

Reclaim Your Day with B2B Sales Automation



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In the world of B2B transactions, every minute can translate into cost savings or losses. And when the stakes are so high, how efficiently and seamlessly B2B customers can move through the buying journey can be the difference between profit and loss.

These customers have overwhelmingly cited a specific pain point in their journey. According to Gartner research,

[75 percent of B2B buyers prefer a journey without a sales representative](#). This isn't just a statistic—it's a call to action for B2B businesses to optimize their customers' journey.

At the same time, sales reps are experiencing their own pain points in the buyer's journey. Tasks like purchasing remain manual, and buyers at small-sized companies often end up completing orders in the evenings, when their schedules aren't crowded with meetings. If time is money, they're spending a lot of it on manual tasks.

As buyers increasingly demand rep-free experiences, and as reps rely on manual processes, automation can streamline the B2B sales journey. With its promise of efficiency and precision, automation is poised to redefine how businesses interact with their clients, streamline operations and, ultimately, drive growth. So, how can B2B businesses be strategic in automating parts of the buyer's journey?

The B2B buying journey is primed and ready for an overhaul

The shift toward automation in B2B sales isn't just about keeping pace with technological advancements; it's also a response to evolving business needs.

B2B sales processes are often characterized by their complexity, involving multiple stakeholders, extensive product specifications and intricate negotiation processes. While cycles often depend on the industry, the [average B2B journey lasts around six months](#) ↗, which is significantly longer than a B2C journey.

Automation offers a potential solution to these challenges, enabling businesses to streamline operations, reduce manual intervention and improve overall efficiency. However, the key lies in determining where automation can be most effective in the journey.

Streamline order processing to speed up the B2B buyer journey

One of the most promising areas for automation in B2B sales is order processing. AI-driven [B2B tools](#) that manage the intake and processing of customer requests can efficiently handle various request formats—such as emails, PDFs and spreadsheets—and automatically generate quotes.

What advantages does automated order processing offer? First, it significantly reduces the time and effort required to process orders. It also minimizes the potential for human error, ensuring greater accuracy and reliability in order fulfillment. Lastly, by accelerating response times, businesses can enhance customer satisfaction, providing clients with timely and efficient service.

Enhance the buying experience with automated product recommendations and bundling

Automation can also play a pivotal role in enhancing the buying experience through intelligent product recommendations and bundling. By leveraging AI to analyze historical data and purchasing patterns, businesses can automatically offer personalized product suggestions that align with a buyer's previous purchases or identified needs. This approach not only enhances the customer experience but also positions the business as a trusted advisor, capable of anticipating and addressing client requirements proactively.



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This not only simplifies decision-making for buyers but also increases the transaction value for sellers. It creates upselling and cross-selling opportunities and streamlines the purchasing process by reducing back-and-forth exchanges between reps and customers.

Revolutionize engagement with elevated customer support

The advent of generative AI and conversational search is reshaping how customers get support and interact with businesses, offering organizations a scalable solution to improve engagement. AI-powered chatbots and virtual assistants can manage inquiries, provide support and guide customers through the purchasing process.

Human representatives can also benefit from this kind of automation, since it gives them back time to focus on complex, strategic activities that further elevate the quality of the customer experience.

Moreover, generative AI enables businesses to engage with customers whenever and wherever they need assistance, 24/7. Built on natural language processing, these AI-powered chatbots also allow for deeper, faster and more successful resolutions to customer queries.

B2B businesses should set themselves up for success with automation

Implementing automated sales journeys is not as straightforward as simply adopting a new AI tool. Businesses need to take a nuanced approach and ensure that their systems are set up to get the most out of automation.

1. Know the customer

Automation does not mean de-personalization. On the contrary, it requires a robust, nuanced portrait of customers in order to segment and engage with them successfully. AI can create personas based on specific inputs, and sales reps can use generative AI tools to converse with these personas to develop a deeper understanding of their customer segments.

2. Prioritize data hygiene

Automation is only as effective as the data it relies on, so businesses need quality data to produce quality results. By [collecting the right data](#), implementing robust data management practices and de-siloing systems to leverage data in the right way, organizations can ensure

that they are able to get reliable and actionable insights. These insights can then be used to automatically build tailored, personalized packages for customers, generate quotes and process orders.

3. Maintain human touchpoints

Automation should not replace human interaction but rather augment it. By automating routine tasks, sales representatives can focus on strategic activities that add value to the customer relationship, ensuring that the human element remains integral to the sales process. In this equation, relationships actually matter even more. Sales representatives can treat these direct interactions as a check-in with customers and the online portion as the checkout. Ultimately, this allows them to spend their time doing what matters: building relationships with customers.

The future of B2B sales will rely on a blend of automation and human interaction

As the B2B sales landscape evolves, so too should the buyer's journey. Today's pain points don't have to be tomorrow's pain points. Instead, automation can give sales teams the time to focus on what's important.

But automation cannot—and will not—fully remove sales reps from the journey. Instead, by strategically integrating it into various stages of the sales process, businesses should balance automation with human interaction to engage with a broader range of customers, ensuring that even smaller accounts receive attention and support.

Automation can potentially help reset and elevate the relationship between sales reps and B2B customers. Ultimately, it may even spark a pendulum swing that could turn the Gartner statistic on its head, fueling customers' desire to have reps at the right places in their journey.



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