Assessing insights from educational technology sales professionals regarding school generational preferences in digital sales

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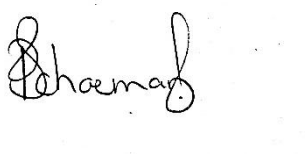
DECLARATION

I confirm that this research project, “Assessing insights from educational technology sales professionals regarding school generational preferences in digital sales” is my original work and is being submitted to partially fulfil the requirements for the Master of Business Administration degree at North-West University. It has not been previously submitted for any degree or examination at any other institution. Furthermore, I affirm that I have secured all requisite authorisations and consent to conduct this study.

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Signature: 

ACKNOWLEDGEMENT

First and foremost, I want to give all the glory and thanks to the Lord God who carried me through these past two years. To my incredible wife, and my two boys, a heartfelt thank you for enduring this journey with me. Your constant support, patience, and sacrifice gave me the space and motivation to see this through, and I could never have done this without you. My sincere gratitude goes to my supervisor, Dr. Leonie Greyling. Your expert guidance, immense patience, and compassion, especially when deadlines were tight, were invaluable. Thank you for shaping this research and for believing in this project and me. Finally, I wish to acknowledge the EdTech sales professionals who participated in this study. This research is a testament to your daily commitment to not just sell for the sake of selling, but to genuinely go out of your way to help the educators of South Africa and, in doing so, building a better future for our children.

ABSTRACT

The rapid digitalisation of sales communication has transformed the South African Educational Technology (EdTech) sector, increasing reliance on Digital Sales Interactions (DSI) while simultaneously creating an impersonal sales environment where trust is difficult to build. This study's primary objective was to explore how EdTech sales professionals perceive and adapt to school educators' generational preferences within this context. Adopting an interpretivist qualitative design, 11 semi-structured interviews were conducted with EdTech sales professionals, and thematic analysis was employed to identify recurring patterns. The findings revealed a significant strategic disconnect between perception and practice. While EdTech sales professionals hold clear generational perceptions that references Baby Boomers as traditionalists, Generation X as versatile and independent, and Millennials as digitally native, they abandon this perception as a primary sales strategy. It is deemed by the sample of sales professionals as too unreliable in a low-trust digital environment. Instead, sales professionals act as realists, prioritising an educator's immediate, tangible context which includes their school's resource availability and the educator's perceived personality, rather than their age cohort. The study's primary contribution is the identification of a new adaptive framework of a Context-First model. This model proposes that context dictates the primary strategy, while generation is used only as a secondary, tactical heuristic to customise social tone. Practically, these findings indicate that EdTech sales training should de-emphasise broad generational stereotypes and focus on developing skills in rapid context analysis and adaptive, human-centred communication. Recommendations for future research include quantitatively validating these findings and incorporating educators' own perspectives.

Keywords: Educational technology industry, Generational cohort, School educator, Educational technology, Digital sales interaction, Sales effectiveness, Competitive differentiation, Information Communication Technology, Sales professional

LIST OF ABBREVIATIONS

NWU	North-West University
AI	Artificial Intelligence
CAGR	Compound Annual Growth Rate
COVID-19	Corona Virus Disease of 2019
DSI	Digital Sales Interactions
EdTech	Educational Technology
POPIA	Protection of Personal Information Act
LMS	Learner Management System
ICT	Information and Communication Technology

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1 INTRODUCTION & BACKGROUND

1.1 Introduction

The emergence of technological progress initiated the fourth industrial revolution and, with that, a wave of consequences (Bharadwaj & Shipley, 2020:108). These consequences are driven by the blending of digital, physical and biological worlds, with the introduction of advancements in this space such as artificial intelligence, quantum computing, 3D printing, and the internet of things (Bharadwaj & Shipley, 2020:106). This has consequently led to a world marked by greater connectivity and interactivity, where digital interactions have become the main mode of customer communications (Bharadwaj & Shipley, 2020:106). The educational sector has not been exempted from these shifts. Sales processes in the educational industry have historically been relational-based, relying on in-person interactions such as school visits, conferences, and printed collateral to market resources like textbooks, e-learning tools, and infrastructure solutions (Christ & Anderson, 2011:174; Jones *et al.*, 2005:105).

Before the COVID-19 pandemic, educational sales strategies prioritised face-to-face engagements, with Education Technology (EdTech) sales professionals building trust through personalised demonstrations and long-term rapport with school leaders (Feldman & Czerniewicz, 2023:52). These methods, though effective, were limited by geographical reach and inefficiencies in scaling traditional practices (Feldman & Czerniewicz, 2023:52). However, the pandemic has accelerated the adoption of digital sales interactions (DSI), forcing educational technology companies to pivot their strategies and explore new avenues for engaging with educators. As a result, DSI have become an essential communication tool for showcasing products and enabling buyer-seller interaction (Peltier & Deeter-Schmelz, 2020:193). This shift has not only expanded the reach of educational resources but also enabled companies to leverage data analytics and virtual platforms for more targeted marketing efforts.

The COVID-19 pandemic resulted in an increased demand for digital interactions across multiple marketplaces (Bharadwaj & Shipley, 2020:108). Digitalisation in educational sales had already started gaining traction pre-pandemic, driven by trends such as the global rise of e-learning platforms and schools' demands for cost-effective data-

management systems. However, COVID-19 acted as an accelerator of the adoption of DSI (Akmanlar & Akkartal, 2021:27). This transformation has prompted educational companies to rethink their strategies, focusing on creating engaging online experiences that foster collaboration and relationship-building between educators and EdTech sales professionals.

To contextualise the abovementioned transformation, it is important to note that school educators refer to all levels of educators, from classroom teachers to heads of departments and principals. Further clarification highlights the necessity to analyse the transition from traditional, relationship-heavy sales models to hybrid or fully digital frameworks. For instance, pre-pandemic EdTech sales often involved lengthy negotiation cycles and physical product trials, whereas post-COVID practices increasingly leverage virtual product demonstrations, artificial intelligence (AI)-driven analytics, and asynchronous communication tools (Ivanovski & Gruevski, 2014:167–168). In the post-COVID era, digital communications have become the prevailing method deployed for buyer-seller transactions across industries (Steinhoff *et al.*, 2019:370).

In this digitally transformed sales environment, it is crucial to recognise that not all educators engage with technology the same way. Research shows that distinct generational differences exist in the preferences and usage patterns (Padayachee, 2017:54). This study, therefore, explores the perceived generational preferences in DSI among school educators in South Africa, informing EdTech sales professionals of appropriate approaches when engaging with school educators. It is widely recognised that sales professionals in today's competitive markets, whether in EdTech or other industries, seek to differentiate their sales interactions (Alnakhli *et al.*, 2021:3). This urgency underscores the importance of this study in developing an understanding of market-specific preferences, specifically the DSI preferences of school educators in South Africa. This research focusses on the perceptions of EdTech sales professionals, rather than surveying educators directly. The study was designed in this manner due to the fact that an educator can only speak to their individual preference, whereas an EdTech sales professional interacts with hundreds of educators across all generational cohorts, granting them a unique, comparative perspective on these patterns.

1.2 Background to the study

There are three key components that form the basis of this research: the EdTech sector, the function of DSI between the EdTech sector and schools, and the role of school educators. Consequently, the role of each of these factors provides the backdrop to the study.

1.2.1 The growth of the EdTech industry

The global EdTech industry has experienced rapid growth in recent years, driven by advancements in digital tools and an increasing demand for innovative learning solutions. These digital tools can include Learning Management Systems (LMS) like Moodle, adaptive learning platforms, discussion forums, online chats, and shared spaces that promote interaction and collaboration among students and teachers (Anghelo *et al.*, 2023:260). Additionally, educational resources such as interactive videos, educational games, and online assessments enhance engagement and motivation and can also be used as tools to enrich the overall teaching-learning process (Anghelo *et al.*, 2023:260). The move from classroom to blended and pure online classroom instruction has also catalysed the global demand for EdTech (Bukina *et al.*, 2023:265). This is demonstrated by the global rise in demand for EdTech products and services, valued at $142.37 billion in 2023 and $163.5 billion in 2024, with an annual growth of 13.3% projected until 2030 (Grand View, 2024:60; 2025). According to a global EdTech market analysis, the overall on-premises and cloud-based EdTech market is expected to increase to around $348.41 billion by 2030 (Grand View, 2025). This global forecast highlights the market potential and competitiveness that continues to grow as schools increase their interest and investment in the EdTech industry.

Focusing on South Africa, factors such as science, technology, engineering, and mathematics (STEM) education demand and accelerate digital adoption (Hart, 2023:114). GlobalData (2025) stated in their latest report that the EdTech market size for South Africa was valued at R17.18 billion ($928.7 million) in 2024, with a market growth of 10.6% Compound Annual Growth Rate (CAGR) between 2019 and 2024. This shows significant growth and demonstrates the importance of the EdTech space, not only globally but also in South Africa.

1.2.2 The emergence of DSI in EdTech

Technological advancements, accelerated by the effects of the COVID-19 pandemic, have dramatically reshaped the landscape of DSI. The increasing prevalence of buyer-seller communications conducted remotely through screen-to-screen interfaces represents a significant shift from traditional face-to-face interactions (Bharadwaj & Shipley, 2020:108). Syam and Sharma (2018:140) note that machine learning and AI are having a profound impact on both personal selling and sales administration. Throughout history, sales have evolved alongside technological innovations, just as the telephone once introduced new possibilities and hurdles in the field. Today, the rise of AI, machine learning, and digital communication tools brings its own set of challenges and opportunities for sales professionals, demanding changes in how sales strategies are crafted (Syam & Sharma, 2018:140). Although DSI can be applied to a wide variety of business sectors and industries, it is important to note that while these new technologies can lead to increased efficiency, they also introduce complexities, particularly concerning the human element of sales (Alavi and Habel (2021:83). Maintaining genuine human connections and leveraging DSI in this landscape is crucial for building trust and fostering long-term customer relationships. Consequently, DSI integration presents difficulties for salespeople, as balancing the use of technology while maintaining meaningful human interactions is challenging. Despite the advances in sales, the effectiveness of salesperson communication in DSI is not yet fully understood in many industries (Bharadwaj & Shipley, 2020:109).

Although there is a wealth of research on the introduction of technology in sales, the question of how effectively these tools are used remains underexplored. Both Wait (2019:2) and Ferrell *et al.* (2010:157) highlight that relatively few studies have examined the impact of adopting new digital tools has on sales performance. While businesses are embracing digital tools, understanding their proper application to maximise efficiency and effectiveness in different sales scenarios is an area that warrants more attention. The gap in research around the practical use of these technologies is significant, especially in terms of their role in driving competitive differentiation. to the ability to use platforms like emails, telephone calls, and online virtual meetings optimally, and converting them into a sale has become an art in itself.

Consequently, it can be understood that examining DSI between sales personnel and their customers can lead to a degree of competitive differentiation in a competitive market. DSI has also introduced complexities that need to be carefully managed. The balance between adopting these technologies and maintaining the personal touch in sales interactions is crucial, particularly when it comes to achieving competitive differentiation. Further research is required to understand how best to navigate DSI while still achieving a full understanding of the customers' needs and how they can be met.

1.2.3 School educators at the centre

Having considered both the EdTech market and the emergence of DSI against the backdrop of the industry's growth, it is evident that the perception of sales professionals is important to develop a competitive differentiation during sales interactions with school educators at all levels. It is crucial to gain a deeper understanding of the educators' context and how they perceive EdTech and DSI. To establish the current state of knowledge in this field, existing research on the preferences of different generational cohorts regarding DSI in EdTech needs to be identified and reviewed.

In a study conducted by Padayachee (2017:56), the researcher clearly states that there are various factors that influence the adoption of Information and Communication Technology (ICT) integration within schools. Accessibility and resource availability also influence a school's perception of ICT integration (Padayachee, 2017:77). Among these various influences, existing research consistently points to an educator's age and generational background as another significant factor that shapes their attitudes towards technology. This evidence on pedagogical ICT adoption serves as a powerful proxy for understanding educators' general technological fluency. It is, therefore, reasonable to infer that these attitudes toward using technology in their professional lives would extend to their communication preferences in a sales context. The findings of Padayachee (2017:77) show that more mature educators often show initial resistance to integrating ICT into their teaching. Traditional teaching methods and lack of trust in technology were found to be the main reasons for resistance, but once benefits were recognised, educators' attitudes towards technology improved (Padayachee, 2017:77). This is also confirmed by Mathipa and Mukhari (2014:1216) in their study of the integration of ICT in schools in Nigeria. In contrast, younger educators are more willing to adopt and

implement new technologies within the school structure (Mathipa & Mukhari, 2014:1216; Padayachee, 2017:77).

It is evident that existing research suggests a possible link between generation and technology adoption in teaching; a clear gap remains in understanding whether these generational attitudes extend to digital sales interactions.

1.3 Problem statement

The rapid growth of the EdTech industry and the increasing reliance on DSI have reshaped the way sales professionals engage with decision-makers in the education sector. As school educators play a critical role in purchasing educational technology, understanding their preferred modes of DSI is essential for effective sales strategies (Bharadwaj & Shipley, 2020:109; Good & McLeod, 2022).

Despite the widespread adoption of digital sales tools, there is limited research on how generational differences influence school educators' preferences for digital sales interactions in South Africa. Sales professionals often adopt a one-size-fits-all approach, which may not align with the distinct communication preferences of different generational cohorts. This misalignment can lead to ineffective engagement, reduced sales success, and missed opportunities for EdTech providers.

Therefore, this study aims to address this gap by investigating whether generational differences impact the DSI preferences of South African school educators. Understanding how various age groups interact with digital sales platforms can help sales professionals adjust their approaches, build stronger customer relationships, and boost sales performance within the EdTech industry.

1.4 Research objectives

1.4.1 Primary objective

The primary objective of this study is to explore how EdTech sales professionals in South Africa perceive generational differences in school educators’ preferences regarding DSI.

1.4.2 Secondary objectives

To achieve the primary objective, the following secondary objectives were formulated:

- To determine sales professionals' perceptions of school educators' generational preferences in terms of digital sales techniques.
- To explore how sales professionals perceive the effectiveness of DSI when engaging with school educators of different generational cohorts.
- To identify the challenges faced by sales professionals when engaging different generations of school educators with DSI.
- To understand how the perceived generational differences have impacted sales professionals' tactics in the EdTech environment.

1.5 Research questions

1.5.1 Primary research questions

To address the primary objective, the primary research question is: How do EdTech sales professionals in South Africa perceive the generational differences in school educators' preferences regarding DSI?

1.5.2 Secondary research questions

To address the secondary objectives, the following research questions were presented:

- What are the EdTech sales professionals' perceived differences in how various generational cohorts of school educators engage with digital sales interactions?
- Which DSI method do EdTech sales professionals perceive to be the most effective for different generational cohorts of school educators?
- What challenges do EdTech sales professionals experience when engaging different generations of school educators in DSI?
- How do EdTech sales professionals adjust their sales tactics in accordance with their perceptions of generational differences in educators' DSI preferences?

1.6 Definition of key terms

As stated by Creswell and Creswell (2018:89), it is important to understand the key concepts of the study when conducting a literature review. In this research, these concepts were identified as the educator, generational cohorts, sales effectiveness, competitive differentiation, the EdTech industry, Information Communication Technology (ICT), and DSI. Consequently, this section focused on these key concepts.

Competitive differentiation - Competitive differentiation is a strategic process employed to aid organisations in differentiating their business from the competition, providing prospective clients with a reason for choosing a specific service over another (Harr, 2022).

Digital sales interaction (DSI) - Digital sales interaction is the encounter between buyers and sellers that is enabled by technological development. It is a term that will predominantly be applied to online exchanges between consumers and sellers which includes video calling, emailing and chatbot (computer programs designed to simulate conversation with human users, especially over the Internet) interaction (Bharadwaj & Shipley, 2020:107). In the case of this research, DSI includes video calling, WhatsApp messaging, emails and chatbots. For clarification, WhatsApp is defined as a freeware, proprietary, cross-platform, and end-to-end encrypted mobile instant messaging (MIM) application designed for smartphones (Kartal, 2019:353).

Educational technology (Edtech) – This refers to the digital hardware and software systems acquired and integrated into school or learning environments to facilitate both pedagogical practices and organisational management (Ortegón *et al.*, 2024:1).

EdTech industry - The EdTech industry is an important aspect of the way schools function through the adoption of new and cutting-edge technologies, emphasising the importance for schools to adopt and use these technologies appropriately (Ortegón *et al.*, 2024:39). Furthermore, it emphasises the use of digital tools and technological resources like computers or tablets in teaching and learning in order to create more engaging, flexible, and effective learning environments (Adeba & Gatewood, 2024:19). This predominantly includes school subjects in the science, technology, engineering, and

mathematics (STEM) fields (Adeba & Gatewood, 2024:19). For example, the inclusion of coding and robotics systems has widely improved the technology and engineering education landscape, providing learners with hands-on experience with robotic kits and online learning experiences.

Generational cohort - A generation is characterised as a cohort composed of people who share a common birth date and are impacted by identical historical events throughout their life stages, which typically consist of late childhood, adolescence, and early adulthood (Costanza *et al.*, 2012:377). For this study, the research participants are defined according to the following parameters (Van Der Linde, 2019:9):

- Baby Boomers born between 1950 and 1969.
- Generation X born between 1970 and 1989.
- Millennials born between 1990 and 2000.

Widely accepted frameworks such as Pew Research's defined generational cohorts will not be used, as they are based on sociocultural trends. This study adopts adjusted birth year ranges to align with the South African educational context and participant demographics. This adjustment considers slower internet penetration and later exposure to digital tools compared to other Western contexts (Van Der Linde, 2019:10).

Information Communication Technology (ICT) - ICT, according to Ratheeswari (2018:45), includes technology that makes it easier to obtain information via telecommunication. ICT includes various communication mediums such as the Internet, wireless networks, and cell phones and is closely related to Information Technology (IT) (Ratheeswari, 2018:45). The rapid advancement of ICT has transformed educational practices. It has led to significant changes in teaching methods and learning approaches, making it essential for teachers and education institutions to adapt their programmes to accommodate these changes (Ratheeswari, 2018:45).

Sales effectiveness - Sales effectiveness is the successful effort of ensuring customer needs are met through well-planned sales activities (Huy *et al.*, 2023:137). Companies can reach this goal when they not only care about the quality of their products but also put a lot of effort into the way they sell them (Huy *et al.*, 2023:137).

School educator - In the school context, an educator is defined as a multifaceted role that encompasses teaching, guiding, and nurturing school learners to achieve educational goals (Rani & Neetu, 2024:1). Beyond academic instruction, educators serve as mentors, guiding learners in their personal development and helping them navigate social and ethical challenges (Dirsa *et al.*, 2022:38). In the scope of this research, referring to a school educator encompasses the entire teaching and management staff. As per the definition stated by Dirsa *et al.* (2022:272), the role of educators also extends into leadership and management.

Sales professional - A sales professional can be defined as an individual who engages in the practice of selling goods or services and is often characterised by a combination of skills, knowledge, and behaviours that align with the principles of professionalism (Amor, 2019:76). Sales professionals are not only involved with the selling process but are also responsible for relationship management, strategic communication, and ethical conduct (Hawes et al., 2004:27).

1.7 Introduction to Research Methodology

To address the research questions, this study employed a qualitative research approach. This included a series of semi-structured interviews that were conducted with EdTech sales professionals in South Africa. This method was chosen to gain deep, contextual insights into the participants' perceptions and lived experiences regarding generational preferences in digital sales interactions. A detailed account of the research methodology, including the sampling strategy and data analysis process, is provided in Chapter 3.

1.8 Chapter layout

Table 1: Chapter Layout

Chapter:	Heading:	Description:
Chapter 1	Introduction and Scope of the Research	This chapter provides an overview of the subject matter, with a particular focus on the problem statement and the background of the issue, introduction of the objectives and questions of the investigation and definition of key terms.
Chapter 2	Literature review	This chapter focuses on the clarification of all concepts that are relevant to the study, as well as a thorough examination of the existing literature that is directly relevant to the research topic.
Chapter 3	The research design and methodology	This chapter provides a comprehensive overview of the research methodology, data collection and analysis, as well as the reliability of the measuring instruments and the relevant ethical considerations.
Chapter 4	Research findings	This chapter details the findings of the research endeavour.
Chapter 5	Discussion of findings, conclusions and recommendations	This chapter provides an analysis and interpretation of the research findings, as well as recommendations based on the interpretations. Lastly, suggestions for future research are considered.

Source: Own compilation

1.9 Chapter summary

This first chapter laid the foundation for the entire study, providing the broader context of the study, namely, the first industrial revolution and the accelerated adoption of DSI in the competitive, post-pandemic EdTech sector. The chapter then focussed on and defined the research problem as the lack of understanding around the influence of generational

preferences in digital sales engagement between sales professionals and educators. The research objectives and questions that guided the study were then outlined. Finally, by defining the study's key terms and providing an introduction to the research methodology, this chapter has established a comprehensive roadmap for the research that follows. The following chapter aims to critically review existing literature regarding generational preferences and digital sales engagement, thereby placing the research problem within current academic debates and identifying key gaps in the field.

2 LITERATURE REVIEW

2.1 Chapter introduction

The literature review offers a comprehensive examination and interpretation of previously published work relevant to the specific research topic (Creswell & Creswell, 2018:79). It aims to provide an overview of what is known, identify gaps, and provide context for a new study (Creswell & Creswell, 2018:79). To achieve this, the literature review has been structured into key sections. Firstly, the literature is examined through the lens of the growth and nature of the global and South African EdTech markets. Secondly, the study explores the emergence of DSI in modern sales, and the subsequent sections provide an understanding of the foundational theories related to generational differences in technology adoption across various industries, including education. This review provides the literature in the format of a final synthesis that connects these distinct fields, highlighting the research gap identified in Chapter 1 and thereby reinforcing the rationale for the study.

2.2 The EdTech industry and the rise of digital sales

Having contextualised this research to the EdTech sector of South Africa, it was important to gain both a global and local perspective of the current and forecasted market trends. This analysis establishes why competitive differentiation through tailored DSI is no longer a luxury, but a strategic necessity, thereby reinforcing the importance of understanding generational preferences of educators in the EdTech market.

2.2.1 The Global EdTech Landscape

As established in chapter 1, the global EdTech industry is experiencing rapid growth, driven primarily by the advancement of digital tools and catalysed by the Covid-19 pandemic. As previously stated, the move from in-classroom to blended and pure online classroom instruction has also increased he global demand for EdTech (Bukina *et al.*, 2023:265). This rapid expansion and high valuations of the EdTech market signal an intensely competitive environment. Consequently, for EdTech companies to achieve a competitive advantage, their sales professionals must adopt more sophisticated and

targeted strategies, moving beyond a one-size-fits-all approach to DSI. This underscores the strategic importance of understanding nuanced client preferences, such as those potentially influenced by generational differences.

Having established the growth factor for the EdTech industry, the specific reasons for this growth were examined. Tools that promote interaction and collaboration among students and teachers, such as Learning Management Systems (LMS) like Moodle, adaptive learning platforms, discussion forums, online chats, and shared spaces, have grown in popularity (Anghelo *et al.*, 2023:260). This was supported by the research done by Dancsa *et al.* (2023:290), confirming the accelerated adoption of online digital tools in education due to the pandemic. Furthermore, educational resources such as interactive videos, instructional games, and online evaluations improved student engagement and motivation and were identified as instruments to enrich the teaching-learning process as a whole (Anghelo *et al.*, 2023:260). It was, therefore, concluded that the initial rise or expansion of the market was prompted by the need for a solution due to challenges caused by Covid-19. The pandemic was a catalyst, however, with the continuation of technological advancement the CAGR growth is projected to expand until at least 2030.

The digital evolution of this market has two main implications for sales professionals, which forms the basis of this study. Firstly, educators are no longer passive recipients of the EdTech offering since their daily use of digital tools has created a more technologically experienced and discerning educator who is looking for specific tools to enhance the classroom experience (Anghelo *et al.*, 2023:260) This shift from being a passive to an active user and possible customer necessitates sales professionals to adopt a more sophisticated sales approach that moves beyond simple product presentation and understands the nuances of how to communicate with educators in an effective manner. Secondly, the very nature of these digital products and the global scale thereof, combined with the competitive nature in the EdTech market, means that DSI has become the primary, default mode of engagement as it is enabled by the technological advancement of the digital tools implemented by EdTech companies in schools (Anghelo *et al.*, 2023:260). This shift to remote, screen-to-screen interfaces has created a new sales landscape where DSI is the standard.

Therefore, this new reality frames the study's focus on DSI effectiveness and the critical, yet unexplored, role of educator preferences. The widespread adoption of diverse digital tools underscores the importance for sales professionals to tailor their DSI approach to align the communication styles of educators, which are potentially influenced by factors such as their generational background.

2.2.2 The adoption of EdTech in South Africa

The adoption of EdTech in South Africa is shaped by a unique set of socioeconomic and infrastructural challenges, which creates a highly complex landscape for sales professionals when utilising DSI. One of the primary factors is access to technical resources, which remain a significant barrier, particularly in rural areas where infrastructure such as internet connectivity and electricity is often lacking (Hart, 2023:12). This lack of access was identified as a first-order barrier to the use of educational technology, particularly in disadvantaged communities (Hart & Laher, 2015:2). The disadvantaged communities were mostly located in rural areas due to the disparity in resource availability between urban and rural areas, as schools in better-resourced areas were more capable of managing the shift to digital learning environments (Feldman & Czerniewicz, 2023:47). This disparity influences teachers' perception of the adoption of EdTech, as the perceived usefulness of technology is a strong predictor of teachers' attitudes towards its integration. Teachers who found the use of EdTech to enhance their teaching and learning were more likely to adopt it in their classrooms (Hart, 2023:12).

However, there is a generational gap in attitudes towards technology, with older educators often showing resistance due to anxiety or difficulty in reconciling ICT with their subject matter (Padayachee, 2017:55–56). Many older teachers are accustomed to traditional teaching methods and feel overwhelmed by the rapid pace of technological change (Padayachee, 2017:55–56). Although the research reported by Padayachee (2017:55) found evidence of the perception among different generational cohorts regarding the usage of ICT, it was argued that gaining greater insights about ICT usage in this context would help inform policy and produce better guidelines to aid teachers in using ICT in the classroom. This highlights the need for targeted training and support to align teacher attitudes with the goals of EdTech integration. This pedagogical resistance is a strong indicator of their likely communication preferences; a sales professional must

take into consideration that an educator hesitant to use ICT for teaching may also be unreceptive to a complex digital sales pitch, thus influencing the choice of DSI channel.

2.2.3 The shift to DSI

Having established the EdTech sector's market size and trends, there was evidence of a shift post-Covid. This raises the question of how this changing market was met with changes in sales interaction and the specific role DSI had to play. Technological advancements, accelerated by the effects of the COVID-19 pandemic, had dramatically reshaped the landscape of DSI. It is important to note that sales were being significantly impacted by AI and machine learning (Syam & Sharma, 2018:140). This change in sales with the advancement of technology was also witnessed upon the introduction of the telephone which initially brought new opportunities and challenges to the industry. Sales professionals face a unique set of opportunities and difficulties as a result of the development of AI, machine learning, and DSI tools, necessitating adjustments to the way sales plans are developed (Syam & Sharma, 2018:140).

In a study done by Mandal (2022:5), it was found that the Internet empowers customers by giving them unprecedented access to information and control over the buying process, therefore, influencing the interaction between buyer and seller. Supplementing this statement was the finding of Wait (2019:1) that suggested the move from traditional brick-and-mortar to online purchasing was due to innovations in technology as well as an extremely competitive environment. Many direct selling organisations had to supplement their traditional direct selling channel with an online selling channel that used the unique traits and capabilities of direct selling to set it apart from other retail channels (Wait, 2019:1). The traditional method of in-person selling emphasised face-to-face connection and relationship-building, whereas the online channel in sales, which was considered impersonal, had grown in popularity and could be viewed as a disruptive development (Wait, 2019:1). Furthermore, the increasing prevalence of buyer-seller communications conducted remotely through screen-to-screen interfaces rather than face-to-face interactions contributes to Wait (2019:1)'s findings, demonstrating that DSI could be considered to be the prevailing interaction between customers and sales professionals (Bharadwaj & Shipley, 2020:108).

DSI can be applied to a wide variety of business sectors and industries, but while these new technologies can lead to increased efficiency, they also introduce complexities, particularly concerning the human element of sales Alavi and Habel (2021). In this context, maintaining true human connections while utilising DSI is critical for developing trust and long-term customer relationships. Despite the advances in sales, the effectiveness of salesperson communication in DSI is not yet fully understood in many industries (Bharadwaj & Shipley, 2020:109). Although there is a wealth of research on the introduction of technology in sales, the question of how effectively these tools are used remain underexplored. Both Wait (2019:2) and Chabalala *et al.* (2024:25) highlighted that relatively few studies have examined the impact of adopting new digital tools on sales performance.

2.3 Generational cohort theory and technology adoption

Having established the market context, the theoretical framework that underpins this study is now introduced. Generational cohort theory provides the lens through which potential differences in educators' technology adoption and communication preferences can be understood. This section will first provide an overview of the theory itself before reviewing existing literature that demonstrates how generational attitudes towards technology vary, generally and in the specific context of South African EdTech.

2.3.1 An overview of generational cohort theory

A generational cohort is defined as a group of individuals born around the same time who have experienced similar social events and life experiences, which shape their attitudes and behaviours (Nwobodo & Weissmann, 2023:47). Furthermore, different generations have distinct expectations and views that have been shaped by the socioeconomic environments in which they grew up (Bilgihan *et al.*, 2016:110). This implies that the historical and cultural events that occurred throughout their formative years had a substantial impact on their values and behaviour (Bilgihan *et al.*, 2016:110).

This cohort theory provides a conceptual foundation for the study as it is based on the premise that cohorts share formative experiences, for example, baby boomers being less

technological driven as millennials. This can be attributed to the fact that in the formative years baby boomers did not grow up in a technological progressive environment. Adopting this theory may influence the perceptions of EdTech sales professionals as to how educators from different generations receive digital sales interactions. However, this theory is not without its limitations as it can be seen as an oversimplification of the age groups. As this study will explore, generational traits can be shaped as much by an individual's immediate context and personal technology exposure as by their age cohort. For example, an educator's access to resources and their personal view on technology may be more powerful drivers of their perception to EdTech in the classroom rather than their generational cohort. This concept is central to the research question.

A wide range of acknowledged generational frameworks or theories exist, however, this study adopted an adjusted birth year range to align with the South African educational context and participant demographics. This adjustment considers slower internet penetration and later exposure to digital tools compared to other Western contexts (Van Der Linde, 2019:10). However, another framework that was noted is the Strauss-Howe generational theory. It emphasised the historical context that influenced the values and attitudes of each generation, suggesting that these cycles repeat every 80-100 years (Andralojć, 2024:8) The theory has been criticised for its lack of empirical evidence and for generalised traits across entire generations, which lead to oversimplification (Andralojć, 2024:8). The framework was not considered for this study due to its oversimplification and lack of consideration for the socio-economic factors of South Africa.

2.3.2 Generational Traits as Predictors of DSI Preferences

While literature on DSI preferences among educators is scarce, a review of broader consumer and social behaviour research reveals underlying generational traits that provide a valuable predictive context.

When assessing consumer behaviour, it was noted by Kamenidou *et al.* (2019:2) that generational differences extend to attitudes and purchasing decisions. For example, Baby Boomers and Generation X are often characterised by their brand loyalty and preference for quality and style, which are crucial factors in industries such as footwear and luxury goods (Ruixia & Chein, 2019:74). On the other hand, Millennials, are more likely to

prioritise social conformity and economic factors (Abraham & Harrington, 2015:52). Millennials are frequently impacted by social groups and group norms, which influence their judgements on what to buy in categories such as homes, cars, and fashion (Abraham & Harrington, 2015:52). These underlying consumer values can predict communication preferences. The preference for quality and loyalty among older cohorts suggests they may value trust and established processes, making them more receptive to formal, direct DSI channels such as a structured email or a phone call. Conversely, the Millennial reliance on social-proving and peer influence suggests that they may be more responsive to informal, conversational, and immediate DSI channels such as WhatsApp, which mimic peer-to-peer interactions.

In a global and political context, these distinctions also appear. In emerging markets, generational cohorts may differ from Western labels, as seen in Malaysia, where distinct cohorts are identified based on local historical events (Ting *et al.*, 2015:772). These generational distinctions also impact entrepreneurial activities, with different cohorts employing varied strategies and resources to overcome business challenges (Kariv *et al.*, 2018:433). For instance, Baby Boomers are often characterised by their independence and optimism, while Generation X is seen as more cynical and pessimistic, and Millennials and Generation Z are noted for their confidence and technological savviness (Twenge, 2023:212).

Political views among generational cohorts were studied by Ahlfeldt *et al.* (2022:2), who found a significant contrast in views between the cohorts. This study reported that older generations prefer representatives who serve as trustees, which indicate that people favour politicians who make judgements based on their discretion and competence rather than strictly following their voters' instant wishes (Ahlfeldt *et al.*, 2022:2). In contrast, younger generations are more likely to support representatives, who are expected to represent the direct demands of their electorate (Ahlfeldt *et al.*, 2022:2). This movement shows a change in democratic engagement, as younger people want greater direct control over political decisions (Ahlfeldt *et al.*, 2022:2). This reveals a difference in attitudes toward authority and communication. The preference for a ‘trustee’ model suggests older cohorts may respond well to an authoritative, expert-led sales interaction, such as a formal online demonstration or a call where the salesperson provides clear, expert guidance. The desire for direct representation suggests younger cohorts may

prefer a more collaborative and responsive DSI experience, valuing immediate feedback and conversational engagement through instant messaging.

Within the specific context of EdTech adoption in South Africa, a review of literature revealed similar generational patterns. A study by Padayachee (2017:77) found that more mature educators often show initial resistance to integrating ICT into their teaching. The primary reasons for this resistance are a reliance on traditional teaching methods and a lack of trust in technology. However, the study also noted that once the benefits were recognised, these educators' attitudes towards technology improved (Padayachee, 2017:77). These findings are confirmed in a study by Mathipa and Mukhari (2014:1218) which explored the integration of ICT in schools. Mathipa and Mukhari (2014:1218) highlighted that the older generation of teachers did not use ICT in their daily lives, which is a significant barrier to ICT integration in teaching and learning. The research interviews of Mathipa and Mukhari (2014:1218) revealed that older teachers are nervous and fearful about adopting ICT for teaching and learning because they think it is not suited to them. This is still evident today as a recent study by Mlambo (2023:271) concluded that age is a large factor that contributes to teachers' resistance to using technology. All three of these studies clearly demonstrate that younger educators show a greater propensity to adapt and use new technologies within the context of learning, compared to their older counterparts.

An educator's level of comfort with using technology for pedagogical purposes is a strong indicator of their likely preference for DSI. The observed resistance to ICT among older educators suggests that a sales professional may find greater success using lower-tech, traditional DSI channels like phone calls and simple emails. Conversely, the willingness of younger educators to embrace new classroom technologies indicate that they are likely to be receptive to a wider and more modern range of DSI, including interactive video meetings and newer messaging platforms.

2.4 Synthesis and identified research gap

The literature review has established two key realities. First, the rapid growth and intense competition within the global and South African EdTech markets have made effective DSI

a strategic necessity for achieving competitive differentiation. Secondly, in other industries, such as ICT, an educator's generational background is a significant factor in shaping their attitudes and proficiency with technology (Mathipa & Mukhari, 2014:1218; Mlambo, 2023:271; Padayachee, 2017:77). The literature consistently demonstrates that different generational cohorts exhibit distinct attitudes, values, and actions throughout consumer behaviour and technological adoption in education and social environments. This trend was particularly evident in the context of how educators embrace technology, as studies indicate that instructors' willingness and approach to integrating ICT into their pedagogy are shaped by their generational background (Mathipa & Mukhari, 2014:1218; Mlambo, 2023:271; Padayachee, 2017:77).

A thorough examination of the literature uncovered a significant gap in the context of the fast-expanding and increasingly competitive EdTech sector in South Africa: while the need for effective DSI is clear, and the influence of generation on technology use is well-documented, there is a distinct lack of research at the intersection of these two fields. There are no known existing studies that specifically investigated how educators' generational preferences manifest within a digital sales context from the perspective of EdTech professionals. This gap leaves sales teams to operate on assumption rather than evidence, potentially leading to an ineffective, "one-size-fits-all" approach that is not well suited to today's competitive market. This study is, therefore, designed to provide the first exploratory insights into this crucial area. Comprehending these DSI preferences is not only an academic endeavour; it is recognised as a crucial element for attaining the competitive distinction and sales efficacy necessary in the modern EdTech industry.

2.5 Chapter summary

This chapter provided a comprehensive review of the literature relevant to the research problem. It began by defining the key terms central to the study, such as the EdTech industry, Digital Sales Interaction (DSI), and generational cohorts. The review then established the market context by examining the rapid growth of the global and South African EdTech sectors, detailing the industry-wide shift from traditional sales methods to DSI. Subsequently, the chapter built the theoretical framework for the study by exploring generational cohort theory and reviewing literature that highlighted differing generational

attitudes towards technology adoption. The chapter concluded by synthesising these findings to confirm the specific research gap: a lack of understanding regarding educators' generational preferences within the DSI context, particularly from the perspective of sales professionals who navigate this competitive landscape. Having established the theoretical context for the study, the following chapter details the research design and methodology that were employed to address the research questions.

3 RESEARCH METHODOLOGY

3.1 Chapter introduction

Having established the research topic, research question, and literature review in previous chapters, this chapter focuses on the research design and methods used to answer the research questions. This study utilised a qualitative research approach to investigate how sales professionals in the EdTech sector in South Africa perceive generational preferences in educators' choices of DSI.

The chapter starts by defining the research philosophical foundation of the research, discussing the research paradigm and the inductive research approach used to drive the inquiry, as well as specifying the qualitative research design and academic support adopted for this study. The next section provides detail around the practical steps, such as population identification and sampling strategy, data collection techniques utilising semi-structured interviews, and the content thematic analysis method. The chapter then concludes by describing the steps taken to ensure the reliability of the findings and the ethical considerations adhered to throughout the duration of the study.

3.2 Research paradigm

According to Saunders *et al.* (2019:140), a research paradigm is essentially a set of basic and taken-for-granted assumptions that underwrite the frame of reference, mode of theorising, and ways of working in which a group operates. It provides a foundational framework for conducting research and understanding the world. The foundational framework for this study adopted both an interpretivist and constructivist paradigm.

The interpretivist framework suggests that all human knowledge is contextual and constructed through language and shared meanings and it acknowledges that both the researcher and the participants are influenced by their respective worlds and experiences (Peat *et al.*, 2019:7). This framework aligns with the qualitative design of this research, making it suitable for understanding the diverse, context-specific perceptions of sales professionals in the South African EdTech sector. It is important to note that since generational preference is not an objective fact but a perceived reality, interpretivism

provides the framework for exploring these individual experiences and diverse perspectives within the unique South African EdTech sector. Complementing the interpretivist framework was the constructivist paradigm, which is grounded in the belief that knowledge is co-constructed by the researcher and participants (Burns *et al.*, 2022:6). This view was particularly relevant in the use of semi-structured interviews, as it recognises that a sales professional's understanding of generational preferences is not simply reported, but is actively shaped and articulated during the research process itself.

The combination of frameworks aligned with the study's objectives perfectly, as it considered the subjective, situational reality of sales professionals with the constructivist principle that knowledge about generational perceptions was co-constructed through the interactions between the researcher and the participants.

3.3 Research approach

In accordance with the research design and paradigm, the study followed an inductive approach. Typically, qualitative research is associated with an inductive approach, which involves generating insights and understanding from observations, allowing patterns and meanings to emerge from the data collected, rather than testing predefined hypotheses and theories (Saunders *et al.*, 2019:173)

This approach was particularly appropriate for exploring sales professionals' perceptions of generational differences in DSI as it provided the freedom to investigate the subjective and co-constructed perceptions of sales professionals without being constrained by existing theoretical frameworks. The inductive approach was essential in allowing patterns and meanings to emerge organically from the participants lived experiences, ensuring the findings were grounded in their reality without being constrained by preconceived notions.

To facilitate this, a narrative inquiry strategy was employed by using open-ended questions during a semi-structured interview process to encourage participants to share detailed accounts of their experiences with educators. This ensured that any data derived from the participants reflected their authentic experiences and interpretations. This

method was particularly effective as the researcher explored how perceptions were constructed around specific topics, such as EdTech sales professionals' perceptions of the effect of age among school educators using DSI. This inductive, exploratory stance directly informed the selection of the qualitative research design, which is detailed in the following section.

3.4 Research design

The study employed a qualitative research design while utilising semi-structured interviews to collect data, enabling a flexible approach during data collection and an in-depth exploration of the subjective experiences and rich perspectives of participants (Saunders *et al*., 2019:374). As the focus was to maintain a balance between capturing participants' understandings and perspectives and guarding against veering off topic, the semi-structured interview was identified as the most suitable option. This approach allowed for flexibility in questioning and participant-led insight and facilitated an understanding of the depth of participants' experiences in the EdTech sector (Creswell & Creswell, 2018:301; Saunders *et al.*, 2019:156). This allowed the researcher to ask a core set of pre-defined questions to ensure consistency across interviews, while also providing the flexibility to probe deeper into participants' responses and explore emergent themes.

One methodological limitation that is inherent to this study design is positionality. The researcher's role as a sales professional and insider to the EdTech industry presents a key challenge. This positionality, while providing valuable access and contextual understanding, also introduces the risk of subjectivity and potential interviewer bias. Another consideration is the nature of the findings of this specific qualitative design, in that they are context specific and not intended for statistical generalisation. The goal of this study is to achieve analytical transferability allowing the readers to assess the relevance to their own positionality and other similar contexts.

To mitigate this design challenge and to strengthen the credibility of the study, several procedures were implemented to counter subjectivity. A data analysis design was implemented that included all interpretations of the findings to ensure that the findings are systematically grounded in participant data and explicitly supported by verbatim

quotations. This ensures that the findings reflect the participants' views, not the researchers. Moreover, the coding process was systematic, managed via ATLAS.ti, to create a clear and traceable audit trail from the raw data to the final themes.

3.5 Population and sampling

The following section focuses on the target population for the study, the sampling method used to select the participants, specific inclusion and exclusion criteria identified, and the final sample size.

3.5.1 Target population

Leedy and Ormrod (2014:20) defined the study population as a group of people who share specified traits and from whom a stratified sample is selected to determine the parameters or characteristics of said population. The target population for this study consisted of employed sales professionals working for an EdTech entity in South Africa. As noted by Williamson and Johanson (2017:56), the alignment between the population and the research question was essential for producing meaningful insights. Therefore, the population was carefully selected to reflect the core focus and aim of the research and to facilitate a detailed analysis of the perceptions amongst sales professionals regarding school educators' preference for DSI and how generational differences might impact it. Specific inclusion and exclusion criteria, detailed later, guided the identification of participants that ensured relevance to the South African EdTech sector.

3.5.2 Sample method

A sample is identified as a subset of the larger population, used to draw conclusions about the entire group without having to study every single member of the population (Shorten & Moorley, 2014:32).

In this instance, the research utilised a combination of non-probability purposive and convenience sampling, which are commonly used in qualitative research methods where the emphasis is placed on exploring the lived experiences of participants (Peat *et al.*, 2019:8). Purposive sampling involves the deliberate selection of participants based on specific traits or experiences that align with the research question (Creswell & Creswell,

2018:301). This method was not random but rather strategic and intentional, ensuring that the sample provided rich, relevant data (Creswell & Creswell, 2018:301).

Convenience sampling involved selecting a sample from a group that is easily accessible to the researcher (Andrade, 2021:86). Although this method was fair to pursue under time constraints, it may not be as effective given that convenience sampling is inherently prone to bias (Andrade, 2021:86). However, combined with a purposive strategy, the convenience sampling method was improved in terms of structure and rigour. Convenience sampling was justified given that the population was easily accessible via the researcher's position in the EdTech environment as a sales professional himself. This strategy was also chosen to ensure that the population adhered to the exclusion and inclusion criteria. The population sample was drawn from the researcher's professional network which results in a population sample that was widespread across South Africa and ranged from individuals in smaller EdTech companies to large-scale companies. This approach was used to deliberately select participants based on their specific experience as EdTech sales professionals, ensuring that the sample provided rich and relevant data. This experience included EdTech sales professionals who interact with school educators only, not higher education or corporate training centres. It is also important to note that EdTech sales professionals can provide comparative perspectives due to their interactions with a wide range of educators from different generational cohorts, which a single educator could not offer.

It is noted that the combination of convenience sampling and purposive sampling can be prone to researcher findings being biased (Andrade, 2021:86). However, the hybrid purposive-convenience sampling approach was a pragmatic necessity, given the niche and geographical dispersion of the target population. Considering the researcher's professional role within the EdTech industry, a network of potential participants was readily accessible. This provided a practical and time-efficient starting point for recruitment. However, to mitigate the potential biases of relying solely on convenience, purposive sampling was also introduced. In qualitative research, heterogeneous samples are often selected through purposeful sampling methods, which aim to include a variety of perspectives relevant to the research question (Benoot *et al.*, 2016:12) This approach ensured that the sample reflected the diversity of the population being studied. The use of certain demographic indicators, such as working experience in the EdTech industry,

age and level of education was considered to prevent bias originating from convenience sampling and to include a variety of perspectives. In other words, the study was heterogeneous, using the researcher's discretion to select individuals with varied demographic qualities from within the EdTech community to give maximum variance in the data obtained (Benoot *et al.*, 2016:12).

3.5.3 Inclusion and exclusion criteria

Inclusion and exclusion criteria are specific features that either permit or disqualify participants from engaging in the research study.

The inclusion criteria were as follows:

- EdTech sales professionals currently employed in the South African EdTech sector.
- EdTech sales professionals actively working within a sales role to ensure that they understand the dynamics of a buyer-seller relationship.
- Participants who actively utilise DSI, including email, WhatsApp, Zoom/Teams or LMS-based demonstrations, as a primary communication tool with school educators
- EdTech sales professionals employed by companies legally owned and operating within the borders of the Republic of South Africa, with a record of selling to South African schools for at least five years.
- EdTech sales professionals with a minimum of a year’s experience in the EdTech sector.

Exclusion criteria were as follows:

- Any EdTech firm that did not directly sell to school educational customers.
- Sales professionals not currently working in the EdTech sector.
- EdTech employees in non-sales roles (for instance, product developers, administrators, or marketers).
- EdTech sales professionals who do not engage with school educators (for instance, those working only with corporate or higher education clients).
- EdTech sales professionals with less than one year’s experience.

3.5.4 Sample size

The concept of sample size in non-probability sampling is complex and dependent on the research questions and the amount of data recorded to meet objectives, particularly in qualitative research using an interview.

The final sample size for this study consisted of 11 participants. This is well within the recommended research range of 5 to 25 interviews, as suggested by Saunders *et al*. (2007:226), with the final number ultimately having been determined by the principle of data saturation. Data saturation is achieved when gathering additional data no longer yields new information or insights, and further coding is not feasible (McLeod, 2024:12). For this study, saturation was considered to have been reached when two consecutive interviews yielded no new major codes or themes related to the research questions. After the ninth interview, it was observed that the core concepts were recurring, and the tenth and eleventh interviews confirmed this pattern, providing a strong indication that a sufficient depth of data had been collected to meet the study's objectives.

3.6 Data collection

The data collection method for this study involved a series of individual, semi-structured interviews conducted by the researcher with each participant via an online video-calling platform called Google Meet. The main language used during these 40-to-60-minute interviews where English with all participants being able to fluently converse in this language to effectively answer all questions. This method was chosen to facilitate in-depth exploration of the topic while accommodating the geographical distribution of EdTech sales professionals across South Africa.

The process of contacting participants was systematic and adhered to strict ethical protocols. Gatekeeper approval was obtained from the CEOs of all participating companies by requesting their consent to interview the EdTech sales professionals within their organisation. Once company gatekeepers had provided their consent, participants were contacted via LinkedIn, email or telephone to request their participation and to schedule an interview at a mutually convenient time. Before each interview, participants were fully informed of the study's goals and assurance was offered that their responses

would remain confidential, at which point their formal informed consent was obtained (Refer Appendix A).

The interviews followed the semi-structured questionnaire developed for the study (Refer Appendix B). Initial questions were derived from the study's primary and secondary research questions, ensuring that each part of the inquiry was covered. These questions were then expanded based on key themes and gaps identified in the literature review. To ensure accuracy and to facilitate a detailed analysis, each interview was recorded using the video-calling application's function and subsequently transcribed verbatim to create the final data text for the study. The researcher complied with all procedures and policies as outlined in the Protection of Personal Information Act (POPIA) when contacting, questioning, and storing participants' data. This was essential as the study involved collecting and processing personal data from sales professionals, including professional opinions. The POPIA, which can be defined as the first comprehensive data-protection regulation established in South Africa Staunton and De Stadler (2019:232) ensures that such data is obtained with informed consent, stored securely, and used only for the stated research purpose, thereby protecting participants' privacy and safeguarding them against potential reputational or professional harm. Compliance with POPIA ensured that the study satisfied all legal obligations while upholding ethical standards of confidentiality, trust, and participant respect.

3.7 Data analysis

Treude (2024:2) mentioned that the data analysis of a qualitative study extends beyond mere data collection and that it involves a thorough and iterative process of coding and interpretation. Qualitative data analysis involves systematically categorising verbal or textual data to identify certain patterns (Dirsa *et al.*, 2022:32). This includes thematic analysis that focuses on identifying themes or patterns within the obtained data (McLeod, 2024:16).

The data gathered from the 11 semi-structured interviews were analysed using content thematic analysis, following the procedural steps for coding derived by Creswell and Creswell (2018:311–312), as detailed below.

Step 1: Data or transcripts were prepared and read through to get an overview of the responses.

Step 2: The process began by reading transcripts and creating themes or thoughts on the underlying meaning of the data in the margins.

Step 3: After all data had been thoroughly examined, a list of topics originating from the margins was created. Similar topics were then clustered together and put into columns.

Step 4: The list was revised, and the topics were organised as codes, identifying relevant text segments. This preliminary thematic analysis revealed new categories and codes.

Step 5: Topics were transformed into descriptive words, grouped based on their interrelationships, and the total list was reduced by grouping related topics.

Step 6: A final decision was made on the abbreviation for each category, and these codes were alphabetised.

Step 7: The data material belonging to each category was assembled together, and a preliminary analysis was performed.

Step 8: Finally, the results were interpreted, and where necessary, the data was recoded.

In keeping with the process outlined above, the recorded interviews were transcribed to text by the researcher, after which the researcher read through all transcripts to gain a general sense of the content. The formal analysis started by systematically working through the transcripts and coding the data, which involved organising segments of text into meaningful categories. The formal coding process was inductive and by using ATLAS.ti and open coding, segments of text from the transcripts were highlighted and initial codes were assigned. These first-cycle codes were often descriptive and adhered closely to the participants' own words. As this process continued utilising the constant comparison technique, codes were compared, refined and the analysis moved to a more interpretive phase. Related codes were then collated through group or family development within ATLAS.ti, where individual codes were categorized into logical clusters. These families formed the basis of potential themes, which were then reviewed and refined to identify patterns and relationships (Beñalet, 2024:86). This iterative

process of moving between the data, the codes, and the emergent themes continued until a coherent and well-supported thematic structure was developed. Finally, the developed themes were reviewed and refined to ensure that they directly addressed the study's research questions, resulting in the three core themes presented in Chapter 4.

3.8 Trustworthiness of the data

The most important factor to consider whenever data is being managed is its accuracy and truthfulness (Creswell & Creswell, 2018:147). The trustworthiness of the findings was established by adhering to the four criteria as outlined by Lincoln *et al*. (1985:880) which are credibility, transferability, dependability, and confirmability:

- Credibility: This refers to the confidence in the truth of the findings and ensuring that they accurately reflect the participants' perspectives. To achieve credibility, this study used a well-defined research design and a systematic, multi-step process for data analysis based on Creswell and Creswell (2018:311–312). Since all emerging themes are based directly on the exact words of participants, the results accurately reflect their perspectives.
- Transferability: As described by Lincoln *et al*. (1985:880) this refers to the degree to which the results may be applied to other situations or contexts. While the findings of this qualitative study were not intended to be generalised, transferability was supported by providing a rich, in-depth description of the research context and the participant demographics. This allows readers to make their own informed judgements about the relevance of the findings to their own specific contexts.
- Dependability: Lincoln *et al*. (1985:880) states that dependability ensures that the research process was logical, traceable, and could be followed by other researchers. Dependability was established in this study by clearly and thoroughly documenting the research methodology in this chapter Lincoln et al. (1985:880). The detailed description of the research design, sampling, data collection, and data analysis procedures creates a clear audit trail for the reader.
- Confirmability: This refers to the degree to which the findings were based on the participants' experiences and not the researcher's own biases (Lincoln *et al*.,1985:880). In addition to dependability, confirmability was achieved through the researcher's reflexivity. The researcher acknowledged his position within the

EdTech industry and remained mindful of potential biases throughout the data analysis and interpretation process, ensuring that all findings were derived directly from the data provided by the participants.

- Reflexivity: This refers to a formal process of critical self-reflection, wherein the researcher continuously examines their own social background, assumptions, positioning, and presence to understand how these factors influence the research process and its outcomes (Lincoln *et al*.,1985:880). Acknowledging his professional role as an "insider" within the EdTech industry, the researcher maintained a strict adherence to the systematic coding process and a focus on grounding all themes directly in the verbatim transcripts of the participants.

3.9 Ethical considerations

The ethical considerations within this study were a cornerstone of this research, as it involved the safety and protection of human participants. The ethical components of the research were considered in parallel with scientific integrity throughout the research process (Taquette & da Matta Souza, 2022:11). The researcher, therefore, constantly evaluated and adapted their behaviour throughout the research process to ensure ethical behaviour and research validity. For example, the researcher's positionality as a professional within the EdTech industry provided valuable access and contextual understanding, however, this also introduced the risk of potential bias which could influence data collection and analysis. This was actively managed through a commitment to reflexivity, as detailed in the previous section. The primary ethical consideration was the protection of participants from any potential reputational or professional harm.

The following steps were taken to ensure ethical participation and research:

1. Participants actively chose to participate in this study, and they were given the relevant information needed to make an informed decision. The primary ethical consideration was the focus on anonymity and privacy for each participant and their respective companies. Consequently, the researcher did not name or identify any of the companies or individuals who engaged in this research, and the research findings were presented in such a way that they could not be traced back to a specific

participant or business. This guaranteed that **respect and autonomy** prevailed throughout the study process.

2. The researcher took all reasonable precautions to assure beneficence and avoid non-maleficence during the study. This was done by guaranteeing strict **anonymity and confidentiality**, securing informed consent for voluntary participation, and ensuring secure data management. Benefice was found in the reflection of participants during interviews, providing actionable insights that could be of direct value to the participants' own professional field.
3. A **gatekeeper** process was undertaken with participating organisations, and **informed consent** was obtained from each participant. Consequently, the researcher obtained permission to contact the sales professionals, while ensuring that the necessary information was shared for participants to make an informed decision regarding their participation.
4. Proper **data management** ensured that recordings and transcriptions were kept in highly secured cloud storage, owned by the researcher.
5. The study's findings are set to be **disseminated** through the university's assigned and secure methods, such as uploading to an online archive while maintaining the confidentiality and identity of research participants.
6. There was no clear evidence of a **conflict of interest** in the execution of this research.
7. This study was **overseen and monitored** by a university-appointed study leader, and all **ethical regulations and guidelines** established by the North-West University were followed.

3.10 Chapter summary

This chapter offered a full overview of the research approach used in the study. It began by outlining the research's philosophical background, including the interpretivist and constructivist paradigms, as well as the inductive approach that led the inquiry. The chapter then described the qualitative study design and semi-structured interviews as the primary data collection method. The study's practical procedures were presented, including the defining of the target population and sampling strategy, the step-by-step data gathering process, and the content thematic analysis method used to analyse the

results. The chapter concluded by describing the steps taken to ensure the credibility of the findings, as well as the ethical considerations that protected the participants throughout the research process. The next chapter provides the study findings.

4 RESEARCH FINDINGS

4.1 Introduction

This chapter presents the findings based on the analysis of the semi-structured interviews which were conducted with EdTech sales professionals in South Africa. The results directly address the primary research question concerning how these professionals perceive generational differences in school educators' preferences regarding DSI. This objective was achieved by grouping the data into the three main themes that emerged from the thematic analysis. The first theme's focus was on the overall use of DSI by EdTech sales professionals, while exploring its perceived effectiveness and the significant challenges encountered. The second theme's focus was on the specific generational perceptions, held by EdTech sales professionals, regarding school educators' choice of DSI. The final theme focuses on the subsequent adaptation of sales professionals' sales strategies.

4.2 Demographic information

The sample was comprised of eleven participants with a wide range of experience, from newcomers with less than five years in the industry to seasoned veterans with a decade of experience. The participants represented both small and medium enterprises, with Table 2 depicting the labelling and biographical information of participants.

Table 2: Demographic Information

Participant Label	Age (Years)	Experience in EdTech Sales (Years)	Highest Education Level	Company Size (Employees)
P1	33	6-10	Bachelors	Small (0-30)
P2	41	6-10	Bachelors	Small (0-30)
P3	25	0-5	Honours	Medium (31-100)
P4	46	0-5	Bachelors	Small (0-30)
P5	29	0-5	Bachelors	Small (0-30)
P6	28	0-5	Matric	Small (0-30)

Participant Label	Age (Years)	Experience in EdTech Sales (Years)	Highest Education Level	Company Size (Employees)
P7	27	0-5	Bachelors	Small (0-30)
P8	52	6-10	Diploma	Medium (31-100)
P9	49	6-10	Bachelors	Medium (31-100)
P10	41	0-5	Matric	Medium (31-100)
P11	32	0-5	Matric	Medium (31-100)

Source: Own compilation

There was a slightly higher number of participants (n=6) representing a small-company (0-30 employees) compared to the participants (n=5) representing medium-sized companies (31-100 employees). Although there was not an exactly equal distribution, the sample is still representative of the population.

Notably, the sample has a relatively young participant age profile while still presenting varying stages of career experience ranging between 1 – 10 years. This indicates that the sample represents a good spread of career phases, thereby ensuring a balanced perspective on digital sales interactions.

4.3 Thematic analysis approach

The findings presented in the chapter were derived from the thematic analysis of the 11 semi-structured interviews. Thematic analysis can be described as a method used in qualitative research to identify, analyse and interpret data from participants into shared meaning or themes (McLeod, 2024:1). This process involved the researcher becoming familiar by rereading interview transcripts to gain an understanding of participants' responses. This was followed by generating initial codes to systematically label meaningful segments or quotes of data relevant to the research question. This process is repetitive in nature and codes are collated or split where needed. These codes were then clustered to generate initial themes, which represent broader patterns of meaning constructed by the researcher. Subsequently, these themes were critically reviewed against the coded data and the entire dataset to ensure that they were coherent and

accurately reflected the data. The analysis of the 11 transcripts resulted in the three core themes presented in the sections that follow.

4.4 Theme 1: Use of digital sales interactions

This section explores the participants' experiences and perceptions regarding the use of DSI in their professional sales roles in the EdTech sector. It begins with identifying the views of sales professionals regarding the most-used channels, then examines their perceived effectiveness of DSI and concludes by presenting the challenges sales professionals encounter when using these tools.

4.4.1 Most-used channels

The following findings and analysis detail the DSI tools participants rely on most, providing a clear hierarchy of tools used. While a variety of platforms were identified by participants, email stood out as the primary tool, followed by online meetings and WhatsApp, with phone calls serving more specific, secondary roles.

Email: Email was identified as the foundational and most-used DSI tool by most participants. Despite some limitations in effectiveness, it is considered to be the leading form of DSI by the EdTech sales professionals, valued for creating a documented record of conversations and providing flexibility. The following quotations affirms this notion of documentation record and flexibility:

> *“I find that those initial contacts via email works the best because they can then deal with it at their pace” - P8*

> *“So, emailing for me is something that's really important, because it does cover you […] regarding everything that you spoke about.”- P10*

Online Meeting & WhatsApp: Following email, participants ranked online meeting platforms and WhatsApp as their next most-used DSI tool. Online meetings were the preferred professional channel for in-depth demonstrations of their EdTech products or services, while WhatsApp was praised for its effectiveness in generating quick, informal

responses. The following confirms online meetings and WhatsApp as preferred DSI tool by sales professionals:

> *"The typical journey starts with emails and then hopefully an online meeting, typically using our own platform lesson space, otherwise a Google meet, or a Team or Zoom [meeting], and then we also do leverage WhatsApp" - P1*

The quotation below is evidence of how teachers respond quicker on WhatsApp:

> *"… WhatsApp is effective with educators, because when they're on school holidays, they're not always necessarily checking their email, [but do use WhatsApp more often]." – P9*

Telephone calls: This tool is also mentioned as a key element of the EdTech sales professional's DSI toolkit, as it is often used to initiate contact before following up with text-based DSI. It is also viewed as a personal touchpoint compared to email. The following response identifies phone call as key to the DSI toolkit:

> *"So, it's definitely my cell phone for making calls, emailing and then WhatsApp."- P10*

The evidence below indicates that a telephone call does provide a more personal touch to EdTech sales professionals' communication with educators:

> *"A phone call is the most effective because they [educators] like that personal touch" – P11*

These findings demonstrate that EdTech sales professionals focus on the purposeful use of DSI tools. The selection of these tools is not random, as email provides a formal audit trail, while WhatsApp, online meetings and phone calls are considered as tools to connect quickly, which instantaneously leads to better rapport when compared to emails. These findings already highlight the assertion by Wait (2019:1) that the use of DSI is considered impersonal compared to traditional relationship-building. The EdTech sales professional's strategic use of WhatsApp for informal, quick responses or phone calls as a more personal approach can be seen as a direct attempt to overcome this impersonality and to

add the human element of sales, an area that Alavi and Habel (2021:83) identified as lacking when using DSI.

4.4.2 Perceived effectiveness of DSI

This theme details the EdTech sales professionals' views of the effectiveness of DSI as a sales tool. The findings indicate that, although participants recognise the challenges elaborated on in Section 4.4.3, they collectively regard DSI as an effective and essential instrument for the three main reasons expanded upon below.

Efficiency and scale: The primary benefit identified by participants was the significant improvement in efficiency and scale made possible using DSI. They found that it enables them to digitally connect with a multitude of potential EdTech customers. Using DSI tools, participants reported to be able to send out more than the standard 20 manual emails a day and allowing them to effectively handle more conversations and support compared to in-person. The following evidence clearly reflects the increased efficacy and scale of DSI:

> *"Modern tools […] in the past you might only have been able to send 20 emails manually typed out per day. With modern tools you can ramp that up significantly. So, your efficiency becomes much greater and]…] the scale of your outbound communications increases substantially." – P1*

> *"So, by volume of interest I'm able to generate more. So ideally, the more conversations that are leading towards the sale that I'm having the better, right? So, with DSI, I'm able to generate a whole lot more compared to in person."- P7*

Geographical Reach: Following efficiency and scale, a key advantage identified by participants regarding the use of DSI was the ability to expand the geographical reach of contact, which allows sales professionals to connect with educators regardless of physical distance, from small rural towns to other countries. The evidence below indicates both rural and international reach:

“However, we're so fortunate because we can get to schools in small towns that I've never ever been to, but we can have an online meeting.” - P2

“I would say […] it's the connection, so you have a more instant connection. So, I can […] get clients in Botswana, for instance, because it's easy enough for me to have digital contact with them.”- P8

Communication Flexibility: The participants highlighted the value of communication flexibility, particularly the advantage of asynchronous tools for example WhatsApp and email. This is perceived by sales professionals as a key advantage of DSI, as they are able to respect the busy schedule of educators giving the space to respond to the information provided at a convenient time. Asynchronous tools also provide educators the space to digest the information provided by the sale professional about their EdTech offering, not putting them on the spot to respond immediately.

The finding below clearly states the provision of a delayed response to educators when text-based DSI is utilised by sales professionals:

“So your best ways to reach out to them and make sure that you're going to be seen are through email and through WhatsApp…because they will get to those [text-based communication] at some point.”. - P9

“When you're looking at DSI in the form of an email for example or a WhatsApp message you're giving the person enough time, breathing space, to look at what you've actually sent them and digest it so they can understand and then make a proper informed decision as opposed to just putting them on the spot and being in their face…”- P10

The analysis of the findings suggest that participants view DSI's effectiveness not as a mere convenience, but rather a strategic necessity for servicing the rapidly expanding EdTech market, as noted by Bukina *et al.* (2023:265). Having the sales tools to enable efficiency, reach and scale serves as a competitive advantage in an expanding market. Furthermore, the evidence that participants perceive communication flexibility as a key effective characteristic is crucial, as affirmed by Anghelo *et al*. (2023:260) that educators

are already using various digital forums and tools that compete for attention. Using asynchronous DSI, which allow communications to happen at the sales professional and client's pace, is a good way to provide flexibility and cater to busy schedules.

4.4.3 Challenges in DSI

Despite the benefits that contribute to the effectiveness of DSI, sales professionals still reported challenges when using DSI tools in the EdTech industry. These challenges include the impersonal nature of DSI and the resulting lack of engagement, which reinforces the strategic value of in-person meetings and diminishes the effectiveness of DSI.

Impersonal nature and difficulty building rapport: The primary challenge identified was the impersonal nature of DSI and being unable to utilise finer nuances or build rapport with people via text, with participants describing DSI as an impersonal tool that lacks human interaction. This makes it difficult to convey personality traits which is critical in the sales conversation or interaction. The digital challenge strips away the ability of non-verbal cues leaving sales professionals unable to read or interpret finer nuances of interaction. Below, a participant commented on the impersonal nature of DSI:

> *"I mean the first thing that comes to mind would be the relationship building. I think there's an impersonality or […] there's a kind of an impersonal thing that happens [when engaged in DSI]" – P1*

> *"I don't know what it is about DSI that you know, it just feels so impersonal." – P7*

The following quote emphasises the difficulty experienced in conveying personality through text and identifying non-verbal cues:

> *"It's the lack of human interaction because at the end of the day, […] sales are a personality thing, right? Once you send them an email or whatever, they just see a written text. They don't really know you. Personalities really don't shine from a sales email." – P5*

“Okay, as I said, […], it's the finer nuances of being able to read a person in-person versus being able to read a person online. – P9

Lack of engagement and technical hurdles: A second major challenge was the lack of engagement and response from educators. Participants described a "feedback block", where their digital outreach was often met with silence, making it difficult to advance the sales conversation. This is often compounded by technical errors or difficulties found in communication of DSI as the recipient might not receive the intended message, which damages the communication line and possible relationship. The following evidence notes the lack of response, leaving the sales process stalled:

“I mean, you can only send so much WhatsApp’s and so many emails, but if they don't respond, you can't really go further from there.” – P3

“…not always getting a response you would want I would say; […] just the struggle maybe to get hold of people.” – P11

A participant’s observation highlights evidence of messages not reaching the intended person, effectively stalling a conversation as a message might end up in the recipient’s spam folder:

“…like I just said, email is good, but another thing is it can go into a junk mail, and you can shoot out 10 of those emails to somebody and it's sitting in the junk mail, and you never get hold of them.” – P5

In-person Challenge: Despite the efficiency of DSI, all participants unanimously agreed that in-person meetings still hold unique and significant value, which challenges DSI as a tool. The primary value of in-person meetings, according to participants, lie in their power to build trust and establish legitimacy in a way that digital channels cannot replicate. This physical presence helps to overcome the impersonal nature of DSI, allowing educators to "put the face to the name." This enhanced trust reportedly leads to higher sales effectiveness, making is a more suitable tool to close sales quicker and achieving higher sales success. The

quotation below reflects how an in-person meeting legitimises an EdTech sales professional as a person and builds trust, compared to DSI:

"I think there's a lot of value in terms of trust building when it comes to in-person school visits or meeting people in person […] proving that you are a legitimate person and with legitimate business interests" – P1

"So, I would definitely say DSI is less effective than in-person, just because it builds trust …they can put the face to the name, to the sound." – P6

The following quotes affirm the role in-person engagements play in finding quicker success when closing deals with educators:

"I've done some in person [engagements] and I've done some online [engagements]. I've had a higher success rate with doing my in-person meetings than I have with doing my online meetings." – P9

"I do find my in-person engagements far easier to close a deal." – P4

The analysis of these concepts regarding the challenges of DSI directly links to the literature identified in the literature review and Alavi and Habel (2021:83)'s study that makes the assertion that digital tools introduce a complexity to the human element of sales. The challenge of DSI actively undermining trust causes sales professionals to lean into a hybrid model where in-person meetings are used to overcome the limitations of DSI. It is not only about trust, but also the technical barriers of DSI messaging not reaching its intended recipient. This correlates with the finding of Hart (2023:12) who identified technological barriers, particularly in rural areas where infrastructure such as internet connectivity and electricity is lacking, which may influence DSI by creating a barrier to communication and quick sales.

4.5 Theme 2: Generational perceptions

This section presents the findings on the perceptions of EdTech sales professionals regarding the influence of age on the choice of DSI among educators, by considering the three main cohorts, namely Baby Boomers, Generation X and Millennials.

4.5.1 Perceptions of Baby Boomers

The first generational cohort considered was the Baby Boomers (born 1950-1969). The most prominent perception among participants was that these educators are generally less technologically inclined and more resistant to adopting new digital tools, compared to their younger counterparts. This perceived resistance was most commonly encountered towards video conferencing, with Baby Boomers being more inclined towards telephone calls, emails or an in-person meeting. Email and phone calls can be identified as a traditional low-technology DSI channel, which are accessible and easier to manage for Baby Boomers; however, it is evident that this generation still prefers in-person engagement over low-technology DSI. The quotations below reflect the perception of Baby Boomers being less technologically advanced than other cohorts and confirming their preference for traditional low-technology DSI channels:

> *"because they, Baby Boomers don't adapt as easily to change"-P9*

> *"…so they're [Baby Boomer] not very clued up […] when it comes to using DSI at all or responding to you [using DSI]." – P10*

Participants observed a clear reluctance from Baby Boomers to engage with video platforms, but rather engage via email or phone calls:

> *"…Baby Boomers are less inclined to accept an online meeting and may be more inclined to accept a phone call or an in-person meeting." – P1*

> *"In terms of [choice of DSI] Baby Boomers [choose], phone calls all day, even email." – P5*

"So, I find that with the older generation, it is better to communicate via email. Just give them a little bit more insight about the product before you just try and set a meeting over a phone call." - P10

The quotations below provide evidence that Baby Boomers prefer to engage in in-person or face-to-face meetings rather than DSI:

"...the older generations are definitely opposed to and not much open to DSI." – P6

"[…Baby] Boomers prefer in-person meetings" – P9

This perceived preference and view of Baby Boomer as technologically resistant aligns well with the pedagogical ICT adoption view found in the literature review. Padayachee (2017:77) found that more mature educators often show initial resistance to integrating ICT into their teaching, which aligns with the participants' views that Baby Boomers don't adapt as easily to DSI changes, and is a real-world reflection of their resistance to integrating ICT. It also strongly supports the findings of Mlambo (2023:271) who identified age as a key factor that contributes to teachers' resistance to the adoption of technology. Furthermore, participants' emphasis on in-person meetings for building trust aligns with the broader consumer and social literature identified in the literature review. The preference for more formal face-to-face interactions aligns with the "trustee" model put forth by Ahlfeldt *et al.* (2022:2), which identifies the older generations' need for an expert-led conversation, built upon trust. Therefore, for the Baby Boomer cohort, a face-to-face meeting is likely perceived as a more legitimate and higher-quality sales interaction than an impersonal DSI.

In summary, EdTech sales professionals perceived the educators within the Baby Boomer cohort as a group that prioritises trust and traditional, formal means of communication. Their perceived resistance to technology and preference for in-person or low-technology contact creates a baseline for this study.

4.5.2 Perception of Generation X

The participants perceived Generation X (born 1970-1989) educators as a highly versatile and adaptable cohort. They were not perceived by sales professionals as having a very rigid preference, but rather as a group that was open to and proficient with a wide variety of DSI tools, comfortably operating in any digital environment. Generation X was found to be the most comfortable with text-based communication that allows for independent research, and they prefer sales professionals to provide details in writing. They would often request information in text format, leading to sales professionals having more success using email compared to in-person interactions. The following points to the adaptability of Generation X:

> *"Gen X's, […] are a lot more open to different platforms." – P2*

> *"Your Gen X's will do it either way. They're a […] lot more adaptable and can operate in either environment." – P9*

Participants also identified the preference of text-based communication for educators wanting to conduct independent research:

> *"And then your generation X […] prefer you [to] write it out. They'll respond [with], " Send me an email and then I'll get back to you" or "Send me all the information. I'll read it myself." – P5*

The comment below demonstrates the efficacy of email for advancing a sale with Generation X, compared to in-person meetings:

> *"I have found it's much easier to help a sale along with a Baby Boomer, if you're talking to them in their face [in-person], whereas the Generation X and the Millennials, it's probably easier to nudge the sale along […] over email." – P4*

These findings on Generation X align with the study by Twenge (2023:212) who identified the younger cohorts as having a greater technological savviness. They prefer to read content themselves and do their own research, which aligns with the social findings of

Ahlfeldt *et al.* (2022:2) that younger generations, compared to Baby Boomers, move away from the traditional authoritative trustee-based model and prefer independent information gathering. It is clear that participants frame Generation X as a versatile cohort perceived as technologically intuitive, but also comfortable with using traditional DSI channels, especially to generate information regarding EdTech offerings.

4.5.3 Perception of Millennials

Sales professionals' perceptions of Millennial (Born 1990-2000) educators are centred on their identity as digitally native and progressive thinkers. Millennials are open to change and new technology available in the market to increase their efficiency. This digital orientation translated into a strong preference for immediate and interactive DSI channels, specifically, online meetings and instant messaging platforms such as WhatsApp, which participants often find more effective for this cohort than email. EdTech sales professionals observed Millennials as the most technologically advanced, with great optimism for the use of new tools:

> *"...the Millennials once again, they [prefer] WhatsApp and actually seeing each other [over] a Google meet [online meeting] rather than email."- P3*

> *"I've probably seen the most progressive thinking in [the] Millennial [group]." - P4*

> *"...with the younger generation, in terms of preference, ideally, Google meets […] makes the best sense." – P7*

> *"...the younger folks are always keen, I guess, and optimistic as to what's new in the market, what's going to [do] better things for us, and they're just really engaging."- P10*

The following quote reiterates the findings that a quicker response can be expected from Millennials via instant messaging platforms:

"... [with] Millennials […], you probably wouldn't get email answers from them as easily as you would get [answers on instant messaging from them." – P8

The analysis of these concepts supports the perception of Millennials being the cohort who is most receptive to new technologies. Their progressive approach to DSI supports Twenge (2023:212) finding, which identified the younger cohorts as having a greater technological inclination. This preference for instant, peer-to-peer style communication reflects the social conformity and peer influence that Abraham and Harrington (2015:52) identified as characteristic of this generation.

The study shows that the Millennial educator cohort is defined by the participants as a digital-first, immediate, and interactive engagement group. In summary, the Millennial group is perceived by sales professionals as being fast and responsive to DSI, utilising modern, less formal channels.

4.5.4 Generational comparison summary

Synthesising the findings of this theme, each generational cohort has its distinct approach and DSI preference. These preferences range from the perceived technological resistance of Baby Boomers to the digital immersion with specific nuances of Generation X and Millennials. Table 3 consolidates and contrasts these insights in terms of the distinct DSI preferences, trust dynamics, and key challenges and observations that sales professionals perceive for each cohort. These differences, as depicted in Table 3, are based on the key insights derived from the responses and not the responses themselves.

Table 3: Generational Comparative Summary Table

Generation	Perceived DSI Preference	Trust & Relationship Dynamics	Challenges & Observations
Baby Boomers (1950-1969)	Traditional and low-tech preference.	Prefer formal engagements.	Technology-resistant
	DSI preference for email and phone calls.	Trust is paramount.	Perceived as less technologically inclined.
	Avoids video calls.	Proving sales legitimacy is key.	Slow to adapt to technological change and innovation.
	Main preference is for in-person meetings		
Generation X (1970-1989)	Versatile and Independent preference.	Prefer given autonomy to self-research before engaging.	Perceived as comfortable with both traditional and modern digital tools.
	Highly adaptable to all DSI channels.	Value product or service information.	Prefer to conduct independent research.
	Prefers formal text-based DSI like emails.	Trust is built by respecting their expertise.	
Millennials (1990-2000)	Digital-native cohort.	Interaction and relational preference.	Perceived for instant availability.
	Prefers immediate and interactive DSI channels.	Trust is built in being responsive to this cohort.	Identified as progressive cohort, constantly using newest tools.
	Strongly favours video calls and instant messaging over formal email.	Favour convenience and accessibility.	

Source: Researcher's own constructs

Table 3 highlights that the differences between cohorts are structured and based on a clear spectrum of technological adoption and communication preferences. On one end of the spectrum, the Baby Boomer cohort with perceived technology resistance showed a preference for in-person, trust-based interactions. Whereas on the other end of the spectrum, the Millennial cohort demonstrates a preference for immediate and interactive DSI channels. Generation X cohort acts as versatile bridge in between Baby Boomers and Generation X, who shows a preference for using DSI for independent research. These insights provide guidance to sales professionals around why and how they should

adapt their strategies for different generational groups. This sets the stage for the analysis of actual sales professionals' practices in the final theme.

4.6 Theme 3: Adaptation strategies by sales professionals

The final theme examines the practical implications of how EdTech sales professionals' perceptions of educators influence their sales strategies and how they adapt their strategies accordingly. These adaptions are in the form of channel choice, communication tone and balancing the use of efficient tools with connectivity while considering personality perceptions, educator context, and communication style.

4.6.1 Strategic disconnect

Despite clearly identifying generational preferences, most participants explicitly detail that they de-emphasise generation as a primary driver of their sales strategy. This finding reveals a significant disconnect between the participants' perception of generational patterns and their daily sales practices. The participating EdTech sales professionals provided two main reasons for this disconnect: firstly, they do not always know the person's age when utilising DSI and, secondly and more significantly, they found that there are more immediate factors that can be a reliable predictor of DSI preference rather than age, such as school context, economic status, timing of the year and personality. The following evidence demonstrates how sales professionals do not consider age in their sales strategy:

> *"I'll be honest, they haven't really influenced our […] strategy for sales at all." – P2*

> *"….it [age of educators] never really factors in [into our strategy] … we don't [adjust our strategy] based on generational cohorts, because we never really know who's going to receive our communication or at least [their] age." – P5*

Participants revealed that their strategies are adapted based on the environment and economic status of the school:

"…in my experience, it's way more to do with the circumstances and environment of that person." – P1

The findings also state that the personality of educators have a more immediate influence on DSI preference than age:

"So, I wouldn't necessarily say it's to their age group. I would say I would try and match their personalities." – P11

Lastly, the comments below indicate that timing of the DSI influences their strategy:

"You must understand the teacher's perspective. So, I think timing in terms of sales is very important. You must understand the term times." – P2

"Really, it's based on timing and the actual availability of the educator. – P9

This section demonstrates that, while sales professionals do acknowledge the generational differences of educators with regards to their DSI preference, they are realists, who find generational theory an insufficient tool in their sales strategies. This strategic disconnect clearly supports the view of oversimplification of the generational cohort theory. The participants' focus on an educator's circumstances or environment directly aligns with the finding of Hart (2023:12) who also identified South African contextual barriers, such as the shortage of resource availability in schools. This suggests that sales professionals have learned that an educator's available resources are a more reliable indicator of DSI preference than their age. The next section focuses on the practical implication of this finding in EdTech professionals' strategic approach to sales.

4.6.2 Practical strategies

This final section of the third theme focusses on the practical strategies that sales professionals apply in the EdTech industry. Having established a disconnect between sales professionals' strategy and DSI approach, participants demonstrated that their strategies are reactive, based on immediate tangible factors. The following immediate

tangible factors, identified by the participants, show how they apply their specific strategies to adapt their digital sales approaches to different generational preferences.

a) **Adapting to context:** The participants identified the educators' immediate context as the most significant factor influencing their adaptation of strategy. Participants noted that they adapt their sales approach by taking into consideration the school's economic factors such as internet connectivity and other resources. This signals a reactive approach, as the sales professional would adjust to the school's circumstances and the context of their educators when engaging in DSI. This is evidenced by the following quotations:

> *"Whatever the person responds to will be how I respond to them, and that's usually what determines […] how I actually respond to any person that I interact with" – P7*

> *"So, you don't really adjust it according to age [but] more towards the background and the context of the of the teacher themselves […] It's an economic factor [as it influences infrastructure and context]. - P9*

b) **Adapting to personality:** Similarly, the perceived personality of the educator, deduced from the initial conversation, would also play a larger role than age in determining strategy. The following suggests how sales professionals use a reactive approach to better connect with the educators, based on their personalities, rather than age:

> *"…if people are more introverted, they generally, I found, prefer DSI to an in-person [engagement] and […] vice versa where extroverts like to grab a beer or have an in-person meeting etc." – P1*

c) **Tactical customisation of tone:** While generational age does not drive the participants' sales strategies, they did confirm the use of minor tactical customisations of tone and formality based on age. This adaptation was most often described as a sign of respect for more mature educators, based on social norms. Sales professionals would hold a more formal or corporate tone with older educators,

whereas interactions younger generations would be more casual, as described by the quotations below:

> *"…there are kind of social contracts around respecting one's elders and you know how one greets or addresses or communicates with people of a certain generation…" – P1*

> *"…when I'm in communication with younger people, I tend to try and keep my messages shorter… [With] Millennial [and] Generation X, … I'm way more casual in my communications…" – P4*

> *"So, you do change how you approach them [older educators] …. And then someone that's like a Millennial; we're [sales professional and educator] are […] closer in age. So, the language is a bit more relaxed than with older generations, which is more corporate or formal. " – P5*

This focus on context describes a reactive strategy rather than proactive strategy, where sales professionals mirror the communication style initiated by the educator to ensure comfort and build rapport.

4.7 Summary of findings

The themes above have clearly identified how sales professionals' perceptions of DSI effectiveness directly inform how they interpret generational behaviours and shape the adaptation strategies they employ in the industry. This has revealed a complex and nuanced perspective of DSI in the South African EdTech sector which was predominately defined by a clear disconnect between sales professionals' perceptions and the practice or sales strategy they employ.

In response to the effectiveness of DSI and the challenges it brings, Theme 1 established that EdTech sales professionals consider DSI as an indispensable tool, providing crucial benefits that include efficiency and geographical reach in the EdTech sector. However, they also identified challenges associated due to the impersonal nature of DSI engagements, leading to difficulty in building rapport and trust with educators. The

consideration of reach, efficiency and trust building directly informed the generational perceptions, as detailed in Theme 2.

Baby Boomers are a more traditional and less technologically inclined cohort who prefer in-person, rather than less personal DSI methods. Participants identified challenges experienced with DSI when it came to building trust. Baby Boomers place huge importance on trust within the sales relationship, which emphasises the challenges around DSI impersonality for this generation. In contrast, Generation X and Millennials were viewed as digitally savvy and adaptable, receptive to a wide variety of modern tools. Participants labelled these generations as tech savvy, and there is an implication that they value DSI in a nuanced manner rather than holding a single preference. Generation X find DSI useful for the autonomy it presents to the user and the ability to transfer large amounts of information. Millennials value DSI for convenience and interaction, preferring immediate, conversational responses. The finding of Theme 3 in connection to the first two themes, identifies a disconnect of generational perception and the use thereof in sale professionals' strategies. Participants revealed a de-emphasis on the generational sales perception explored in Theme 2, but rather a reactive, context-first approach, prioritising an educator's immediate context, personality, and inbound communication style over their generational cohort. The findings suggested that only their tone of communication is influenced by the age of educators, based on the social contract established around respect for your elders.

Based on the findings, the overarching pattern that is identified is the strategic disconnect between the influences of generational perceptions as a sales strategy and the associated challenges that accompany the use of DSI in the strategy. The finding clearly establishes DSI as an indispensable tool for efficiency and scale but also highlights its impersonal nature that creates a trust deficit. This trust issue is the primary challenge for sales professionals in utilising DSI effectively. While sales professionals do hold clear, coherent perception for each generation, the findings show they largely abandon these profiles as a primary strategy with only a minor adjustment to tone. A cross-cutting insight emerging from the analysis is what can be described as a context-first orientation among EdTech sales professionals. Participants consistently emphasised that understanding the client's institutional environment, including resource constraints, digital readiness, and socio-economic realities, guided how they selected and used DSI channels. So, rather

than applying a uniform or generation-based strategy, sales professionals adapt their approach to align with the contextual realities of each school or educator group. These consolidated findings provide the foundation for the next chapter, which interprets their significance in relation to existing literature and discusses their practical implications for DSI in the EdTech sector.

5 DISCUSSIONS, CONCLUSION AND RECOMMENDATIONS

5.1 Chapter introduction

While Chapter 4 presented the empirical findings, this chapter integrates the findings, draws conclusions and unpacks implications. The practical and academic significance of the study is also presented. Finally, a set of recommendations is offered for both EdTech sales professionals and future researchers, while the inherent limitations of the study are acknowledged.

5.2 Discussion of findings

The following discussion includes the three main themes or findings that emerged from the study, namely, EdTech sales professionals' perceptions of the effectiveness of DSI, their generational perceptions of educators' engagement with DSI, and adaptation strategies utilised by sales professionals in response to these generational perceptions.

5.2.1 Sales professionals' perception of DSI

Theme 1's findings indicate that EdTech sales professionals operate in a dynamic and highly competitive market, which is shaped by rapid technological advancements and continual growth. This market growth, as observed by both GlobalData (2025) and Dancsa *et al*. (2023:290), translates into immense pressure for EdTech sales professionals to increase outreach and differentiate their approach. This makes the efficiency and reach of DSI not just a benefit, but a fundamental tool that cannot be ignored by sales professionals. The findings confirm that EdTech sales professionals experience an inherent tension between the efficiency offered by DSI and the challenges these tools create in building authentic client relationships. This study empirically validates the complexities identified by Alavi and Habel (2021:83) by showing how DSI's impersonal nature reduces the opportunity for personal engagement and the trust that typically develops through in-person interaction.

This tension creates a paradox based of the very tools needed for scale. This paradox related to the challenge of relational breadth and depth, refines the study done by Bharadwaj and Shipley (2020:109) who noted that DSI effectiveness is not yet fully understood. The study, therefore, clearly answers this by stating the challenge of trust

and rapport due to the impersonal nature of DSI. Furthermore, this finding extends the work of Wait (2019:2) by suggesting that the impersonal nature of DSI is not just a passive quality but an active barrier that likely contributes to the lack of responsiveness participants reported. The argument states that educators do not respond to the DSI efforts of sales professionals due to the lack of relational debt and not having a sense of obligation to do so. The implications of this paradox are that EdTech sales professionals must adopt a pragmatic approach by leveraging DSI for its productivity benefits while recognising that sustained success still relies on cultivating meaningful, trust-based relationships. These findings empirically support the literature, aligning with Alavi and Habel (2021:83) and Wait (2019:2) on the importance of building rapport. However, the findings also significantly extend this research by simply moving beyond acknowledging the importance of trust. It clearly demonstrates that participants directly link rapport to tangible sales outcomes, such as faster sales and longer sales relationships. This is a critical insight, as it reframes trust not just as a human element but as a key driver of sales effectiveness, highlighting the significant business risk that the impersonal nature of DSI presents.

It is, however, important to acknowledge the high value participants placed on in-person meetings, which is not interpreted as a rejection of DSI, but rather as a strategic solution to its well-documented limitations. This finding provides a direct, practical answer to the theoretical complexities raised by Alavi and Habel (2021:83). The participants' experience of having a higher success rate with in-person meetings demonstrate that actively deploying a face-to-face interaction to re-inject the human element lacking in DSI, is effective. This also supports Wait's (2019:1) argument that traditional, in-person engagement is superior for relationship-building, while also extending Wait's research by clearly finding results on how professionals strategically use it as a trust-building intervention to overcome DSI's impersonal nature. Consequently, it can be argued that for an EdTech sales professional to be successful they would have to operate within a flexible, hybrid model. Based on the findings, this hybrid model states the two opposing needs of sales professionals namely, the use DSI for the efficiency and scale required by the competitive, growing market while reserving in-person engagement for high-stakes moments that require a human element to build trust. This would mean that sales professionals in South Africa would have to constantly consider this trade-off and be able to evaluate which side of the hybrid model to deploy.

The findings of this analysis have two significant practical implications for EdTech companies. Firstly, it refines the literature on salesperson competencies stated by Bharadwaj & Shipley (2020:109) which suggests that the modern EdTech professional must be a dual-skilled operator, able to utilise DSI for scale and efficiency but also an empathetic, high-trust relationship builder. Secondly, it implies that for EdTech companies who use a DSI-only strategy, success would be limited. To successfully close deals at speed, companies must provide their sales teams with the flexibility, budget, and strategic mandate to employ this hybrid model, thereby empowering them to secure trust when DSI fails.

5.2.2 The generational perceptions of DSI

The discussion in this section addresses how EdTech sales professionals perceive the DSI preferences and behaviours of different generational cohorts, specifically Baby Boomers, Generation X, and Millennials. Understanding these perceived differences is essential, as they shape how sales professionals tailor their communication strategies and engagement approaches across digital platforms.

Firstly, the findings reveal that the Baby Boomer cohort is perceived as less technologically inclined and prefer traditional, low-tech channels which provides strong empirical support for the literature described in Chapter 2. This result is consistent with the finding of Padayachee (2017:77) who also noted the same initial resistance to integrating ICT among more mature educators. This resistance to adopt technology strengthen the arguments of both Mlambo (2023:271) and Mathipa & Mukhari (2014:1218) by showing that the technology resistance they identified in the classroom is not isolated to their teaching methods but also extends to their professional communication preferences. This is a critical insight, as it suggests that the resistance sales professionals encounter when communicating with Baby Boomer cohorts is not a simple sales objection. Rather it is found to be a distrust of the DSI channel itself, which increases the impact of the impersonal nature and trust deficit of DSI identified in Theme 1. An important issue emerges from these findings that states that an inherent aversion to technology among Baby Boomers exists. This is highlighted by the participants who reflected that this cohort, who weren't part of the tech boom, are

generally distrustful of the unknown and slow to accept the innovation and change DSI offer to the customer experience. This perceived struggle to accept innovation is critical. It suggests that if an educator is already uncomfortable with the product or service innovation being sold to them, they will be even more resistant to an unfamiliar DSI process. This is complemented by the political literature from Ahlfeldt *et al*. (2022:2), who found older generations prefer a trustees' model where they identify experts they can trust to make decisions on their behalf. This finding will have an implication to the primary sales goal of sales professionals who will focus on establishing a high level of trust with the Baby Boomer cohort using traditional DSI tools or using in-person conversations. The discovery that this group values face-to-face meetings to build trust and view a salesperson as a legitimate person, extends into the consumer behaviour literature of Ruixia & Chein (2019:74), which describes Baby Boomers as favouring quality and established procedures. This suggests that for Baby Boomers, the quality of the product or service is not the only convincing factor but rather the sales process. Sales professionals would need to be conscious of not only the product demonstration, but also the choice of buyer-seller communication platform. This means that for this cohort, the way sales professionals communicate is a sign of the seller's legitimacy, therefore, a face-to-face meeting shows a level of seriousness and quality that a quick digital message over DSI may not. This leads to sales professional's having to make the initial in-person visit before DSI can commence, supporting the concerns found in the study by Alavi and Habel (2021:83) indicating that the human element cannot be removed from the sales process.

In contrast to the findings of the Baby Boomer cohort, the Millennials and Generation X were found as being digitally native, flexible, and open to new DSI. This confirms the study of Twenge (2023:212) expressing that the younger cohorts have greater confidence and technological savviness compared to older generations. This can be attributed to the two cohorts having lived most of their lives in an era of digital advancements and being faced with constant innovative change from birth. However, there is a critical distinction found in the study between Millennials and Generation X which reveals they cannot be clustered together but rather have distinct approaches to DSI.

The analysis of these two distinct groups highlights the importance of autonomy for Generation X. The perception of Generation X preferring text-based communication from

the sales professional for independent research suggests they desire to be in an authoritative position before a sales conversation. This is a critical finding as it refines the "trustee" model identified by Ahlfeldt *et al*. (2022:2). According to the trustee model, Baby Boomers suggests that they should trust the sales professional as the expert. However, with Generation X, trust is established when the sales professional respects the educator's own expertise and provides data in an open and honest manner, rather than through a persuasive pitch. These findings have significant implications for sales strategy, as a professional who pushes for an immediate call before an exchange of information could be perceived as authoritative over product information, thereby immediately breaking the trust established via DSI. It is, therefore, pertinent for sales professionals to send text-based documentation detailing clear product information to educators via their preferred channel as to ensure them time for self-research and to feel confident in other varying DSI channels.

The perception of Millennials preferring channels that conform to an immediate response style, such as WhatsApp, directly supports the findings of Abraham and Harrington (2015:52), who identified this cohort's high valuation of convenience. This is crucial as it suggests that the strategy or DSI approach for Millennials, should include responsiveness and accessibility. An important issue emerging from this finding is that a slow, formal, or inconvenient sales process designed in the form of repetitive email may be perceived as inefficient and unrelatable by Millennials. For example, a sales professional who is slow to respond or who relies only on formal channels like email, may be perceived as non-responsive or less reliable, thereby losing the digital engagement. This has a direct impact on sales effectiveness and success, as the sales professional risks low sales conversions, not related to the product's value, but rather because the communication channel itself failed to meet this cohort's expectations for speed and convenience. This perceived difference is essential in developing a tailored sales strategy and directly informs the next section focusing on the adaption of strategies based on these nuances. In conclusion, these differences discussed above suggest that sales professionals should engage Baby Boomers using a more conventional DSI format such as a phone call or email. It is noted that in the case of a lack of trust due to DSI, it is appropriate to suggest an in-person meeting as Baby Boomers find building relational depth with sales professionals easier in this format. The Generation X cohort should be granted autonomy to conduct their own research and receive information in a formal DSI format. It is

recommended to use email, to communicate product or service details. When engaging Millennials through a DSI channel, it is crucial to utilise a tool that facilitates quick interaction and prompt responses such as WhatsApp. This conceptual framework is vital for formulating effective, customised DSI and offers the necessary background for the strategic modifications addressed in the concluding topic.

5.2.3 Adaptation strategies by sales professionals

This section examines how EdTech sales professionals navigate the evolving dynamics of DSI, with the analysis focusing on the strategies deployed to achieve relational depth, trust and communication efficacy in a digital environment.

Discussing the findings of the disconnect between perception and practice, the data provide strong empirical support for the academic critiques of generational cohort theory acknowledged in the literature review. While the literature from Twenge (2023:212) and Abraham and Harrington (2015:52) clearly supports the clear existence of generational cohorts, the results found in the study specifically challenge the practical use generational profiling as a primary tool for sales engagements in the EdTech sector of South Africa. An important issue emerging from these findings is the significant risk associated with proactive stereotyping. The analysis highlights that in the low trust, impersonal DSI environment identified in Theme 1, a sales professional making a wrong assumption can instantly break rapport and trigger a feedback block described by participants. Therefore, sales professionals abandon these stereotypes, not because they are necessarily untrue, but because they are too unreliable to justify risk in a low trust environment.

These results indicate that professionals should adopt a reactive, context-first model. The context-first model is based on the analysis of the influence of the context and economic factors of schools in South Africa, which were identified as the main challenges behind ICT adoption (Hart, 2023:12). This lack of access was identified as a barrier to the use of educational technology, particularly in disadvantaged communities (Hart & Laher, 2015:2). Consequently, the results of the study provided refinement to the work of Hart & Laher (2015:2). The data suggests that economic and contextual factors do not just influence technology adoption in schools, but that they also influence the communication expectations of educators. Other influences such as personality and culture were also identified in the findings as influential factors to the DSI choice. This interpretation of the

findings suggests that sales professionals must be able to be flexible in their use of DSI and in-person meetings and be agile in adaption to the influences in the South African and human context.

However, this does not mean generational perception does not hold any value. The analysis highlights the importance of sales professionals using generational preferences for tactical customisation of tone to refine and enhance the context-based model. This suggests that it is rather a social heuristic used to manage the trust deficit by navigating generational expectations regarding respect for elders. Adopting this more formal, respectful tone is a way to manage the perceived resistance to integrating ICT noted by Padayachee (2017:77) and Mlambo (2023:271) and align with the trustee model identified by Ahlfeldt *et al.* (2022:2). With the use of correct tone, it would indicate to educators a sign of respect and possible relational deepening. These results indicate Baby Boomers preferring a more traditional approach to the buyer-sellers conversation and that tone would help navigate the social contracts around respecting one's elders and mitigate the trust deficit inherent in DSI. In contrast, the finding suggest Millennials would prefer more casual tone to the conversation and would enhance the relational trust factor in the DSI.

Ultimately, this theme's finding, and discussion contributes to a more nuanced model of sales adaptation for the EdTech sector. The study's key contribution not only suggests a hybrid model in the use of DSI as set in Theme 1, but also the consideration of the educator's context and the tempering of tone according to societal norms. This model, which is the central practical finding of the study, proposes that sales professionals prioritise an educator's immediate context, such as shortage on infrastructure, using generational perception only as a secondary heuristic for tactical customisation such as adapting tone. This has significant practical implications, indicating that EdTech sales training should focus less on the broad generational stereotypes and more on developing professionals' skills in rapid context analysis and adaptive, interpersonal communication. This positions sales professionals as active agents who shape, rather than simply respond to, digital transformation. They do this by making critical judgments about when to leverage an efficient, scalable DSI tool and when to deploy a high-trust, in-person engagement to secure the human element of the sale.

5.3 Conclusions

In conclusion, the study's primary objective was to explore how EdTech sales professionals in South Africa perceive generational preferences in DSI and how these perceptions impact their sales strategies. The research analysis identified a clear answer to this objective demonstrating three critical, interconnected insights that lead to a new suggested model of sales strategy adaptions of sales professionals.

5.3.1 Conclusion on DSI Effectiveness and Challenges (Objectives 2 & 3)

The study concludes that the EdTech sales environment is defined by a central paradox leading to the recommendation of a hybrid approach to effectively overcome the challenges posed by DSI. The balance of the tension between DSI's efficiency and its impersonal nature, leads to model where sales professionals must constantly manage a trust deficit to ensure a successful buyer-sellers interaction. This insight confirms the theoretical complexities of the human element identified by Alavi and Habel (2021:83). Furthermore, it extends the work of Wait (2019:1) by interpreting the high value placed on in-person meetings not as a rejection of DSI, but as a strategic, hybrid solution to this core problem of building trust.

5.3.2 Conclusion on Generational Perceptions (Objective 1)

In response to the objective on generational preferences regarding DSI, the study concludes that the held perceptions of sales professionals are coherent and empirically grounded. The meaning of this result is that the perceptions held are not just random stereotypes of generational age but clearly validates the academic findings of the literature in Chapter 2. The Baby Boomer preference of DSI is defined as a traditionalist profile, preferring conventional DSI channels due to their resistance to change, which supports and further refines the technology resistance noted by Padayachee (2017:77) and Mlambo (2023:271). In contrast the finding provides insights to the Millennials and Generation X preferences translating into a digital-first profile, by distinguishing between the preferred autonomous, text-based approach by Generation X and the casual immediate response type of Millennials. This would mean that a strategic approach to the

DSI conversations by sales professionals to these three cohorts will widely differ and that flexibility of the sales professionals to the preferences of educators is key.

5.3.3 Conclusion on Strategic Adaptation (Primary Objective & Objective 4)

Finally, the study clearly concludes that although sales professionals perceive the defined generational framework of DSI preferences as stated in Theme 2, they strategically abandon this as a primary driver of strategy. This relates to a disconnect found in their perception and practical outplay of strategy, which answers the final research objective. The findings demonstrate that in a low trust DSI environment, using a generational stereotype is a high-risk strategy. The use of contextual indicators, like the economic environment of the schools, are found to be more accurate DSI adjustment tool. This means a "context-first" approach, based on these more reliable clues is a safer and more effective method for choosing effective DSI channels. Therefore, this study concludes that professionals are not replacing a standard sales strategy with an equally rigid generational one. Rather it suggests a more nuanced "Context-First, Cohort-Second" model, in which professionals prioritise an educator's immediate context first and use generational perception only as a secondary heuristic for the tactical customisation of social tone.

These insights consolidate into the study's main contribution.

5.4 Recommendations for EdTech professionals

Based on the finding of this study and the concluding analysis, the following recommendations are proposed for EdTech sales professionals:

Implement Adaptive Sales Strategies:

The study highlights that for a EdTech sales professionals to be successful, they need to consciously adapt their communication, and engagement approaches according to generational preferences and contextual demands. Considering this, organisations should promote sales strategies that are flexible, rather than uniform, allowing professionals to adjust tone, DSI channels, and frequency of digital interaction to align with educators' expectations. Training programmes should, therefore, focus on

developing situational awareness and adaptive communication competencies to equip sales teams in EdTech companies to interpret generational cues from educators and respond appropriately within digital sales environments. When organisations make their sales processes and performance evaluations more adaptable, they can boost customer satisfaction, build stronger trust, and achieve better conversion rates among different generations.

Formally Adopt and Fund a Hybrid Sales Model:

The findings clearly demonstrated that DSI is perceived as an impersonal tool and creates a trust deficit, while in-person meetings would yield a higher success rate due to their effectiveness in building rapport. This directly supports the adoption of a hybrid model in EdTech companies' formal sales strategies. EdTech companies need to implement a formal hybrid sales model and move away from a DSI-only approach. To operationalise this recommended hybrid model, EdTech companies and their executives should formally budget for in-person engagements executed by their sales professionals. This is a critical step, as it strategically empowers them to use in-person meetings as a tool to solve for the trust deficit found in using DSI. Using this approach would re-inject the human element and secure trust with educators, while potentially increasing the velocity of sales deals. A specific and actionable recommendation to implement this is to accommodate annual roadshows, allowing teams to visit locations with a high density of prospects and existing clients. This would ensure that they build and maintain the high-trust relationships among all generations which DSI alone cannot.

Develop Nuanced Tactics for Digital-First Cohorts:

This study's findings revealed a critical distinction between Generation X and Millennials. Generation X is perceived by sales professionals to value autonomy and independent research, while Millennials are perceived to value immediacy and interaction from instant messaging. Therefore, sales managers should develop distinct DSI strategies for these two cohorts by enabling sales team the access to various DSI tools to effectively address the two key differences. In the sales engagements with Generation X, professionals should be trained to lead with information-rich DSI, and it is recommended based on the findings to use email as a main channel. They should respect the desire of this cohort for independent research and autonomy by ensuring a sales playbook that includes a reduced cadence of communication to enable time for self-research. Conversely, for Millennials, training should focus on interaction-led DSI like a responsive WhatsApp message that meets their expectation for convenience and speed. An adjustment to a sales playbook could include a higher frequency of communication to satisfy the expectation of immediacy. This tactical refinement is essential for effectively engaging these two distinct groups, leading to higher level of communication satisfaction.

The Cohort Second Tactical Tool

The central finding of this study based on the strategic disconnect leads to the following recommendation. EdTech sales professionals must be trained to adjust their generational perception as a secondary, tactical tool and not a primary strategy. The findings show that in the low-trust, impersonal DSI environment, proactive stereotyping is a high-risk error that can break rapport. Therefore, it is critical for sales teams to design and implement the Context-First approach and rather utilise their generational perception as a social heuristic to refine their tone and supplement the sales advantage. This should include defaulting to a formal, respectful tone that aligns with the trustee model for Baby Boomers, versus a more casual, responsive tone for Millennials. This tactical customisation is essential for navigating the social contracts identified in South Africa and building the initial trust required.

In summary, these recommendations are designed to work in unison, grounded in the study's core finding that professionals must be agile and context aware. When organisations use a hybrid model and invest in face-to-face meetings, they can actively reduce trust issues and improve how they manage relationships. Simultaneously, by

developing nuanced tactics for digital-first cohorts and reframing generational tactics as a tool for tone, sales professionals can significantly improve their digital engagement, making it more relevant and effective. This provides a practical, evidence-based framework for navigating the complexities of DSI, ultimately leading to greater sales success in the EdTech sector.

5.5 Limitations of the study

Although the research provides insight in terms of how sales professionals navigate generational preferences in DSI, it is important to recognise methodological and contextual limitations that may have affected the depth and generalisability of the conclusions, including:

- **Sample size and generalisability:** The study's qualitative scope and small, non-probability sample of 11 EdTech sales professionals mean that the findings are intended for analytical transferability and not statistical generalisability. This was a deliberate methodological choice to achieve analytical depth. This limitation was mitigated by interviewing participants until data saturation was reached. This was done to ensure consistent, well-developed insight from this specific sample. This scope logically points to the need for future quantitative research to test the prevalence of the models identified in this study.

- **Perception-based:** This study was intentionally designed to explore the perceptions of sales professionals rather than the actual preferences of educators. Even though these findings based on sales professionals offered experience-based insights into DSI preferences of educators, the study's ability to triangulate these perceptions with the educators' actual preferences was limited. It is important to note that while this external triangulation was not undertaken, the study's internal credibility was supported through iterative coding and internal consistency checks. Therefore, this limitation has implications for the breadth of the study, accurately presenting the insider reality of sales professionals, which is what shapes their strategies.
- **Contextual limitation:** The findings of this study are contextually specific to the South African EdTech school sector, which is strongly shaped by resource disparity and digital infrastructure variability. This context may influence how

generational preferences influence the choice DSI. This focus enhances the understanding of how environmental and generational factors interact to shape DSI practices in an emerging-market system. This logically suggests that the findings may not be directly transferable to more resource-homogenous markets and indicates a clear need for future comparative studies.

5.6 Recommendations for future research

Based on the findings and limitations of this study, key research gaps emerged. These gaps include the need to validate the perceptions with educators themselves, test the Context-First model's generalisability, and explore the boundaries of its contextual specificity. The following recommendations are, therefore, proposed.

5.6.1 Methodological recommendations

This study was intentionally limited to the perceptions of sales professionals. Future research focusing on educators themselves could validate or challenge the perceptions uncovered in this study. A quantitative survey or qualitative interview study focusing on Baby Boomer, Generation X, and Millennial educators is essential. This would extend the understanding of DSI preferences by providing a comprehensive, two-sided view of the sales interaction.

The study's findings are based on a small, qualitative sample of 11 participants. It is recommended that a large-scale, quantitative study be conducted on EdTech sales professionals to test the findings for statistical generalisability. This would be valuable as it could statistically measure the prevalence of the Context-First model, confirming if the findings from this exploratory study are a widespread industry norm.

5.6.2 Contextual recommendations

The findings are contextually specific to the South African EdTech sector, which is defined by significant resource disparity. Therefore, future research is recommended to conduct comparative, cross-contextual studies. This would extend the understanding of the

Context-First model by determining if the economic factor is a consistent primary driver across different market segments, or if the model is a specific adaptation to South Africa's unique economic landscape.

5.7 Significance of the Study

The significance of this study was found in both its practical, theoretical and methodological contributions to the South African EdTech sector.

5.7.1 Practical significance

This study's primary practical significance is providing clear, actionable insights for EdTech sales professionals in a competitive market where a uniform DSI approach lacks competitive differentiation. The concluding Context-First model, which uses generational profiles as a secondary tactic, offers a concrete, data-driven framework for refining sales strategies, informing everything from DSI channel choice to the social tone of an interaction. These findings provide evidence to guide targeted professional development that assists sales teams in adapting their digital engagement strategies across generational cohorts. This, in turn, provides a clear foundation for sales managers and executives to enhance customer relationships and, as the findings suggest, improve sales effectiveness by mitigating the feedback block and building the rapport necessary to close deals.

5.7.2 Theoretical significance

The theoretical significance established in this study is twofold, namely the completion of the research objective to fill the clear gap in existing literature and also the contribution to a new, nuanced model of sales adaption. While it is established in Chapter 2 that substantial research exists on technology in sales, this literature review confirmed that there was limited research available on how generational differences influence DSI preferences among South African educators. This study, therefore, contributes the first exploratory insights into this underexplored area. The study also highlights a context-first orientation among EdTech sales professionals, where contextual understanding of schools' resource environments and digital maturity shapes how generational

preferences are interpreted and how digital tools are applied. This reflects a contextual adaptation strategy rather than a formal model, underscoring that effective digital engagement is driven by situational awareness and relational alignment rather than generational stereotypes alone.

5.7.3 Methodological significance

Methodologically, the study demonstrates the value of a qualitative, interpretivist approach for exploring how sales professionals navigate digital transformation in context-specific environments. By using semi-structured interviews, the research captured nuanced insights into personal experiences, perceptions, and adaptation strategies that would likely be overlooked by quantitative designs. The use of thematic analysis within ATLAS.ti enabled systematic identification of patterns across participants, leading to the emergence of a context-first orientation that connects generational, technological, and relational dimensions of sales practice. This approach highlights how qualitative inquiry can meaningfully contribute to understanding complex, human-centred processes in the digital sales domain, particularly within emerging-market settings where contextual dynamics strongly shape professional behaviour.

5.8 Chapter summary

This chapter integrated the findings of the study with existing literature to interpret how sales professionals in the South African EdTech sector navigate DSI across generational context and perceptions. Through this analysis, the study stated the tension between technological efficiency and relational depth, while demonstrating that the effectiveness of DSI lies in sales professionals' ability to adapt communication strategies to generational expectations and context. The chapter concluded that successful DSI requires a balance between digital competence and human connection, offering both theoretical insights and practical recommendations for EdTech organisations and sales practitioners. Limitations were acknowledged, and directions for future research were proposed to extend the understanding of generationally informed digital engagement. Collectively, the discussion, conclusions, and recommendations presented in this chapter affirm the study's contribution to the growing body of knowledge on digital sales and generational behaviour. By providing a nuanced understanding of how sales professionals adapt within a technologically mediated, competitive environment, the study

lays a foundation for more contextually grounded research and more adaptive, human-centred sales practices in the EdTech industry.

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7 APPENDICES

7.1 Appendix A: Semi-structured interview questionnaire

Section 1: Participant Background

1. What is your current age?
2. What is your highest level of education you have obtained?
3. How long have you worked as a sales professional in the EdTech sector?
4. How would you describe your company's size and structure?
5. What types of EdTech solutions do you primarily sell? Are your products targeted toward specific types of schools or educator roles?

Section 2: Use of Digital Sales Interactions (DSI)

6. How do you typically use DSI to reach out to educators in your sales process? Can you walk me through a typical engagement, from first contact to sale? (List)
7. What digital platforms or tools do you rely on most when engaging with educators?
8. Are there digital platforms or tools you avoid using with certain educator groups? Why?
9. What do you find most effective about using DSI to connect with educators? Can you give an example of a particularly successful DSI experience?
10. What do you find less effective or more difficult about using DSI? Are there specific educator behaviours or contexts that make DSI harder?
11. How do you compare DSI to in-person school visits? Have you found DSI to be more, or less, effective in building trust or closing sales? Please explain.

Section 3: Generational Perceptions

12. What differences have you observed in how educators from different generational cohorts (e.g., Baby Boomers, Gen X, Millennials, Gen Z) respond to your DSI efforts?
13. How do you think these generational differences affect educators' DSI preferences?
14. Do certain generations prefer specific tools or styles of engagement? Have you seen any exceptions?

15. Can you share a memorable example where a generational difference was particularly evident?

Section 4: Sales Strategy Influence

16. How have your perceptions of generational differences influenced your sales strategies or tactics?
17. Have you adapted your messaging or approach based on age group preferences?
18. What challenges do you face when adjusting your sales strategies to accommodate generational preferences?
19. Can you describe a situation where it was difficult to adapt to an educator's digital preferences?
20. Looking ahead, how do you think your sales strategies could better address generational differences in educators' DSI preferences?
21. Are there any tools, training, or new methods you're considering enhancing your DSI approach?

Section 5: Closing

22. Is there anything else you would like to add about your experience or views on generational preferences in DSI?
23. Is there something you think EdTech companies or researchers should better understand about the educator-sales relationship?

7.2 Appendix B: Ethical approval letter of study

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6 June 2025

ETHICS APPROVAL LETTER OF STUDY

Based on approval by the **North-West University Economic and Management Sciences Research Ethics Committee (EMS-REC)** on 6 June 2025 , the Economic and Management Sciences Research Ethics Committee hereby **approves** your study as indicated below. This implies that the North-West University Senate Committee for Research Ethics (NWU-REC) grants its permission that, provided the special conditions specified below are met and pending any other authorisation that may be necessary, the study may be initiated, using the ethics number below.

Study title:	Educational technology sales professionals' perceptions of generational preferences in digital sales interactions among South African school educators		
Study leader/Supervisor (Principal investigator/Researcher:	Dr L. Greyling	**University no.:**	25071017
Student:	P. Schoeman	**University no.:**	36628107
Ethics number:	**N W U - 0 0 6 6 8 - 2 5 - A 4** Institution / Study number / Year / Status Status: S = Submission; R = Re-submission; P = Provisional authorisation; A = Authorisation		
Application type:	Single study - Postgraduate research	**Risk level:**	Low/minimal risk
Commencement date:	6/6/25		
Expiry date:	6/6/26		

Approval of the study is initially provided for a year, after which continuation of the study is dependent on receipt and review of the annual (or as otherwise stipulated) monitoring report and the concomitant issuing of a letter of continuation.

Special in process conditions of the research for approval (if applicable):

None.

7.3 Appendix C: Certificate of Proofreading and Editing

PikBioStat
Statistical Solutions

18 November 2025

Certificate of Proofreading and Editing

This is to Certify That
Peet Schoeman (student number 36628107)

has received Proofreading and Editing Services from PikBioStat

This certifies that the dissertation titled

"Assessing insights from educational technology sales professionals regarding school generational preferences in digital sales."

submitted in partial fulfilment of the requirements for the
Master of Business Administration (MBA)
degree has been professionally proofread and edited for
grammar, spelling, punctuation, structure, and overall readability.

Date of Completion: 18 November 2025

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