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Adapting Small and Medium-Sized Enterprises to the Digital Scenario: A Practical Framework for Leveraging Sales

Tais Fraile^{1*}, Thiago Anderson Lira Clemente²

¹Brazilian School of Public and Business Administration, Getulio Vargas Foundation (FGV EBAPE), Rio de Janeiro, Brazil

²Business Administration, FAEP, Brazil

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Abstract

Small and medium-sized enterprises (SMEs) were among the organizations most affected by the acceleration of digitalization that followed the COVID-19 pandemic, yet they often lack the resources, skills and structures needed to adapt their marketing. This narrative review examines how SMEs can adjust their business and marketing practices to the digital scenario in order to leverage sales. Peer-reviewed studies and reference works published up to 2023 on digital transformation, digital marketing, customer relationship management and marketing analytics were analyzed qualitatively. The literature shows that successful SME adaptation tends to follow a staged path: diagnosing the customer journey and the firm's digital maturity, establishing an integrated digital presence, developing relevant content and engagement, structuring customer relationship management and adopting simple performance indicators that link marketing actions to sales. Rather than large technology investments, the evidence points to the consistent use of accessible tools, clear priorities and a test-and-learn culture as the main drivers of results. Based on these findings, the article proposes a six-stage practical framework, summarizing objectives, actions and indicators for each stage. The framework is intended to help managers and consultants guide the digital adaptation of SMEs in a structured and measurable way.

Keywords: small and medium-sized enterprises; digital transformation; digital marketing; sales growth; customer relationship management; marketing analytics; business model; digital maturity

1 Introduction

Small and medium-sized enterprises (SMEs) play a central role in employment and economic activity, but they typically operate with limited financial resources, small teams and less access to specialized expertise than large corporations. These constraints shape how SMEs respond to technological change. The acceleration of digitalization during the COVID-19 pandemic made this challenge visible: many SMEs had to move their sales and communication to digital channels almost overnight in order to continue operating [1, 2].

Digital marketing offers SMEs opportunities that were previously available only to large firms, such as reaching specific audiences at low cost, measuring the results of each action and maintaining continuous relationships with customers [3, 4]. However, the mere presence on digital platforms does not guarantee results. Without a clear strategy, SMEs often adopt tools in a fragmented way, producing activity without corresponding growth in sales.

This study therefore examines how SMEs can adjust their marketing and business practices to the digital scenario in order to leverage sales. Its objective is to synthesize the literature into a practical framework that managers and consultants can apply in a structured and measurable way.

1.1 Theoretical background

Digital transformation is commonly described as a process in three phases: digitization, in which analog information is converted into digital form; digitalization, in which digital technologies are used to improve existing processes; and digital transformation, in which the business model itself changes [5]. For most SMEs, the immediate challenge lies in the first two phases, but the long-term competitive advantage depends on reaching the third.

From a marketing perspective, digital technologies affect the entire process of value creation, from understanding customers to delivering and sustaining value [3]. Customer relationship management (CRM) provides a complementary lens: it emphasizes acquiring, retaining and developing profitable customer relationships over time, supported by information on customer behavior and value [6]. New media have intensified this logic by multiplying the channels through which customers interact with firms and with each other [7].

2 Materials and methods

2.1 Review design and source selection

This study adopts a narrative literature-review approach. Peer-reviewed articles and reference books published up to 2023 were selected on four themes: digital transformation of SMEs, digital marketing strategy, customer relationship management and marketing analytics. Priority was given to conceptual frameworks and empirical studies that address the practical adaptation of firms, particularly in the context of the COVID-19 pandemic.

2.2 Framework development

The selected sources were analyzed qualitatively to identify recurring stages, practices and indicators associated with successful digital adaptation. These elements were then organized into a sequential framework. The framework is conceptual and is intended as a guide for practice; it does not result from new empirical testing. No ethical approval was required, as the study relies exclusively on published sources.

3 Results and discussion

3.1 Digital transformation paths in SMEs

Empirical evidence from the pandemic period shows that SMEs followed different digital transformation paths depending on their initial digital maturity and resources [1]. Firms with little prior digital experience typically began by moving sales and communication to digital channels, such as social networks, messaging applications and marketplaces. Firms with greater maturity were able to digitalize internal processes and, in some cases, redesign their business models [1, 8].

Studies of family-owned firms in Europe show a similar pattern: in the face of the crisis, firms combined short-term measures, such as cost reduction and liquidity protection, with a rapid adoption of digital tools to maintain contact with customers [2]. These findings suggest that digital

adaptation is not a single decision but a sequence of steps whose pace depends on the firm's starting point.

3.2 Common obstacles

The literature identifies recurring obstacles to digital marketing in firms, many of which are more acute in SMEs. They include limited analytical talent, difficulty measuring the return on digital investments and the challenge of keeping up with the speed of technological change [9]. In addition, digital transformation requires changes in organizational structures and capabilities, not only in technology, which can be particularly demanding for small teams [5].

These obstacles help explain why SMEs often adopt tools without a clear strategy. Opening social media profiles or launching an online store without defining target customers, value proposition and success indicators tends to produce limited results. The framework presented below addresses this problem by organizing adaptation into stages with defined objectives.

3.3 A practical framework for leveraging sales

Based on the literature, the digital adaptation of SMEs can be organized into six stages, summarized in Table 1. The first stage is a diagnosis of the customer journey and of the firm's digital maturity, identifying how customers search, evaluate and buy, and where the firm currently stands [5, 10]. The second stage establishes an integrated digital presence, ensuring that the firm can be found and that customers can move easily between channels [4, 11].

The third stage concerns content and engagement. Relevant, useful content builds trust and engagement and supports the customer's decision process, particularly in markets where purchase decisions require information [12]. Social networks and partnerships with creators can extend the reach of this content when they are consistent with the brand [13, 14].

The fourth stage structures customer relationship management. Recording interactions, segmenting customers and maintaining regular contact through e-mail, messaging and after-sales service help increase repurchase and customer value over time [6, 7]. The fifth stage introduces measurement through a small set of key performance indicators (KPIs) that connect marketing actions to sales, such as conversion rate, customer acquisition cost (CAC), retention and customer lifetime value (CLV) [6, 15]. The sixth stage institutionalizes continuous improvement through testing, learning and reallocating resources to the actions that produce the best results [5].

Table 1. Practical framework for the digital adaptation of SMEs.

Stage	Objective and main actions	Example indicators
1. Diagnosis	Map the customer journey and assess digital maturity; identify channels, friction points and priorities [5, 10].	Share of sales by channel; main sources of customer inquiries.
2. Integrated digital presence	Ensure the firm can be found and contacted (website, search, social networks, marketplaces) with consistent information across channels [4, 11].	Website traffic; visibility in search; response time to inquiries.
3. Content and engagement	Produce useful content that answers customer questions; use social media and creators aligned with the brand [12–14].	Engagement rate; qualified leads generated by content.
4. Relationship management	Record interactions, segment customers and maintain regular post-sale contact [6, 7].	Repurchase rate; retention; customer satisfaction.

Stage	Objective and main actions	Example indicators
5. Measurement	Adopt a small set of KPIs that link marketing to sales results [15].	Conversion rate; CAC; CLV; return on marketing investment.
6. Continuous improvement	Test, learn and reallocate resources to the most effective actions [5].	Results of tests; evolution of KPIs over time.

Source: prepared by the author from the cited literature.

3.4 Discussion

The framework emphasizes sequence and consistency rather than the adoption of advanced technologies. This is consistent with evidence that SMEs advance through digital transformation in stages and that early gains come from using accessible tools coherently [1]. It also reflects the view that digital marketing creates value when it is integrated with the firm's strategy and customer relationships, rather than treated as a separate communication activity [3, 16].

An important implication concerns measurement. Many SMEs evaluate digital marketing through activity metrics, such as followers or posts, which do not necessarily reflect commercial results. Linking actions to indicators such as conversion, acquisition cost and customer lifetime value allows managers to decide where to invest limited resources and to justify those decisions [6, 15]. Equally important is the human dimension: SMEs often compete on proximity and personalized service, and digital tools should reinforce, not replace, these advantages [16].

3.5 Limitations

The framework is derived from a narrative review and has not been empirically validated across sectors. SMEs differ widely in size, industry, resources and digital maturity, so the stages may need to be adapted, combined or reordered in specific contexts. Future empirical studies could test the framework and measure its effect on sales performance.

4 Conclusion

SMEs face the digital scenario with fewer resources than large firms, but they can achieve meaningful sales gains by adopting digital marketing in a structured way. The literature indicates that successful adaptation follows a staged path that begins with understanding customers and the firm's own digital maturity and progresses toward integrated channels, relevant content, structured customer relationships and measurement linked to sales.

The six-stage framework proposed in this article translates these findings into a practical sequence of objectives, actions and indicators. Its central message is that consistency, prioritization and continuous learning matter more than the volume of tools adopted. Future research should evaluate the framework empirically and examine how SMEs in different sectors can accelerate their progression through the stages.

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Conflict of Interest

The author declares no conflict of interest.

Abbreviations

CAC — Customer acquisition cost

CLV — Customer lifetime value

CRM — Customer relationship management

KPI — Key performance indicator

SMEs — Small and medium-sized enterprises

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