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Identifying the right solution customers: a managerial methodology

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Research Highlights:

- Solution customer strategies are not “one-size-fits-all”.
- Solution customer strategies consider relationship quality to date and customer potential for future solution partnership.
- Solution customer strategies are influenced by solution maturity.
- Segmenting and targeting should be organised as a strategic sales process with inputs from customers.

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Abstract

The purpose of this paper is to develop and apply a methodology for identifying, assessing and segmenting customers for business solutions. Firstly, interviews with 23 solution project managers are undertaken to refine literature-derived profiling criteria for solution customers. Secondly, a longitudinal case study with three solution suppliers and five of their customers is conducted to transfer the selection criteria into a managerial methodology which is validated by both solution suppliers and customers. The revised methodology comprises 21 criteria which are structured into two dimensions: firstly, the quality of the relationship to date and, secondly, the customer's potential for a future solution partnership. By combining the two perspectives in a portfolio, four customer segments are established. The contribution lies in bridging academic research and managerial practice on business solutions through a methodology which synthesises existing theory and empirical knowledge and derives a set of manageable practices.

Keywords: integrated solution, customer segmentation, customer selection, managerial methodology, co-creation, business-to-business relationships

1. Introduction

Offering solutions is an increasingly popular strategy in business-to-business markets. Companies such as Caterpillar, Michelin and Rolls-Royce are examples of companies that have transitioned from selling stand-alone products to selling solutions successfully. Rolls-Royce Aerospace, for example, offers airline customers an alternate to the outright purchase of aero engines. Instead, airlines can pay for 'engine by hour of flight' whilst allowing Rolls-Royce to manage the maintenance of the engine remotely 24/7 during flight. This contributes to a smooth operation of the airlines' flight schedules and increases aircraft availability (Rolls-Royce, 2015). Caterpillar's coal mining fleet management supports their customers' operations with real-time machine tracking, assignment and productivity management. It works with all types of assets and equipment and contributes to reductions in costs per ton and enhances productivity (Caterpillar, 2012).

The literature on business solutions is emergent and extant definitions of business solutions contain different perspectives. The majority of definitions state that it is an integrated combination of products and/or services that address a customer's business needs (e.g. Bastl et al., 2012; Brady et al., 2005; Brax & Jonsson, 2009; Davies et al. 2007; Johnstone et al., 2009; Sawhney, 2006; Windahl & Lakemond, 2006, 2010). In other words, a solution is an offering that integrates different components and contains an outcome focus. Some definitions also assert that solutions are co-created with customers (e.g. Cova & Salle, 2008; Evanschitzky et al., 2011; Nordin & Kowalkowski, 2010; Salonen, 2011). Others take a process view, stating that business solutions are a set of customer-supplier relational processes (e.g. Storbacka, 2011; Töllner et al., 2011; Tuli et al., 2007). We argue that neither of these perspectives alone sufficiently captures the nature of solutions. Firstly, by simply positing that a solution is an integrated combination of products and services, the concept is not differentiated from that of product bundling. Stremersch and Tellis (2002, 57) define product bundling as "the integration and sale of two or more separate products or services at any

price". Like with solutions, the integrated nature of product bundles is supposed to provide value that is greater than the sum of the individual components (Stremersch & Tellis, 2002). Secondly, the co-creation view by itself does not distinguish solutions from other types of service offerings (Nordin & Kowalkowski, 2010). From a service logic perspective, this applies to all kinds of services irrespective of whether they are solutions or less complex offerings (cf. e.g. Grönroos, 2011; Normann, 2001; Vargo & Lusch, 2004). We therefore argue that solutions have to combine the defining elements discussed in the literature. The definition by Ulaga and Reinartz (2011) best meets this requirement. The authors define solutions as offerings supporting the customer's processes with a value proposition that relates to achieving a result (Ulaga & Reinartz, 2011, 17). Furthermore, they point out that solutions integrate goods and services and comprise customer involvement. We extend their definition by adding the emphasis on product-service bundles and co-creation value. Hence, in this paper, business solutions are defined as product-service bundles supporting the customer's processes with a value proposition that relates to achieving a co-created result.

Business solutions can not only reduce risk, cost and complexity for the customer, but successful suppliers can increase their own profit by up to 25 % versus merely selling products (Roegener et al., 2001). Yet, the transition from offering products to solutions represents a major strategic change and requires a customer-oriented adaptation of the entire business model to bear fruit (Fang et al., 2008). Much of our marketing theory and practice, however, has been developed in the context of selling stand-alone products and services rather than in complex solutions. We posit that due to their interactive and process-driven nature, marketing and selling strategies for solutions differ from traditional product or service-focused approaches. So far, the literature has considered the pricing implications of solutions and stressed that many traditional pricing approaches cannot be applied to solution contexts (Bonnemeier et al., 2010). Moreover, a range of studies have investigated how solutions affect suppliers' selling approaches (Bonney & Williams, 2009; Le Meunier-FitzHugh et al., 2011;

Sharma et al., 2008; Storbacka et al., 2011). Finally, the life cycle or rather development cycle of solutions and its resultant supplier capabilities and management practices have been researched by a number of studies (Brady et al., 2005; Storbacka, 2011; Tuli et al., 2007; Ulaga & Reinartz, 2011). Still, to date, segmenting and targeting solution customers as one of the key strategic marketing tasks, has received scarce attention. As solutions lead to higher dependency and interconnectedness between supplier and customer (Tuli et al., 2007), the number of customers willing to enter solution relationships is likely to be small. Also, the value proposition of a solution corresponds to what Anderson et al. (2006) designate as a "resonating focus", i.e. it relates to what is most worthwhile to the customer in the longer-term. This, in turn, leads to an extension of the value creating activities and a deeper level of co-creation. It can be assumed that not all customers have a potential for this extended value proposition. For instance, customers that already have a superior logistics organisation or possibly a third-party logistics provider do not need a logistics solution since they do not have a problem to be solved. Hence, not all existing customers of a supplier are qualified as solution customers. In a similar vein, the solution value proposition may attract prospects that have not been attracted to the supplier's stand-alone product or service offerings.

Furthermore, from the supplier perspective, solutions often require relationship-specific investments (Miller et al., 2002) and the transaction specificity should equally trigger thorough customer assessments based on solution-specific criteria. The purpose of this paper is to address this gap and investigate how suppliers can identify, assess and segment solution customers. The objectives are firstly, to derive a set of solution customer segmentation criteria from the extant literature; secondly, to refine, specify and differentiate these criteria empirically; and thirdly, to initially validate the criteria via the development of a managerial methodology and suggest resultant strategy implications for suppliers. Overall, this paper aims to make a conceptual contribution by articulating procedures for executing business-to-business marketing strategies in the prominent area of business solutions (MacInnis, 2011).

Our conceptual contribution can be positioned as “summarising”, i.e. through inductive reasoning we encapsulate and consolidate existing empirical knowledge on solution customer characteristics into a manageable set of activities and an organising framework. As stated by MacInnis (2011, 142): “conceptual contributions at the procedure level can be of particular value to marketing practitioners.”

The remainder of the paper is structured into four parts: Firstly, we present a literature review that identifies criteria for solution customers drawing on extant knowledge from key account selection, relationship marketing, customer integration into innovation processes and business solutions. Secondly, we present the methodology, an interaction research approach (Gummesson, 2002) consisting of two parts. The first part comprises semi-structured interviews with 23 managers of international solution providing companies. The objective is to refine, specify and differentiate the literature-derived insights. The second part consists of a longitudinal case study with three solution suppliers and selected customers. The aim is to transfer the selection criteria into a managerial methodology which is validated by both solution suppliers and customers. Thirdly, we present and discuss the findings. The final set of solution customer selection criteria comprises 21 criteria relating to the past customer-supplier relationship and the potential of the customer as a future solutions partner. Finally, we conclude the paper by outlining managerial and theoretical implications.

2. Literature Review

In order to identify assessment criteria for segmenting solution customers, not only the literature on business solutions, but also the related fields of key account selection, relationship marketing and customer integration into innovation processes have been considered. The criteria we derived from the literature can be structured into seven areas: Customer paying and investment behaviour, supplier contacts within the customer organisation, customer attitude towards the business relationship, customer competency as a

value co-creator, customer attitude towards joint innovation with the supplier, customer industry and solution replication potential (cf. Table 1). Before we elaborate on them in more detail, it is important to point out that business practice shows that essential solution criteria such as trust make it almost impossible to start a new customer relationship as a solution relationship. Therefore, our paper predominantly characterises existing customers. However, at the same time it helps to estimate the potential of new customers to become a solution customer in a reasonable amount of time.

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2.1 Customer paying and investment behaviour

One financial consideration for suitable solution customers relates to the customer's practice of paying on time without having to be chased for the payment. This creates a satisfactory exchange performance for the supplier (Han et al., 1993). Another financial aspect relates to the customer being both able and willing to invest sufficient funds in the relationship to ensure an economically viable relationship development (Adamson et al., 2012; Campbell & Cunningham, 1983; Everhartz et al., 2014; Ojasalo, 2001). From a solution perspective, both criteria are important because potentially high up-front investments on behalf of the supplier stress the need for secure returns and hence customer payment reliability.

2.2 Supplier contacts within the customer organisation

In contrast to goods sales, business solution offerings tend not to follow customer specifications and are seldom well defined from the beginning. Rather, they call for strong customer involvement and co-creation to elaborate the offering (Ulaga & Reinartz, 2011). Also, the implementation of business solutions is likely to affect different actors within the

customer organisation in different ways and some may benefit more from the solution than others (Macdonald et al., 2011). Therefore, the supplier should have contacts to the key personnel within the buyer organisation. Contacts to actors at the top management level are crucial since these strategic decision makers tend to see the potential gains from solutions more readily (Ulaga & Reinartz, 2011). In addition, Michel et al. (2008) differentiate the roles of solution buyers, users and payers. Learning about their individual needs and requirements is essential in order to be able to "develop the right argument for the right person" (Ulaga & Reinartz, 2011, 13). Adamson et al. (2012) distinguish between two key roles. Firstly, "talkers", i.e. customer employees that are personable, accessible and willing to share information and hence build the focus in traditional sales training. Secondly, "mobilizers", which can be intimidating for suppliers because they ask tough questions and tend to be supplier-agnostic. However, according to the authors, contact to mobilizers is critical because they are engaged by the big and disruptive ideas that solutions often represent. Overall, these different conceptualisations of the solution buying centre stress that the customer's political landscape might obstruct any solution agreement and, at the same time, reveal the need for the supplier to access the customer's informal "grapevine", i.e. information relevant for the cooperation (Kindström & Kowalkowski, 2014; Tuli et al., 2007). This will enable the supplier to understand customer requirements in a more complete and nuanced way and to address the concerns of the various stakeholders.

2.3 Customer attitude towards the business relationship

The relational paradigm assumes that mutual interdependence, long-term orientation and cooperation leads to higher value creation than self-interest and independence (Webster, 1992). Since business solutions comprise relational processes (Tuli et al., 2007), the customer should clearly have a long-term orientation towards the business relationship (c.f. e.g. Gosselin & Bauwen, 2006). In a similar vein, it is important that the customer demonstrates

commitment towards the relationship (Heide & John, 1992; Ojasalo, 2001). In addition, the customer should apply the concept of total cost of ownership (TCO) in their purchasing decisions rather than focus on the purchasing price (Ellram & Siferd, 1998). Solution offerings tend to target a decline in TCO, but are likely to cost a price premium compared to stand-alone products or services (Bonnemeier et al., 2010). The fact that solution value propositions involve different cost/benefits ratios is also illustrated by the following non-monetary costs for customers: higher exit barriers and increased dependence on the supplier (Davies et al., 2006). Therefore, the customer should be prepared to be dependent on the supplier regarding assets (Windahl & Lakemond, 2006), processes (Brady et al., 2005) and know-how (Heide & John, 1992), subject to the nature of the solution offering. Finally, to enable the supplier to offer a solution that provides value by supporting the customer's strategy and operations, the customer should support transparency and provide counselling regarding its strategy and operations (Tuli et al., 2007). In other words, the customer should be prepared to share the relevant strategic and operational business knowledge (Tuli et al., 2007; Walter, 1999).

2.4 Customer competency as a value co-creator

Since business solutions are co-created in interactive processes (Evanschitzky et al., 2011; Nordin & Kowalkowski, 2010), the customer's competency as a value co-creator is crucial for the solution development and its ongoing operations. In particular, the customer should possess development expertise and process competency in the processes relevant to the collaboration with the supplier (Michel et al., 2008; Nicolajsen & Scupola, 2011).

2.5 Customer attitude towards joint innovation with the supplier

Solutions may comprise product, service and process innovations. Moreover, implementing a solution in the customer's environment can imply that the customer needs to adapt their

internal routines and processes (Tuli et al., 2007), signifying an innovation to the customer. Due to the co-creation value logic underlying solutions, these innovations require active customer participation. In the literature, increasing customer involvement in innovations has been stressed as a characteristic of business-to-business markets (Bonner & Walker, 2004; Prahalad & Ramaswamy, 2000). Their involvement can occur in various phases of the process, such as idea generation, pilot testing or commercialisation (e.g. Alam & Perry, 2002; Cantù et al., 2012; Öberg, 2010). Customers can take over different roles in which they perform different activities, such as a source of information and a co-developer (Coviello & Joseph, 2012; Fang, 2008; Lengnick-Hall, 1996). To develop new solutions and adjust existing ones, customers should be open towards product, service and process innovations and be willing to take over an active role in the joint innovation process (Mele, 2009; Mota Pedrosa, 2012; Napolitano, 1997).

2.6 Customer industry

Since offering solutions is a strategic choice for suppliers, they should be developed with customers from strategic industries and markets. Strategically important industries for solution offerings may be different from that for stand-alone product or service offerings (Foote et al., 2001). They should be defined according to the most significant value creation potential of the solution (Gomez-Arias & Montermoso, 2007; Miller et al., 2002).

2.7 Solution replication potential

The importance of the replicability of business solutions is widely acknowledged in the literature. The aim of a successful business solution provider should be to achieve ‘economies of repetition’ (Brax & Jonsson, 2009; Galbraith, 2002; Salonen, 2011). The replication potential of the solution which will be developed in the customer-supplier relationship should therefore be high.

3. Methodology

The criteria selected from the literature were validated, revised and further developed through field-based research. We applied an interaction research approach (Gummesson, 2002), assuming that "interaction and communication play a crucial role" in the research process and that testing concepts, ideas, and findings through interaction with different target groups is "an integral part of the whole research process" (Gummesson, 2002, 345). We proceeded in a two-stage process comprising firstly, a cross-sectional study in which 23 interviews with managers from international solution providers were conducted. The purpose of the interviews was to refine, specify and differentiate the literature-derived criteria. Subsequently, a longitudinal case study with three solution suppliers and selected customers followed. The objective of the case study was to transfer the selection criteria into a managerial methodology which is validated by both solution suppliers and customers.

3.1 Semi-structured interviews – data collection and analysis

Firstly, we conducted semi-structured interviews with senior managers from 23 international solution providers of different sizes and industries (cf.

Table **2**). Our sample is the outcome of purposeful sampling (Patton, 1990). The selection criteria were, firstly, that the managers had to be involved in solution projects in their companies for at least two years to ensure their experience in the area. Secondly, the characteristics of these solution projects had to be in line with the definition which we adopt for this research and of which we argue that it distinguishes solutions from other offerings: Solutions are product-service bundles supporting the customer's processes with a value proposition that relates to achieving a co-created result (cf. Ulaga & Reinartz, 2011). The interviews lasted 60 minutes on average and were transcribed verbatim. As a leading

framework for the interviews, we used a set of structured questions. They were followed up by asking for clarifications, examples and further details on possibly interesting thoughts. The questions related to the description of "ideal" solution customer profiles, their rationale, and to positive and negative experiences with customers in solution projects (see appendix A for the interview structure). Data analysis followed a template analysis approach (King, 2004) (see appendix B for the final coding scheme). The literature-derived criteria formed the initial coding scheme. During the course of the analysis, the scheme evolved further, including refinements and amendments of criteria. Individual criteria were considered as confirmed and additional criteria were added when multiple interviewees mentioned them (cf. Tuli et al., 2007; Ulaga & Reinartz, 2011).

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3.2 Case study – data collection and analysis

In the first phase of the longitudinal case study, the aim was to transfer the selection criteria into a managerial methodology. Three solution suppliers which are currently developing solution innovations were selected (see Table). Once again, a purposeful sampling approach (Patton, 1990) was applied. The criteria were that the companies' solution innovations had to comply with the definition of business solutions which we adopted for this research. None of these companies took part in the interviews of the first phase. All are headquartered in Switzerland.

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Data collection in the first phase involved a joint workshop with representatives from all three companies (see Table 3 above), in which the selection criteria as well as their application were discussed. Furthermore, it comprised the subsequent evaluation of overall 18 customers across the three supplier companies in the form of a completed Excel sheet as well as written feedback on the methodology.

After 11 months, the companies were contacted again. All three agreed to participate in the research once more. They also suggested seven customers to be included in the study of which five agreed. This time, data gathering was focused on validating the methodology.

The second phase started one year after the initial solution customer selection. Data were collected from overall 17 semi-structured interviews with both representatives of five customer companies initially evaluated by the suppliers as well as the managers involved in the initial evaluation (see Table). Supplier interviews lasted 45 minutes on average, customer interviews 40 minutes. All interviews were recorded and transcribed verbatim. The interview guideline was structured into two parts: a report on what happened in the last 12 months since the initial evaluation as well as further feedback on the methodology (for the interview structure see Appendix C).

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Data analysis followed King's (2004) template approach. The interview guideline was the basis for the initial template consisting of an assessment of the solution offering-related developments in the last 12 months and feedback on the methodology. During the course of the analysis, different events and outcomes of the solution offering-related developments were

added. The feedback on the methodology was complemented by specific feedback to individual criteria. The final step included the interpretation of the data (King, 2004).

4. Discussion of the Findings

4.1 Findings from the semi-structured interviews

The managers confirmed 17 of the 20 literature-derived criteria and suggested four additional criteria. Three literature-derived criteria were not confirmed: (1) the customer's payment record, (2) their level of commitment to the customer-supplier relationship, and (3) the supplier's access to customer informal "grapevine" information. Four new criteria advanced from the conversations with the managers: They emphasised *firstly,* that suitable solution customers should be prepared to accept the supplier as a business consultant since this will have the effect that the customer will share their business problems and difficulties, but also their knowledge and expertise more readily. As one manager of C-part management solutions explained: *"[…] to get access to the real pain points of the customer these people have to appreciate us as some kind of external advisers whom they can trust, not sellers."(criterion 15). Secondly*, the customer's initiative in further developing the cooperation towards a solution venture was found relevant. The managers posited that the more the customer is motivated to develop a solution, the more time and effort they will invest. One manager of IT solutions elaborated: *"[…] and this team [of the customer firm] was so dedicated to the development [of the offering]. It just made the processes so much smoother […] in contrast to the sluggish cooperation with the demotivated bunch we encountered in another firm." (criterion 16). Thirdly,* the managers pointed out that it is beneficial when the customer faces pressure to create a sense of urgency. This relates to the need to save costs and resources within the business area(s) which the supplier solution targets. A manager of healthcare solutions highlighted: *"[…], but when they [the customer] do not have these savings targets, they don't see the need to consider our offering. Their thinking is like why should they change*

their process if what they have works well enough."(criterion 19). A related and *final* new criterion pertains to the pressure of developing new business opportunities which are supported by the supplier solution. In the words of a manager of biotechnology solutions: *"We have a situation of perfect match when the customer's environment is so competitive that they just have no choice but develop their business in this direction." (criterion 20)*

Moreover, the managers emphasised that not all customers with whom collaborative product or service-centred relationships have been maintained in the past, also qualify as future solution candidates. Nevertheless, they confirmed that the past relationship quality can be a foundation for future relationship development in the solution realm. Still, new customers, with whom little past experience exists, can equally be interesting for joint solution development processes. In order to adopt this practitioner feedback and experience, we structured the criteria into two dimensions: Firstly, the dimension on the quality of the relationship between supplier and customer to date and secondly, the dimension on the potential as a future solution partner. In line with the managers' statements, the criteria allocated to the past relationship quality are those that might allow drawing inferences from the past relationship quality to the potential as future solution candidates. The criteria allocated to the dimension on the potential as future solution partners exclusively relate to the customers' profile and qualification in the solution realm. We adjusted the wording of the criteria so that they clearly reflect either the past or future perspective and developed a two by two matrix with "quality of the relationship to date" – high versus low, and "customer potential as future solution partner" – high versus low. One criterion, i.e. access to buyers, payers and users was established as relevant for both perspectives. To sum up the findings of the research's first empirical phase, an overview of all solution customer section criteria is provided in Tables 5 and 6.

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4.2 Findings from the case study I – Solution providers' initial customer selection

In the joint workshop with the three solution providers, the necessary steps for translating the findings relating to the selection criteria into a managerial tool were discussed. The participants agreed that the criteria for each dimension should be assessed with the help of scoring models. Thereby, each potential solution customer could be positioned in the matrix. To determine the criterions' importance, weights are given from 1 (relevant but not important) to 6 (very important). Participants agreed that the weightings are highly context-specific and should be derived from those components of their corporate or business unit strategy that relate to solutions. After the criteria are weighted, the customers are rated against the criteria on a scale from 1 to 5. If a criterion is of no relevance, no weighting and rating should be done. The customer rating should be carried out by the employees possessing the highest customer knowledge. Moreover, the companies requested further guidance on the proposed 5-point scale and suggested to define mid and end points of each criterion. Hence, for each criterion the appropriate mid (3) and end points (1 and 5) were agreed. The following table illustrates a selection of the scales (see Table 7).

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The scale thus shares some of the features of a semantic differential, although the methodology is not focused on bipolar adjectives. Still, the bipolar anchor points help managers to indicate their opinion about customer-related events in the past and a projection of the relationship into the future.

The findings relating to the successive independent customer evaluation in the three solution providing firms can be structured into the evaluators' feedback on the usage of the tool, evaluation outcomes and the evaluators' feedback on the suitability of the tool.

The managers' feedback on the usage of the tool comprises three key aspects. They pointed out that an assessment of the total customer base is unlikely to be feasible. Instead, a shortlist of the customers to be assessed should be compiled. Ideally, the preselection would involve the interaction between two supplier functions, which will play a critical role in the further solution development phases: the functions which take responsibility for the solution idea or innovation and sales. Moreover, it was highlighted that throughout the initial assessment, the company-specific adaptation of the methodology occurs in conjunction with the customer evaluation. By allocating weights to all criteria, the methodology is adjusted to the company's or business unit's solution strategy. Thereby, the involvement of strategic level managers was deemed crucial. The subsequent initial customer evaluation should ideally be conducted by the person with the deepest customer knowledge. Finally, the managers stressed that it is important that the application complements and drives rather than replaces discussions between the parties involved in the solution process. Therefore, internal as well as customer employees could be encouraged to either comment on the results from the initial validation or carry out an assessment themselves.

Error! Reference source not found. summarises the evaluation results of the 18 potential solution customers. The workshop participants took part in the evaluation of all customers. Overall, eight customers are in the field "top development customers", three are in the field "potential solution development customers", seven are in the field "low potential solution candidates".

The feedback of the managers on the suitability of the methodology included their consensus that the customer category in the top right quadrant, anticipated as most suitable solution

partners, should have a better than mediocre assessment regarding both the quality of the cooperation to date and the potential as future solution partner. This in turn, suggests that the four segments should not be derived from mid point scale scores. For the top segment, a profile matching the labels for the mid points is not sufficient. For these customers, for example, the mid point label for criterion 1 that "joint product innovation was discussed, but never implemented", or for criterion 14 that "customer will be hesitant to share strategic business knowledge with us", was deemed unacceptable. The managers supported the argument from the literature, that successful solution companies "target a finite number of customers" (Johansson et al., 2003, 9). This is not necessarily the result of a predefined number cap but rather of the high standards that are defined when selecting the customers for co-creating solutions in the early development phases. This finding is also in line with business practice from some of the most widely-cited successful solution providers. For example, the construction tool manufacturer Hilti started its Fleet Management solution with just eight customers (Anand & Barsoux, 2014). Developing a solution innovation from idea generation to implementation can take two years and more and requires substantial investments (Tuli et al. 2007). In order to justify such prolonged amortization, the risk caused by selecting the wrong customers needs to be minimized. To qualify for the top customer segment, an average score of 3.8 has to be achieved. In addition, the managers pointed at the time dimension related to the customer segments. In early stages of the solution development, the two segments at the top should be prioritised. Higher scores on the criteria subsumed under "potential as future solution partner" indicate that these customers are more susceptible to new solution ventures. Only once the solution has progressed and overcome potential "teething problems", customers from the bottom two segments, with a clear priority of the segment at the bottom right ("old friends"), should be addressed. Thirdly, potential new customers can only be assessed on one of the two dimensions, i.e. "potential as future solution partner" and, subsequently, can only be positioned in the two left quadrants of the matrix. The

practitioner feedback has been incorporated into the further development of the methodology and is depicted in **Error! Reference source not found.**.

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4.3 Findings from the case study II – Validation one year after the initial application through solution providers and selected customers

The findings from the follow-up interviews with the solution suppliers and their customers are structured into insights on the "status quo" of the five customer-supplier relationships, from which subsequently implications for the methodology are derived (see Table 8). All case study customers involved in this second data collection phase were initially evaluated as "top solution development customers" by their suppliers.

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One year after the initial evaluation, in relationship supplier 1 – customer 1, the two parties had completed a pilot solution project. The customer interviewee considered the solution concept to be solid. However, he also pointed out that firstly, at the moment the customer lacked the resources and capabilities to invest in its implementation, which is included in criterion 9: customer's prospective readiness and ability to invest in an extension of the cooperation. For instance, the customer's IT system was not compatible with the supplier's solution. Secondly, the customer interviewee highlighted that the solution was not considered a top priority since the company had to address other more pressing issues first before the supplier's solution could be implemented. This concern is captured in criterion 19: customer's

prospective pressure to save costs and resources within the business area(s) which the supplier solution targets. In other words, the customer was not (yet) motivated to implement the solution. The supplier interviewee explained that the supplier's initial evaluation of the customer was found to be confirmed and that the delay in the implementation of the solution with the customer was not perceived as a point of concern, since the supplier was convinced that it would only be a matter of time.

In relationship supplier 1 – customer 2, a pilot solution project was also completed. When reflecting on the initial customer evaluation, the managers of the supplier company found that the customer would be better suited for the solution replication phase, rather than the initial development phase. One interviewee assumed that the customer would probably only accept a smaller version of the full scale solution with a lower level of interdependency. The interviews on the customer side confirmed the supplier's assessment. The customer interviewees pointed to the strong reluctance of their engineering department to share their technical designs and specifications, which is reflected in criterion 14: customer's prospective preparedness to share strategic business knowledge with the supplier relevant for the cooperation. Also, the customer interviewees stressed that they preferred to do engineering in-house without any supplier involvement since they wanted to avoid dependency on supplier know-how. The argument links into criterion 12: customer's prospective readiness to be dependent on the supplier regarding know-how. Both concerns were associated with doubts related to the supplier's capability as a solution provider. As a consequence, the customer showed a low willingness to implement the full scale solution, even though the customer interviewees clearly acknowledged the solution's value potential.

In relationship supplier 2 – customer 3, 12 months after the initial evaluation the solution project was in the scoping phase. The supplier interviewees considered their initial assessment of the customer as appropriate. This included low scores on the criteria 11 (customer's

prospective readiness to be dependent on the supplier regarding processes) and 12 (customer's prospective readiness to be dependent on the supplier regarding know-how). The supplier interviewees emphasised that these points were the main inhibitors for further progress in the solution relationship. At the same time, they highlighted that both parties were willing to pursue the opportunity. The supplier's assessment is mirrored in the customer interviewees' statements. They stressed that the value potential of the solution was obvious and acknowledged. Yet, the implementation would involve relying on the solution provider by delegating their electronic parts supplier relationship management to the provider, which they were not yet prepared to do due to two major concerns. One concern was that the solution provider might not ensure supply availability. This was stressed to be crucial since they would remain responsible for the on-time contract fulfilment towards their customers and, in case of non-adherence, would face high contract penalties. Another concern was that they feared that the solution supplier might not ensure that they still received the highly important technical know-how support of the various electronic parts suppliers. In sum, the customer was slightly hesitant to implement the solution due to a lack of trust in the supplier's capability as a solution provider.

In relationship supplier 2 – customer 4, the solution project was stopped with mutual consent after the first strategic-level solution discussions had taken place. Reflecting on the initial customer evaluation, the supplier interviewees pointed out that the customer would better fit into the category "old friends", since the "as-is relationship" was good, but the customer demonstrated only limited qualification as a solution customer. The interviewees stressed that the established relationship would be continued, but that the likelihood of growth into a solution-based relationship was perceived to be small. The customer interviewee completed the picture. He did not perceive a clear value potential of the solution. He highlighted that due to industry pressure, his highest priority were low purchase prices. A solution which focuses

on a decrease in TCO and in turn has a premium price was not perceived as a suitable value proposition by him.

In the relationship supplier 3 – customer 5, the situation after 12 months was that the solution project was put "on hold" by the solution supplier. On reflection, the supplier interviewees slightly revised the initial customer evaluation to the category "old friends". The reason was that the customer did not take the initiative in further developing the cooperation (criterion 16). This initiative was stressed to be important since the supplier needed a "co-creation partner" that would jointly develop the solution with the supplier. Because of that, the supplier was unwilling to commit further resources. The customer interviewees in turn highlighted that the value potential of the solution was evident and acknowledged. However, there was an implicit criticism regarding the solution provider of not being proactive enough. The customer interviewees pointed out that the solution provider would be too slow in delivering promises fulfilling their requirements. It can be argued that this customer understands its role as a purely "value-receiving customer" and is not motivated to be a "co-creation partner".

In sum, the findings from the five customer-supplier relationships confirmed all except for two criteria as well as the initial evaluations on the dimension "relationship to date". However, regarding the second dimension "potential as a future solution partner", an additional revision is advised (see Table 8, column on the right, and Table 9). The findings show that four components impact the customer's potential as a solution partner: a) whether the customer sees a solution value potential (new criterion, numbered 23), b) whether the customer has the capabilities and resources to co-creation solution value (criterion 9), c) whether the customer trusts into the supplier's capability as a solution provider (criteria 10,11,12,13,14,15) and d) whether the customer is motivated to fulfil the co-creation role (criteria 16, 17, 18, 19, 20). Concerns regarding a customer's qualification on any single one

of these four components might, at a later stage, lead either to an altered strategy (customers 4 and 5) or substantial delays in the progression towards a solution relationship (customer 3). Therefore, a revised assessment is proposed. A customer needs to achieve an average score higher than 3.8 on all four components. If only one averaged score is lower than 3.8, the customer does not qualify as "top solution development customer". Criteria 22 and 23 ("solution replication potential" and "customer's industry") are dropped since they were not validated in the case study. Furthermore, the relationship between solution provider 2 and customer 4 shows that the segment "old friends" might not only be approached by pursuing the customer when the solution is ready to be replicated. An equally valid strategy is to continue and nurture the established business relationship. Finally, some customers were reassigned, once solution-related negotiations with the various stakeholders in the customer organisation took place (e.g. customer 4). This points at the benefits of regular reassessments. The methodology should therefore be used as a controlling instrument or even "solution cockpit" with regular updates and monitoring of the current solution relationship projects.

-- please insert Table 9 here --

5. Conclusion

Since solution-focused customer-supplier relationships differ from product- or service-oriented relationships, existing knowledge on segmenting and targeting customers cannot be readily applied to solution contexts. To the best of our knowledge, there is no review of the literature which synthesises the recommendations on solution customer profiles. We derived a set of criteria supporting solution customer selection from the literature and field-based research. In addition, we provided a validation of the criteria by developing and applying a

customer selection methodology. Overall, our study focuses on synthesising existing theory and empirical knowledge and further developing it in order to bridge academic research and managerial practice (Roberts et al., 2014). Our primary intention is knowledge conversion, i.e. to translate existing knowledge into a practical methodology which can subsequently foster knowledge application and support business-to-business marketing decisions.

Although the managerial implications are therefore more prominent, we still believe that from the paper several fertile avenues exist for further research into business solutions. We discuss both the managerial and research implications next.

5.1 Managerial implications

Based on the lessons learned by the solution suppliers and customers included in the empirical study, we derive a set of managerial implications. Overall, the developed managerial methodology supports suppliers in identifying solution customers, segmenting them, designing and implementing customer-specific strategies and monitoring the strategies over time.

The findings show that suppliers are often too optimistic, assessing customers too positive when it comes to their solution suitability. This was evident in most of the relationships investigated. For example, in the relationship between supplier 3 and customer 5, the supplier overestimated the customer's motivation to act as a co-creator. Instead, the customer expected to receive a solution which is developed, fully implemented and serviced by the supplier. Supplier 1 did not recognize that customer 1 had a number of other strategic projects which needed funding and, as a consequence, the investment into the solution did not receive the priority the supplier hoped for. Finally, customer 3 had some concerns regarding the ability of supplier 2 to take over the new role as solution provider, a doubt which was not anticipated and shared by the confident supplier organization. The implication for the methodology was

that it has become increasingly stricter over the course of its validation, culminating in the outcome that each of the four components of the "customer's potential as a future solution partner" has to be fulfilled for a "top solution customer". A stringent selection is recommendable since many suppliers make losses with their solution offerings (Johansson et al., 2003; Stanley & Wojcik, 2005). In the empirical study, the suppliers themselves were partly astonished that they had evaluated the customers so positively at the outset. They explained it by their initial euphoria of the solution. Although suppliers appear to assess the solution potential of customers more positively, both parties seem to be in agreement when evaluating the quality of the relationship to date as well as the risk of increasing dependence in solution relationships (see e.g. the relationships between supplier 2 – customer 3 and supplier 1 – customer 2). The final methodology has the benefit that it hampers any "sugarcoating" and can help to assess risks correctly.

Furthermore, the findings exhibit differences in the solution strategies for different customers. They range from being eager to pursue the first pilot projects to establish a reference case (cf. supplier 1) to a "tit for tat" strategy, in which suppliers wait whether the customer demonstrates its motivation to be a co-creation partner (supplier 3). In the empirical study, the suppliers stressed that so far, their emphasis was on customising the solution which is in line with the literature (e.g. Storbacka, 2011; Tuli et al., 2007). The benefit of the methodology is that it additionally supports the design of solution customer-specific relationship strategies.

Additionally, the longitudinal design revealed that due to the long-term process and relationship character of solutions, segmenting and targeting should also be organised as a strategic sales process with inputs from customers, rather than a marketing tool which is used on an ad hoc basis and steered by the supplier only. Both segmenting and targeting customers should thus involve strategic sales in solution businesses (Storbacka et al., 2011). Thereby, the criteria can support sales to gather relevant customer information and engage in conversations

with customers regarding their solution potential. In this way, for example, the overly optimistic targeting of customer 4 by supplier 2 could have been avoided. The supplier's targeting decision was strongly influenced by the excellent relationship of the two companies' top managements. Hence, the criteria included in the methodology guide sales personnel when approaching potential solution customers for the relevant customer information. This, in turn, facilitates solution targeting decisions.

The longitudinal design furthermore showed that the criteria for the identification of solution customers can also be used as a basis for a process-oriented controlling of the solution relationship. In our empirical study, we captured the objectives set by the suppliers for each of the five customers and reviewed the degree to which the targets had been met after 12 months. In line with the differences observed in the solution relationship strategies, the objectives were also specific. In two of the five relationships investigated, the objectives both referred to an increase of the "share of wallet" or "quality of the wallet" and were fully met: Supplier 1 wanted to supply a better product mix to customer 1, i.e. specialised C- and B-parts with higher margins rather than low-margin, commodity type C-parts. Supplier 2 achieved a 10% increase of the share of customer 3. In the relationship between supplier 1 and customer 2, the target was qualitative rather than quantitative, i.e. to increase the trust and commitment of the customer and to raise the exit barriers. Since the collaborative pilot study had been completed and the customer acknowledged the benefit, the supplier was satisfied with the progress achieved. In the relationships between supplier 2 and customer 4 as well as between supplier 3 and customer 5, the objectives (increasing the margin – customer 4 and increasing the share of wallet – customer 5) were not met. This is in line with the suppliers' reflection on the initial evaluation, which they saw as too optimistic. Both companies felt confident that the final revision of the methodology, which raises the qualification barriers for top solution customers, would have helped to set more realistic targets. To date, there is no literature on controlling and progress measurement of solution relationships although the process-driven

character of solutions is strongly stressed (e.g. Storbacka, 2011; Tuli et al., 2007). As our study shows, the customer assessment profile resulting from the application of the methodology can be used as a basis for setting relationship-specific targets and progress controlling. Based on e.g. annual reviews, implications for further developing a solution customer can be derived. In addition, it can also lead to the repositioning of a solution customer. Supplier 3 stressed that the problems they have been facing with customer 5 in the last 12 months now led to setting a milestone with a "go-no-go" decision.

5.2 Limitations and research implications

We contribute to the rapidly growing body of knowledge on business solutions by developing a methodology for assessing the solution potential of customers. Hereby, our study may extend the existing phase-oriented models (e.g. Töllner et al., 2011; Tuli et al., 2007), where the initial phase starts with a defined customer and is named either requirement definition (Tuli et al. 2007) or signalling (Töllner et al. 2011). Our study suggests that a comprehensive customer evaluation, segmentation and selection should precede these defined initial phases. Therefore, it complements the existing models. The progression of a solution through these phases is seen as essential for a successful solution project, which is a relational process rather than a short-term transaction (Tuli et al. 2007). We would therefore argue that the likelihood of a fully implemented solution will be dependent on the supplier's customer assessment and segmentation. Further research could test the impact of an initial customer assessment on successful solution project completion.

The study demonstrates the importance of the four components of the "customer's potential as a future solution partner". Future research might investigate each of the components in detail by addressing the following research questions: How can customers be convinced of the solution value potential? How can the motivation of the customers to fulfil the co-creation role be fostered? How can customers be supported to develop the resources and capabilities to

fulfil the co-creation role? How can customers be convinced to trust into the supplier's capability as a solution provider?

Moreover, our study points to the importance of research into customer-specific solution strategies. To date, the literature assumes a "one for all" approach without distinguishing customer-specific solution strategies (e.g. Adamson et al., 2012; Storbacka et al., 2011). Although the second stage of our data collection only investigates the strategies applied to solution customers from one segment (top solution development customers), differences in the strategies are obvious. Future research could take our work one step further by exploring the implementation of the proposed strategies in other segments. In this regard, the segment of "potential solution development customers" is of particular interest. It would help building knowledge into the differences between strategies designed to upgrade existing business relationships to solution bonding with those developed for recruiting new solution customers.

Furthermore, the proposed portfolio can facilitate research into the costs of providing solutions. Existing research into the profit earnings of solution suppliers (e.g. Fang et al. 2008) could be extended by conducting customer lifetime value analyses and comparing the solution ROI in relationships with customers across the different segments. Our findings show that the costs incurred by individual customers may differ substantially at any point in time but also over time if, for example, a customer acknowledges the value potential of the solution, but does not prioritise its implementation. Future research could investigate cash flows over the course of different solution relationships and derive, for instance, the implications for solution-specific customer lifetime value analyses.

Finally, we suggest a further avenue for research which could add to the literature on bundle evaluation (Janiszewski & Cunha Jr, 2004; Soman & Gourville, 2001; Yadav, 1994). Future research might investigate whether solution bundle evaluation is impacted by customers' characteristics and preferences, as indicated by their position in the solution customer

portfolio. Initial evidence from one of our case companies confirms such a proposition. For the fastening elements management, supplier 1 offers its customers two pricing options: either to pay for products and accompanying logistics services separately or, alternatively, to pay a price for the solution bundle through higher unit prices. Interestingly, the supplier confirms that customers with low solution potential tend to have a preference for individual pricing because bundle prices cannot easily be compared with competitive offerings. Hence, “low potential solution candidates” might have a critical stance towards buying a comprehensive bundle and prefer to buy discrete product and service offerings. In contrast “top solution development customers” are likely to assess the value of the solution bundle more favourably, possibly since they value the comprehensiveness of a solution bundle.

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Appendices

Appendix A: Interview Structure – Study I

1) What type of solution does your company offer?
   Possible prompt: Which customer process is supported? Which result is to be achieved?
2) Please describe a specific solution project with a specific customer that is running or ran particularly well.
   Possible prompt: What are/were the success factors of that project with regards to the customer?
3) Please describe a specific solution project with a specific customer that is running or ran particularly badly.
   Possible prompt: What are/were the inhibitors of that project with regards to the customer?
4) Please describe the characteristics of an 'ideal' solution customer for your company.
   Possible prompt: Why are these characteristics 'ideal'?
5) Which positive experiences did you have with customers in solution projects in the past?
   Possible prompt: Why was the particular experience positive?
6) Which negative experiences did you have with customers in solution projects in the past?
   Possible prompt: Why was the particular experience negative?

Appendix B: Coding Scheme – Study I

-- please insert Table B.1 here –

Appendix C: Interview Structure – Study II

Supplier Interview Structure

1) Please describe in detail the solution offering-related developments that have occurred in the relationship between your customer and you over the last 12 months.
   a. What has been especially positive?
   b. What has been rather negative?
2) How do you see the future cooperation between your customer and you?
3) Please reflect on the customer's initial assessment by means of the methodology. Do you still agree with it or would your assessment be differently today? Why (not)?
   Possible prompts for individual criteria.

Customer Interview Structure

1) Please describe in detail the solution offering-related developments that have occurred in the relationship between your supplier and you over the last 12 months.
    a. What has been especially positive?
    b. What has been rather negative?
2) How do you see the future cooperation between your supplier and you?
3) [After having introduced the methodology]: Please provide your thoughts about the methodology.
4) Which criteria do you find most relevant to the cooperation between your supplier and you and why?

Table 1: Overview of literature indicating solution customer selection and segmentation criteria

Criteria	Literature source
Customer paying and investment behaviour	
- Customer's payment record	Han et al. (1993)
- Customer's investment readiness and ability	Campbell & Cunningham (1983), Ojasalo (2001), Everhartz et al. (2014), Adamson et al. (2012)
Supplier contacts within the customer organisation	
– Contacts to users, buyers and payers in the customer organisation	Michel et al. (2008), Kindström & Kowalkowski (2014), Ojasalo (2001), Macdonald et al. (2011), Chakkol et al. (2014), Ulaga & Reinartz (2011), Adamson et al. (2012)
- Contacts to actors at the top of the corporate hierarchy	Ulaga & Reinartz (2011)
- Access to customer informal "grapevine" information	Tuli et al. (2007), Kindström & Kowalkowki (2014), Üstüner & Godes (2006)
Customer attitude towards the business relationship	
- Time horizon of the customer-supplier relationship (long-term vs. short term)	Gosselin & Bauwen (2006), Campbell & Cunningham (1983), Ojasalo (2001), Heide & John (1992), Napolitano (1997)
- Focus of the customer-supplier relationship (Total Cost of Ownership (TCO) vs. purchasing price)	Ojasalo (2001), Ellram & Siferd (1998)
- Customer's level of commitment to the customer-supplier relationship	Ojasalo (2001), Heide & John (1992)
– Customer's readiness to be dependent on the supplier regarding assets	Windahl & Lakemond (2010), Heide & John (1992)
– Customer's readiness to be dependent on the supplier regarding processes	Brady et al. (2005), Doster & Roegner (2000), Windahl & Lakemond (2006), Heide & John (1992), Napolitano (1997)
– Customer's readiness to be dependent on the supplier regarding know-how	Heide & John (1992)
– Customer's readiness to share operational business knowledge with the supplier	Tuli et al. (2007), Kindström & Kowalkowski (2014), Walter (1999), Gounaris and Tzempelikos (2014)
– Customer's preparedness to share strategic business knowledge with the supplier	Tuli et al. (2007), Matthyssens & Vandenbempt (2008), Walter (1999)
Customer competency as a value co-creator	
– Customer's process competency in the collaboration with the supplier	Michel et al. (2008), Nicolajsen & Scupola (2011)
– Customer's development expertise in the collaboration with the supplier	Michel et al. (2008), Nicolajsen & Scupola (2011)
Customer attitude towards joint innovation with the supplier	
– Customer's openness towards product innovation together with the supplier	Mele (2009), Napolitano (1997)
– Customer's openness towards service innovation together with the supplier	Mele (2009), Mota Pedrosa (2012), Napolitano (1997)
– Customer's openness towards process innovation together with the supplier	Mele (2009), Mota Pedrosa (2012)
Customer industry	
– Strategic importance of the customer industry	Gomez-Arias & Montermoso (2007), Miller et al. (2002)
Solution replication potential	
– Replication potential of the solution which will be developed in the customer-supplier relationship	Storbacka (2011), Miller et al. (2002), Ulaga & Reinartz (2011), Brax & Jonsson (2009), Davies et al. (2006), Galbraith (2002), Salonen (2011), Tuli et al. (2007), Sawhney (2006)

Table 2: Overview of interviewees

	Company's solution offering	Country[a]	Size[b]	Interviewee's corporate function
1	Factory automation solutions	**Germany**	Mid-sized	Head of corporate solution centre
2	Energy performance contracting	Switzerland	Big	Head of energy services
3	Electricity and heat solutions	Switzerland / USA	Big	Manager Customer Services
4	Drive and control solutions	**Germany**	Big	Head of Business Development
5	Biotechnology solutions	**Denmark**	Mid-sized	Global Launch Manager
6	Car rental solutions	Great Britain	Big	Senior Finance Partner
7	Automotive body shop solutions	**Netherlands**	Big	Project Director
8	Chemical solutions	Switzerland	Big	Business Manager Solvents Europe
9	Retailer and barista solutions	Switzerland	Mid-sized	Country Manager
10	VMI consultancy solutions	**Netherlands**	Mid-sized	Member of the Board of Directors
11	Logistics solutions	**Switzerland**	Mid-sized	CEO
12	Lighting and illumination solutions	**Denmark**	Mid-sized	CEO
13	Food / freshwater fish solutions	**Brazil**	Small	CEO
14	Healthcare solutions	Great Britain	Big	VP Global Logistics
15	Space branding solutions	**Hong Kong**	Mid-sized	CEO
16	C-part management solutions	**Switzerland**	Mid-sized	VP Global Key Accounts & Global Lean Solutions
17	Integrated security solutions	**Switzerland**	Mid-sized	Senior Marketing Manager
18	Content management solutions	Switzerland	Mid-sized	VP SAP Solutions Group
19	IT solutions	**Switzerland**	Small	CEO
20	IT, consulting and financing	Switzerland	Big	Managing Director
21	Power generation solutions	**Switzerland**	Mid-sized	Head of strategic sales projects
22	Consulting solutions	**Brazil**	Small	CEO
23	Camera solutions	Germany	Big	Marketing Director Europe

[a] Bold marked country names = headquarters; otherwise subsidiary
[b] Small ≤ 50 employees; mid-sized 51-5,000 employees; big > 5,000 employees

Table 3: First phase data collection: supplier case companies and workshop participants

	Solution supplier	Size[a]	Solution offering	Workshop participants	Number of customers evaluated
1	Fastening technology provider	Mid-sized	Fastening elements management	– VP Global Key Accounts – VP Logistics and Engineering Consulting	2
			Fastening elements engineering	– Engineering Consultant – District Sales Manager	2
2	Electronic parts provider	Mid-sized	Electronic parts management	– Business Development Manager – 2 District Sales Managers	3
3	Precision instrument provider	Big	Co-managed precision instrument services	– Global Key Account Manager – Country Sales Manager	11

[a] mid-sized 51-5,000 employees; big > 5,000 employees

Table 4: Second phase data collection: supplier-customer dyad case companies and interviewees

Solution suppliers		Solution offerings	Supplier interviewees	Solution customers		Customer interviewees
1	Fastening technology provider	Fastening elements management	– Head Customer Logistics	1	reciprocating compressors manufacturer	– CEO
		Fastening elements engineering	– Head Sales – Application Engineer	2	coating systems producer	– Head Strategic Sales – Head Operations
2	Electronic parts provider	Electronic parts management	– Head Operations – Head Sales Branch	3	industrial automation full service provider	– Head Hardware Engineering – Head Sales
			– General Manager Branch – Head Marketing	4	electronic and telematics services provider	– CEO
3	Precision instrument provider	Co-managed precision instrument services	– Global Key Account Manager – Head of Solutions	5	pharmaceutical company	– R&D Manager – R&D Team Leader

Table 5: Criteria for quality of the relationship between supplier and customer to date

Customer attitude towards joint innovation with the supplier
1. Customer's openness towards product innovation together with the supplier to date
2. Customer's openness towards service innovation together with the supplier to date
3. Customer's openness towards process innovation together with the supplier to date
Existing contacts
4. Supplier's existing contacts to users, buyers and payers in the customer organisation
Evidence of a strategic perspective within the customer-supplier relationship
5. Time horizon of the customer-supplier relationship to date (long-term vs. short-term)
6. Focus of the customer-supplier relationship to date (Total cost of ownership (TCO) vs. purchasing price)
Customer's competency as a "value co-creator"
7. Customer's process competency in the processes relevant to the collaboration with the supplier to date
8. Customer's development expertise in the collaboration with the supplier to date

Table 6: Criteria for customer potential as future solution partner

Financial aspect
1. Customer's prospective readiness and ability to invest in an extension of the cooperation
Customer attitude towards the future relationship development
2. Customer's prospective readiness to be dependent on the supplier regarding assets
3. Customer's prospective readiness to be dependent on the supplier regarding processes
4. Customer's prospective readiness to be dependent on the supplier regarding know-how
5. Customer's prospective readiness to share operational business knowledge with the supplier relevant for the cooperation
6. Customer's prospective preparedness to share strategic business knowledge with the supplier relevant for the cooperation
7. Customer's prospective preparedness to accept the supplier in the role of a business consultant.
8. Customer's prospective initiative in further developing the cooperation
Future contacts
9. Prospective ease to establish new ties with future buyers, payers and users
10. Prospective ease of access to actors at the top of the corporate hierarchy
Customer's degree of pressure to change
11. Customer's prospective pressure to save costs and resources within the business area(s) which the supplier solution targets
12. Customer's prospective pressure to develop new business opportunities which are supported by the supplier solution
Solution replication potential
13. Replication potential of the solution which will be developed in the customer-supplier relationship
Customer's industry
14. Strategic importance of the customer industry for the supplier

Table 7: The scale for customer assessment – selected criteria

Criteria	*Scale – label 1*	*Scale - label 3*	*Scale – label 5*
6. Focus of the customer-supplier relationship to date (Total cost of ownership (TCO) vs. purchasing price)	Our relationship has always been dominated by thinking in purchasing prices.	The focus of our relationship has oscillated between thinking in TCO and purchasing prices.	Our relationship has always been characterised by a mindset of TCO.
14. Customer's prospective preparedness to share strategic business knowledge with the supplier relevant for the cooperation	Customer won't share strategic business knowledge with us.	Customer will be hesitant to share strategic business knowledge with us.	Customer will be readily prepared to share strategic business knowledge with us.

Table 8: Overview of the feedbacks on the methodology one year after the initial application

Solution Relation-ship	Phase 1 – Initial evaluation	Phase 2 – Situation after 12 months	Supplier feedback	Customer feedback	Implications for the methodology
Solution supplier 1 – customer 1	Top solution development customer – Score relationship to date: 4.3; future solution potential: 4.5	Pilot solution project completed	Initial customer assessment confirmed. Delay in the roll-out is no concern.	Solution is important but customer lacks resources to invest into its implementation (criterion 9) and the solution doesn't have top priority (criterion 19)	Emphasis on customer capabilities/resources and motivation to co-create solution
Solution supplier 1 – customer 2	Top solution development customer Score relationship to date: 3.8; future solution potential: 4.4	Pilot solution project completed	On reflection revised assignment to "solution replication" because the customer will most likely only accept a smaller version of the initial solution with a lower level of interdependency.	Internal reluctance to share the necessary strategic business knowledge with the supplier (criterion 14) and to become dependent on the supplier regarding know-how (criterion 12)	Emphasis on customer trust into supplier's capability as a solution provider
Solution supplier 2 – customer 3	Top solution development customer Score relationship to date: 3.8; future solution potential: 3.8	Solution project in the scoping phase	Initial customer assessment confirmed. Criteria with initial low scores (11 and 12) are main inhibitors for further progress in the solution relationship but both parties are willing to pursue the opportunity.	Value potential of the solution is evident and acknowledged. However, implementation involves delegating supplier relationship management to the solution provider. Accepting higher dependence regarding process and know-how (criteria 11 and 12) are hence barriers.	Emphasis on customer trust into supplier's capability as a solution provider
Solution supplier 2 – customer 4	Top solution development customer Score relationship to date: 3.9; future solution potential: 3.8	Project stopped with mutual consent after first strategic-level solution discussions	On reflection revised assignment to "old friends" – established relationship will be continued and likelihood of growth into solution-based relationship is perceived to be small.	Value potential of the solution is not evident, due to industry pressure; customer defines low purchase prices as top priorities.	Customer assessment of the solution value potential (not yet captured in the methodology). Additional strategy for "old friends": continuation of established relationship.
Solution supplier 3 – customer 5	Top solution development customer Score relationship to date: 3.9; future solution potential: 3.8	Project put "on hold" by the solution provider	On reflection slightly revised assignment to "old friends" – the customer does not take the initiative in further developing the cooperation (criterion 16) and the supplier is unwilling to commit further resources.	Value potential of the solution is evident and acknowledged, customer implicitly criticises the solution provider for not being proactive. See themselves as the "customer" and not "a co-creation partner".	Emphasis on customer motivation to co-create solution

Table 9: Revised themes and criteria for customer potential as future solution partner [a]

Customer assessment of solution value potential
23. Customer's assessment of solution value potential
Customer capabilities and resources to fulfil co-creation role
9. Customer's prospective readiness and ability to invest in an extension of the cooperation
Customer trust into the supplier's capability as a solution provider
10. Customer's prospective readiness to be dependent on the supplier regarding assets
11. Customer's prospective readiness to be dependent on the supplier regarding processes
12. Customer's prospective readiness to be dependent on the supplier regarding know-how
13. Customer's prospective readiness to share operational business knowledge with the supplier relevant for the cooperation
14. Customer's prospective preparedness to share strategic business knowledge with the supplier relevant for the cooperation
15. Customer's prospective preparedness to accept the supplier in the role of a business consultant.
Customer motivation to fulfil co-creation role
16. Customer's prospective initiative in further developing the cooperation
17. Prospective ease to establish new ties with future buyers, payers and users
18. Prospective ease of access to actors at the top of the corporate hierarchy
19. Customer's prospective pressure to save costs and resources within the business area(s) which the supplier solution targets
20. Customer's prospective pressure to develop new business opportunities which are supported by the supplier solution

[a] To allow for traceability of the research processes, the criteria remain their initial numbering and the new criterion is provided consecutive numbering.

Table B.1: Coding Scheme

Codes	**Definition**	**Exemplary Quote** (the numbers behind the quotes indicate the interviewee cited, cf. Table 2)
Criteria for quality of the relationship between supplier and customer to date		
Customer attitude towards joint innovation with the supplier		
Customer's openness towards product innovation together with the supplier to date	Customer's susceptibility to develop new or enhance existing products together with the supplier firm to date.	*"It was so helpful that they [the customer] were so engaged in supporting us in the development of the [… product]."* (9)
Customer's openness towards service innovation together with the supplier to date	Customer's susceptibility to develop new or enhance existing services together with the supplier firm to date.	*"Of course, the service components had to be advanced. In this respect, they [the customer] were open and we worked it out together."* (6)
Customer's openness towards process innovation together with the supplier to date	Customer's susceptibility to develop new or enhance existing processes together with the supplier firm to date.	*"[…] even in the past, we had process changes and this particular key account never opposed them. In contrast, they always assisted us in the process refinement.* (10)
Existing contacts		
Supplier's existing contacts to users, buyers and payers in the customer organisation	The supplier firm's connections to the following actors in the customer organisation: Users, i.e. those who have used their products/services; buyers, i.e. those who have purchased their products/services; payers, i.e. those who have paid for their products/services.	*"This is why it was essential that we could have a chat with all of them, the Operations Manager [user] and the guys from finance [payer] and procurement [buyer]."* (20)
Evidence of a strategic perspective within the customer-supplier relationship		
Time horizon of the customer-supplier relationship to date (long-term vs. short-term)	The orientation of the supplier firm's relationship with the customer along the time continuum: short-term - medium-term - long-term.	*"We only approached customers with our solution idea of who we knew had always been looking for a business relationship with us, rather than one or two transactions."* (15)
Focus of the customer-supplier relationship to date (Total cost of ownership (TCO) vs. purchasing price)	The stance of the supplier firm's relationship with the customer along the continuum: purchasing price - TCO (Estimate of all direct and indirect costs associated with an asset or acquisition over its entire life cycle).	*"Well, it was definitely not a suitable client for our solutions because he had always looked for the cheapest deals."* (13)
Customer's competency as a "value co-creator"		
Customer's process competency in the processes relevant to the cooperation to date	The customer's proficiency level in the processes enabling the effective implementation of the supplier firm's value proposition, i.e. their products and services, within the customer's own organisation.	*"For this program to run smoothly, it was crucial that the customer had […this process] in place."* (19)
Customer's development expertise in the cooperation to date	The customer's proficiency level in adopting innovative elements of the supplier firm's value proposition through changes in the customer's internal processes and organisation.	*"[…] so basically they [the customer] had to alter a part of their long-established manufacturing process. Not only did they demonstrate great skill in doing so, but also […]"* (1)
Criteria for customer potential as future solution partner		
Financial aspect		
Customer's prospective readiness and ability to invest in an extension of the cooperation	The customer's prospective willingness and capacity to invest in	*"The problem was that the customer liked the idea, but was not willing to pay for it."* (22)

	extended cooperation with the supplier firm in the future.	
Customer attitude towards the future relationship development		
Customer's prospective readiness to be dependent on the supplier regarding assets	The customer's future stance towards dependency on relationship specific assets, e.g. IT infrastructure, tools, a.s.o., which render the substitution of the supplier firm more difficult, if not impossible.	*"With the adoption of our solution, it is very costly for customers to switch from our cameras to another brand. Unfortunately, many customers are therefore still reluctant."* (23)
Customer's prospective readiness to be dependent on the supplier regarding processes	The customer's future stance towards dependency on relationship specific processes, e.g. logistics, repairs, a.s.o., which render the substitution of the supplier firm more difficult, if not impossible.	*"The decisive factor was that the guys finally [the customer] agreed to be a lot more dependent on our way of handling the inventory management process."* (10)
Customer's prospective readiness to be dependent on the supplier regarding know-how	The customer's future stance towards dependency on relationship specific know-how, e.g. technical, operational, a.s.o., which render the substitution of the supplier firm more difficult, if not impossible.	*"[…] the customer who doesn't want to understand, doesn't want to do anything, just wants us to do everything… This type of customer is ideal for our solution."* (3)
Customer's prospective readiness to share operational business knowledge with the supplier relevant for the cooperation	The customer's future stance towards sharing information and guidance about its operations which is relevant for the cooperation.	*"[…] we face a lot of resistance from the restaurants or their food chains to deliver the information that we needed for the business. They are not really very confident in delivering the information and sharing information. And any full solution or business solution is based largely in terms of understanding and the amount of information that you have from customers."* (13)
Customer's prospective preparedness to share strategic business knowledge with the supplier relevant for the cooperation	The customer's future stance towards sharing information and guidance about its strategies which is relevant for the cooperation.	*"[…] sometimes we have clients where they want basically to keep their strategies to themselves and it is my experience that that's probably not the best way for the collaboration, but it takes trust to share something with your client and the other way around and if you have that you can achieve great things."* (5)
Customer's prospective preparedness to accept the supplier in the role of a business consultant.	The customer's willingness to accept the supplier firm's involvement in improving its own business (e.g. through productivity gains, changes of customer processes, a.s.o).	*"[…] but it has a lot to do with being a trusted adviser. So if your intent is to sell something to a customer, then he will initially not open up to you, but […] that really also builds trust and confidence, and once you have established that then they come up to you and say, "I also have this, or this problem."* (10)
Customer's prospective initiative in further developing the cooperation	The customer's future stance towards developing the cooperation along the continuum: minimises its own initiative - reactive - proactive.	*"Ideally, the customer would demonstrate a proactive attitude to increasing the depth of collaboration."* (6)
Future contacts		
Prospective ease to establish new ties with future buyers, payers and users	The supplier firm's future opportunity to access the following actors in the customer organisation: Users, i.e. those who will use the supplier's solution; buyers, i.e. those who will make the buying decision for the supplier's solution; payers, i.e. those	*"We are quickly in an area which has project character and is cross-functional. […] But when the middle management and the people don't want, it'll die. […] Therefore, you have to be able to have them all at one table."* (16)

	who will pay for the supplier's solution.	
Prospective ease of access to actors at the top of the corporate hierarchy	The supplier firm's future opportunity to get in touch with actors at the top of the corporate hierarchy.	*"Being able to present the solution at the C-level is the door opener. "* (16)
Customer's degree of pressure to change		
Customer's prospective pressure to save costs and resources within the business area(s) which the supplier solution targets	The customer's future urgency to save costs and resources within the area(s) which the supplier firm's solution addresses.	*"It's of course a good precondition for us if the customer is under considerable strain to cut costs in this area."* (8)
Customer's prospective pressure to develop new business opportunities which are supported by the supplier solution	The customer's future urgency to tap new business areas which are supported by the supplier firm's solution.	*"This situation was ideal since they [the customer] were intending to venture into this direction".* (15)
Solution replication potential		
Replication potential of the solution which will be developed in the customer-supplier relationship	The degree to which the solution know-how developed with the customer can be replicated in further customer relationships.	*"[…], we opted out since we knew that the needs of this particular client were rather unique and did not apply to a wider market."* (19)
Customer's industry		
Strategic importance of the customer industry for the supplier	The degree of strategic significance which the customer industry plays for the supplier firm's company.	*"Basically, we focus on industries of mass production because this is where the value of our offer unfolds the most."* (16)

Figure 1: The methodology and evaluation results after the initial application