics worthy of future research: structural dynamics and key performance indicators (KPIs).

### *Structural Dynamics*

The social structure elements we propose (i.e., *n-m-p-s*) evolve across- and within-customer journey stages, presenting many opportunities to study structural dynamics (i.e., coevolution of social structure elements and buyer/seller decisions and outcomes). For example, a buyer may want some common actors across journey stages. Which actor, *n*-ad-*p* and/or *n*-ad-*s*, should continue across particular journey stages? There is an inherent trade-off as greater overlap would reduce information loss but might also perpetuate groupthink. Similarly, institutionalized knowledge about structural dynamics and associated outcomes can help buyer/seller use the knowledge base to navigate future social structure decisions in customer journeys. Knowing the relationship between buying/selling configuration and associated outcomes at each stage should build organizational memory for managing future buyer/seller relationships. Structural dynamics for customer social journey in B2B marketing remain unresearched due to aggregate conceptualization of social networks.

### *Key Performance Indicators*

Researchers can also offer insight into KPIs that measure the benefits and costs associated with *n*-ad, *m*-hierarchy, and *p-s* social influences at different journey stages. These metrics can provide buyers and sellers with potential governance mechanisms. For example, as *n*-ad increases for primary influence, the potential for free riding should also increase. The principal could use process and outcome KPIs to monitor the contributions of the *n*-ad agents. Similarly, as *m*-hierarchy becomes complex, the power dependence becomes asymmetric, and the principal might need to rely on contractible metrics to mitigate the deleterious effects of the asymmetry. The whole domain of governance within buyer, within seller, and for buyer–seller relationships across the customer journey stages remains an open area for research.

## Conclusion

The B2B customer journey is social by definition, with the actors, their roles, and their relationships changing across the journey as it is cocreated. Thus, we augment the conceptualization of HFHM to highlight the unique social aspects of the B2B customer journey. In doing so, we formalize the social influence structure in the B2B customer journey by introducing elements of *n*-ad social structures, *m*-hierarchy social structures, and *p-s* social influences. This formalization enriches the current sparse research on B2B buying that adopts a social network perspective. We suggest illustrative research questions that we hope will spawn future research on the B2B social customer journey.

### Declaration of Conflicting Interests

The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

### Funding

The author(s) received no financial support for the research, authorship, and/or publication of this article.

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