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Understanding the B2B customer experience and journey: A convergence-based lens☆

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ABSTRACT

This article advances our understanding of Business-to-Business (B2B) Customer Experience (CX) and the B2B Customer Journey (CJ) by introducing a convergence-based theoretical lens. This perspective highlights how psychological and operational convergence shape B2B CX and CJ by (1) aligning CX across multiple levels (individual, team, organization) within the buyer organization and (2) facilitating interactions between the buyer and seller organizations across the CJ. The authors offer six core insights that enrich CX and CJ theory, form the basis for actionable managerial recommendations, and inform a future research agenda to address ongoing complexities and challenges in B2B settings.

1. Introduction

Practitioners and academics have devoted significant attention to understanding customer experience (CX) and the customer journey (CJ)—which we respectively define as "customer's responses during direct and indirect interactions with an organization" and "the series of touchpoints associated with the purchase and usage of goods and services" (De Keyser, Verleye, Lemon, Keiningham, & Klaus, 2020; Lemon & Verhoef, 2016). This focus is well justified, as both concepts are central to understanding how customers interact with organizations, perceive these interactions, and form long-term relationships that ultimately drive financial success (Lemon & Verhoef, 2016; Wetzels & Wetzels, 2023).

To date, CX and CJ research have predominantly focused on Business-to-Consumer (B2C) contexts (Lemon & Verhoef, 2016; Voorhees et al., 2017). However, with the scale of Business-to-Business (B2B) markets—estimated at $25 trillion in North America alone (Mastercard, 2022)—and the rising expectations of B2B buyers (Harvard Business Review Analytic Services, 2022), there is a growing recognition of the need to extend these concepts to B2B environments (Purmonen, Jaakkola, & Terho, 2023; Witell et al., 2020).

Despite this shift, B2B CX and CJ research still heavily draws from B2C insights and remains limited in several key areas. For instance, while the multi-level nature of B2B CX is acknowledged (e.g., Zolkiewski et al., 2017; Witell et al., 2020), there is no comprehensive theoretical lens to explain how CX emerges and aligns across different organizational levels, from individual experiences to the team level and beyond to the broader organization (i.e., spanning 2 or more teams). Similarly, although the B2B CJ literature identifies the various stages and phases of the CJ (Steward et al., 2019; Grewal & Sridhar, 2021), it lacks a detailed discussion of how buyer and seller organizations align throughout the CJ and the crucial role of sellers in this process.

In response to these gaps, we introduce a convergence-based theoretical lens that integrates psychological convergence and operational convergence as key components for understanding and managing B2B CX and the CJ. *Psychological convergence* refers to the perceived alignment of individual experiences within teams and/or the organization, whereas *operational convergence* concerns the alignment of actions, processes, and touchpoints between different entities (i.e., the buyer and seller organizations) along the CJ. This convergence lens offers a novel framework for understanding how CX develops at multiple organizational levels and how buyer–seller interactions can be optimized to

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create a more seamless and value-driven CJ.

To concretize these ideas, we put forth six core insights that offer a basis for understanding CX and CJ in B2B contexts. These insights are particularly valid in the context of complex solutions procurement, where buying and implementation/usage processes are prolonged and involve multiple stakeholders. The six insights not only provide a theoretical grounding for B2B CX and CJ but also serve as a basis for discussing critical managerial implications through a convergence-based lens. Finally, building on these insights, we propose an extensive future research agenda addressing the complexities and challenges of B2B CX/CJ management.

Table 1
Gaps Table – Core Literature on B2B CX and CJ.

Articles* & (Method)	Key ContributionsKey Contributions	Gaps in Understanding Multi-Level B2B CX	Gaps in Understanding Multi-Stage, Multi-Phase CJ
Zolkiewski et al. (2017) (Conceptual article)	This article presents a novel strategic framework for managing B2B CX. It focuses on capturing the intricate dynamics of B2B service interactions and proposes an approach emphasizing outcomes-based evaluation.	• Acknowledges that CX is shared in a B2B context. Yet, the multi-level aspect of B2B CX remains a peripheral topic. • Does not provide a conceptualization of B2B CX at different levels. • Does not offer a theoretical lens to understand the emergence of B2B CX.	• Does not clearly acknowledge the different stages and phases of the CJ. • Does not provide a theoretical lens to capture buyer–seller convergence across the CJ.
McColl-Kennedy et al. (2018) (Empirical article)	Proposes a comprehensive B2B CX conceptual framework, comprised of value creation elements (i.e., resources, activities, context, interactions, and customer role), cognitive responses, and discrete emotions at touchpoints across the CJ. It demonstrates the effectiveness of longitudinal CX analytics that combine quantitative and qualitative measures.	• Does not clearly acknowledge the multi-level nature of B2B CX. • Does not provide a conceptualization of B2B CX at different levels. • Does not offer a theoretical lens to understand the emergence of B2B CX.	• Does not clearly acknowledge the different stages and phases of the CJ. • Does not provide a theoretical lens to capture buyer–seller convergence across the CJ.
Steward et al. (2019)(Review article)	This article discusses the historical progression of B2B buying process models. It outlines the shift from simple transaction-based models to more complex journey-based frameworks by incorporating various phases and touchpoints in the B2B buying process. These authors argue for the importance of the notion of CX in B2B.	• Does not clearly acknowledge the multi-level nature of B2B CX. • Does not provide a conceptualization of B2B CX at different levels. • Does not offer a theoretical lens to understand the emergence of B2B CX.	• Does not develop a clear B2B CJ (stages and phases) model, but provides an overview of different models. • Does not provide a theoretical lens to capture buyer–seller convergence across the CJ.
Witell et al. (2020) (Conceptual article)	This paper develops a comprehensive framework for understanding CX management in B2B. It identifies two key dimensions – relationship control and customer entity – and discusses various challenges related to these dimensions. The framework also sheds light on the phases of the CJ, the roles of multiple actors in relationships, and control over different touchpoints.	• Acknowledges that B2B CX involves an important multi-level distinction. Yet, the multi-level aspect of B2B CX remains a peripheral topic of this article. • Does not provide a conceptualization of B2B CX at different levels. • Does not offer a theoretical lens to understand the emergence of B2B CX.	• Discusses three basic stages of the CJ—that is, pre-bid engagement, negotiation, and implementation stage, thereby lacking a further detailing. • Does not provide a theoretical lens to capture buyer–seller convergence across the CJ.
Articles* & (Method)	Key ContributionsKey Contributions	Gaps in Understanding Multi-level B2B CX	Gaps in Understanding Multi-Stage, Multi-Phase CJ
Grewal & Sridhar (2021) (Conceptual article)	Proposes a structured approach to understanding social influences within B2B CJs. It introduces three distinct concepts: the n-ad social structure, the m-hierarchy social structure, and primary-support social influences, each addressing different aspects of social dynamics in B2B interactions.	• Acknowledges that CX is shared in a B2B context. Yet, the multi-level aspect of B2B CX remains a peripheral topic. • Does not provide a conceptualization of B2B CX at different levels. • Does not offer a theoretical lens to understand the emergence of B2B CX.	• Does not provide a theoretical lens to capture buyer–seller convergence across the CJ. The article solely looks at the convergence from a 'social influence' perspective.
Homburg & Tischer (2023)(Empirical article)	This article conceptualizes and operationalizes the concept of *CJ management capability* in a B2B context. It provides evidence for an indirect positive effect of this variable on organization performance through customer loyalty and customer-related coordination costs.	• Acknowledges multi-personality in B2B buying. Yet, the multi-level aspect of B2B CX remains a peripheral topic. • Does not provide a conceptualization of B2B CX at different levels. • Does not offer a theoretical lens to understand the emergence of B2B CX.	• The B2B CJ is summarily divided into three basic stages—that is, pre-purchase, purchase, and post-purchase. • Offers a first theoretical lens to capture buyer–seller convergence across the CJ, although the analysis lacks detail.
Purmonen,Jaakola, & Terho (2023) (Conceptual article)	This article provides a new conceptualization of the B2B CJ, explicating its core elements and providing a novel, customer-centric definition of the concept.	• Acknowledges that CX is shared in a B2B context. Yet, the multi-level aspect of B2B CX remains a peripheral topic. • Does not provide a conceptualization of B2B CX at different levels. • Does not offer a theoretical lens to understand the emergence of B2B CX.	• Does not provide a theoretical lens to capture buyer–seller convergence across the CJ.
Present research (Conceptual article)	The present research develops a convergence-based view to better understand: • how B2B CX emerges when considering the multilevel nature of an industrial buyer (e.g., psychological convergence); • how a multi-stage, multi-phase B2B CJ is shaped by the role of sellers (e.g., operational convergence).	We propose a comprehensive multilevel conceptualization of B2B CX, which relies on psychological convergence. Through this process, individual CXs align to form collective CXs at the team and/or organization levels.	We leverage the concept of operational convergence, which refers to the alignment of actions, processes, and touchpoints between the buyer and seller throughout the CJ. Operational convergence underscores the necessity for sellers to align their operations closely with the buyer's journey, thereby ensuring a cohesive and frictionless CX that spans the CJ.

* We acknowledge other B2B CX and B2B CJ articles have been written. In this table, however, we have focused on the articles that focus on establishing these core concepts and have been foundational to the B2B CX and CJ space.

2. Literature background on B2B CX and CJ

2.1. B2B customer experience

We reviewed the newly developed B2B CX literature. In Table 1, we summarize core articles that have been particularly important in shaping this field. Notably, most of these articles discuss both CX and CJ, as they are inherently connected concepts.

Much of the B2B literature has adopted a common B2C CX definition (e.g., Becker & Jaakkola, 2020), describing B2B CX as *encompassing a buyer's nondeliberate, spontaneous responses and reactions to offering-related stimuli along the customer journey*. This perspective frames B2B CX at the *individual* level (e.g., McColl-Kennedy, Zaki, Lemon, Urmetzer, & Neely, 2019), referring to the responses of individual *employees* within the buyer organization. These experiences are multidimensional in nature, including cognitive, emotional, sensorial, social, and behavioral dimensions—see the work of De Keyser et al. (2020; 2025) for an elaborate discussion. For instance, cognitive experiences arise when employees process substantial amounts of information during a bidding process. Similarly, various emotional experiences (e.g., joy, anger, fear, disgust, surprise) may occur when interacting with the seller and their service offering (e.g., McColl-Kennedy et al., 2019).

While individual-level CX is crucial, recent work has emphasized the multilevel nature of B2B CX. Specifically, individuals typically operate within *teams* or *units*—such as a buying center, a user center, a department, or a multi-functional team—which together make up the organization (e.g., Witell et al., 2020; Zolkiewski et al., 2017). This aligns with Gummesson's (1987) characterization of B2B customers as "multi-headed" entities. Understanding how individual CXs are shared within a team and how team CXs are shared within an organization necessarily requires a multilevel conceptualization. However, despite growing recognition of B2B CX's multilevel nature (e.g., Witell et al., 2020), the current literature has largely treated this aspect as a background factor. To date, we are unaware of any systematic conceptualization of how B2B CX develops and converges across individuals, teams, and the organization.

We pay special attention to the article of Witell et al. (2020), which makes insightful remarks about the multilevel nature of B2B CX. These authors develop a comprehensive framework for CX management, anchored in two key dimensions: "relationship control" and "customer entity". They provide useful examples describing the roles of employees, teams, and organizations and highlight the need to synchronize these different entities. Although this foundational work underscores the multilevel nature of B2B CX, it does not treat it as its central focus. Rather, Witell et al. (2020) primarily concentrate on managing B2B CX, rather than providing a conceptualization of B2B CX and a theoretical lens explaining its emergence.

2.2. B2B customer journey

The B2B CJ (see Table 1) is typically defined as *the path taken by an organizational buyer in procuring and utilizing offerings, which includes a series of touchpoints associated with the purchase and usage of solutions* (Purmonen, Jaakkola, & Terho, 2023). Notably, while CX captures customers' responses that arise from these touchpoints, the CJ represents the structured sequence in which they unfold. In this sense, the CJ acts as the backbone of CX, shaping how experiences are formed and accumulated and ultimately influencing decision-making processes within and across multiple individuals in the buying organization. At the core of the CJ are touchpoints, which entail any point of contact between a seller organization and a buyer organization (McColl-Kennedy et al., 2019). These touchpoints vary in nature, being *human* (e.g., a salesperson), *digital* (e.g., chatbot, website), *physical* (e.g., an exhibit booth), or any combination thereof (Steward, Narus, Roehm, & Ritz, 2019).

Furthermore, touchpoints differ in terms of their level of organizational control (Witell et al., 2020). Some touchpoints are fully controlled by the selling organization (e.g., service offering, ad campaigns), which makes them highly adaptable to the requirements of industrial buyers. Other touchpoints, however, fall outside the seller organizations' control and include "final customer"-controlled (e.g., an individual employee within the buyer organization using their own electronic device to interact with the seller's software), social (e.g., online reviews and blogs), and other external (e.g., independent dealerships) touchpoints (Purmonen et al., 2023).

Importantly, this literature has recognized different stages of the customer journey—all building on the original steps of the buying process (see Steward et al. [2019] for a review)—with the purpose of simplifying and organizing holistic journeys. The simplest division is inspired by the B2C literature; it boils down to recognizing pre-purchase, purchase or service, and post-purchase stages (e.g., Homburg and Tischer, 2023). Other articles have recognized the need for a finer-grained conceptualization fitting the complexities of the B2B CJ. For instance, Grewal and Sridhar (2021) propose a journey with eight stages, starting with "need activation," going through "maintenance or repair," and finishing with "disposal or repurchase." In turn, Witell et al. (2020) make a distinction between the "pre-bid engagement," "negotiation," "implementation," and "operations" stages.

We place particular emphasis on Purmonen et al's. (2023) work, which proposes a detailed and well-justified conceptualization of the B2B CJ. These authors make a distinction between the *purchase journey*—which is composed of need recognition, information search, comparison of alternatives, and selection—and the *usage journey*—which encompasses the stages of offering deployment, usage, maintenance, and reassessment. They explain the connection between these two stages for different purchasing contexts (e.g., rebuy, new buying situation), the differences between direct and indirect touchpoints, and the influence of a series of relational factors (e.g., relationship atmosphere, interaction history, and interconnected relationships). They also provide a useful lexicon of concepts related to the B2B CJ.

Within Purmonen et al.'s (2023) insightful conceptualizations, we identify a critical area that requires further development. Although Purmonen et al. (2023) acknowledge that the seller organization plays a vital role along the CJ, they do not formally address the need for convergence between the seller and buyer organizations across the CJ. While research on the B2B CJ recognizes—implicitly or explicitly—that sellers play a role in managing the B2B CX (e.g., Homburg & Tischer, 2023; Witell et al., 2020), the precise nature and extent of their involvement is somewhat overlooked in the B2B CX/CJ literature.

3. Convergence

3.1. A broad definition of convergence

We propose that the gaps previously identified can be addressed through a *convergence* lens. Drawing from marketing (e.g., Ahearne, Atefi, Lam, & Pourmasoudi, 2022; Becker et al., 2023; Gupta, Kumar, Grewal, & Lilien, 2019; Lawrence, Crecelius, Scheer, & Lam, 2019) and organizational psychology/behavior (e.g., Echterhoff, Higgins, & Levine, 2009; Fulmer & Ostroff, 2016; Kozlowski & Klein, 2000), we define convergence *as the process of increasing alignment in psychological responses and/or operational activities between different individuals and/or teams.* This alignment can occur within an organization (e.g., between employees, departments, or cross-functional teams) or across organizational boundaries (e.g., between an organization and its suppliers or external partners).

The suggested broad definition has two key implications. First, B2B CX may remain an exclusively individual affair if there is no convergence among individuals (i.e., *a divergence of individual views*). Alternatively, it may be confined to one or more specific teams that are more cohesive in their views without emerging as an organization-wide phenomenon (Becker et al., 2023; Kozlowski & Klein, 2000). Second, B2B CX requires time to emerge as it results from the "experiential

current of the community" (Stein, 2000; p. 140)—a collective process shaped by individuals navigating different stages of the CJ. In other words, the level of convergence is constantly in flux, varying across time, context and actors involved along the CJ (Burns, 2016).

3.2. Psychological and operational convergence

We propose that two distinct but related types of convergence—psychological and operational—are relevant for B2B CX and B2B CJ, respectively. For B2B CX, the process of *psychological convergence* is essential for the alignment of individuals' perceptions of CX within and across team(s). Relatedly, a seamless B2B CJ involves a high degree of *operational convergence*, ensuring alignment in the activities and processes of the buyer and seller organizations. We expand on these two types of convergence below.

Psychological convergence pertains to the perceived alignment of experiences among individuals within the buying (or selling) organization; for instance, this type of convergence is captured in expressions such as "*we* feel that" or "*we* believe that" (Becker et al., 2023; Echterhoff et al., 2009). Building on research on collective mind and consciousness, we recognize that psychological convergence is not merely an aggregation of individual experiences but rather a shared perspective, being cognitively constructed, that emerges through social synchronization and joint attention (Shteynberg 2024; Shteynberg et al., 2023). Representations of the collective mind suggest that when individuals encode their experiences as part of a shared mental framework, these experiences gain psychological salience and are prioritized in cognitions and communications (Shteynberg et al., 2023).

Psychological convergence allows individuals to communicate more effectively internally, ensuring that different people are on the same page regarding their interactions with the seller (Kozlowski & Klein, 2000; Rafferty, Jimmieson, & Armenakis, 2013). Furthermore, collective consciousness theory suggests that shared representations of CX within teams and organizations can enhance trust, coordination, and cooperation (Shteynberg, 2024), which stimulate the further emergence of B2B CX. In sum, the notion of psychological convergence is beneficial to grasp the multilevel development of B2B CX within the buyer organization.

Next, we define *operational convergence* as the alignment of actions, processes, and touchpoints between two or more entities (e.g., buyer and seller organizations) as they coordinate and integrate their activities throughout the CJ. For example, in the implementation phase of a complex B2B service solution, operational convergence may occur when the seller's deployment team works closely with the buyer's IT and procurement teams to ensure seamless solution integration (e.g., aligning resources, synchronizing timelines, developing troubleshooting processes to prevent disruptions, etc.). This convergence emerges from the dynamic and collaborative relationships formed between individuals, teams and/or organizations, where continuous interactions and adaptations facilitate efficient operations over time (Provan, Fish, & Sydow, 2007; Shamsollahi, Chmielewski-Raimondo, Bell, & Kachouie, 2021). In this research, we posit that operational convergence plays a central role in understanding the role of sellers in shaping the B2B CJ.

In what follows, and building on the convergence lens, we identify six insights (see Table 2 for an overview) that are central to understanding B2B CX and CJ. Ultimately, these insights can help guide the development of the B2B CX and CJ domains. In the following section, we first focus on the multilevel aspect of B2B CX (insights 1 to 3). The subsequent section then focuses on B2B CJ and the role of seller-buyer interactions in shaping journeys (insights 4 to 6).

4. From individual-level CX to multilevel CX

This first section, which addresses the multilevel nature of CX, is organized as follows: First, we differentiate different CX levels (insights 1–2) and then discuss the process of psychological convergence (insight 3).

Table 2
Six Core Insights to Understand B2B CX and B2B CJ.

	Core Insights
The multilevel nature of B2B CX	**1.** B2B CX requires a multilevel perspective composed of three layers: an individual-level, a team-level, and an organization-level CX. **2.** Higher-level (i.e., team and organization) CX emerges from the sharing of individual-level CXs that psychologically converge over time in a collective experience. **3.** Social interactions, leadership, organizational structures, homogeneity of individuals, and buyer–seller alignment facilitate psychological convergence and, therefore, lead to the emergence of higher-level B2B CX.
The multi-stage, multi-phase nature of CJ	**4.** The B2B CJ is a multi-phase process, consisting of a buying phase and an implementation-and-usage phase, each of which is further divided into multiple stages (i.e., pre-, core-, and post-) **5.** The B2B CJ typically involves different individuals/teams participating across different phases and stages, resulting in the occurrence of multiple (often parallel) sub-journeys that together shape the overall B2B CJ. **6.** Implementing a successful B2B CJ requires strong operational convergence between the buyer and seller organizations, which develops over time.

4.1. Differentiating between CX levels

When considering B2B CX, it is imperative to account for the fact that business services/goods are typically used by collectives of individuals belonging to functional units or teams with determined roles and objectives within an organization (Becker et al., 2023; Burns, 2016; Pacherie, 2018). As a result, B2B CX requires a multilevel perspective composed of minimally three layers: an individual-level, a team-level CX, and an organization-level CX (i.e., spanning across two or more teams of the organization)—see Fig. 1 for a visual representation. Consequently, *our first core insight recognizes that B2B CX requires a multilevel perspective composed of three layers: an individual-level, a team-level, and an organization-level CX*. As recently highlighted by Becker et al. (2023), the study of collective experiences (i.e., team-level and organization-level) requires more than a process of straightforward "aggregation" of individual assessments to a higher level of analysis. Collective entities, like a buying unit, cannot consciously experience stimuli (Burns, 2016; Pacherie, 2018). This suggests that individual perceptions of a *shared* experience with a given seller organization represent the foundation of B2B CX at a higher and collective level of analysis (Becker et al., 2023).

More precisely, we propose that, through a process of psychological convergence, individuals within a team or an organization develop a collective sense of their experience with a seller organization. Team- and organization-level CXs are fundamentally grounded in experiences communicated and perceived by individuals in the group as having common cognitive, emotional, social, behavioral and/or sensorial features.[1] Obviously, such sharing and interactions evolve and may change over time; accordingly, creating that sense of individual and collective experiences is an iterative and longitudinal process (Sandberg & Tsoukas, 2020). Therefore, *our second core insight proposes that higher-level (i.e., team and organization) CX emerges from the sharing of individual-level CXs that psychologically converge over time in a collective experience.*

[1] Organization B2B CX does not necessarily imply that all employees of an organization are involved. Typically, CX with a seller organization is concentrated within specific teams, while others have limited (if any at all) direct or indirect interactions with the seller organization.

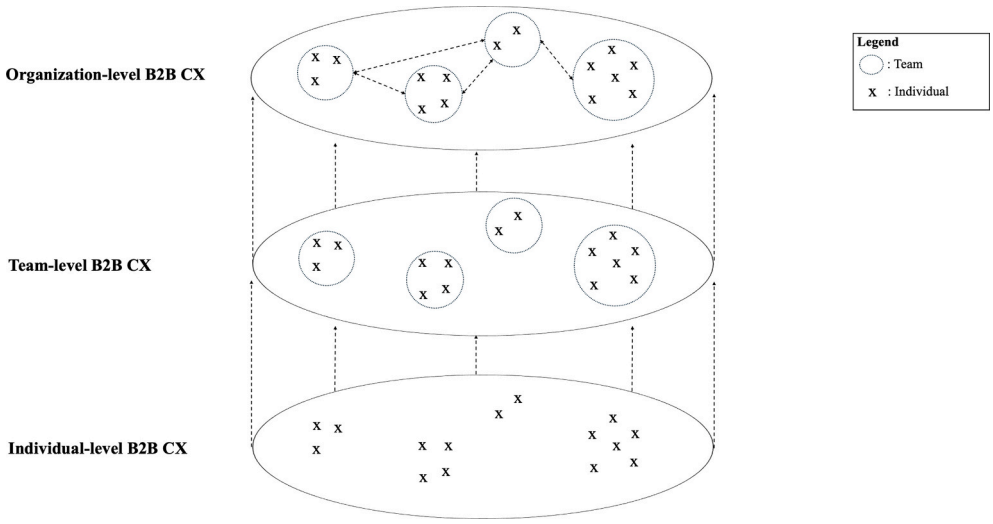

Fig. 1. Multilevel Nature of B2B CX.

We note that while individual members of a team or organization may believe that they share a common experience with a seller, it is important to recognize that this perceived alignment might not be accurate. Individual perceptions of convergence—where team members feel they are on the same page—can mask actual differences in how each individual really experiences and interprets interactions with the seller organization. Specifically, while some individuals believe that their perspectives are well aligned with those of others, divergence can still exist beneath the surface, particularly when a certain level of uncertainty is present (Shteynberg et al., 2023). That is, people may confidently believe that they know the perspective of others in their organization; however, it still conceivable that these "others" hold subtly different or even contradictory views. This false sense of commonality can create "blind spots" in CX management, where hidden discrepancies in the collective experience go unnoticed until they cause frictions in decision-making. Thus, it is crucial for B2B CX management not only to encourage convergence but also to be aware of potential (hidden) divergence that can impact the collective experience.

4.2. Drivers of psychological convergence

The organizational psychology literature has identified several main factors driving the emergence and subsequent convergence of higher-level psychological constructs: (1) social interactions and comparison, (2) leadership, (3) organizational structures, (4) homogeneity of individuals, and (5) buyer–seller alignment (i.e., operational convergence) (e.g., Fulmer & Ostroff, 2016; Ostroff, Kinicki, & Muhammad, 2012). Accordingly, *our third core insight is that social interactions, leadership, organizational structures, homogeneity of individuals, and buyer–seller alignment facilitate psychological convergence and, therefore, lead to the emergence of higher-level B2B CX.* To the best of our knowledge, we are the first to consider the relevance of these factors in the emergence of B2B CX. We acknowledge that the relative influence of each factor may vary depending on the organization, as well as the level of investigation (i.e., team versus organization).

Social interactions, as the essential factor for a high-level CX to emerge, include exchanges between individuals who share relevant information concerning their experiences with a seller organization. Research on social networks has demonstrated (Adler & Kwon, 2002; Rost, 2011) that such exchanges can be social or hierarchical. The diversity of the ties impacts the level of organizational control and influences the information exchange process among concerned individuals. This network of interactions leads to the development of a higher-level CX through three interrelated mechanisms of social comparison (Feldman, 1984; Schachter, 1959), contagion (Hatfield, Cacioppo, & Rapson, 1992), and amplification (Boothby, Smith, Clark, & Bargh, 2016).

Social comparison is grounded in individuals' observations of others' behaviors and responses. Individuals—especially when uncertain about their own evaluation of the seller organization—will observe others to learn how they should feel and respond toward the seller (Gump & Kulik, 1997). At earlier stages in the relationship, team members might compare their perceptions with the experiences of others to understand how they should evaluate the seller. Rooted in psychological theories of behavioral mimicry (Hatfield et al., 1992), *contagion* offers a similar mechanism. Observing others' positive responses to an offering will immediately trigger a positive response through mechanisms of imitation, which are independent of the cognitive learning implicit in social comparisons (Howard & Gengler, 2001). This is especially so when individuals desire to get along with others, so that attuning one's beliefs and perceptions is more likely to happen. Interestingly, research also shows that sharing an experience strengthens its intensity (Boothby, Clark, & Bargh, 2014; Boothby et al., 2016). Here, when colleagues in a team or organization share their views about the seller, an *amplification* process takes place, which increases the negativity or positivity of their individual experiences.

These mechanisms align with research on collective mind and consciousness, which shows that simultaneously experiencing information strengthens shared perceptions and psychological convergence (Shteynberg, 2024; Shteynberg et al., 2023). Experiencing an event at the same time—whether through co-attending meetings, discussing seller performance in real-time, or jointly reacting to service interactions—makes these experiences become more psychologically salient and socially reinforced (Shteynberg et al., 2023).

Leadership is a second factor that impacts the psychological convergence of individual CX to a higher-level property at the team and/or organization levels. Here, top management provides critical information that shapes how individual team members make sense of a particular offering and interact with the seller organization (Maitlis & Lawrence, 2007; Zaccaro, Rittman, & Marks, 2001). Beyond the influence due to their status, leaders can impact the convergence of team-level and organization-level CX disproportionately because they are likely to have more relationships (or ties) within the network of interactions. Social network research suggests the importance of considering the number, strength, and density of these relationships to assess each individual's relative importance in a given network (Payne, Moore, Griffis, & Autry, 2011). Leaders are expected to have many important relationships, both professionally and socially, with other individuals across the

organization. This position confers on them a key role in the emergence of a higher-level B2B CX.

Organizational structures encompass characteristics like the size and configuration of the organization, as well as its internal practices and institutions. These help establish an ordinary reality for employees (Mintberg, 1979), which may provide a basis to create a shared perception of interactions with a seller organization. A company's practices and its institutions' consistency, visibility, and consensus (Bowen & Ostroff, 2004) may foster this collective perception. Consistency ensures that practices and institutions represent a coherent and internally consistent whole. Visibility makes these practices and institutions more salient. Consensus means that practices and institutions are communicated widely and clearly, and that they are administered consistently throughout the organization.

Homogeneity of individual employees within a team and organization also contributes to B2B CX convergence at higher levels. Specifically, building on the principle of homophily, individuals who are like each other in terms of personal attributes, goals, and values are more likely to be attracted to each other and typically communicate more frequently (Fulmer & Ostroff, 2016). Furthermore, research on social tuning supports this idea, suggesting that individuals are more likely to mentally prioritize and encode stimuli when they believe those stimuli are experienced by similar others (Shteynberg, 2010). That is, when individuals assume that their group members are exposed to the same seller interactions, their cognitive accessibility of these experiences increases, reinforcing shared perceptions of CX. This, we posit, subsequently leads to a higher likelihood of psychological convergence.

Finally, the level of *alignment* between the seller and buyer organizations across the B2B CJ (i.e., *operational convergence*) impacts the occurrence and level of psychological convergence within the buyer organization. Through such alignment, buyer and seller organizations develop shared understandings, common goals, and capabilities that enhance their ability to operate cohesively across different phases of the CJ. Consistent and aligned interactions with the seller will lead to a higher likelihood of a shared and common perception across individuals working within the buyer organization. We discuss this alignment in more detail in section 5.2 as well as in the concluding section (i.e., section 6.1).

5. The Multi-Phase, Multi-Stage customer journey

This section elaborates on three additional insights (see Table 2) regarding the B2B CJ. Briefly stated, these insights emphasize the different phases and stages of the B2B CJ (insight 4), the longitudinal and parallel nature of different sub-journeys (insight 5), and the necessity of operational convergence between the buyers and sellers (insight 6).

5.1. CJ phases and stages

Our fourth insight asserts that *the B2B CJ is a multi-phase process, consisting of a buying phase and an implementation-and-usage phase, each of which is further divided into multiple stages (*i.e.*, pre-, core-, and post-)*. The first phase is the buying phase, where buyers and sellers negotiate the agreement, guiding the subsequent implementation and usage phase (Purmonen et al., 2023). The buying phase comprises three stages: pre-buying, core-buying, and post-buying (Lemon & Verhoef, 2016), while the implementation phase again consists of three stages: pre-service, core-service, and post-service (Voorhees et al., 2017).[2]

[2] Purmonen et al. (2023) also conceptualize B2B CJ as a two-phase process, but their framework follows a different sub-phase structure. Rather than directly adopting their stage breakdown, we align our sub-phases with well-established consumer journey models (Lemon & Verhoef, 2016; Voorhees et al., 2017) to maintain consistency with the broader CX literature.

Fig. 2 illustrates the complexity of the B2B CJ and the B2B CX therein. As mentioned above, the B2B CX is a *multilevel concept*, spanning across the individual employee, team, and organizational levels (i.e., across two or more teams). The figure delineates the *multi-phase*, *multi-stage* nature of B2B CJ. In the purchase of complex B2B solutions, the B2B CJ starts with a lengthy and complex *buying* phase through which an organization selects a seller and negotiates the procurement conditions (Purmonen et al., 2023). This initial phase is followed by another long-term phase involving the *implementation and usage of the procured solutions* (Purmonen et al., 2023). The seller organization is often (co–) responsible for implementing, testing, maintaining, repairing, and/or upgrading its offered solutions.

We elaborate on each of the phases (buying and implementation/usage) and their underlying stages (pre-, core-, post-) below. Within all, a strong interaction between the buyer and seller organizations is (ideally) taking place.

5.1.1. The buying Phase: Pre-Buying, Core-Buying, Post-Buying

The pre-buying stage is arguably a critical period of the buying phase in a B2B context, especially for complex solutions. The pre-buying stage encapsulates the consideration and evaluation of potential seller organizations that can provide the necessary solutions to a particular need or problem the buyer organization is facing. This starts with the buyer's consideration, which is marked by the recognition of a need (Edelman & Singer, 2015; Steward et al., 2019). For example, the buyer's procurement team can identify a need for a new software, subsequently articulating and quantifying the required features, quantity, location, and other relevant details. This stage involves input from the solution users and experts, who provide valuable information; and it requires the seller organization's involvement, as it could help understanding the buyer's unique needs and preferences.

Next comes the *core-buying stage*, which is characterized by moments of choice-making, order finalization, payment transactions, and contractual agreements. Here, the choice to work together with a particular seller organization marks the initiation of the core-buying stage. However, this stage continues with multiple rounds of negotiations between the buyer and seller. Even after reaching an initial agreement, buyer organizations frequently raise objections regarding various aspects (e.g., price, quantities, expected delivery time, return policies, warranties, and other negotiated terms). Achieving an agreement requires coordinating actions and individuals within and between both sides. For example, a buyer's purchasing agents, in conjunction with their finance agents, determine the optimal price and delivery details. Simultaneously, the seller's representatives, working with their logistics and finance units, finalize the details that will (ideally) be customer-centric yet still profitable (Hochstein, Chaker, Rangarajan, Nagel, & Hartmann, 2021). The conclusive agreement on these terms finalizes the procurement contract. Agreements can take diverse formats—either as one-time purchases or recurring orders (Feng, Zhang, & Zhang, 2023).

Finally, the *post-buying stage* considers elements like the finalization of contracts and the initial development of an implementation plan. This further includes handling objections and the constant modifications of the initial agreements to account for the challenges experienced in the implementation phase (our next point). Negotiations and objection handling may persist after the initial formal agreement—particularly for complex solutions, where the sales cycle is long and payment unfolds over multiple years. For high-value acquisitions, for instance, a buyer's objection may arise from the perception that a significant portion of the total cost is due too early in the sales cycle. Here, the buyer organization may ask for more balanced payments, which align with the completion core steps in the implementation and usage phase.

5.1.2. The implementation and usage Phase: Pre-Service, Core-Service, Post-Service

The implementation and usage phase begins after the buying phase

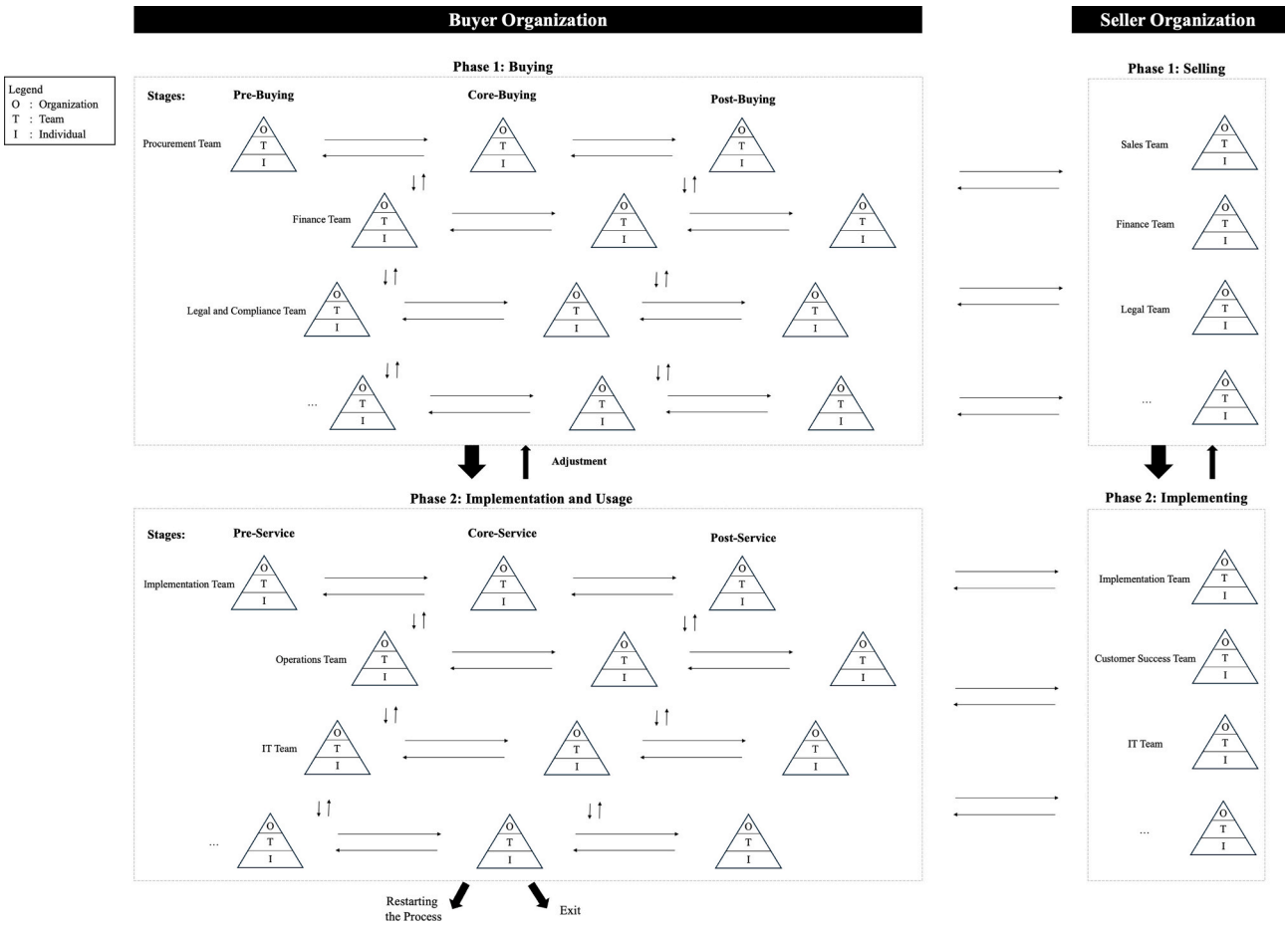

Fig. 2. A Conceptual Illustration of B2B Customer Journey.

(see Fig. 2) but is largely conditioned by the agreement made in this earlier phase. Building on the work of Voorhees et al. (2017), we again consider this phase as comprising three related stages—pre-service, core-service, and post-service—which are discussed below.

In the *pre-service stage*, the buyer awaits the delivery of the final solution. This waiting experience differs for simple products vs. complex solutions (our core focus). For simple products, waiting time tends to be more passive, while for complex solutions, this period involves many active aspects that will influence the CJ. In this case, the seller organization—for instance, through its sales and operations teams—maintains ongoing communications with the buyer to finalize product delivery, logistics, installation, maintenance, and customization details. Sometimes, customization may extend beyond delivery, such as adding commercial colors and brand logos. During this stage, emphasis is placed on preparing users and experts to use the solutions.

During the *core-service stage*, the actual implementation of the delivered solution happens, allowing users to start leveraging the promised solution. A usage evaluation, including performance reports, is conducted; and this information is provided to the seller organization. At this stage, technology may be used to provide automatic feedback to both the buyer and seller organizations in real-time. This feedback serves to address potential issues with the solutions and adjust the parameters optimally. Ideally, the CX is positive, leading to buyer satisfaction, which fosters long-term engagement and transforms the buyer into a dedicated customer who advocates for the seller as a brand ambassador (Beeler, Rouziou, & Gyomlai, 2023).

In the *post-service stage*, bonding unfolds before potentially embarking on a new CJ. Notably, it takes only one bad CX in any part of the implementation phase to negatively impact the business relationship (Hilbert, 2021). Therefore, service failures, recovery, and customer reconciliations are important components of the post-service stage (Voorhees et al., 2017). Here, seller organizations are strongly advised to mobilize internal unit coordination, allocate resources to satisfy customers, and build enduring relationships (Burchett et al., 2024; Hochstein et al., 2021).

5.1.3. *Parallel journeys over time*

As illustrated in Fig. 2, different individuals—be it in a role of decision-makers, experts, or users—across various teams (e.g., legal, financial, operational) may participate in different phases of the B2B CJ. In most cases, especially for complex solutions, only a limited set of individuals or teams—if any at all—remains involved throughout the entire CJ. We posit this as our *fifth core insight: The B2B CJ typically involves different individuals/teams participating across different CJ phases and stages, resulting in the occurrence of multiple (often parallel) sub-journeys that together shape the overall B2B CJ.* During this longitudinal journey, multiple individuals/teams from the buyer and seller sides—playing different roles—go through their parallel journeys and evolve at different paces (Purmonen et al., 2023). Although these individuals/teams have their own journeys, they also communicate with one another, and their actions must be carefully aligned, as discussed next.

As illustrated in Fig. 2, different individuals/teams commence their journeys at different times because they engage in the CJ at earlier or later stages. For example, the financial team may get involved once the agreement is finalized to ensure payment during the buying phase. An internal operations team may only be engaged during the implementation phase to facilitate the implementation of a bought solution. This means that their specific journey begins at a later moment in the overall CJ.

Implicit in the concept of a CJ is also its non-linearity. As in B2C contexts, B2B CJs may involve loops or circles, where buyers revisit earlier stages because of changing needs, renegotiations, or challenges during implementation. Addressing this non-linearity requires sellers to remain flexible and responsive to the evolving needs of the buyer across different stages, ensuring alignment despite potential loops back to earlier phases.

5.2. Operational Convergence: Alignment of the buyer and seller organizations

The many phases (i.e., purchase and implementation/usage) and stages (pre-, core-, post-) of the B2B CJ enhance the complexity of its management. *Our sixth insight emphasizes that a successful B2B customer journey requires strong operational convergence between the buyer and seller organizations, which develops over time.* Importantly, we further posit that the psychological convergence of B2B CX within the buyer organization may help facilitate operational convergence by ensuring that internal alignment exists when engaging with the seller. When teams within the buyer organization share a cohesive perception of CX, their interactions with the seller will likely be more consistent, likely simplifying the process of operational convergence.

Considering operational convergence, significant efforts are needed from the seller's side (Homburg & Tischer, 2023). Although prior work acknowledges this role, it has been somewhat underrepresented in the B2B CJ/CX literature. A key aspect of operational convergence is ensuring alignment between the buyer's CJ and the seller's sales funnel—the structured process sellers use to guide prospects from initial engagement to purchase and beyond (Moncrief & Marshall, 2005). While the B2B CJ represents the buyer's experience, the sales funnel organizes the seller's efforts into sequential steps, such as prospecting, approach, presentation, overcoming objections, closing, and follow-up (Moncrief & Marshall, 2005). For a smooth exchange, the seller's actions must be adapted so that they match with the different steps of the buyer's CJ, ensuring a value-enabling B2B CX (Burchett et al, 2024). This collaboration should lead to more informed purchasing decisions and mutually beneficial outcomes—a concept known as holistic selling (Kalwey et al., 2025).

Specifically, the seller organization is responsible for facilitating operational coherence by strategically managing touchpoints across the CJ. As highlighted in the work of Homburg and Tischer (2023), effective CJ management hinges on four key capabilities of the seller organization: (1) ensuring that each touchpoint aligns with the value proposition of the buyer organization; (2) maintaining consistency across touchpoints; (3) integrating touchpoints to facilitate seamless transitions in the CJ; and (4) closely monitoring and adapting the touchpoints so they meet the diverse needs of the buyer organization. These capabilities are essential for achieving operational alignment in B2B exchanges (Schmitt, Klein, & Lussier, 2025).

Here, customer success management—characterized by a proactive approach and a strong focus on customer value realization (Hochstein et al., 2023)—has emerged as a novel critical function within seller organizations (Hochstein et al., 2020; Eggert et al., 2020; Goad et al., 2024). This function plays an increasingly important role in ensuring operational convergence between buyer and seller organizations, by building a strong relationship between the buyer and seller organizations.

Traditionally focused on the implementation/usage phase—where customer success managers support buyers in realizing value (Prohl-Schwenke & Kleinaltenkamp, 2022)—recent research also highlights the potential role of customer success management in the buying phase. For instance, the customer success management function can collaborate with the dedicated sales team in the buying phase by aligning expectations, advising prospects, and ensuring a smooth transition from sales to implementation (Boghe et al., 2024). Additionally, customer success teams now facilitate onboarding by streamlining the transition from purchase to implementation, reducing uncertainty, and ensuring a smooth handover (Hilton et al., 2020). This makes sellers shift from transaction-focused sales to an integrated, long-term relationship approach that enhances mutual value in the B2B ecosystem (Goad et al., 2024; Kleinaltenkamp et al., 2022).

To support these objectives, many customer success teams leverage real-time technologies to monitor customer interactions across the CJ, allowing them to track buyer engagement and identify friction points. These technologies help sellers ensure that buyers experience value at every stage of the CJ by proactively detecting and addressing challenges before they escalate (Eggert et al., 2020). Key components of this proactive approach include customer health scoring and other advanced metrics (Rouziou et al., 2025), which allow sellers to assess buyer engagement, usage patterns, and satisfaction levels—often in real time. By systematically analyzing these data points, managers can anticipate potential churn risks and implement corrective measures before dissatisfaction escalates (Hochstein et al., 2023).

6. Conclusion

6.1. Conceptual Contributions

This conceptual research introduces a convergence-based theoretical lens to advance our understanding of B2B CX and the B2B CJ. Specifically, we focus on the role of psychological convergence for B2B CX and that of operational convergence for the B2B CJ. Overall, we address several gaps in the B2B CX/CJ literature.

First, we noted the lack of a comprehensive multilevel conceptualization of B2B CX—one that accounts for the interplay between individual, team, and organization CX. While prior work has acknowledged the multilevel nature of B2B CX, it has mostly remained a peripheral consideration rather than a systematically theorized construct (Homburg & Tischer, 2023; Purmonen et al., 2023; Witell et al., 2020; Zolkiewski et al., 2017). Our research applies and extends the work of Becker et al. (2023) on multi-level CX by using psychological convergence as a theoretical lens (Kozlowski & Klein, 2000; Rafferty et al., 2013). Psychological convergence explains how individual CX perceptions within a buyer organization may align over time, forming collective CXs at the team and/or organizational (i.e., across two or more teams) levels. Various factors, including social interactions, leadership, organizational structures, individual homogeneity, and the alignment between the buyer and seller organizations may stimulate this form of alignment. By establishing psychological convergence as the foundation of B2B CX, our research provides a novel lens to clarify how B2B CX emerges, evolves, and diffuses across the organization—a perspective underexplored in the literature.

Second, we address the necessity of alignment between the buyer and seller organizations and discuss the critical role played by sellers in shaping CJs. Specifically, our research introduces and formalizes the concept of operational convergence, which refers to the degree to which buyer and seller organizations align their actions, processes, and touchpoints throughout the B2B CJ. As articulated in our work, operational convergence underscores the importance for sellers to align their operations closely with the buyer's journey, thereby ensuring a cohesive and frictionless experience that spans all phases of the CJ. This approach is supported by recent studies that emphasize the need for sellers to develop strong CJ management capabilities (Homburg & Tischer, 2023) and literature on customer success management (Hochstein et al., 2023). Here, our work bridges the B2B CX/CJ literature with the emerging domain of customer success management. While B2B CX and CJ research have traditionally focused on the buyer's experience, customer success management offers a structured approach for managing long-term buyer–seller interactions, particularly in complex B2B exchanges (Eggert et al., 2020; Hochstein et al., 2020).

Next, the introduction of a convergence-based lens in the B2B CX and CJ space not only strengthens the conceptual foundations of these

Table 3
Key Managerial Implications.

	Managerial Implications	
Managing the multilevel nature of B2B CX	*For the seller organization*	• Assess B2B CX at multiple levels (individual, team, and organization) to track convergence patterns. • Identify key individuals and influential teams that shape CX within the buyer organization. • Engage "CX amplifiers" (key influencers in the buyer organization) to accelerate CX convergence. • Foster cross-team interactions within the buyer organization (e.g., training sessions, co-creation workshops) to promote shared positive CX perceptions.
	For the buyer organization	• Ensure internal coordination across departments (e.g., procurement, IT, finance, operations) to prevent fragmented CXs. • Establish mechanisms to align CX perceptions across internal teams. • Monitor possible psychological divergence in CX perceptions to diagnose inconsistencies and internal divergence. • Leverage internal champions to communicate seller value across teams and ensure consistency in expectations throughout the CJ.
Ensuring operational convergence throughout the B2B CJ	*For the seller organization*	• Facilitate seamless transitions between CJ phases by aligning the different internal actors involved in the interaction with the buyer. • Establish a dedicated customer success function to coordinate interactions and proactively address misalignments. • Implement structured onboarding, performance monitoring, and reviews for own employees to maintain a consistent alignment with the buyer organization. • Leverage CX analytics across buyer touchpoints to assess alignment and detect misalignment early.
	For the buyer organization	• Create cross-functional project teams to ensure smooth knowledge and expectation transfer across CJ phases. • Develop structured seller onboarding by involving implementation teams early in pre-buying discussions. • Implement seller evaluation models that consolidate insights across the organization for a holistic CJ assessment.

interrelated concepts; it also offers a foundation for understanding the reciprocal dynamics between the B2B CX and CJ. Rather than treating CX and CJ as separate domains, our approach highlights their interdependence through a convergence lens, positioning psychological and operational convergence as mutually reinforcing mechanisms that shape buyer–seller relationships over time. On the one hand, operational convergence leads to a cohesive B2B CX at the team and organization levels. With operational convergence, individuals within both organizations can more easily develop shared understandings, common goals, and complementary capabilities that allow them to operate cohesively. This alignment enhances the likelihood that individuals' CX within the buyer organization will converge psychologically. On the other hand, psychological convergence within the buyer organization may reinforce and enhance operational convergence. When individuals within and across teams share a mutual perception of their CX, it simplifies the coordination of decision-making processes. This internal alignment, in turn, facilitates more structured collaboration with the seller, allowing the seller organization to optimize its actions, processes, and touchpoints accordingly. As a result, psychological convergence feeds back into the operational convergence between the two organizations.

This dynamic interaction creates a virtuous circle of convergence. Operational convergence fosters psychological convergence within the buyer organization by ensuring that the seller's actions are perceived consistently and positively across different individuals and teams. In turn, psychological convergence strengthens operational convergence. Here, we argue that a unified internal perspective within the buyer organization more easily enables effective collaboration and alignment with the seller. This virtuous circle may enhance the overall B2B CX and CJ, creating deeper and more sustained value for both buyer and seller organizations.

6.2. Managerial implications

Our research provides actionable insights for B2B managers to navigate the complexity of the B2B CX and CJ. These implications focus on two key areas: managing the multilevel nature of B2B CX and ensuring operational convergence throughout the B2B CJ. For each, we offer concrete recommendations for both seller and buyer organizations, emphasizing practical steps rather than restating conceptual foundations (see Table 3 for a summary).

A first key implication is the need for a multilevel approach to managing CX within the buyer organization. Seller organizations must recognize that CX is not restricted to a singular, individual-level phenomenon; rather, it spans across teams and the organization. Sellers must assess CX convergence: Do individual experiences converge at the team and organizational levels? If not, what barriers exist, and how can they be overcome? Therefore, CX strategies should not be confined to interactions with a set of individuals but must account for how CXs are shared and interpreted within and across relevant teams of the buyer organization. This requires sellers to map internal influence structures and proactively engage with key individuals who shape how their teams perceive and evaluate the seller. Engaging these "CX amplifiers" can accelerate convergence within and across teams, ensuring the seller's value is communicated effectively inside the buyer organization. Rather than relying solely on procurement contacts, sellers should actively foster relationships with those responsible for implementation and daily usage to strengthen CX beyond the purchase decision.

From the buyer's side, organizations must ensure internal coordination to prevent divergence in their CX with the seller. For instance, procurement, IT, finance, and operational teams often engage with the seller at different points, leading to fragmented CXs if these interactions are not appropriately managed. Buyers should, therefore, establish internal CX convergence mechanisms, such as structured seller evaluation processes that integrate feedback from multiple teams. By formalizing internal discussions about seller performance, buyers can identify inconsistencies early and ensure seller-related actions are based on a comprehensive organizational perspective.

A second implication is that sellers must recognize that CX does not necessarily and naturally converge in all cases—it is shaped by, among other things, internal discussions, social influence, and leadership within the buyer organization. To support this process, sellers could design engagement initiatives encouraging shared positive CXs, such as cross-team training sessions, co-creation workshops, and multi-stakeholder onboarding programs. Ensuring consistent messaging and touchpoints across all interactions with the buyer limits the chances for CX divergence. Additionally, sellers must proactively identify potential sources of misalignment, such as discrepancies between how decision-makers and end-users perceive the seller. One practical step is to

conduct multi-stakeholder CX reviews, where feedback from different buyer teams is consolidated to uncover and address gaps.

For buyer organizations, a structured approach to tracking and aligning CX internally can prevent conflicting evaluations of the seller. Identifying variations in CX perceptions can help diagnose misalignment patterns and reveal subgroups/individuals with differing experiences. Grasping the factors behind divergence allows for targeted interventions to align perceptions and prevent internal frictions. This includes integrating seller performance reviews across functions, rather than evaluating sellers in silos. By ensuring that different individuals and teams share insights on CX, the buyer organization can spot divergences early and request adjusted seller interactions accordingly. Buyers can also leverage internal champions—employees who advocate for strong seller relationships—to help communicate seller value across teams and ensure that implementation teams inherit the expectations set during procurement.

Next, along with B2B CX convergence, operational convergence is critical to ensuring a seamless CX throughout the CJ. The transition from "buying" to "implementation-usage" is a frequent pain point in B2B relationships, as different buyer teams engage with the seller at different stages/phases. From the seller's side, ensuring a smooth transition requires a tight integration between the different teams that interact with the buyer organization. Rather than treating the CJ as separate stages owned by different teams, sellers should create a continuous engagement model where responsibility shifts smoothly across internal functions. A key enabler of operational convergence is a dedicated customer success function, which plays a central role in coordinating interactions between the buyer and seller organizations (Hochstein et al., 2023). Sellers should ensure that these managers are well-integrated into their organization, coordinating cross-functional efforts and proactively addressing potential frictions. Establishing practices (such as structured onboarding frameworks, continuous performance monitoring, and multi-stakeholder reviews) may allow to keep both buyer and seller teams aligned throughout the CJ.

From the buyer's perspective, operational convergence also requires a certain level of internal coordination. Buyers may be advised to establish cross-functional project teams that engage with the seller across all CJ phases, ensuring that knowledge and expectations transfer smoothly. A structured approach to seller onboarding—where implementation teams are involved in pre-buying discussions—can prevent misalignment once the contract is signed.

Finally, both seller and buyer organizations may implement measurement frameworks to track B2B CX across the CJ. Sellers should integrate CX analytics across different buyer touchpoints, moving beyond general satisfaction scores to assess alignment between individual-, team-, and organization-level experiences. By segmenting feedback across different buyer teams, sellers can detect early warning signs of misalignment and intervene proactively. Buyers, in turn, should implement structured seller evaluation models that consolidate insights from multiple functions, ensuring that seller performance assessments reflect the entire CJ rather than isolated interactions.

6.3. Future research Directions

Our research highlights the importance of managing the multilevel nature of B2B CX and ensuring operational convergence throughout the B2B CJ. Yet, several research questions remain (see Table 4 for an overview and detailed questions).

First, future research should further explore the mechanisms driving psychological convergence in B2B CX. While we have identified factors such as social interactions, leadership, and organizational structures as key drivers, it remains unclear how these factors interact over time and whether specific organizational settings facilitate faster and/or stronger convergence than others. For example, at the team level, the history of how a group forms, its background, and its stage of development could shape how CX perceptions align or diverge over time (Kozlowski & Bell, 2003). Similarly, the entry of newcomers or turnover within teams may disrupt psychological convergence, requiring further research on how CX evolves within dynamic team structures (De Keyser et al., 2020; Rubin & Martin, 1994). Beyond internal organizational factors, external pressures such as market conditions or competitive dynamics may also influence convergence; yet their role remains largely unexplored.

Second, CX at the team and organization level is not always fully converging, and divergence may be an overlooked aspect of B2B CX. While we have argued that individual CX can align into a collective team or organization CX, this process is neither automatic nor guaranteed. In practice, different individuals may be influenced by distinct factors (De Keyser et al., 2020; 2025), leading to misalignment in their perceptions of the seller and its offerings. Future studies should investigate the antecedents and consequences of CX divergence and how sellers can best intervene to manage misalignment. Additionally, while sellers typically strive for CX convergence, not all divergence forms are necessarily negative. At the beginning of the CX process, a certain degree of divergence is natural and may even be beneficial (Reinartz, Krafft, & Hoyer, 2004). For example, if a seller introduces a new technological innovation, some members of the buyer organization may embrace it enthusiastically while others resist, leading to temporary divergence. Future research should examine under what conditions CX divergence fosters creativity and adaptability versus when it leads to friction, dissatisfaction, or loss of trust.

Also, the longitudinal nature of B2B CX and its evolution over time remains underexplored. Psychological convergence is rarely static—buyer teams may initially perceive their interactions with a seller differently, but their evaluations may align (or further fragment) over time. Future research should examine how B2B CX unfolds dynamically, identifying key turning points or touchpoints that significantly impact convergence or divergence. Longitudinal research designs—tracking CX perceptions at multiple time points—would provide valuable insights into how convergence strengthens or weakens across different journey phases, enabling organizations to develop proactive strategies rather than reactive corrections.

Beyond psychological convergence within the buyer organization, future research should also focus on how to better align buyer–seller interactions throughout the CJ. While our conceptualization of operational convergence highlights the need for sellers to align their actions, processes, and touchpoints with buyer needs, we still lack a precise understanding of how this alignment unfolds, what obstacles arise, and what interventions are most effective at different CJ stages.

Moreover, with the increasing role of digital tools and Artificial Intelligence (AI) in B2B exchanges (Mikalef, Islam, Parida, Singh, & Altwaijry, 2023), it is crucial to explore how emerging technologies facilitate—or disrupt—operational convergence in B2B CJ. The strategic use of social media, for instance, has been proposed as a way to enhance B2B interactions (Cartwright, Liu, & Raddats, 2021), but we still lack clarity on how social media fosters CX alignment in complex, multi-stakeholder settings. Research should investigate which platforms are most effective at different CJ stages, how digital touchpoints integrate with human interactions, and what types of content best facilitate convergence.

Similarly, AI-driven tools, such as large language models (LLMs), predictive analytics, automated recommendation systems, and conversational agents, are expected to enhance convergence by providing real-time, data-driven insights and interaction capabilities (Li, Peng, Xing, Zhang, & Zhang, 2021). However, their implementation remains poorly understood in B2B contexts. While AI has the potential to accelerate convergence by standardizing exchanges and ensuring consistency, it may also introduce risks, such as depersonalized interactions or algorithmic biases, which could create new CX divergence challenges (Gligor, Pillai, & Golgeci, 2021; Grewal, Guha, Satornino, & Schweiger, 2021). Future research should critically examine both the benefits and unintended consequences of AI in shaping psychological and operational convergence in B2B CX and CJ.

Table 4
Future Research Avenues.

	Exemplary Research Avenues
Managing the multilevel nature of B2B CX	• **Drivers and mechanisms** - What are the key organizational, team-level, and individual-level factors that influence psychological convergence? - How do leadership, social interactions, and organizational structures interact to foster psychological convergence? - How do team formation history, background, and development stages shape the convergence or divergence of CX perceptions? - What impact does employee turnover or the integration of newcomers have on psychological convergence within teams? • **External influences** - How do external pressures, such as market conditions and competitive dynamics, shape the emergence and divergence of B2B CX? - Which external factors are most likely to disrupt psychological convergence within teams or organizations, and how do they interact with internal dynamics? - How do industry shifts, technological advancements, or regulatory changes contribute to psychological divergence, and what strategies can sellers use to mitigate these effects? • **Divergence** - What factors lead to psychological divergence? - What strategies can sellers employ to realign divergent CX within teams and organizations? - Under what circumstances does psychological divergence lead to positive outcomes? - How can organizations leverage divergent CX to foster innovation or adapt to changing market conditions? • **Evolution over time** - How does B2B CX convergence (and/or) divergence evolve over time, and what are the critical touchpoints or interactions that influence this process? - What insights can longitudinal studies provide about the temporal evolution of B2B CX convergence, and how can these insights inform proactive CX management strategies?
	Exemplary Research Avenues
Ensuring operational convergence throughout the B2B CJ	• **Buyer-seller alignment** - What factors influence the alignment of actions between buyers and sellers in B2B exchanges throughout the CJ? Which are most effective? - Which units and individuals within buyer and seller organizations are most critical in ensuring successful operational convergence at different stages of the CJ? - How does the timing of actions and interactions between buyers and sellers affect the overall alignment and success of the CJ? • **Digital tools and AI** - How do digital tools and AI impact operational convergence within the B2B CJ? - How can social media be leveraged as a strategic tool to facilitate communication and operational convergence, and what types of content are most effective in this context? - What opportunities and challenges do emerging technologies, such as AI, present in facilitating or disrupting the convergence of buyer–seller actions and processes during the CJ? - How can organizations strategically use digital tools and AI to enhance communication and relationship-building efforts at various stages of the CJ? What role can social media channels play here? - What are the potential threats posed by AI to the operational convergence between buyers and sellers, and how can these risks be mitigated? - What ethical considerations and potential downsides (e.g., data privacy, reduced personal interaction) need to be addressed when deploying AI in CJ management? • **Internal touchpoints** - What is the role and importance of internal touchpoints along the CJ? - What strategies can sellers use to identify and engage key internal stakeholders to optimize CX across the buyer's organization? - How can sellers effectively influence or manage these internal touchpoints to ensure a smoother journey and better CX outcomes?

Lastly, a promising but underexplored area of research concerns the role of internal touchpoints within the buyer's organization. While prior studies have focused on buyer–seller interactions, the internal coordination of different teams within the buyer organization also shapes CX and CJ outcomes. Future studies could investigate how teams like IT, procurement, or operations—acting as internal intermediaries—affect the overall CX/CJ trajectory. For example, after purchasing a software solution, the buyer's IT team may become (partly) responsible for implementing it and training other departments. In this role, the IT team acts as an internal touchpoint, representing the seller by interpreting instructions, troubleshooting issues, and ensuring adoption across the organization. Key research questions include: How can sellers effectively engage with and influence these internal touchpoints to ensure a smoother CJ? What strategies can sellers use to identify key internal stakeholders and align their interactions to optimize CX outcomes across the buyer's organization?

CRediT authorship contribution statement

Arne De Keyser: Writing – review & editing, Writing – original draft, Investigation, Conceptualization, Project administration. **Paolo Antonetti:** Writing – review & editing, Writing – original draft, Conceptualization, Investigation. **Maria Rouziou:** Writing – review & editing, Writing – original draft, Conceptualization, Investigation. **Mathieu Béal:** Writing – review & editing, Writing – original draft, Conceptualization, Investigation. **Zih-Hsiang Wang:** Writing – review & editing, Writing – original draft, Conceptualization, Investigation. **Yany Grégoire:** Writing – review & editing, Writing – original draft, Supervision, Resources, Project administration, Conceptualization, Investigation. **Bruno Lussier:** Writing – review & editing, Conceptualization, Investigation, Writing – original draft.

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