

# Supporting value co-creation through interaction during the pre-purchase customer journey: empirical evidence from B2B HR services

*Elina Lassila, Eija-Liisa Heikka and Satu Nätti*

Faculty of Economics and Business Administration, University of Oulu, Oulu, Finland

## Abstract

**Purpose** – The purpose of this study is to examine the role of interaction in supporting value co-creation during pre-purchase customer journey stages when selling professional B-to-B services. First, value co-creation in professional service firms (PSFs) is reviewed, and, second, the role of interaction in the different stages of a customer's pre-purchase journey is explored, specifically in the context of B-to-B human resource management services.

**Design/methodology/approach** – Qualitative, semi-structured interview data was collected from potential B2B customers of a PSF in question, providing a broad coverage of prospective clients in architecture, engineering and IT sector.

**Findings** – In general, the findings of this study indicate that interaction plays a crucial role in pre-purchasing stages of a customer journey. In particular, these findings form understanding of how various interaction channels and content support PSF's ability to co-create value with its prospects.

**Originality/value** – The existing research tends to concentrate on how value is created for existing customers, and far less attention has been paid to the perspective of prospects. This study contributes theoretically by providing novel insights into the current literature on value co-creation in PSFs by providing an understanding of how interactions in pre-purchase phases affect the co-creation of value from the perspective of prospects, which is a less researched viewpoint. Empirically, this study offers managers much-needed, context-specific knowledge of PSFs by comparing differences and pulling together similarities from each customer journey stage of PSF prospects.

**Keywords** Business-to-business, Professional service firms, Pre-purchase customer journey, Prospect, Value co-creation

**Paper type** Research paper

## 1. Introduction

In existing research related to professional business services, value co-creation has gained a great deal of attention, and it has been suggested that it is mainly created through the interaction between customer and professional services firm (PSF) (Bonamigo *et al.*, 2022; Cheng *et al.*, 2022; Nätti and Ulkuniemi, 2022). In this kind of interaction, value is co-created through the exchange of information, and new information and knowledge are created as a result (Berthon and John, 2006).

The aim of this study is to investigate the role of interaction in supporting value co-creation during the pre-purchase customer journey stages of prospective customers. This is a topical issue in business-to-business (B2B) services because technological advancements and the consequent growth in digital devices mean that such journeys have become increasingly complex and varied, making their management

even more demanding (Lemon and Verhoef, 2016). Relatedly, firms are faced with tough challenges when finding ways to attract customer attention and gain trust (Pathak *et al.*, 2022) through the different media channels available today (Dakouan *et al.*, 2019).

Much of the academic research on customer journeys concentrates on business-to-consumer (B2C) contexts (Kuehnl *et al.*, 2019; Demmers *et al.*, 2020), while B2B customers are not particularly well addressed. In addition, the value created by PSFs is mainly studied at a point when a relationship has already been formed between the firm and the customer (Pemer and Skjølsvik, 2019), leaving the pre-purchasing stages insufficiently examined. Moreover, the literature on B2B professional services is relatively fragmented across a range of discussions in multiple

---

© Elina Lassila, Eija-Liisa Heikka and Satu Nätti. Published by Emerald Publishing Limited. This article is published under the Creative Commons Attribution (CC BY 4.0) licence. Anyone may reproduce, distribute, translate and create derivative works of this article (for both commercial and non-commercial purposes), subject to full attribution to the original publication and authors. The full terms of this licence may be seen at <http://creativecommons.org/licenses/by/4.0/legalcode>

---

The current issue and full text archive of this journal is available on Emerald Insight at: <https://www.emerald.com/insight/0885-8624.htm>



Journal of Business & Industrial Marketing  
38/13 (2023) 63–73  
Emerald Publishing Limited [ISSN 0885-8624]  
[DOI 10.1108/JBIM-12-2021-0552]

Received 13 December 2021  
Revised 27 June 2022  
22 December 2022  
Accepted 2 January 2023

research areas, including capabilities (Janssen *et al.*, 2018); customer relationships (Cabigiosu and Campagnolo, 2019; Casidy and Nyadzayo, 2019; Growe, 2019; Heirati *et al.*, 2019); innovation and new service development (Santos-Vijande *et al.*, 2013); knowledge construction (Heikka, 2020); modularity (Cabigiosu and Campagnolo, 2019; Nätti *et al.*, 2017; Heikka *et al.*, 2018); purchasing (Bonamigo *et al.*, 2022; Heikka and Mustak, 2017; Nyadzayo *et al.*, 2020); value co-creation (Kohtamäki and Partanen, 2016; Mustak, 2019); and value propositions (Baumann *et al.*, 2017; Heikka and Nätti, 2018).

In contrast, research on creating value for prospects within the pre-purchase phase of B2B PSF relationships is scarce and requires further investigation. Although it has been acknowledged that interaction between parties plays a crucial role (Bonamigo *et al.*, 2022; Cheng *et al.*, 2022), knowledge about how to accomplish it in practice is still lacking (Salomonson *et al.*, 2012), especially in pre-purchase stages. Nevertheless, related interaction with potential customers seems to be a fruitful research area through topics such as brand communities (Bruhn *et al.*, 2014), customer experience management (Zolkiewski *et al.*, 2017) and the social media presence of salespeople (Agnihotri *et al.*, 2016).

In the present study, we therefore examine the research question of *how interaction supports value co-creation during the pre-purchase customer journey stages of prospective customers*. Specifically, we consider the pre-purchase stages of customer journeys in the empirical context of B2B human resources (HR) services. Our findings contribute to existing knowledge on PSFs and offer managerial insight into providing a better customer experience and more advanced sales function. The key suggestions relate to targeting marketing actions made possible by effective interaction during the pre-purchase phases of a customer's journey.

In the following section, we examine the literature on value creation in PSFs and take a closer look at the pre-purchase journey. We then turn our attention to the empirical evidence from this study, and a discussion of the findings is followed by theoretical contributions, managerial implications, limitations and suggestions for future research.

## 2. Value co-creation and pre-purchase customer journeys in professional services

### 2.1 Value co-creation in professional services firms

PSFs are characterized by involving highly expert staff who develop and transfer knowledge to create value for their clients, typically in the form of customized services (Cassia and Magno, 2021). Customers assess professional services based on several factors, such as value as an expected outcome of value co-creation, influencing both their intention to buy and their satisfaction (Aarikka-Stenroos and Makkonen, 2014).

Although the value co-creation literature has grown in the past couple of decades, it is still quite fragmented (Saha *et al.*, 2022). A generally accepted idea is that value in professional services is co-created (Bonamigo *et al.*, 2022; Cheng *et al.*, 2022), an act of joint problem solving (Eggert *et al.*, 2018). That is, the firm and the customer combine their respective resources in a collaborative, interactive

process to solve problems and challenges. Typically, professional service firm's resources include professional methods and tools, as well as specialized knowledge and skills, while the customer brings, for example, information about their business needs and goals. The collaborative process starts with problem identification and proceeds to solution and implementation, which results in value-in-use (Aarikka-Stenroos and Jaakkola, 2012).

As value co-creation happens during joint problem solving where both parties play an equally essential role in combining their resources, it is an interactive process *per se*, which can therefore be supported through interaction (Heinonen and Strandvik, 2018). Moreover, PSFs characteristically rely on expert knowledge, so the relationship between the firm and the customer involves high levels of interaction due to complexity and the abstract nature of the possible solutions (Løwendahl *et al.*, 2001). Relatedly, the customer's willingness to participate in value co-creation is multifaceted and influenced by many factors, such as culture of customer firm, motivation, perceived value, competence, trust, relationship and peer influence (Pathak *et al.*, 2022).

The relationship between firm and customer usually involves significant interaction that supports value co-creation, starting with recognition of the problem and lasts through to, and beyond, service delivery (Von Nordenflycht, 2010). Companies can create value for their client's business by considering the creation process and the goals of each customer journey. Since value co-creation happens to a large extent in these interactions with customers during each customer journey stage, the better the PSFs understands its clients' goals, the better it can co-create value with customers in its interactions by putting more focus on these interactions. In this way, the PSFs can build productive and long-lasting customer relationships, illustrating the positive outcome of value co-creation (Marcos-Cuevas *et al.*, 2016). In addition, an active co-creation process produces positive outcomes on individual well-being, work performance and team resilience (Partouche-Sebban *et al.*, 2021). Value co-creation and interaction are so essential that they were among the key factors found in the literature for selecting other firms as partners (Bonamigo *et al.*, 2022).

### 2.2 Pre-purchase interaction

Customers travel on a customer journey when collaborating with a service provider (Andersson *et al.*, 2017), and, as value is co-created throughout this journey, different touchpoints occur. These can be direct, for example during meetings, or indirect, for example through third-party reviews of the firm (Bakhtieva, 2017). At each of these moments of contact, the customer is forming a value perception of the collaboration, and this comparison of benefits and costs is a naturally multi-dimensional process with several evaluative attributes forming their overall understanding of the value (McDonald *et al.*, 2011).

Managing the customer journey has become crucial (Andersson *et al.*, 2017), not least because of the increasing complexity of different channels and media (Lemon and Verhoef, 2016). A key challenge for PSF marketers is how to build an effective strategy based on touchpoints (Bakhtieva, 2017) that might be physical, digital or personal (Zafer, 2015).

Digital developments have shaped B2B customer journeys, creating less linear and more circular touchpoint patterns, and an increasing number of customers now complete their purchases through digital platforms. B2B clients are also influenced by the same social networks that affect them as individual consumers (Lingqvist *et al.*, 2015). Relatedly, given its interactive core, value co-creation can take place through different physical and digital interactions (Banker *et al.*, 2011; Keeling *et al.*, 2019) in the pre-purchase stage. Methods of interaction in value co-creation has verbal and non-verbal and written forms to reach mutual understanding (Goldreich *et al.*, 2012) in everyday interaction, including methods such as face-to-face interaction as an example of physical interaction methods and e-mail and social media as examples of digital interaction methods.

The traditional marketing process consists of layered stages relating to customer awareness, consideration, intent and satisfaction (Colicev *et al.*, 2019), and its narrowing funnel shape comes from an assumption that some customers will drop out at each layer, and so a large number of potential clients never actually complete the customer journey (Peet, 2016). Therefore, pre-purchase value is emphasized in this study to gain an understanding of how prospects can be engaged in co-creating value before they have actually decided to become a customer. During this pre-purchase phase, prospective B2B clients increasingly use online channels to search for information that will help them determine the potential value of the services in question (Pemer and Skjølvik, 2019), for example in terms of how well customer expectations have been met (Trasorras *et al.*, 2009).

The pre-purchase stages of customer journeys involve various touchpoints which themselves correspond to different consumer behaviors, including awareness, needs recognition, search and consideration. For example, during awareness, the customer might consider, “What is this?; in needs recognition, “Do I need this?; in the search stage, they might ask “Are there others like this?; and during consideration, “Should I buy this?” After these linked stages, the customer eventually reaches the purchase stage (Lemon and Verhoef, 2016). Figure 1 presents the tentative framework of this study based on these various stages.

### 3. Research methodology

To answer the research question, we implement a qualitative data gathering method and an abductive research strategy. A qualitative method aids in understanding of a problem by producing in-depth information about it, thereby increasing comprehension of social contexts, human action and experience (Fossey *et al.*, 2002) in its specific context (Yin, 2009). An abductive research strategy (Dubois and Gadde, 2002) was chosen because of the qualitative nature of the study and the existence of theoretical pre-knowledge (Figure 1). In this study, an abductive research strategy was performed so that the theoretical pre-knowledge provided an initial understanding of the topic, which guided the collection of the empirical data, and enabled the interplay between and simultaneous development of theoretical and empirical material (Kovács and Spens, 2005). This allowed theoretical and empirical understanding to grow while developing the

Figure 1 Tentative framework



understanding of theoretical aspects of this study. In addition, an abductive strategy allows researchers to become immersed in the study to be able to discern what is remarkable about it in an interpretive reality (Chamberlain, 2006).

#### 3.1 Data collection

This study collected data through qualitative interviews conducted with participants in potential B2B customers of an HR PSF. To understand their views and experiences, semi-structured interviews were used to collect primary data to allow a targeted focus on a specific topic in a conversational manner (Fossey *et al.*, 2002). A semi-structured approach also enables the interviewer to follow the flow of the conversation, ask questions as they occur, and allow participants to raise topics themselves (Green *et al.*, 2014). To allow this conversational tone, the interview structure was created from an exploratory perspective, and questions were designed to learn each informant’s perceptions of the pre-purchase phases. The interviews were conducted as phone interviews and recorded to assist in analysis.

Purposeful sampling was used to select the interviewees that would maximize the richness and depth of the data collected (DiCicco *et al.*, 2006). In this study, the HR PSF provided the initial sampling criteria that suited the research aim to provide broad coverage of the B2B sector with prospective clients in architecture, engineering and IT. The criteria, therefore, related to the industry, location and the number of employees,

and so small and medium-sized enterprises in architecture, engineering and IT operating in the same geographic area as the PSF were interviewed. The IT industry was further split between a consulting and a software development firm as these branches of the sector operate differently.

The company CEOs were interviewed on the assumption that they would have a strong influence in the purchasing decisions relating to this type of professional service in this size of a firm and are often involved in HR work themselves. Therefore, it was expected that they would have sufficient knowledge about HR-related matters to participate meaningfully. Altogether, eight interviews were conducted in December 2020, each of which lasted between 25 and 50 min. The number of interviews was based on information saturation, in which the benefits of additional interviews were compared with the value, time and cost of conducting those (Guest *et al.*, 2006). According to Sandelowski (1995) qualitative sample sizes of about ten people are adequate for sampling within a homogeneous population who share common skills. In our data, these general skills are related to the participants' work and expertise in the KIBS environment, as well as their duties in senior management, on the basis of which they were selected as participants for this study.

Existing knowledge of the pre-purchase customer journey was used to create the interview structure and conduct the analysis. In addition to the possibility of a possible selection bias, conducting interviews can also result in bias from the way the sessions are organized and how informants are selected (Ryan *et al.*, 2009). To mitigate this, all of the interviews in this study were conducted in the same manner, and the pre-planned structure helped the researcher stay on topic. The questions posed during the interviews were open-ended to avoid influencing the answers, and relevant documentation was drawn up beforehand (Ryan *et al.*, 2009). The research data of this study is illustrated in Table 1.

### 3.2 Data analysis

All interview sessions were audio-recorded to be able to re-check the data during analysis and avoid misinterpretation. The interviews were transcribed from audio recordings and analyzed using NVivo qualitative analysis software. Subsequently, the transcripts were read, and the material was categorized according to different stages of the pre-purchase process derived from the prior literature: awareness, needs recognition, search and consideration. As value co-creation continues through these pre-purchase stages until the purchase stage, the analysis also covers the interaction in the purchase

stage, although the purchase stage is not addressed in detail in this study.

The interviews were read again, and initial coding was performed so that themes and topics were coded to a corresponding category to build detail of the different stages and find any further categories. Then, the transcripts were reread a few times more, and the coding was modified and refined as necessary in relation to interaction channels and content supporting value co-creation. The chain of evidence was made as transparent as possible by using quotes from the interviews. The next chapter introduces our findings in more detail.

## 4. Findings – interaction channels and content during the pre-purchase customer journey stages

In the following analysis, the findings are structured according to the different pre-purchasing stages, namely, awareness, need recognition, search and consideration, also covering the interaction in the purchase stage which the customer eventually reaches through the pre-purchasing stages. The analysis looks at these potential customers as one prospect pool to compare differences and pull together similarities from each journey stage.

### 4.1 Awareness stage

According to our interviewees, the preferred ways to raise their awareness is through the firm's website or personal marketing contact. Most of the prospects in this study perceived their HR problems to relate to recruitment, and so tagging their pages effectively, for example with recruitment-related keywords, to ensure their pages are found more effectively during specific searches on possible service providers.

Our informants felt that advertising through industry-specific media to reach prospects is crucial as well as raising awareness within the potential customers' networks. In line with this, learning about the good experiences of existing customers was seen as essential; satisfied clients tend to spread positive word-of-mouth (WOM). More personal contact like this can include e-mail marketing, and customer visits should also be conducted once contact has been made. The CEO from the architecture firm A mentioned that they "would want to learn about service offerings on the firm's website. I would use Google for that. Also, making contact by phone or e-mail and by customer visits."

According to our participants, the most important channels in the awareness stage are individual networks, social media

Table 1 Research data

Firm	Informant position	Date	Duration
Architecture firm A	CEO	December 11, 2020	35 min
Architecture firm B	CEO	December 18, 2020	25 min
Engineering firm A	CEO	December 1, 2020	50 min
Engineering firm B	CEO	December 2, 2020	40 min
IT consultant firm A	CEO	December 15, 2020	30 min
IT consultant firm B	CEO	December 11, 2020	30 min
IT software development firm A	CEO	December 31, 2020	45 min
IT software development firm B	CEO	December 10, 2020	40 min

(especially LinkedIn and Twitter), industry-specific media, Google, websites, e-mail, phone calls and visits. A LinkedIn presence is seen as vital to noticing the PSF, although the specific channel does not actually matter that much if the message is targeted.

#### 4.2 Needs recognition stage

The prospective customers who took part in this study recognize that HR problems often relate to transferring information to new employees and efficient onboarding. For example, the informant from the architecture firm B stated that “HR work takes a lot of time. Our business development manager takes care of some HR work, and, because of this, some of his work hours are cut from sales, marketing, and customer management.” Educating the customer to recognize their own needs requires detailed planning of blog and e-mail content marketing to include, in these cases, information about recruitment, such as finding and evaluating candidates; how to assess applicant communication skills; onboarding processes; and the time-saving benefits of outsourcing.

One specific problem in HR relates to finding suitable candidates, especially senior-level employees, and the associated ability to trust the PSF to handle more demanding recruitment processes. For example, the CEO from the engineering firm B felt that “it is difficult to find suitable experts. Some firms sell CVs, it always costs something, and you cannot trust the result. It is helpful to use outside analysis.” HR PSFs should convince customers of their ability to locate and recruit suitable candidates, for example, by emphasizing selection is not based purely on CV but also on how a candidate might fit the company’s culture and team. However, participants also acknowledged the pressure to avoid contracting HR tasks externally because of perceived difficulties, emphasized by the informant from the IT consultant firm A: “The problem concerning outsourcing HR is how to integrate it to be part of the team.” In this context, it was nevertheless considered possible to outsource the initial selection of candidates. The PSF should work to convince customers of the benefits of outsourcing those elements of HR that will support their business optimally.

At this needs recognition stage, the most important messages for value creation concern improving onboarding, time saving, recruitment and communication skills. To educate prospective clients to recognize their own needs, it is essential that PSFs focus on how HR can support business and how this relationship can be improved through content marketing. It is also important that the benefits of HR outsourcing, particularly in time savings, are emphasized in the form of blogs or videos from the PSF.

#### 4.3 Search stage

The informants reported searching for information on external HR PSFs via different service providers, primarily within their network, from Google, on LinkedIn, or through industry-specific media. The informant from the architecture firm A highlighted that “I would ask other entrepreneurs. Of course, Google different service providers” with another informant from the engineering firm A explaining “I would try to find information within my personal network or from Google.” At this search stage, the interviewees felt it is essential to know the

price, service description and resources required. For example, the CEO of the architecture firm B stated “You have to understand the bundle of services, what the service provider offers. Of course, price is one matter.” Services and prices must be clearly described on the PSF’s website.

The information that our participants wanted during the search includes candidate references, information about candidates, evidence of industry-specific knowledge, details about recruitment and candidate evaluation methods and the PSF’s availability schedule, which was seen as a central aspect of customer satisfaction. The informant from the IT consultant firm A described wanting to hear others’ experiences; “I want to know what the methods are for finding [recruitment] candidates and if the service provider can commit to certain schedules.”

Customer may also want information about how the service will actually help them in terms of details about the “service model and how the process goes; what the service includes and how the service would help” (CEO of the IT software development firm B). The most important interaction channels for search, according to our interviewees, are the customer’s own network, Google, websites, LinkedIn and industry-specific media. On these channels, the key content for value co-creation is service descriptions, price lists, references, industry expertise, recruitment methods and processes and value propositions.

#### 4.4 Consideration stage

At the consideration stage, the prospects in this study stated that it is crucial to see the potential benefits in relation to saved time, for example that “the service would have to free our resources to other work. Of course, the service provider’s references and competence” (CEO of the architecture firm B). Other vital elements seem to include price, expertise and the quality of communication with the PSF, with the informant from the architecture firm A wanting to know “What is the price benefit? And how the communication works. Communication should be easy, and we should receive answers fast.” The PSF’s representative plays a key role at this stage, as it is stated that much attention is being paid to “the salesperson [and] how they sell themselves and the service” (CEO of the engineering firm A). Personal relationships become central, as does the expert’s ability to communicate the service and its value and manage the relationship. The informant from the IT consultant firm A emphasized that customers are keen to engage with someone “with whom you have the best connection. You get the feeling that they understand your needs.” Overall, ease, speed and reciprocal communication are seen as crucial as stated by the informant from the IT software development firm B: “The PSF would handle [recruitment] interviews, which would lead to time savings. Regular contact and keeping up-to-date are also crucial.”

Moreover, the offer of additional services by the PSF can be seen as helpful. The CEO from the architecture firm A mentioned that consideration would involve “not purchasing HR services alone. It would have to include other services such as financial management, book-keeping, or payroll calculations.” Similarly, the ability of the service to enhance employee retention and improve workplace atmosphere matter in this stage because as one of the informants stated “we cannot lose a single employee. An outsider could detect if people are

not feeling well [and] improve work atmosphere” (CEO of the engineering firm B). Thus, communication about PSF benefits in these areas is crucial, particularly because the customer will not have to hire new employees and arrange onboarding once higher retention is achieved.

The interviewed prospects evaluated trustworthiness, professionalism, price, image and earlier projects when considering possible PSFs, the informant from the architecture firm B stating for example that “I would request references [...] and we would make a price-quality comparison. References are a key factor, and so it is imperative that PSFs focus on presenting earlier projects and the companies with which they have already worked.” The participants felt that the performance of a PSF would need to be better than what was possible inside the company, as mentioned in the following quote: “Outsourcing is more expensive than doing things in-house” (CEO of the IT consultant firm A). The informant from the IT software development firm A specified that this kind of consideration can also involve the ranking of two or three service providers based on information within a customer’s network: “an Excel table with the service providers’ names, service description, price, references.” Selection can depend on the PSF’s perceived capability to bring best practice and innovative methods to the customer, and on the service content, price, employee references and schedule. It is critical that the PSF understands the customer’s value creation processes and goals to be able to convince them of their ability to engage with them effectively.

At this consideration stage, the most important interaction channels for our participants are websites and WOM, and the most compelling content for value co-creation includes references; personal relationships; service and resource descriptions; price-to-benefit comparisons and details about cost and time savings; novel ideas and value propositions; proactiveness, effortlessness and flexibility; service delivery; notions of expertise and trust; and PSF image, communication and additional services.

#### 4.5 Purchase stage

For the companies represented in this study, final purchase decisions are typically made by the CEO, especially in smaller firms, or by two or three management team members for more significant purchases. This decision is usually undertaken in weekly or monthly meetings, according to urgency. For example, one informant from the IT consultant firm B explained that “I would take part in the purchase decision as CEO and, depending on the purchase, we would make a final decision in the management team.”

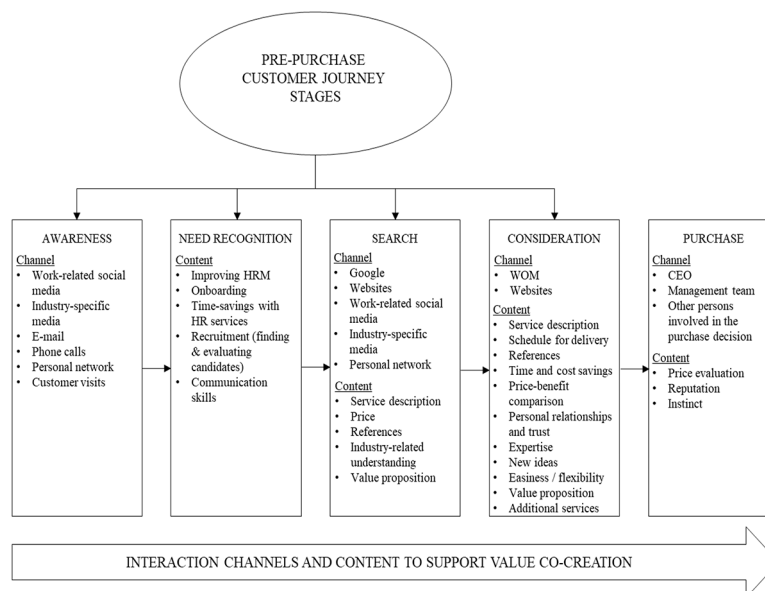
Purchase is often based on the reputation and image of the PSF which affects “what kind of message is left in the memory” (CEO of the engineering firm A). To boost reputation, customer satisfaction must be measured and feedback collected, which is why it is critical that customer projects are well handled, and a PSF acts upon the feedback they receive to have this kind of effect. As such, it is definitely not the price alone that affects purchase decisions, but as the informant from the IT consultant firm B mentioned also a customer’s feelings about a situation and others’ experiences of the PSF: “It affects you if someone in the network has had good or bad experiences.” It is therefore critical that prospects realize the value of the service. In addition, brand-focused communication and social bonds can further strengthen the reputation of PSFs and thereby encourage purchase decisions.

At this purchase stage, the key decision-makers are the management team and CEO, or anyone participating in the final decision, and the most important factors for value co-creation concern price, reputation and the prospect’s instinct. The PSF must especially try to ensure positive WOM to show the purchase decision-makers the value and benefits of the service.

#### 4.6 Summary of the findings

Figure 2 summarizes the interaction channels and content for value co-creation during the pre-purchase stages of PSF customer journeys.

**Figure 2** Interaction channels and content during the pre-purchase customer journey stages



The findings of this study demonstrate that regarding the role of interaction, both social and structural bonds are needed to meet customers' needs and co-create value in B2B professional services. Specifically, the prospective clients examined here preferred social media, especially LinkedIn, as an engagement method in the awareness stage, wanting to discover services themselves instead of being imposed upon. Nevertheless, more traditional marketing methods such as e-mail campaigns were also mentioned. In addition, participants felt it was crucial to be able to find the PSF's website through Google, and relied heavily on WOM within their network to find potential service providers.

The HR problems most commonly recognized by the prospects were related to recruitment, particularly finding suitable candidates with the requisite soft skills, and communication, particularly managing information flows. These issues were mainly caused by HR work taking a lot of time away from the CEO. For the needs recognition stage, in the sense of interaction, a content marketing strategy addressing these common problems should be designed to attract attention and highlight future value.

Searching for information through personal networks and Google was important when comparing possible service providers in the search stage, and prospects also looked to LinkedIn and industry-specific media to identify new services. In the needs recognition stage, they wanted to find relevant information. Therefore, in this stage, PSFs should highlight in their interaction issues that they found central, such as service descriptions, references; details about time savings and effortlessness; evidence of industry-related expertise and add-on services. Furthermore, they assessed if the service would free up resources, the quality of communication, the PSF's ability to implement new ideas and methods and reported efficiency and effectiveness of service delivery.

During consideration, the emphasis switched to personal relationships and the PSF's experts' capacity to manage them. Moreover, in their interaction, the PSFs should focus on brand-focused marketing communication that enhances their image and bolsters awareness, covering the benefits and cost savings for the customer. Social bonds are also needed to create trust and effective communication between the parties, thus making service delivery more straightforward. At this stage, it is also important to produce customized offerings and discover opportunities to add further services. Likewise, it is crucial to identify the customer's value creation processes and align the services offered to co-create value for both parties.

In the purchase stage, PSFs are finally evaluated by the CEO or management team. It is therefore essential that all decision-makers are shown the value that the service can provide before this stage is reached, by focusing on their interaction primarily on brand-focused communication and by enhancing positive WOM.

The first three stages of the pre-purchase customer journey are awareness, needs recognition and search (Lemon and Verhoef, 2016). From an interaction perspective, these linked stages emphasize the role of information and the need to provide prospective clients with marketing content that is valuable and interesting, even before any personal contact has been made. Customers prefer to use their own networks and Google to find information about services, especially price and

references, and evidence of industry expertise and value propositions are also central. PSFs must ensure that all of this information is easily available and is found on their website. Online platforms allow customers to search far and wide, thus enlarging opportunities for comparison and evaluation.

From the consideration stage onwards, interaction in PSFs must focus on establishing solid customer relationships, engaging in quality communication and creating a sense of trust. In the B2B context, a PSF must emphasize personal relationships and manage them well. Various aspects during consideration can influence a customer to ultimately make the purchase decision, including trust, cost and competence. Detecting the customer's value creation processes and considering these in tailoring services can help co-create value for both parties, and increasing positive WOM will be influential in multiple pre-purchase stages. The PSF must, naturally, take great care of current customer projects.

In this study, a particular problem of outsourcing HR services was considered to be how they might be integrated into the company to develop in-house solutions. Another area of concern was primarily time-related in that HR work was seen to take a lot of time away from core business responsibilities. HR work for our participants basically meant recruitment, and so it might be challenging to secure purchase decisions, or even interest, if prospective clients do not understand what professional HR services can include or their value. As such, prospects may need education around HR involving more than just recruitment.

## 5. Discussion and conclusions

In this study, we examined the question of *how interaction supports value co-creation during the pre-purchase customer journey stages of prospective customers*. We investigated pre-purchase customer journeys, especially in the context of B2B professional services, and, more specifically, the appropriate steps to take to guide customers through the different stages involved.

This study makes a contribution to the extant literature of value co-creation in PSFs (Marcos-Cuevas *et al.*, 2016; Partouche-Sebban *et al.*, 2021; Trasorras *et al.*, 2009) by providing an understanding of how interactions in pre-purchase phases affect the co-creation of value from the perspective of prospects, which is a less researched viewpoint in value co-creation of PSFs. We suggest that the existing literature on customer journeys does not sufficiently describe today's processes, often putting too much emphasis on the purchasing stage and thus prompting marketers to focus on that aspect. Instead, customer journeys should be seen as more than just trying to secure a purchase decision. For example, it might be suggested that customer loyalty is only earned after a purchase is made, but a business must earn it, and their trust, in each interaction and each of the stages described.

The findings of this study reveal that the highly interactive nature of professional services (Löwendahl *et al.*, 2001) means that emphasis is placed on the experts during the consideration stage who might even act as a catalyst for value co-creation due to their active interactions with customers (Leone *et al.*, 2021; Nätti and Ulkuniemi, 2022). Consequently, how employees sell the services and manage customer relationships should be

assessed. Furthermore, these skills should be enhanced by developing an appropriate knowledge base, particularly as it is the PSF experts who co-create value with customers.

Our findings support previous research about pre-purchase customer journeys as our data fits the already established stages. In particular, the earliest stages outlined by [Lemon and Verhoef \(2016\)](#) were also seen in this study. The importance of targeted marketing to potential clients is highest in these first stages, after which social bonds and relationships are more strongly emphasized. The majority of B2B customers use online channels even in the later stages of pre-purchase journeys to search for more information ([Pemer and Skjølvik, 2019](#)). Thus, PSFs must ensure that they provide the online information required by prospective clients.

Earlier research has emphasized the importance of WOM in the B2B context ([Aarikka-Stenroos and Makkonen, 2014](#)), and particularly that when customer satisfaction is high, WOM is increased, thus facilitating further acquisition ([Wangenheim and Bayón, 2007](#)). The importance of WOM in the pre-purchase customer journey, and in professional services, is evident in the findings of this study in that it was noted in multiple stages. Furthermore, the prospective clients in this study wanted to hear others' views and experiences about the service and the firm, which means it is essential that PSFs have a presence in online forums such as LinkedIn.

Based on the study, customer expectations and the related perceptions of value are all part of the pre-purchase journey and selection process ([Bonamigo et al., 2022](#); [Sanchez-Fernandez and Iniesta-Bonillo, 2007](#)). Accordingly, customer perceptions should be analyzed at each interactive touchpoint of the journey to help discover the strengths and weaknesses of current processes and be able to improve service quality ([Ludwig et al., 2017](#)).

### 6.1 Managerial implications

The paper contains new and significant information for managers about the role of interaction in supporting value co-creation during pre-purchase customer journey stages in the B2B context. As value co-creation occurs to a large extent in interactions with customers during each customer journey stage, it can be leveraged through putting more emphasis on the quality of these interactions. Therefore, for managers, it is essential to acknowledge prospective clients' needs regarding which marketing content is valuable and which channels they want to engage with. At the same time, the PSF's experts must realize the importance of managing customer relationships, where interaction is a constituent part and both of which are crucial factors for prospects during the pre-purchase journey. For example, building of social bonds and keeping contact supports customer interaction and demonstrates availability and interest, which fosters trust, commitment and satisfaction.

As interaction plays a substantial role in the B2B professional services context, PSFs should build a presence on work-related social media, especially LinkedIn and Twitter, to engage with prospects and deliver social media marketing. PSFs also need to ensure that websites can be found through Google, for example, in terms of search engine optimization (SEO) to be found through search engines to help potential clients find relevant information online, and paid advertising in industry-specific media can also be useful.

PSF customers are purchasing professional expertise and knowledge; thus, what happens in each stage of the pre-purchase journey from a marketing perspective must be well designed to support an expert image of the firm. A PSF should therefore work on defining the journey for the customer and planning each stage to offer the best possible experience for them. It is consequently vital that all customer projects are delivered in a professional manner to leave a good impression. When firms succeed in convincing the customer, interaction increases and prospects are more likely to purchase.

It is crucial that the PSF provides comprehensive content about service descriptions with prices, references and benefits. To create more effective marketing strategies, defining the pre-purchase journey and what is expected from each of its stages is essential. When a PSF knows what marketing channels customers prefer and the kind of content that should be published, and where, they can use this knowledge in their marketing to help customers move through the journey more smoothly. As a result, using a marketing strategy that is appropriate to the pre-purchase stages could increase efficient interaction, improve the quality of the services offered and, ultimately, create more value for customers.

The influences of interactions are difficult to fully anticipate and manage due to their multiplicity, diversity and multi-channelity, and because of the unpredictability of the situational factors affecting customers. However, by acknowledging the influence of interaction and related channels and content in supporting value co-creation during pre-purchase customer journey stages of prospective customers, PSFs are able to create a consistent interaction strategy to support their value co-creation.

### 6.2 Study limitation and future research

As with any other, this study has its limitations. A disadvantage of using qualitative methods is that there are concerns about how widely the findings can be generalized ([Ochieng, 2009](#)). One issue limiting generalizations of the findings related to the size of the data. However, according to [Sandelowski \(1995\)](#), a qualitative sample size of about ten people is adequate when it meets the conditions of a homogeneous population with the same common skills. These conditions are met in this study. Other possible issues are whether the participants' perspectives have been well represented, the interpretations are of the primary data, the findings fit the context that the data was derived from, and the interviewees were authentic and transparent ([Fossey et al., 2002](#)). To represent the participants' answers clearly, quotes have been used to support the findings, and the primary data was used to understand the pre-purchase journeys of these customers and avoid misinterpretations. The possibility remains that our interviewees were not entirely authentic when discussing perceived problems in HR in that they may not have trusted the anonymity of the study and were not comfortable sharing. Moreover, although an abductive research strategy has many benefits, there are some risks involved. Such an approach allows the researcher to become immersed in the data, which can result in bias during interpretation. To avoid this, the researcher must be receptive to the participants' own subjective experiences, although this can itself lead to losing touch with established concepts and previous research ([Chamberlain, 2006](#)).



This study concentrated on the pre-purchase stages of the customer journey in the professional services context. As most research regarding value co-creation in professional services concentrates on how a PSF can do so for existing customers, future studies should focus even more on creating new understanding of pre-purchase stages, where collaboration should be studied from additional perspectives, such as which other elements should be given attention during pre-purchase interactions and how customer acquisition can be enhanced in the professional services sector. In addition, similar studies should be conducted in other B-to-B contexts, too, to generate more empirical and theoretical understanding. Nevertheless, our findings provide new insight on pre-purchase marketing interactions, and thereby constitute a solid basis for future research.

## References

- Aarikka-Stenroos, L. and Jaakkola, E. (2012), "Value co-creation in knowledge-intensive business services: a dyadic perspective on the joint problem solving process", *Industrial Marketing Management*, Vol. 41 No. 1, pp. 15-26.
- Aarikka-Stenroos, L. and Makkonen, H. (2014), "Industrial buyers' use of references, word-of-mouth and reputation in complex buying situation", *Journal of Business & Industrial Marketing*, Vol. 29 No. 4, pp. 344-352.
- Agnihotri, R., Dingus, R., Hu, M.Y. and Krush, M.T. (2016), "Social media: influencing customer satisfaction in B2B sales", *Industrial Marketing Management*, Vol. 53, pp. 172-180.
- Andersson, T., Boedeker, M. and Vuori, V. (2017), "Emotion-gauge: analyzing affective experiences in B2B customer journeys", *Strategic Innovative Marketing*, Springer, Cham, pp. 31-36.
- Bakhtieva, E. (2017), "B2B digital marketing strategy: a framework for assessing digital touchpoints and increasing customer loyalty based on Austrian companies from heating, ventilation and air conditioning industry", *Oeconomia Copernicana*, Vol. 8 No. 3, pp. 463-478.
- Banker, R., Mitra, S. and Sambamurthy, V. (2011), "The effects of digital trading platforms on commodity prices in agricultural supply chains", *MIS Quarterly*, Vol. 35 No. 3, pp. 599-611.
- Baumann, J., Le Meunier-FitzHugh, K. and Wilson, H.N. (2017), "The challenge of communicating reciprocal value promises: buyer-seller value proposition disparity in professional services", *Industrial Marketing Management*, Vol. 64, pp. 107-121.
- Berthon, P. and John, J. (2006), *Delineating Value in Customer-Firm Interactions. The Service-Dominant Logic of Marketing: Dialog, Debate, and Directions*, ME Sharpe, Armonk, New York, NY, pp. 196-207.
- Bonamigo, A., D., Silva, A.A., D., Silva, B.P. and Werner, S. M. (2022), "Criteria for selecting actors for the value co-creation in startups", *Journal of Business & Industrial Marketing*, Vol. 37 No. 11.
- Bruhn, M., Schnebelen, S. and Schäfer, D. (2014), "Antecedents and consequences of the quality of e-customer-to-customer interactions in B2B brand communities", *Industrial Marketing Management*, Vol. 43 No. 1, pp. 164-176.
- Cabigiosu, A. and Campagnolo, D. (2019), "Innovation and growth in KIBS: the role of clients' collaboration and service customization", *Industry and Innovation*, Vol. 26 No. 5, pp. 592-618.
- Casidy, R. and Nyadzayo, M. (2019), "Drivers and outcomes of relationship quality with professional service firms: an SME owner-manager perspective", *Industrial Marketing Management*, Vol. 78, pp. 27-42.
- Cassia, F. and Magno, F. (2021), "Antecedents of professionals' self-efficacy in professional service firms: effects of external source credibility and content quality", *Journal of Business & Industrial Marketing*, Vol. 36 No. 13, pp. 187-198.
- Chamberlain, G.P. (2006), "Researching strategy formation process: an abductive methodology", *Quality & Quantity*, Vol. 40 No. 2, pp. 289-301.
- Cheng, J.H., Lei, D.Y., Wang, T.T., Chuang, W.B. and Huang, K.P. (2022), "The value co-creation and innovation activities of knowledge-intensive business services partnerships-evidence from Taiwan-based manufacturing firms", *International Journal of Organizational Innovation*, Vol. 14 No. 4, pp. 230-246.
- Colicev, A., Kumar, A. and O'Connor, P. (2019), "Modeling the relationship between firm and user-generated content and the stages of the marketing funnel", *International Journal of Research in Marketing*, Vol. 36 No. 1, pp. 100-116.
- Dakouan, C., Benabdelouahed, R. and Anabir, H. (2019), "Inbound marketing vs outbound marketing: independent or complementary strategies", *Expert Journal of Marketing*, Vol. 7 No. 1, pp. 1-6.
- Demmers, J., Weltevreden, J.W. and van Dolen, W.M. (2020), "Consumer engagement with brand posts on social media in consecutive stages of the customer journey", *International Journal of Electronic Commerce*, Vol. 24 No. 1, pp. 53-77.
- DiCicco-Bloom, B. and Crabtree, B.F. (2006), "The qualitative research interview", *Medical Education*, Vol. 40 No. 4, pp. 314-321.
- Dubois, A. and Gadde, L.E. (2002), "Systematic combining: an abductive approach to case research", *Journal of Business Research*, Vol. 55 No. 7, pp. 553-560.
- Eggert, A., Ulaga, W., Frow, P. and Payne, A. (2018), "Conceptualizing and communicating value in business markets: from value in exchange to value in use", *Industrial Marketing Management*, Vol. 69, pp. 80-90.
- Fossey, E., Harvey, C., McDermott, F. and Davidson, L. (2002), "Understanding and evaluating qualitative research", *Australian & New Zealand Journal of Psychiatry*, Vol. 36 No. 6, pp. 717-732.
- Goldreich, O., Juba, B. and Sudan, M. (2012), "A theory of goal-oriented communication", *Journal of the ACM (JACM)*, Vol. 59 No. 2, pp. 1-65.
- Green, C.A., Duan, N., Gibbons, R.D., Hoagwood, K.E., Palinkas, L.A. and Wisdom, J.P. (2014), "Approaches to mixed methods dissemination and implementation research: methods, strengths, caveats, and opportunities", *Administration and Policy in Mental Health and Mental Health Services Research*, Vol. 42 No. 5, pp. 508-523.
- Growe, A. (2019), "Developing trust in face-to-face interaction of knowledge-intensive business services (KIBS)", *Regional Studies*, Vol. 53 No. 5, pp. 720-730.

- Guest, G., Bunce, A. and Johnson, L. (2006), "How many interviews are enough? An experiment with data saturation and variability", *Field Methods*, Vol. 18 No. 1, pp. 59-82.
- Heikka, E.L. and Mustak, M. (2017), "Purchasing of knowledge-intensive business services: a case study of relevant factors", *International Journal of Procurement Management*, Vol. 10 No. 1, pp. 21-37.
- Heikka, E.L., Frandsen, T. and Hsuan, J. (2018), "Matching value propositions with varied customer needs: the role of service modularity", *Knowledge and Process Management*, Vol. 25 No. 1, pp. 64-73.
- Heikka, E.L. and Nätti, S. (2018), "Evolving value propositions in knowledge-intensive business services", *Journal of Business & Industrial Marketing*, Vol. 33 No. 8, pp. 1153-1164.
- Heikka, E.L. (2020), "Constructing customer knowledge in knowledge-intensive customer relationships", *Knowledge and Process Management*, Vol. 27 No. 4, pp. 251-261.
- Heinonen, K. and Strandvik, T. (2018), "Reflections on customers' primary role in markets", *European Management Journal*, Vol. 36 No. 1, pp. 1-11.
- Heirati, N., Henneberg, S.C., Richter, A. and Harste, R. (2019), "Differential importance of social and economic determinants of relationship performance in professional services", *Industrial Marketing Management*, Vol. 76, pp. 23-35.
- Janssen, M.J., Castaldi, C. and Alexiev, A.S. (2018), "In the vanguard of openness: which dynamic capabilities are essential for innovative KIBS firms to develop?", *Industry and Innovation*, Vol. 25 No. 4, pp. 432-457.
- Keeling, D., De Ruyter, K., Mousavi, S. and Laing, A. (2019), "Technology push without a patient pull: examining digital unengagement (DU) with online health services", *European Journal of Marketing*, Vol. 53 No. 9, pp. 1701-1732.
- Kohtamäki, M. and Partanen, J. (2016), "Co-creating value from knowledge-intensive business services in manufacturing firms: the moderating role of relationship learning in supplier-customer interactions", *Journal of Business Research*, Vol. 69 No. 7, pp. 2498-2506.
- Kovács, G. and Spens, K.M. (2005), "Abductive reasoning in logistics research", *International Journal of Physical Distribution & Logistics Management*, Vol. 35 No. 2, pp. 132-144.
- Kuehnl, C., Jozic, D. and Homburg, C. (2019), "Effective customer journey design: consumers' conception, measurement, and consequences", *Journal of the Academy of Marketing Science*, Vol. 47 No. 3, pp. 551-568.
- Lemon, K.N. and Verhoef, P.C. (2016), "Understanding customer experience throughout the customer journey", *Journal of Marketing*, Vol. 80 No. 6, pp. 69-96.
- Leone, D., Schiavone, F. and Simoni, M. (2021), "Key account management and value co-creation in multi-stakeholder ecosystems. A 'market access' mix", *Journal of Business & Industrial Marketing*, Vol. 36 No. 13, pp. 199-209.
- Lingqvist, O., Plotkin, C.L. and Stanley, J. (2015), "Do you really understand how your business customers buy", *McKinsey Quarterly*, Vol. 1, pp. 74-85.
- Ludwig, T., Wang, X., Kotthaus, C., Harhues, S. and Pipek, V. (2017), "User narratives in experience design for a B2B customer journey mapping", *Mensch Und Computer 2017-Tagungsband*.
- Marcos-Cuevas, J., Nätti, S., Palo, T. and Baumann, J. (2016), "Value co-creation practices and capabilities: sustained purposeful engagement across B2B systems", *Industrial Marketing Management*, Vol. 56, pp. 97-107.
- Mustak, M. (2019), "Customer participation in knowledge-intensive business services: perceived value outcomes from a dyadic perspective", *Industrial Marketing Management*, Vol. 78, pp. 76-87.
- Nyadzayo, M.W., Casidy, R. and Thaichon, P. (2020), "B2B purchase engagement: examining the key drivers and outcomes in professional services", *Industrial Marketing Management*, Vol. 85, pp. 197-208.
- Nätti, S. and Ulkuniemi, P. (2022), "Embeddedness of individual expertise in professional business service relationships", *Knowledge and Process Management*, Vol. 29 No. 1, pp. 79-91.
- Nätti, S., Ulkuniemi, P. and Pekkarinen, S. (2017), "Implementing modularization in professional services – the influence of varied knowledge environments", *Knowledge and Process Management*, Vol. 24 No. 2, pp. 125-138.
- Ochieng, P.A. (2009), "An analysis of the strengths and limitation of qualitative and quantitative research paradigms", *Problems of Education in the 21st Century*, Vol. 13 No. 13.
- Partouche-Sebban, J., Rezaee Vessal, S. and Bernhard, F. (2021), "When co-creation pays off: the effect of co-creation on well-being, work performance and team resilience", *Journal of Business & Industrial Marketing*, Vol. 37 No. 8, pp. 1640-1649.
- Pathak, B., Ashok, M. and Leng Tan, Y. (2022), "Value co-creation in the B2B context: a conceptual framework and its implications", *The Service Industries Journal*, Vol. 42 Nos 3/4, pp. 178-205.
- Peet, J.G. (2016), "Digital and the traditional marketing funnel", available at: <https://medium.com/william-joseph/digital-and-the-traditional-marketing-funnel-5f498307d9d6>
- Pemer, F. and Skjølvik, T. (2019), "The cues that matter: screening for quality signals in the ex ante phase of buying professional services", *Journal of Business Research*, Vol. 98, pp. 352-365.
- Ryan, F., Coughlan, M. and Cronin, P. (2009), "Interviewing in qualitative research: the one-to-one interview", *International Journal of Therapy and Rehabilitation*, Vol. 16 No. 6, pp. 309-314.
- Saha, V., Goyal, P. and Jebarajakirthy, C. (2022), "Value co-creation: a review of literature and future research agenda", *Journal of Business & Industrial Marketing*, Vol. 37 No. 3, pp. 612-628.
- Salomonson, N., Åberg, A. and Allwood, J. (2012), "Communicative skills that support value creation: a study of B2B interactions between customers and customer service representatives", *Industrial Marketing Management*, Vol. 41 No. 1, pp. 145-155.
- Sandelowski, M. (1995), "Sample size in qualitative research", *Research in Nursing & Health*, Vol. 18 No. 2, pp. 179-183.
- Santos-Vijande, M.L., González-Mieres, C. and López-Sánchez, J.Á. (2013), "An assessment of innovativeness in

- KIBS: implications on KIBS' co-creation culture, innovation capability, and performance", *Journal of Business & Industrial Marketing*, Vol. 28 No. 2, pp. 86-102.
- Trasorras, R., Weinstein, A. and Abratt, R. (2009), "Value, satisfaction, loyalty and retention in professional services", *Marketing Intelligence & Planning*, Vol. 27 No. 5, pp. 615-632.
- Von Nordenflycht, A. (2010), "What is a professional service firm? Toward a theory and taxonomy of knowledge-intensive firms", *Academy of Management Review*, Vol. 35 No. 1, pp. 155-174.
- Wangenheim, F.V. and Bayón, T. (2007), "The chain from customer satisfaction via word-of-mouth referrals to new customer acquisition", *Journal of the Academy of Marketing Science*, Vol. 35 No. 2, pp. 233-249.

- Zafer, A.S. (2015), *Authentic Customer Centricity: A Journey towards Sustainable Customer Experience*, Information Age Publishing Inc., Charlotte, NC.
- Zolkiewski, J., Storey, V., Burton, J., Chan, P., Gomes, A., Hunter-Jones, P. and Robinson, W. (2017), "Strategic B2B customer experience management: the importance of outcomes-based measures", *Journal of Services Marketing*, Vol. 31 No. 2, pp. 172-184.
- Yin, R.K. (2009), *Case Study Research: Design and Methods*, 4th ed. Sage Publications.

**Corresponding author**

**Eija-Liisa Heikka** can be contacted at: [eija-liisa.heikka@oulu.fi](mailto:eija-liisa.heikka@oulu.fi)