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Sales Process Optimization in B2B Steel Industry

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ABSTRACT

The B2B steel industry is highly competitive and relationship-oriented, wherein business growth and repeat orders depend on the effectiveness of the selling mechanism. The relevance of this research paper can be seen in its objective of optimizing the sales process in B2B steel trading by studying key support functions such as customer conversion, payment follow-up, and stock list management. This study aims to know how structured communication, accurate data handling, and systematic follow-up would increase sales efficiency and maintain client trust.

The scope of the research is PAN India, and the sample size consists of 59 respondents chosen from sales executives, managers, and distributors representing varied industrial regions. The descriptive research methodology has been the basis of the study, and in this respect, data have been collected through a structured questionnaire. The sampling technique is purposive because only those actively involved with sales, accounts, or logistics were selected.

The study shows that frequent communication, CRM-supported follow-up, and correct stock coordination yield better results in customer satisfaction and lead conversion in the steel industry. This indicates that sales process optimization is dependent not only on selling strategy but also on internal coordination and relationship maintenance.

Keywords: Sales Process Optimization, B2B Steel Trading, Customer Conversion, Payment Follow-up, Stocklist Management

INTRODUCTION

The steel industry is considered one of the most influential sectors in the economic and infrastructural development of India, providing raw material to construction, manufacturing, and engineering industries. As opposed to consumer markets, the steel sector operates in a B2B trading environment wherein sales results are generated by bulk orders, negotiations, and long-term business relationships rather than direct retail transactions. Under these circumstances, companies should emphasize enhancing the efficacy of their selling methods to maintain profitability. This is where Sales Process Optimization is essential.

Sales process optimization means the enhancement of every stage in the sales cycle, from lead generation to order completion, for greater productivity with reduced delays while improving customer relationships. B2B steel trading relies heavily on relationship building and word-of-mouth rather than advertising or walk-in demand. One of the most practiced ways of acquiring new customers is Customer Conversion through cold calls, referrals, and follow-ups. However, customer responses depend on various factors like product suitability, price negotiation, brand trust, and timing of communication, which makes conversion a challenge.

Apart from conversion, major efficiency in the sales process lies in Payment Follow-up, which maintains a smooth cash flow and reduces outstanding dues. Proper frequency of follow-up, professional communication channels, and relations based on trust are needed to maintain financial discipline in B2B trade, where credit transactions are common.

Another critical element of the optimized sales cycle is Stocklist Management, which ensures accuracy of availability information, reduces delivery delays, and supports internal coordination between sales, logistics, and accounts departments. When a stocklist is updated in real time, the chances of order cancellation and miscommunication reduce significantly.

Thus, the sales process in the B2B steel industry is not just about selling a product; rather, it is managing information, relationships, and timelines. This study, therefore, covers the optimization of three key components, namely Customer Conversion, Payment Follow-up, and Stocklist Management, to show exactly how structured systems can ensure better overall sales performance in the steel trading business.

LITEATURE REVIEW

Humă and Stokoe (2023) analyzed 159 real B2B cold sales calls to understand how prospects show resistance during conversations. They identified two major forms of resistance: blocks (direct refusals) and stalls (delaying tactics). Their findings indicate that resistance is co-constructed by both the salesperson and the prospect through conversational cues such as overlapping speech and justification statements. The authors conclude that effective management of resistance requires salespeople to identify these cues in real time and respond appropriately. This study contributes to the literature by highlighting the dynamic and interactive nature of resistance in cold calling and offering practical recommendations to improve outreach effectiveness.

Conde (2025) introduces the use of Necessary Condition Analysis (NCA) in evaluating the B2B sales funnel, showing how NCA can identify critical bottlenecks and minimum conditions required at each stage. Unlike traditional methods that focus on average effects, NCA highlights essential factors such as adequate prospecting effort or effective closing practices without which conversions cannot occur. The study applies NCA across all seven stages of the sales funnel, revealing non-linear dependencies that common regression models typically overlook. By integrating NCA with predictive analytics and AI, the framework provides sales teams with actionable insights to improve resource allocation and strengthen stage-level strategies. This work adds value to sales analytics by offering a practical tool for optimizing complex B2B sales processes.

Smith (2024) examines how modern technologies such as CRM systems, AI tools, predictive analytics, and automation platforms are transforming B2B sales operations. The research demonstrates measurable improvements in lead scoring, follow-up efficiency, pipeline visibility, and overall team performance after adopting these technologies. The study emphasizes the importance of combining multiple tools such as CRM integrated with AI-driven analytics to enhance decision-making and monitor sales activities more accurately. Smith's findings present strong evidence that technology-enabled processes significantly improve the effectiveness and productivity of B2B sales teams.

RESEARCH METHODOLOGY

Research Design

The present study follows a **descriptive research design**, as it aims to explore and analyze the existing sales process practices in the B2B steel industry and identify areas that require optimization. Descriptive research is suitable because it enables factual and systematic analysis of real-time sales operations such as cold calling, follow-ups, stock handling, and customer conversion behavior.

Objectives of the Study

From the reviewed literature, three key gaps were identified:

- 1. Lack of clarity on why customers convert or refuse in cold calling (Humă & Stokoe, 2023)
- 2. Limited understanding of bottlenecks in the sales funnel (Conde, 2025)
- 3. Need for real-world evidence on CRM and follow-up effectiveness in B2B steel trade (Smith, 2024)

Scope of the Study

The Study is focused on B2B steel trading companies in India, with respondents from sales, accounts, logistics, and managerial roles.

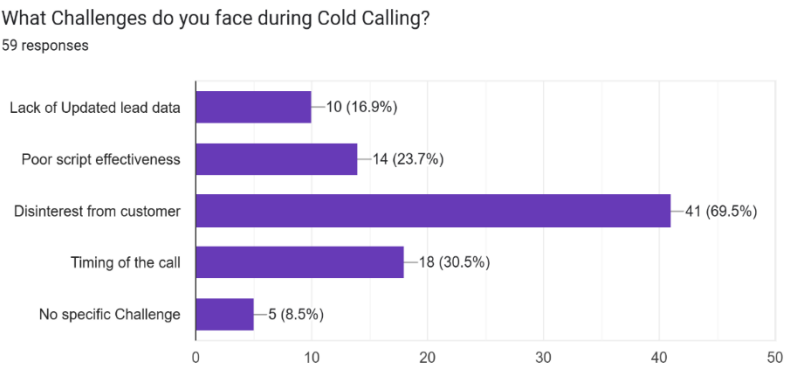
Sample Size & Sampling Technique

The study includes a total sample size of 59 respondents. A purposive sampling technique was adopted, as the respondents were selected based on their direct involvement in key sales process activities such as cold calling, follow-ups, customer handling, logistics coordination, and stock management. This ensured that only individuals with relevant experience and operational knowledge contributed to the data.

Research Tool

The study used both primary and secondary data. Primary data was collected through a structured Google Form questionnaire, which included Likert scale items, multiple-choice questions, yes/no questions, and open-ended responses to capture detailed insights on sales processes. Secondary data was obtained from company records, published journals, research articles, and CRM usage data, providing additional context and supporting evidence for the analysis.

DATA INTERPRETATION



The statistics point to the fact that the biggest obstacle encountered in cold calling is customer indifference, reported by 69.5% of the respondents. This suggests a huge obstacle in engaging and getting the attention of prospective leads.

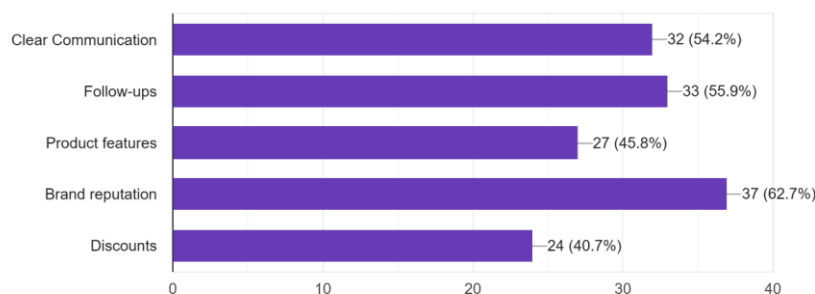
Other top challenges are the time of call (30.5%), implying that calls issued at unsuitable times can lower the prospects of effective interaction, and poor calling scripts (23.7%), indicating that improved communication strategy and customization are necessary.

A lower percentage of respondents (16.9%) encounter the problem of stale lead data, which can cause wasted time and lost productivity. Just 8.5% reported encountering no particular issue, meaning cold calling is still a process riddled with significant friction for most professionals.

In general, the evidence indicates that enhancing script quality, maintaining up-to-date lead databases, and calling at the best times might go a long way in optimizing cold calling efficiency. But customer disinterest issues being addressed through enhanced targeting and pre-call qualification techniques seem to be the most critical requirement.

What factor most influences customer conversion?

59 responses



The answers reflect the most important customer conversion factor as brand reputation, where 62.7% of the respondents mentioned it as the most critical aspect. This implies that customers will be more likely to convert if they trust the brand or view it as dependable and well-rooted in the marketplace.

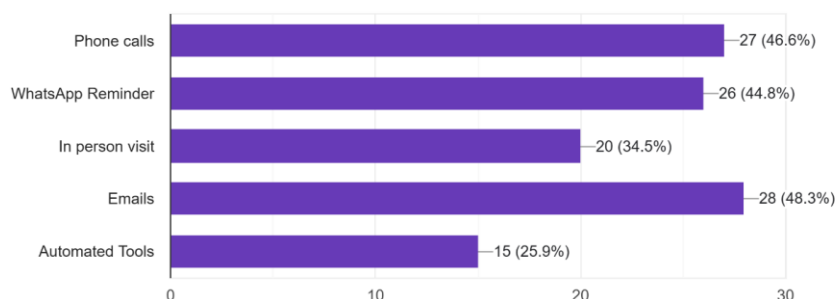
Not far behind are follow-ups (55.9%) and clear communication (54.2%), both of which show how much importance is placed on regular contact and open communication during the sales process. Both of these show the human side to selling, with its focus on building relationships and professional dialogue.

Product attributes and promotions, although significant, are comparatively less powerful (45.8% and 40.7%, respectively). It means that even though price and product details are relevant, they are not the key drivers for conversion unless accompanied by a solid brand reputation and good communication.

In short, this information emphasizes how customer trust, follow-up consistently, and transparency are more conclusive in conversion compared to competitive pricing alone. This knowledge can be invaluable in streamlining sales strategies for the B2B steel trading industry.

What method do you find most successful in collecting payments?

58 responses



The statistics indicate that emails (48.3%) and phone calls (46.6%) are regarded as the most effective ways to receive payments. These options balance professionalism with a personal touch, enabling companies to have formal communication while guaranteed quick attention from clients.

WhatsApp reminders (44.8%) are almost on par, which indicates that casual, real-time instant messaging platforms have become increasingly popular in professional communication because they are easily accessible and timely.

In-person calls (34.5%), although less frequent, are nonetheless rated as effective, perhaps utilized in cases of higher dues or overdue collections that need to be negotiated face-to-face. Computerized software like reminder systems or CRM automation is the least preferred (25.9%), perhaps because it lacks personal touch or is less effective in handling delicate financial issues.

This information suggests that the human touch continues to prevail when it comes to payment follow-ups in B2B settings, with a balance of phone calls, emails, and WhatsApp being most effective. Companies must balance automation and personal contact to maximize collections.

KEY FINDINGS & STRENGTHS

1. Cold Calling Generates Initial Interest but Low Conversion

The results show that cold calling remains a 'Point Zero' for business conversations in the B2B steel industry, but at the same time, it has low efficiency due to disinterest on the part of customers, timing issues, or ill-prepared scripts. While the majority of prospects demonstrate curiosity at the beginning of conversations, only a minor share are converted into qualified leads, which indicates an increasingly larger need for personalized and targeted outreach strategies.

2. Customer Trust is the Central Driver of Conversion

The insight derived from the analysis is that the main drivers of conversion decisions in B2B steel trading revolve around brand credibility, previous experience, and clear communication. Clients prefer dealing with companies that demonstrate reliability, product knowledge, and transparent interactions. Price plays a role but is not a dominant factor.

3. Follow-Up Behaviour Directly Influences Business Outcomes

Timely follow-ups significantly enhance both conversion and payment recovery. The respondents strongly agreed that continuous follow-up communication strengthens customer confidence, while delayed or erratic follow-ups definitely weaken the relationships and further discourage repeat business.

4. Payment Collection relies on human communication over technology.

Although automation tools exist, the study shows that email, phone calls, and WhatsApp reminders remain the most effective methods of payment follow-up. Clients respond better to personalized contact, meaning that B2B relationships in steel trading are still kept alive by humans rather than dominated digitally.

CONCLUSION

Sales process optimization in the B2B steel industry is a multidimensional practice that brings together communication quality, internal coordination, customer understanding, and disciplined follow-up procedures. The evidence clearly indicates that while cold calling remains one of the most widespread methods of initiating contact, its success heavily depends on the salesperson's ability to understand the client's needs and build rapport.

Evidence shows that trust, brand reputation, and clarity of communication are the major driving factors in customer conversion, which again proves that relationship building is the core of B2B steel trading. Moreover, one of the key contributors to long-term relationship management emerged in follow-up practices concerning payment, as timely and respectful communication strengthens trust and maintains cash flow stability.

The research also concludes that efficient management of stocklist and coordination across sales, accounts, and logistics teams enhance operational efficiency and customer satisfaction. If internal systems are structured and data gets updated accurately, organizations can respond faster and more effectively towards the requirements of customers.

Overall, this study shows that in the B2B steel industry, the fine-tuning of the sales process requires a judicious blend of human interaction, process discipline, and technology integration. It is very likely, therefore, that firms that invest in improving communication quality, adopting CRM tools, and strengthening internal collaboration will be rewarded with higher lead conversion, sustained customer loyalty, and better business performance overall.

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