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## Developing and Empirically Testing a Sales Pipeline Execution Process Framework

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# **Developing and Empirically Testing a Sales Pipeline Execution Process Framework**

**Kieran Sheahan**



A thesis submitted in fulfilment of the requirements for the Award of Doctor of Philosophy.

College of Business  
TU Dublin.

September 2020

**Supervisor:**

Professor Joseph Coughlan

## **Abstract**

Every customer-facing organisation must have some means of developing customer interest in their offerings (Monat, 2011). Growing sales and finding new qualified customers (Sohnchen & Albers, 2010) is the lifeblood of any company (Monat, 2010; Hummel, 2011; Blake, 2013; D’Haen & Van den Poel, 2013; Moncrief, Bedford, & Bedford, 2017). For start-up companies and established firms looking to open up new markets, salespeople play a major role in acquiring these new customers (Harmon, Hammond, Widing, & Brown, 2002). The sales process is an essential tool to clarify the steps required to win sales. However, there is little emphasis on the front-end of this process – the steps needed to get a customer. Dubinsky, 1981 and Moncrief & Marshall (2005) highlighted the traditional seven steps of selling at a macro-level. There are significant streams of literature on issues such as key account management (KAM) (Guenzi, Georges, & Pardo, 2009), sales and marketing integration (Le Meunier-Fitzhugh & Massey, 2019), CRM (Agnihotri, Trainor, Itani, & Rodriguez, 2017), social media (Itani, Agnihotri, & Dingus, 2017), and the role of information technology (Harrison & Hair, 2017) that give insight but need to be integrated. At the front-end of the sales process the focus is on identifying prospects - a process called lead generation (Jobber, Lancaster, & Le Meunier-Fitzhugh, 2019). Despite the criticality in acquiring new customers and building a sales pipeline (Wilding, 2014), this is an area where a significant gap in the literature has emerged, and has been considered the ‘neglected dark side of selling’ (Virtanen, Parvinen, & Rollins, 2015). This thesis focuses on the early stages of the front end of the sales process in B2B by creating a framework, informed by theory and a two stage research methodology, which provides firms with opportunities for early relationship building (Borg & Young, 2014) and helping to build a sales pipeline, complementing and enhancing the seven steps approach (Moncrief & Marshall, 2005). Phase one was a set of nine interviews with individual small to medium sized enterprises (SMEs). This led to a set of challenges for these firms around the front-end of the sales process culminating in a Prospecting Implementation Process (PIP). Following on from this, semi-structured interviews took place with 17 participants from six SME case companies: three located in the UK and three in Ireland. This research resulted in a Sales Pipeline Execution Process (SPEP) which contributes towards the closing of the literature gap around the front-end of the sales process. This SPEP has shed light on each stage of the front-end of the sales process. This research has also identified antecedents which are a key part of the overall SPEP that should enable the further enhancement of the SPEP, resulting in moving the sales cycle for organisations that adopt it nearer to closing the sale.

## **Declaration**

I hereby certify that this thesis which I now submit for examination for the award of Doctor of Philosophy, is entirely my own work and has not been taken from the work of others and to the extent that such work has been cited and acknowledged within the text of my own work.

This thesis has been prepared according to the regulations for postgraduate study by research of the Technological University Dublin (TU Dublin) and has not been submitted in whole or in part for an award in any other Institute or University.

The work reported in this thesis conforms to the principles and requirements of the Institute's guidelines for ethics in research.

Signature: \_\_Kieran Sheahan\_\_\_\_\_

Date: \_\_September 25<sup>th</sup>, 2020\_\_\_\_\_



## Acknowledgements

When thinking of a metaphor for the journey I have been on, for me it has certainly been a rollercoaster ride that started way back when I first met Laura Cuddihy at the Heritage Hotel in Portlaoise. Laura was presenting the Saleswise Program for TU Dublin and I signed up from industry to participate in the Diploma. During this time, I got to know various people from TU Dublin and they made me feel part of their organisation. On successful completion I went on to complete an MSc in sales at TU Dublin supervised at the time by Dr Joseph Coughlan. We discussed doing a PhD, and on a business trip to China, I brought some journals with me to review with some reservations as I felt at the time I was working in the ‘real world’ and academia was somewhere else entirely. I had a ‘eureka’ moment when strangely enough, as he is here today, I read a paper by Ken Le Meunier Fitzhugh on collaboration between sales and marketing, and I was hooked. I remember saying to myself at the time that this stuff really makes sense and it would work in industry. On return from my business trip, I sat with Dr Coughlan and we agreed that I would take on a PhD.

As a supervisor, Dr Joseph Coughlan has been amazing and I want to thank him most sincerely. He has to be the most calm and patient person I have ever met and I know I would not have arrived at this point without him. His feedback was excellent on the work I submitted and he was always very precise and constructive. At times when I felt I was almost hanging off outside the rollercoaster he would calmly sit down and guide me, bringing me back to reality. After our meetings I always felt that I could move on to the next stage and make it happen. His firm common sense chats were excellent and kept me sane. A massive thank you Joe.

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## **Chapter 1 Introduction**

### **1.0 Vignette**

*'There was actually no market for the crab, there was no demand for it so basically we were chucking these yokes over the boat everyday back into the sea. We kind of had a chat among ourselves and asked ourselves wouldn't it be nice if we got a return out of this. We sort of invested in a few gas cookers, took out a few hammers and started to open the crabs and cook the meat, and then we started selling it to a few local restaurants. We went on like this for about two years and we also went back to the other boatmen and told them to hold on a while, don't throw the crabs back into the sea, we will buy them from you. At that stage we didn't even have a van, it was into the boot of the car, you would actually put your product into sleeping bags, that would be your refrigeration, you would go in to your five star hotels, you would show them your crab meat and they loved it. The business went very well so we had to buy our first refrigerated unit van and we built it from there'*

### **1.1 What is being researched?**

The above excerpt is taken from a transcript of an interview with a case participant conducted as part of this research. This fisherman built, from scratch, a €23 million business. It clearly shows the challenge any entrepreneur faces when starting a new business in that the number one priority is to win new customers and sell. Various articles have been published in relation to the evolution of sales over the last number of decades (Moncrief & Marshall, 2005, Borg & Young, 2014; Aril, Bauer, & Palmatier, 2018). This research is centred on the business-to-business (B2B) market in an SME environment. This thesis focuses on the front end of the sales process where customers are not as plentiful as in the business-to-consumer (B2C) market. There also happens to be

significant competition for these customers, especially the ones that are profitable to serve. The focus is on small to medium sized enterprises (SMEs) as they do not typically have the resources to invest in improving their sales process.

This research is important as start-up companies looking to exploit new markets need to find new customers as they initially don't have any customers. Companies looking to achieve growth in their business look to add new customers. The sales department is a "major force" in a company's survival as it is the revenue generation mechanism of a firm (Harmon et al., 2002). Existing companies selling into mature markets will eventually lose customers and they will need to replace these with new ones (Wilson, 2003). Every company that sells products or services must have some means of developing customer interest in their offerings (Monat, 2011). Identifying prospects is called lead generation (Jobber et al., 2019) and for a new customer this takes place at an early stage of the sales process. A lead is an expression of interest in a company's product or service by an existing or potential prospect (Monat, 2011). It is most often found in a product or service that can satisfy the prospect's need, and a product that the prospect is willing to buy (Jolson, 1996). There are a significant number of practitioner-oriented-resources available in relation to the management of the front-end of the sales process e.g. pipeline management, though these are of varying quality. However, despite the criticality of the sales pipeline in B2B markets and marketing, the academic literature is almost silent on this topic. This is a key gap in the literature and one that this thesis addresses.

Sales is the lifeblood of a firm's business and the economy (Moncrief et al., 2017) and the sales pipeline plays a major role. Pipelines are a flow of opportunities going through various stages of a process where some of them will be removed, while others may successfully be won from the prospects (Sohnchen & Albers, 2010). This thesis depicts the sales pipeline as the cornerstone of B2B selling. Companies looking to increase

revenues and add new customers will find it difficult to achieve this goal successfully without a proper sales pipeline process. Effort and performance levels of the sales team are key concerns for senior management. In this context, it is important to note that 39% of B2B buyers select a supplier according to the skills of the salesperson rather than price, quality or service features (Fogel, Hoffmeister, Rocco & Strunk, 2012).

The world of business is going through major changes with the advancements in technology/social media, the growth of global sales, mergers and new forms of competition (Moncrief et al., 2017). New trends have emerged for sales managers to deal with, such as longer sales cycles, the emergence of solutions selling, and a move from a product to a more service centric economy (Plouffe, Holmes, & Beuk, 2013) and these contextual changes will be explored in the research.

A key area identified is relational selling, which is at the forefront of marketing practice and research in the B2B environment but despite this, relational selling at the front-end of the selling process has not yet been addressed. Arli et al.'s (2018) paper discusses the evolution of relational selling noting how individual selling had moved to buying centres and then to adaptive selling and more recently customer orientation and solution selling. They highlighted that much still needs to be learned about the effectiveness of relational selling strategies for customer acquisition and that the sales function will continue to evolve and that salespeople will need to learn how to deal with more demanding and organised buyers. They suggested that there are likely to be changes in the future in this area which will involve more of a team effort to ensure suppliers maintain a competitive advantage. Suppliers will need to introduce new concepts and models with their customers and their salespeople, and they will need to have strong interpersonal and relational skills to move the sales process forward (Borg & Young, 2014).

Digital platforms are driving B2B purchases and this is impacting the evolution of relational selling where buyers are making decisions before they even contact the salespeople. These decisions include, locating potential suppliers for the product or service that buyers are looking to source, dismissing other suppliers due to negative reviews on the web, price comparisons and partners/competitors that the suppliers are already working with. The balance has shifted and as the buyer has as much information as the seller one of the new guiding principles is *caveat venditor*, i.e. seller beware (Pink, 2013). With these technological advances, suppliers need to be proactive and much better prepared for their interactions with prospects and customers (Arli et al., 2018). Customers' expectations of salespeople and their companies will be higher, customers will demand more and expect faster answers from their suppliers. Hence the reason why team efforts are required as this can help create the opportunity to build long term relationships with the customers.

Trust will continue to be a key determinant of the quality of a business relationship especially in the digital era and trust can offer a critical foundation for future sales. Trust and commitment towards the salesperson in data sharing was an area identified for future research (Arli et al., 2018). Suppliers need to demonstrate real value to their prospects and customers and this value can be created through relationships. The Industrial Marketing and Purchasing (IMP) have created a multi-level selling process framework and there are 23 interpersonal relationship elements that can influence the B2B selling process (Borg & Young, 2014). "The objective is to strengthen the company's network position by (i) optimising its relationship competence, (ii) optimising its relationship portfolio via (iii) optimising its relationship value" (Borg & Young, 2014, p549).

The contributions SMEs make to a country's GDP can be significant and Governments establish agencies to support these SMEs in their goal to grow their revenues. The next section gives additional context for this research by discussing some of these key agencies, their contributions to supporting companies growing their revenues and their recognition of the importance of sales in this process.

## **1.2 Irish Government Published Reports on the Importance of Sales**

There are 250,000 SMEs in Ireland employing close to one million people (ISME, 2019). A report issued by the Irish government in 2004 focussed on placing Ireland 'Ahead of the Curve' through a plan to enable the recruitment of 1,000 sales and marketing personnel. The report identified a lack of qualified salespeople in Ireland as a major inhibitor to Ireland's economic growth. It recommended the recruitment of 1,000 graduates and internationally experienced professionals to Irish firms, in order to augment the country's stock of sales and marketing talent. The report recommended that Ireland incorporate work placements and modules that focus on the practical capabilities required by firms into third level marketing and sales programmes and the report itself be available to students of technical disciplines (Driscoll, 2004).

The Enterprise Ireland Eurozone 2017-2020 Strategy Report highlights the need for companies to grow their business along with developing opportunities in extended markets. It stated that Enterprise Ireland, the government body responsible for the development and growth of Irish enterprises in world markets, is undertaking a new sales strategy which will result in one of the largest strategic shifts in its client company exports. They are aiming to drive companies in increasing their reach and in building the scale of their business within Eurozone markets (Ireland, 2017). Another driving factor

is the uncertainty of Brexit, where 83% of Irish exporters plan to extend into new international markets by September 2020, (O' Donovan, 2019).

Bord Bia, an Irish state agency promoting food/drink/horticulture suppliers globally published a report 2018/19 Exports Performance and Prospects which highlighted that Irish food and drink products were exported to over 180 countries in 2018 with a value of €12.1 billion, with increased output and a consistency of global demand for key products driving results (Bia, 2019). The report identified lead generation as a key component for Irish companies to achieve growth, it stated 'Lead Generation: moving beyond thinking, making things happen: connecting with a network of contacts, setting up meetings, driving the human connection that makes business happen' (MacSweeney & McCarthy, 2019, p33). An Organisation for Economic Co-operation and Development (OECD) report on SME entrepreneurship highlighted that only six percent of Irish SMEs exporters trade directly across borders (Boschmans & Potter, 2019).

The Local Enterprise Offices (LEO) in Ireland, established by government to help small companies grow their business, issued an impact report in March 2019. These small companies generated €131 million in revenue in 2018, of which €58 million was exported to 52 countries. The report stated that their objectives for the future is to work with these small companies and help them to grow their revenues globally (LEO, 2019). These reports highlight the importance of sales and the part it plays in growing a company's revenues and profits.

### **1.3 Background of the Researcher**

The researcher has over 30 years of international experience, 13 of these years based overseas, working in various industries including engineering, pharmaceutical,

electronics, services and the steel industry. He has worked in several departments with a key focus in procurement, logistics, business development, sales and general management. With a team of people, he set up global sources for products in Europe, North/South America, Asia & Russia. He was lead procurement negotiator with a team of 80 buyers for a multinational in semiconductors, with an annual expenditure budget of \$1.3 billion. He drove sales in an SME IT distribution company from a start-up to €62 million annual turnover, and successfully introduced many US companies into the European market, where they eventually set up their own European infrastructure. This experience has proven to be a valuable asset when carrying out the qualitative research.

#### **1.4 Importance of this Research**

There are many reasons why the research in this area is important: (1) if a company cannot win customers then this will lead to the closure of the company (Schiffman, 2003); (2) established companies lose customers due to strong competitors arriving on the scene (Friend & Johnson, 2017); (3) significant price reductions given by a competitor can result in a company being displaced (Liu, Chugh, & Leach, 2015); (4) change in the buying department can cause displacement, with the new buyers bringing in their preferred suppliers from their previous companies (Gitomer, 2003); and (5) companies looking to expand need an effective pipeline process in place to give them the best chance to win this new business.

Lost customers need to be replaced to compensate for decreased revenues and profits and new customers need to be won to achieve business growth. This study develops a framework which aims to replace these lost revenues/profits, along with acquiring new customers. The aim of this research is to make two main contributions to the knowledge base. Firstly, it contributes to the literature by broadening the scope and roles of the sales team in the front-end of the sales process, namely sales pipeline management. Secondly,

with the creation of framework by the researcher, practitioners can execute this in their organisations. This research focusses on SMEs in the B2B sector; however, the results of the study are not solely applicable to SMEs - they can also apply to larger organisations. Research has shown that companies at the early part of their start-up period often expand very quickly when they want to extend their markets (Gray & McNaughton, 2010), and the framework can help them achieve this objective.

The US Department of Labour has estimated that each day there are over 15 million people working in sales. It is estimated by the US Bureau of Labour Statistics office that two million new sales jobs will be added by 2020 (USA, 2019). In the EU, it is estimated that 13% of the region's 500 million workforce work in sales (Europa.eu, 2017). With this significant number of people employed in sales, the recruiting of the right candidates is crucial in the growth of a company, and a later section of this thesis is dedicated to recruitment and selection. Arli et al. (2018) had suggested recruitment as a future research area.

#### **1.4.1 Criticality of Sales**

If a company doesn't have any customers, then it will not be possible for them to increase the transaction value or frequency of purchases. 97% of businesses in the US focus most of their time on increasing the number of customers and prospecting plays a critical role in the success of finding these customers (Schiffman, 1997). Sales is a critical part of an organisation and one of the major challenges for SMEs is finding the right salespeople who can build a professional rapport with their prospects and customers, along with improving performance (Rosen, 2008). Companies can be over-exposed with some customers, who may make up the lion's share of the company's business, and the danger of losing one of these key customers is another motivator in winning new customers



(Capon, 2001). These are the key reasons why SMEs need to have an effective sales pipeline model in place that will help them achieve their goals in terms of additional revenues/profits and winning new customers. These points also contributed towards the motivation for carrying out this research.

#### **1.4.2 Changing landscape**

The 21<sup>st</sup> century has seen a shift in the landscape in terms of where buyers see salespeople being of use to them. One thousand B2B companies were surveyed across four continents and buyers found 76% of salespeople useful when researching a new product/service, 52% of salespeople useful on repeat purchases with a change to the specification. 15% found them helpful on repeat buying of the same product, and 4% never wanted to speak with a salesperson (Colter, Guan, Mahadavian, Razzaq & Schneider, 2018). With the fourth industrial revolution already started, e.g. digitisation, communication, machine learning, artificial intelligence (AI) and robotics, this will have an impact on sales. Arli et al., (2018) suggested future research on the effects of AI in building and sustaining relationships. Buyers are seeing a decline in the use of some salespeople and the role of the salesperson is changing. Social media is moving the shift of power from seller to the buyer (Moncrief et al., 2017). Buyers can access the Internet and collect a great deal of information on products and services along with reviewing suppliers pricing and their value. In some cases they can have a ‘virtual relationship’ with their suppliers (Marshall, Moncrief, Rudd, & Lee, 2012 p358). Even though serious changes are taking place in sales automation, not all sales processes can be automated such as the personal selling interface. The sales processes that are not automated will need salespeople with the right skill set and companies will need to invest in these areas to ensure they are well placed (Sheth & Sharma, 2008) and that the salespeople are prepared to deal with more organised buyers demanding more from them (Arli et al., 2018).

## 1.5 Identifying the Gaps

Despite discussions taking place on a frequent basis regarding the importance of salespeople, and whether this importance is increasing or decreasing, it is still seen as essential for salespeople to adapt to changes taking place (Hartmann et al., 2018). The extant literature in sales is somewhat fragmented. During the initial literature review conducted for this thesis, it emerged that there were very few papers on the front-end of the sales process, particularly in relation to sales pipeline management. Numerous books have been published about prospecting, covering various individual parts of the front-end of the sales process, but they do not present a complete front-end sales process. In the publication 'High Efficiency Selling' Schiffman (1997) discusses improving sales results by the use of a prospecting process. Gitomer's 'Lead Generation' (Gitomer, 2017) covers how to develop qualified leads, and O'Dea's 'Business Battlecard' (O'Dea, 2009) mentions customer profiling and also calls it the "sweet spot". 'Insight Selling' (Schultz & Doerr (2014) discusses connecting, convincing and collaborating with the prospect while selling ideas and values within the prospect's organisation. 'Selling Today' (Manning, Reece, & Ahearne, 2010) discusses partnering with your prospect and building relationships, using four strategic areas of personal selling. Stein's 'How Winners Sell' (Stein, 2002) looks at outselling your competition and winning major sales, with lots of practical tips on how to achieve this, while 'Getting to Closed' (Schiffman, 2002) discusses how to increase sales.

Sales pipeline and prospecting does not have a rich academic history, and this study expands upon current sales pipeline research in order to examine the evolving world of winning new customers in the 21<sup>st</sup> century. In researching this subject, the author used the following key words to narrow down literature searches: "prospecting", "sales pipeline", "cold-calling", "lead generation" and "sales conversion". Results from electronic databases, e.g. Business Source Complete, Emerald Insight, ScienceDirect and

on the Online University library (TU. Dublin) showed that while numerous trade publications, magazines, published books, blogs and newspaper articles exist covering these issues, the focus is predominantly on retail, and there is a lack of research on this important area in a B2B SME context.

A gap in existing literature was also evident from a 2014 call for papers in sales-oriented journals, including areas of lead generation, prospecting, the role of the sales and marketing functions in lead generation, pre-approach research and proper control systems to manage sales leads (Groza, 2014). From contact with the journal editor, no submissions were made. There are very few publications that discuss prospecting, sales lead conversion and sales pipeline management, along with connecting the dots and creating a pipeline process. A 2015 paper on lost and cancelled leads highlighted that their study was the first attempt to empirically examine this area (Virtanen et al., 2015) and that this is a 'neglected dark side of selling'. Taking all these points into consideration, it is evident that there is a significant gap in the academic literature to be addressed. Arli et al., (2018) recommended future research in salespeople generating leads through e-commerce at the front end of the sales process. It should be acknowledged that there are a number of papers that cover various individual steps of the sales process e.g. CRM (Agnihotri et al., 2017), social media (Itani et al., 2017), customer value proposition (CVP) (Amue, Asiegbu, & Chukwu, 2012; Wouters & Kirchberger, 2015) and technology (Harrison & Hair, 2017).

Why are sales important in an organisation? A famous professor at Harvard Business School once asked his students to name the number one reason that businesses fail. Many of the students highlighted bad management, poor products, cash-flow, bad organisational skills and lack of marketing as being the main reasons that businesses fail. Having reviewed all the answers, the professor stood in front of the class and wrote three words on the blackboard, stating that the number one reason businesses fail is 'lack of sales'

(Schiffman, 2002). Nothing happens in business until someone sells something (Fogel et al., 2012). Management guru Peter Drucker once stated that the main purpose of a business is to create a customer (Drucker, 1973). One of the key objectives of the sales team is capturing and retaining the right customers and making sure their customers hit the “boomerang principle” of coming back and placing additional orders. There are three ways in which a company can grow: (1) increase the number of customers, (2) increase the average transaction value the customers are spending and (3) increase the frequency of purchases (Schiffman, 2003). This study focusses on the front end of the sales process; acquiring new customers in SMEs in B2B. The outcome of this research is a framework for effective sales pipeline management processes in SMEs that contributes not only to the academic literature but will also benefit practitioners.

The research problem, aims and objectives of this study will be discussed following a short section defining the SME - the context of this research.

## **1.6 SMEs**

The full definition of an SME can be viewed on the Official Journal of the European Commission. The key points on the website describing an SME are that they ‘are made up of enterprises which employ fewer than 250 persons’ and have ‘an annual turnover not exceeding EUR 50 million’. The European Commission’s website stated in June 2016 that small and medium sized enterprises (SMEs) are ‘the backbone of the European economy’ (European, 2016). These SMEs represent 99% of all businesses in the EU and over the last five years these SMEs have created over 85% of new jobs. The European Commission believes that SMEs are key to making sure economic growth is achieved along with job creation, innovation and social integration within the EU.

## **1.7 The Research Problem**

This research is focussed on bridging the literature gap in sales pipeline management identified. Secondly the creation of a framework may help management increase revenues and win new customers in their respective companies.

### **1.7.1 Research Aims and Objectives**

This study plans to develop an effective response to the challenges that sales management faces when looking to win new customers in B2B at the front-end of the sales process. It is intended that the research findings will not only contribute to the development of a framework that will help practitioners, but it will also address the literature gap identified from the initial literature review.

### **1.7.2 Research Aim**

Develop a framework to help SMEs at the front-end of the sales process.

The literature gap shows that there is a lack of research on the sales pipeline and specifically on the front end of the sales process. This is important since the sales department is critical from a revenue generation perspective (Harmon et al., 2002). The literature shows that there is an absence of a sales process that employees could follow in relation to sales (Jobber et al., 2019). There does not seem to be a clear framework in place covering the front-end of the sales process and as a result many opportunities in relation to lead generation are lost and in other cases not followed up on (Sabnis, Chatterjee, Grewal, & Lilien, 2013). Organisations have a major issue recruiting suitable salespeople with the right skill set (Cameron, Miller *et al.* 2010) and this may

be partially attributed to the lack of clarity on the process to be followed. Part of the problem seems to be that many sales professionals fell into sales with limited experience and training (Powers, Jennings, & DeCarlo, 2013). These issues demonstrate the gap in the literature with regard to the sales process.

### **1.7.3 Objectives**

#### **Research objective 1.**

To understand the key challenges facing SMEs in the sales space.

#### **Research objective 2.**

The core of objective 2 was to understand the key elements of the front-end of the sales process. In order to meet this overarching objective, a series of six sub-objectives were specified as follows:

Objective 2.1: How compelling are customer value propositions when looking to attract new customers?

Objective 2.2: How effective is customer profiling when looking to acquire new customers?

Objective 2.3: What are the most successful routes in lead generation to locate qualified sales leads?

Objective 2.4: How important is lead pre-qualification when looking to acquire new customers?

Objective 2.5: What approach/strategy is adapted when making contact with a prospect for the first time?

Objective 2.6: How do sales departments/functions measure performance at the front-end of the sales process?

### **Research Objective 3**

The core of research objective 3 is to explore the antecedents/enablers of the framework.

This was best achieved through a series of sub-objectives, as per below:

Objective 3.1: How important a role does recruitment/selection and sales training play in organisations?

Objective 3.2: What part does relationship selling/key account management (KAM) play in building the sales pipeline?

Objective 3.3: What is the role of collaboration between sales and marketing in supporting the sales process?

Objective 3.4: How critical is technology (including CRM/SFA, Digital (Social Media) and AI) in sales and what are the perceived benefits of adoption of such technology?

Objective 3.5: How important is motivation and rewards in driving the sales team?

## **1.8 Interplay between the literature and the data**

The research carried out was made up of two phases. Phase one involved meeting with participants from nine SMEs and was put in place to understand the environment which is objective 1. Phase 2, a series of six case studies, the core of the research, was conducted to provide evidence for objectives 2 and 3 and their sub-objectives. Both these phases were carried out in conjunction with updating the literature. This iterative approach was essential in crafting the research and drawing out the implications of the analysis. The first step was to carry out a literature review which resulted in a list of questions being created to complete phase 1. The results of phase 1 including the literature review helped create a Pipeline Implementation Process (PIP). Phase 2 involved a more comprehensive literature review and six case studies. The results of the research from phase 2 helped to enhance the PIP and led to the creation of a Sales Pipeline Execution Process (SPEP). Fig 1.1 presents the interplay that took place between the literature and the data and how they intersected along with the output from each iteration.



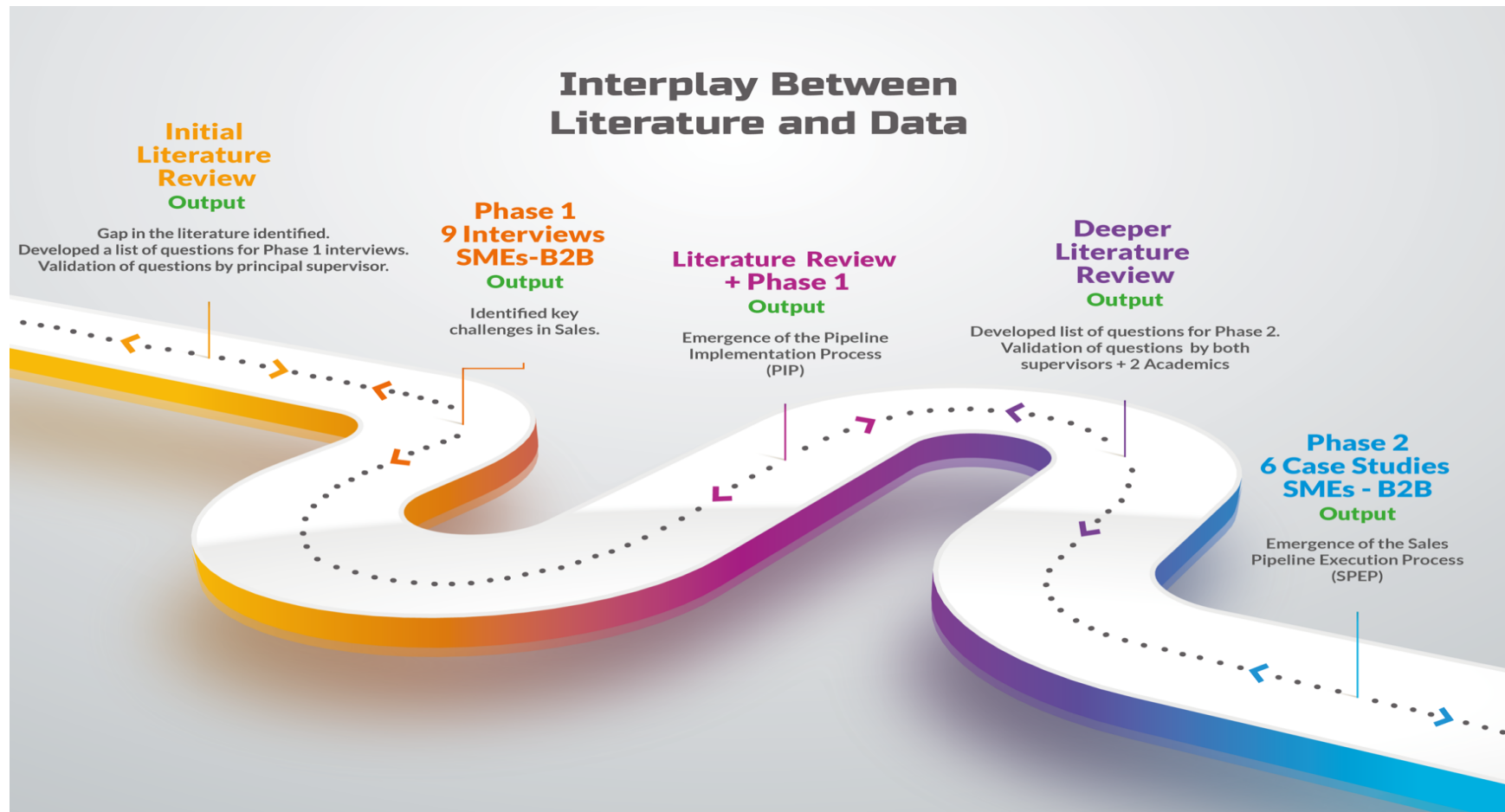


Figure 1.1 Interplay between literature and data.

## **1.9 Structure of the Thesis:**

The multi-stage nature of this study and the consequent cycling through the literature and the research phases meant that these chapters are set up in a specific way in order to be coherent (Fig 1.2). The actual process was quite fluid with repeated iterations between theory and research and it was felt that providing a clear literature review up front (chapters 2 and 3) would help the reader to understand the literature. Where this iteration occurred, this is noted in the discussion of the results of the research. Chapter 2 presents the first stage of the literature review, covering the key antecedents from the SPEP, required to support the early stages of the front-end of the sales process. These include recruitment and selection, sales and marketing integration, technology/social media, SFA/customer relationship management motivation/rewards, sales training and key account management.

Chapter 3 progresses to the next stage of the literature review. It discusses the front-end of the sales pipeline management process covering the key components of the SPEP framework including, customer profiling, customer value proposition, lead generation strategy, qualifying/capturing leads, pre-initial contact with the prospect, actual contact, post contact analysis and performance sales pipeline metrics.

Chapter 4 focuses on how the research was carried out. The research design (Figure 1.2) is presented in this chapter along with the aims and objectives of the research. The chapter examines the reasons why multi-qualitative methods were used in this study. Included in this is a discussion on the use of case study research in phase 2 along with the semi-structured interviews used in phase 1. There will be a section on the philosophy used in the research, i.e. critical realism, and why this was an appropriate approach to take for this research. Finally, in closing this chapter there will be a discussion on the ethical

challenges qualitative researchers face in their field work and how these challenges were addressed in this research.

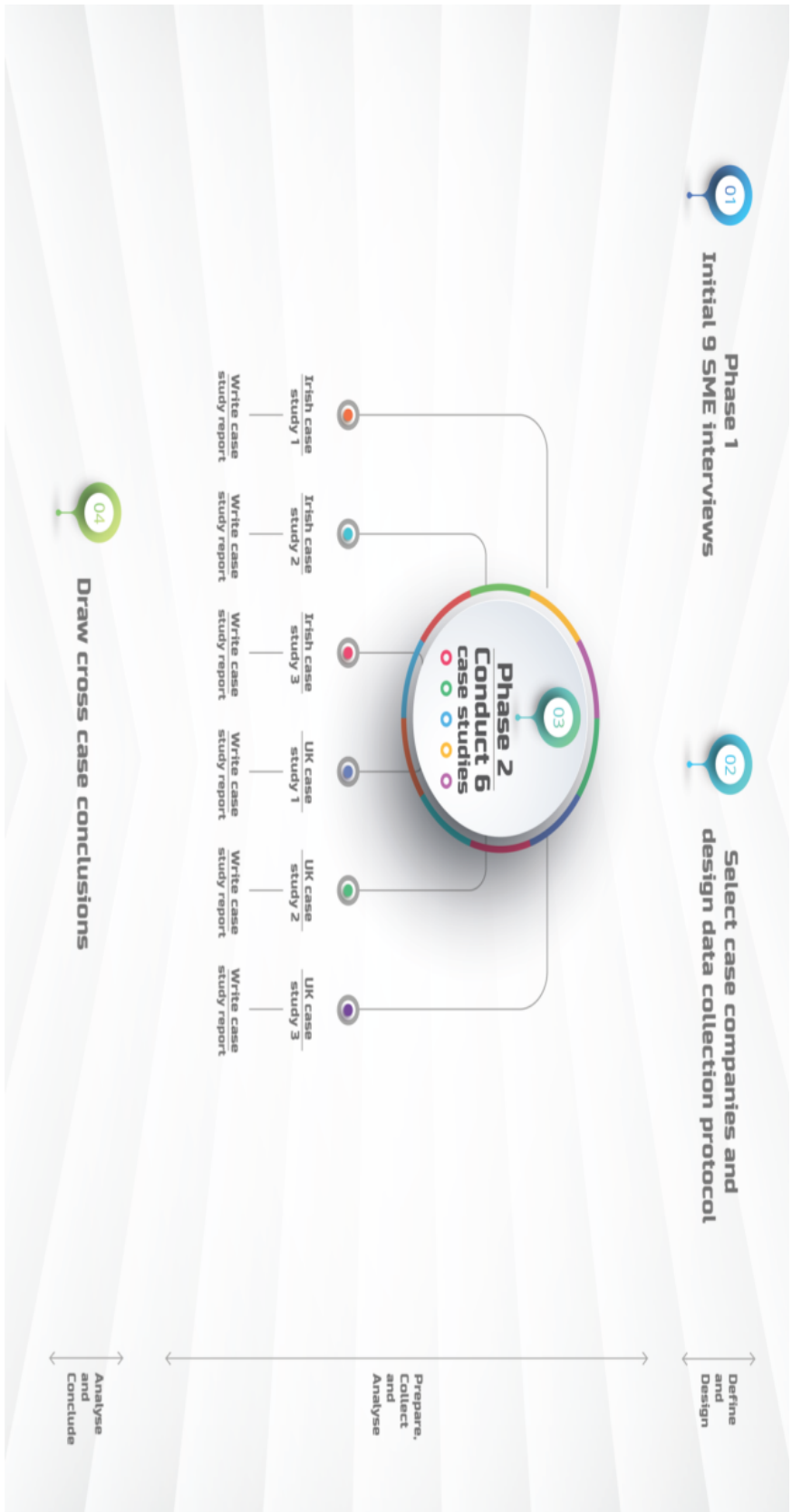


Figure 1.2 The Research Design

Chapter 5 discusses the findings from phase one of the qualitative research, where nine interviews took place with the managing directors/business owners or sales directors of a number of SMEs. The purpose of this part of the research was to (1) identify the challenges that SMEs are facing in sales in their organisations (2) to study the initial literature review carried out and to see where the gaps are. As a result of this a Prospecting Implementation Process (PIP) was created. The results of phase one provided the basis for identifying the final research problem.

Chapter 6 covers the second critical phase of the qualitative research, using a rich data set from the six case companies carried out. The focus on this chapter was to analyse the data collected from the six case companies. It discusses the findings from the six case companies and their relationship with the literature review. The output from this analysis was the creation of the framework model developed in this thesis, i.e. the Sales Pipeline Execution Process (SPEP). Additionally, a diagrammatic version of the two-phase process is presented.

Chapter 7 concludes with a cross-case analysis and draws conclusions and where appropriate, modifies the framework. The study is completed with a summary of the overall research findings and the contributions to literature, practice and policy. Limitations of the research are highlighted along with the managerial implications. The chapter will conclude with the identification of opportunities for future research.

## **Chapter 2     Literature Review - Antecedents of the SPEP**

### **2.0     Introduction**

This chapter presents the first stage of the literature review, covering the key antecedents from the SPEP, required to support the early stages of the front-end of the sales process. These include recruitment and selection, sales and marketing integration, technology/social media, SFA/customer relationship management motivation/rewards, sales training and key account management. Before addressing the first antecedent of the SPEP there is a brief discussion on (Moncrief & Marshall 2005) seven steps of selling.

### **2.1     Seven Steps of Selling**

The seven steps of selling are perhaps the oldest paradigm in the sales discipline, i.e. ‘prospecting, pre-approach, approach, presentation, overcoming objections, close and follow up’ (Moncrief & Marshall, 2005, p15). These seven steps have been cited in numerous articles along with a discussion on how they have evolved into the 21<sup>st</sup> century (Verbeke, W., Dietz, B., & Verwaal, E. 2011; Arli et al., 2018; Borg & Young, 2014). In their study, Moncrief and Marshall (2005) discussed what transformative factors have led to changes in each step, and how relationship selling is key at the back end of the sales process, where key account management takes place with profitable customers. While Moncrief et al. (2005) discuss the traditional seven steps of selling, highlighting that the oldest and best known sales paradigm is still applicable in the 21<sup>st</sup> century, additional nuances are required and this research addresses these gaps.

With the rapid changes taking place in the business sphere, sales organisations need to adapt at a very fast rate, and sales research may be lagging behind in some cases, Arli et al., 2018).

Relationship selling is at the forefront of marketing practice and research, especially with the rapid developments in technologies (Palmatier, Houston, Dant, & Grewal, 2013). By having relationship selling at the front-end of the sales process, one can help develop sales. Relationship selling has been recognised as key in business growth, with researchers evaluating the number of relationships within the buying and selling area of the sales process, and how these can be maximised to increase sales (Borg & Young, 2014).

Salespeople need to develop new skills and abilities in order to engage successfully in relationship selling and Human Resources play a key role in hiring the right salespeople with the correct set of sales skills. This includes salespeople being able to adopt a relationship selling mindset. Dubinsky et al. (2002) suggests how business-to-business sales managers can form an organisational infrastructure that will help salespeople's adoption of such a mindset. Managers' efforts are focussed at adopting a sales organisation that is ready for change. Buyers see the importance of supplier relationship orientation, and know that this is critical to the success of their company's performance (Winklhofer, Pressey, & Tzokas, 2006). Supplier relationship orientation helps suppliers view this as a positive step which in turn helps to keep them motivated in investing their time to help the customer. This research, with a more specific focus on the early stages of the sales process, should provide firms with opportunities for early relationship building by integrating the changes in the evolution of the early stage sales process into the framework. This approach will complement and indeed enhance the (Moncrief and Marshall 2005) aforementioned steps. One of the first antecedents to support the SPEP framework is recruitment and selection and this is discussed in the next section.

## 2.1 Recruitment and Selection

Hiring decisions in sales are critical to companies (Bolander et al., 2020). Effective recruitment and selection processes are key to any organisation, especially in the area of sales as they encourage innovation, survival and growth of the SME (Ongori & Temtime, 2009). Without the right salespeople, the company will find it difficult to achieve their objectives (Piercy & Lane 2009). It is a critical objective of all SMEs to ensure that individuals hired through the recruitment and selection process are suitable candidates for the position (Cameron, Miller *et al.* 2010). Recruitment and selection are two of the most critical human resource decisions an organisation can make (Sullivan, Peterson, & Krishnam, 2012), and may be seen as the single hardest task in organisational life (Cappelli, 2013).

Salespeople represent an important and challenging set of employees for Management (McAmis, Evans, & Arnold, 2015). In the US, companies spend more than a trillion dollars each year on their full-time sales teams (Gillespie & Noble, 2017). Effort and performance of the sales team are key concerns for Senior Management. Non-performing salespeople, sometimes known as ‘laggards’, can have a negative impact on the company’s performance (Boichuk, et al., 2019). Sales managers, at times, do not know how to deal with these laggards. Results of a study suggested that laggards should be advised that if they do not meet their sales forecast at the end of the year which is backed up with a bonus plan, a trainee would replace them and they would be placed on the bench (Boichuk et al., 2019). This study highlighted that these changes contributed to the same managers overcoming the challenges with these non-performers.

Sales management need to be aware of the changes taking place in sales and the competitive landscape and that the salespeople they hire can deal with these changes. In relation to competitors looking to displace them as the incumbent, they need to have the right leadership and sales team to be able to adapt to this competitive environment (Inyang, Agnihotri, & Munoz, 2018). Selling is a science, an acquired skill, and management need to ensure that they recruit the right person for the job (Gitomer, 2003). Sales managers also need to be aware of any issues with the sales team and if there are any indications of a decline. Some of these indications include (Jones, Steven, Andris, & Barton, 2005):

- Sales force turnover from the best salespeople;
- Declining customer satisfaction ratings;
- Waning customer focus due to too much time spent on selling activities; and
- Missed targets on a regular basis.

An SME in particular cannot afford to hire the wrong candidate, as they have limited resources, and a poor selection decision can adversely affect the entire organisation. When a company seeks to recruit people, they can either hire people externally, develop existing employees or bring in experts from consultancy companies who can provide these people (Cappelli, 2013). They can also use educational establishments as these are gaining in popularity and can be an alternative source (Bolander et al., 2020). When looking to hire salespeople, sales managers can look at competitors or other industries in search of the suitable candidates (Jobber et al., 2019).

Direct costs associated with recruiting and training a new sales employee are estimated to be 200% of salary (Boles, Dudley, Onyeemah, Rouzies, & Weeks, 2012). Since SMEs are very



dependent on an above-average motivated and qualified sales workforce, it is critical that they hire the right team with the proper skills set (Behrends, 2007). It is important to implement the correct selection process for making the right hiring decision (Cron, Marshall, Singh, Spiro, & Sujana, 2005). Effective recruitment and selection processes can be implemented which can help the company to recruit the right team (Ahmad & Schroeder, 2002).

### **2.1.1 Challenges in recruitment**

There are three areas where managers struggle in terms of recruitment and selection: (1) they have difficulties finding good talent and who to hire, (2) identifying salespeople to spend their time with to help them turnaround and perform better, and (3) which salespeople should be let go due to poor performance, and when to do it (Rosen, 2008). In a study carried out in 2008, 1,146 employers identified one of the key constraints on business investment and expansion was the availability of qualified sales employees (Pajo, Coetzer *et al.* 2010). The ability to attract and retain reliable good employees has become a key component of an SME in developing an effective and sustainable competitive advantage (Kickul, 2001). It was estimated that for every 100 people that enter sales without natural sales traits, 40% don't make it and decide to resign, 40% perform just about average and the remaining 20% are above average (Martin, 2013). There are serious challenges facing sales managers in the employee selection process (Altinay *et al.* 2008). Having high rates of sales staff turnover (Cameron, Miller *et al.* 2010) can have serious cost implications for the company if the sales team are not happy and decide to leave (Kiesche 1997). In some industries, in a US study, 40% of a company's sales revenue is spent on sales force costs (Zoltners, Prabhakant, & Lorimer, 2008). \$15 billion is estimated to be spent on training the sales force in 2018 (Sunder, Kumar, Goreczny, & Maurer, 2017). If there are high levels of staff turnover, then this training investment becomes a

significant cost to the firm. Sales managers can have two different viewpoints when it comes to hiring salespeople. Do they look for prior experience so that the salesperson can deliver immediately, or do they hire someone with no prior sales experience and mould them to the company's needs (Bolander et al., 2019).

With increases in transport costs and travel challenges for outside sales teams, there is a growing interest for companies to review alternative strategies. One of these is to create an inside sales team (Gessner & Scott, 2009). An inside sales team supports field sales and interacts with customers and prospects virtually dealing with customer enquiries including offering product and technical assistance (Sleep et al., 2020). The activities of inside sales teams can include supporting internal and external clients. These inside sales teams can manage telemarketing programs, provide customer service support and they can also engage in sales related activities previously handled by outside salespeople in the past (Rapp et al., 2012). Some of these activities handled by the inside sales team can help free up time-consuming administrative issues which helps give the outside salespeople time to become more strategic in orientation with their customers (Ingram et al., 2002). While an inside sales team can contribute towards reducing costs and deal with outside sales support issues, it may lead to a decrease in the development of the customer relationship (Rapp et al, 2012) unless they use technology and business intelligence tools to enable this process (Webb & Hogan, 2002). It is worth noting the growth that is taking place in relation to 'inside sales' and companies need to be aware of this. Recent literature has highlighted that inside sales will play a more active role in the future in sales (Sharma & Syam, 2018) and companies will need to ensure they hire the right salespeople with the correct set of sales skills to support this trend. Inside salespeople have a greater reliance on sales technology and data than outside salespeople (Sleep, Dixon, DeCarlo, & Lam, 2020). Progressive sales organisations are looking to become more strategic

and they are using technology to free their salespeople from time consuming tasks to support this sales strategy (Ingram, LaForge & Leigh, 2002). Companies are moving more towards having more inside sales activities within their organisation, but it is also important to have the outside salesforce to maintain customer relationships, (Rapp et al., 2012). Arli et al. (2018) highlighted that inside sales organisations should increase their strategic role and that this can contribute towards effective relational selling.

### **2.1.2 Attributes of good salespeople**

Plouffe et al. (2013) identified that the best salespeople were expert closers, along with being good consultants that listen well and are good at solving problems. Salespeople are seen by buyers as knowledge brokers and their responsibility is to acquire knowledge about their products/services and customers industries and help solve their customer problems (Rapp, Bachrach, Panagopoulos, & Ogilvie, 2014). When salespeople are hired, it is beneficial to aim to recruit coachable salespeople as it can have a positive impact on sales performance (Shanahan, Shannahan, & Bush, 2013). The most successful sales professionals see themselves as problem solvers with specific expertise, who are able to challenge the thinking of their prospects (Hughes, 2013). Salespeople need to be proactive especially when they are looking to build long term relationships with their key accounts as customers expect to get quick responses and follow up (Kaski *et al.*, 2017). Other attributes that salespeople should possess are good communicators, self-motivated, determined and a good personality (Jobber *et al.*, 2019).

Recruitment managers can test candidates on these skills by using psychometric testing or it can be covered when the candidates are being interviewed and they are asked to give examples

of where they were proactive and instigated change (Murphy & Coughlan, 2018). Another skillset looked for in the area of sales is the ability of the salesperson to deal with conflict. Good conflict with buyers can lead to effective relationship results (Bradford & Weitz, 2009). Buyers identified how poor salespeople listening skills are and their failure to adjust the dialogue accordingly (Kaski *et al.*, 2017). It is therefore important that the focus is not only on the skills based aspects of the sales position (Loveland *et al.*, 2015). Companies are now looking for salespeople that rank high on Emotional Intelligence scales when they are recruiting their sales team (Lassk, Ingram, Kraus, & Mascio, 2012). Rapp *et al.* (2014) identified five categories of salespeople: (1) the challenger, (2) the reactive problem solver, (3) the relationship builder, (4) the lone wolf, and (5) the hard worker. These categories need to be taken into consideration during the recruitment process.

### **2.1.3 Turnover of staff**

The recruitment and retention of key sales employees is critical, and they are two of the most difficult tasks facing sales managers (Fournier, Tanner *et al.*, 2010). Average annual staff turnover in sales companies is 25%-30%, which can equate to a company replacing their entire sales team approximately every four years (Cespedes, 2014). Many people leave sales prospecting positions because they are bored, they feel it is a repetitive and thankless job, or they are young and the constant rejection destroys their already shaky confidence (Wan, 2011). Salespeople are among the highest risk group in relation to employee turnover (Katsikea, Theodosiou, & Morgan, 2015). In the US, it is estimated that sales staff turnover is 27%, which is double the rate in the overall work force (Sunder *et al.*, 2017). Sales training and development can help reduce employee turnover, with particular focus on the knowledge, skills and abilities of the salespeople (Powers, Jennings, & DeCarlo, 2013). When experienced salespeople leave, the company loses a valuable resource and they may take customers with them to their new

employer. It can be very expensive to replace these salespeople and it can take a long time to get the right replacement in place Katsikea et al., 2015). One of the best ways to retain valued employees is to give them better career opportunities than they could find in another company (Cappelli, 2013).

A study highlighted that some of the reasons why salespeople fail are attributed mainly to:

- Poor listening skills;
- Not addressing key priorities;
- Not putting in enough effort;
- Lack of recognising the customer needs;
- Lack of sales planning; and
- Not enough product knowledge (Ingram, Schwepker, & Hutson, 1992).

All of the above need to be taken into consideration when recruiting salespeople. Once the right salespeople have been recruited, the discussion moves to the second antecedent of the SPEP which is the training of the sales team and this is discussed in the next section.

## **2.2 Sales Training**

Before delving into sales training, it is worth noting that in many professions, there is an accepted entry mechanism and educational path. For example, few will employ an accountant without an accounting qualification, a legal professional without a legal qualification or a marketer without a marketing qualification, but yet this is the norm for sales. As a result, sales training is essential for survival of organisations as many salespeople learn on the job. Before

discussing sales training in detail, it is worth reviewing the role of formal education in the sales profession.

Personal selling has been subject to disapproval by many people due to its disposition for unethical practices (Munoz & Mallin, 2013). In looking at the Collins dictionary and reviewing the word “selling”, many of the definitions include swindle, trickery, corrupt, bargaining, betray for money, cheat, hoax, deceive and disappoint. Roget’s Thesaurus definition of sales includes terms such as hawk, peddle, falseness, fraud, sham, sleight of hand, hocus pocus, chicanery, hypocrisy, delusion, snare, trap and ambush (Hughes, 2013). In some circles, sales is the province of dodgy characters doing slippery things along with trickery and deceit. A study of sales executives highlighted that 50% suspect that their salespeople may have lied to their customers and 75% believe that their salespeople have stopped focussing on what their customers need (Erevelles & Fukawa, 2013). A sales team that does not follow ethical and legal standards can have knock-on negative consequences for the organisation and its performance (Munoz et al., 2013).

Despite an increasing number of sales professionals, students are fairly negative in relation to the perception of a career in sales, and very few are enthusiastic about following a career in this area (Bristow, Gulati, & Amyx, 2006). If sales is perceived in an organisation negatively then it can impact on the implementation of an effective sales process. Determining where sales sits in the organisation is crucial, while ensuring the positive positioning of sales has an impact on the organisation’s performance. Bristow et al., (2006) found that with sales related coursework, the student’s skills were developed, and sales related courses provided tools for effectively prospecting and conducting sales calls. The study went on to highlight that students who had covered sales coursework were more optimistic in their ability to perform in sales

than the students who didn't participate (Bristow et al., 2006). Further research carried out in 2014 discovered that perceptions of salespeople, attitudes towards a career in sales, along with intentions of pursuing a career in sales increases when students participate in sales courses (Mich, Conners, & Feldman, 2014). It is important when building the sales team that these findings are taken into consideration especially when looking to develop sales graduates for the future in the business.

Research has shown that even though the overall perception of salespeople is not great, it is important that sales managers do not stereotype their salespeople, as this will influence the relationship that they have with their manager, leading to disruption within the sales team (Yang, Hansen, Chartrand, & Fitzsimons, 2013). Over the last 50 years, significant progress has been made towards a better understanding of sales force behaviour (Albers, Raman, & Lee, 2015, Koponen et al., 2019).

The sales team need to be trained on all the above aspects of the sales process so that they can implement a successful prospecting program. These sections have highlighted several of the areas that salespeople need to receive training. Companies are spending billions of dollars annually training their salespeople (Atefi et al., 2018). This training takes place at the company's premises, off site and can take the form of multiday training events. Many companies are leveraging sales training to create strategic advantages which can improve the company's overall firm performance (Lassk et al., 2012). The motivation to receive training is very high among salespeople, sales managers and sales executives. It is important the sales manager ensure that their salespeople receive the relevant training and experience that can help develop their closing techniques along with managing various customer situations (Johlke, 2006). Part of sales management's job is to walk around and develop a great sales team that

are inspired, coached and developed properly. Coaching skills have been identified by sales managers and sales representatives as a critical attribute that effective sales managers need to have as it can have a significant impact on customer relationship development along with the development of the sales team (Mathieu & Pousa, 2011). It is important that the sales manager provides the right feedback to the salespeople by identifying the right behaviours in their salespeople and they also need to encourage high performance (Harmon et al., 2002).

In one of the first research studies carried out in the area of technology adoption for goal orientated salespeople the study showed that continuous training has a positive impact on salespeople adoption of SFA (Jelinek et al., 2006). It makes sense to have on-going training in a company as there are major benefits for everyone. It is critical that the proper sales skills training for understanding and delivering value is given to the sales team as the buzz word in industry is all about creating value by developing good relationships with the buyers (Haas et al., 2012). Changing economic conditions are forcing companies to reconsider their sales training programs in order that they can develop skills in order to stay ahead of the competition (Lambert, 2010). In 2009, US businesses spent \$15 billion on sales training covering areas in the changing role of the salesperson, increased accountability, technology changes and cultural diversity and these are some of the main challenges facing salespeople (Lassk et al., 2012). Salespeople need to be trained in the area of sales call anxiety and how to deal with this anxiety along with ensuring that when they make their future sales prospecting calls they have the tools to ensure the calls are successful (Belschak, Verbeke, & Bagoyyi, 2006). When deploying their sales force, sales managers need to consider what thinking styles are required by their salespeople when working on a particular account, i.e. executive style salespeople tend to like structure and follow procedures and rules, legislative style salespeople don't like structure, they like to solve the problems themselves and create their own innovative ideas whereas judicial



style salespeople apply reason and like to solve each problem separately (Groza, Locander, & Howlett, 2016). Communication style has also been observed to be a key issue in this area (Koponen et al., 2019).

When hiring salespeople there is not a one size fits all and some salespeople have an influence style which allows them use a tactic but when used by a different salesperson with a different style reduces sales performance (Plouffe, Bolander, & Cote, 2014). Companies will need to establish what training programs are required to ensure that their salespeople are able to compete in the marketplace and win new customers and if they need any mentoring. A study identified that sales mentoring has a positive effect on sales and if the mentoring is carried out internally it helps the salesperson to mimic the work behaviours of their mentors in similar work settings (Bradford, Rutherford, Rutherford, & Friend, 2017).

One of the key departments and the third antecedent of the SPEP along with being a significant contributor towards the success of sales, is the marketing department. It is critical that both the sales and marketing departments are aligned, as they play a crucial role in the success of the initial phase of the sales pipeline process (Rouzies & Hullah, 2014). Numerous studies have taken place in relation to the importance of strong sales and marketing Integration (SMI). There are major challenges between these departments but with close collaboration these can be overcome. This is discussed in the next section.

### **2.3 Sales and Marketing Interface**

Despite all of the research carried out, a recent paper highlighted that after 30 years of research in the area of sales and marketing, both are still plagued with issues between them (Singh et al., 2019). Since sales and marketing are the primary revenue generating functions in a

company, both departments need to work closely together and agree on the best approach in terms of an agreed strategy (Malshe & Sohi, 2009). Sales and marketing selling centres (SMSCs) can assist in marketing preparation, salesperson preparation, joint preparation and joint follow up (Johnson et al., 2019). Marketing is strongly dependent on the sales department for the collection of the much needed market data (Matthyssens & Johnston, 2006) . The sales force can be a very rich source of market intelligence and a key vehicle for implementing marketing strategy (Lysus, Rogers, & Simms, 2010). Historically, in many companies the sales function operated in tactical isolation from the marketing strategy. There is growing recognition that by improving various factors between sales and marketing, the effectiveness of the relationship between both departments will be enhanced (Hulland, Nenkov, & Barclay, 2012). An effective sales-marketing interface is critical in how well a company delivers and communicates its customer value propositions.

The relationship between sales and marketing functions has persisted as one of the major sources of organisational conflict (Webster, 1997). They feud like Shakespeare's Capulets and Montagues, with disastrous results (Kotler, Neil, & Sam, 2006) and the relationship is frequently rocky, conflict-laden, adversarial that it is not always harmonious and constructive. Sales and marketing are often at odds, even though their common goal is to increase revenue and profits (Smith, Gopalakrishna, & Chatterjee, 2006). This integration gap (Sleep, Lam, & Hulland, 2018) varies from company to company and it demonstrates that that the departments are not satisfied with the existing relationship which can have a negative influence on the business. Failure to match sales operations with marketing campaigns have led to loss of prospects, stock outs, loss of customers and excess inventories. In the 1990s, due to weak integration, Boeing ended up with a loss for the year of \$2.6 billion (Piercy & Le Meunier-Fitzhugh, 2009). At times, these formal departments may function as independent fiefdoms

battling for resources (Biemans & Brencic, 2007). This lack of alignment ends up hurting corporate performance, as they are not in sync and the organisation suffers (Kotler et al., 2006). They are supposed to be part of the same function but there has been a growing realisation that this relationship is not always operating as efficiently as it should (Le Meunier-Fitzhugh & Piercy, 2010). In the past, scholars devoted very limited attention to the relationship between these two departments (Guenzi & Troilo, 2006). Montgomery & Webster, (1997) highlighted that the link between sales and marketing should be further investigated. Scholars have begun to investigate the sales and marketing interface in greater detail (Biemans & Brencic, 2007; Le Meunier-Fitzhugh & Piercy, 2011; Madhani, 2016; Malshe, Johnson, & Viio, 2017). Biemans *et al.*, (2007) highlighted that future research in the area of sales and marketing should help advance our knowledge of how to design effective marketing-sales interfaces in B2B firms (Biemans, Makovec, & Malshe, 2010). A company's performance greatly depends on how well its sales and marketing functions work together (Biemans et al., 2007). These dual functions have the most direct contact with customers, and they play a key role in managing the company-customer interface. Social relationships between sales managers and marketing managers are also important.

### **2.3.1 Issues that can create conflict between sales and marketing**

The most successful configurations of sales and marketing are characterised by strong cultural linkages between sales and marketing and a high extent of market knowledge in marketing (Homburg, Jensen, & Krohmer, 2008). Homburg *et al.* (2008) carried out a detailed study in Germany of 337 business units, in seven industry sectors. Their research identified that (1) there is a general lack of empirical insight into the sales and marketing interface, (2) there is a lot of ambiguity in some of the previous studies carried out by researchers - sales is mixed in

with marketing tasks and vice versa with no clear distinction and finally (3) all the studies they reviewed focussed on an “average” and did not analyse variation in the organisation of sales and marketing (Homburg et al., 2008). After reviewing various research papers and synthesising their results the following conflict areas were identified within sales and marketing.

- Goals and objectives
- Culture/background
- Communication
- Role ambiguity
- Customer versus Product
- Results versus Process
- Field versus Office

### **2.3.2 How can sales and marketing work together**

These differences in sales/marketing activities and processes can have a very serious impact on a company, and if there is conflict then this may result in the dissatisfaction of customers, lost prospects and lost business (Tjosvold, 1998). The company’s strategy will be inconsistent, weak, and execution will be flawed and inefficient (Shapiro, 2002). Shapiro goes on to state that nowhere is the need to work together more important than in the twin customer functions of sales and marketing. The creation of joint sales-marketing teams has a positive effect on strengthening sales-marketing connections (Malshe, 2011). Every company can and should improve the relationship between sales and marketing (Kotler et al., 2006). Sales and marketing functions need to be working symbiotically to the benefit of the organisation (Blythe, 2000).

In the absence of seamless cooperation between sales and marketing, content marketing will not be integrated successfully with B2B sales processes (Jarvinen & Taiminen, 2015). Where sales and marketing work on qualified sales lead criteria together, there are less arguments in relation to the quality of the leads.

Sales and marketing need to align themselves to each other, and the two departments need to be integrated in order to build customer relationships, enhance their brand, maximise sales leads, increase market share and improve revenues (Athens, 2001). International surveys of senior executives from various businesses highlight that sales and marketing integration is one of the organisational changes that would help sales performance, and that this is one of the critical areas facing marketing managers in the future (Rouzies et al., 2005). Malshe & Sohi (2009) highlighted that a marketing strategy is more likely to be successful when sales and marketing are involved in the process. Both need to be equally invested in the complete process. Their paper proposed a three-stage strategy, making process across the sales and marketing interface (Figure 2.1). This included both departments working together on the groundwork at the start of the process, exploring various ideas on the company's products and services, and having an open conversation. Then, this moves to the transfer stage, where the marketing people explain their strategy to the sales team and allow the sales team to challenge these ideas so that they can both agree on the strategy. Once agreed, marketing then transfers the strategy over to sales. Even though marketing step back at this stage and allow sales drive the agreed strategy with their customers, follow up meetings are required to see how everything is progressing and if any changes need to take place in relation to the strategy (Malshe & Sohi, 2009).

**Groundwork-----Transfer-----Follow up**

Figure 2.1 Three Stage Process.

Source: Malshe & Sohi (2009)

Workman, Homburg and Jensen (2003) suggested that sales and marketing should be integrated under a Chief Marketing Executive (CME). From research conducted by (Piercy 2006), no one company had embraced the recommendation of having a single head over sales and marketing. Previous research highlighted that it is very difficult for a single manager to oversee all of the activities within a sales and marketing environment (Ackroyd, 2002). Where a company is focused on customer orientation with a customer centric structure approach this can help reduce the integration gap as there is task interdependence between sales and marketing (Sleep et al., 2020).

Le Meunier-Fitzhugh & Piercy (2007) confirm that collaboration has a very positive impact on business. Collaboration is all about people working together to achieve a shared objective. It is a mind-set found in a person who is convinced that people working together will achieve a common goal quickly and more effectively than if they had worked on their own. The research carried out by Le Meunier-Fitzhugh and Piercy (2007) is the first study that shows a direct correlation between sales and marketing collaboration and business performance. It highlights areas that sales and marketing should work on to positively impact the business. A company's business performance greatly depends on how sales and marketing work together (Guenzi & Trolio, 2007).

Le Meunier-Fitzhugh and Piercy (2007) suggest that both departments need to collaborate rather than integrate. Their paper highlights key areas that need to be addressed, areas which could lead to successful collaboration between both departments. After reviewing additional articles on what methods can help to reduce conflict between sales and marketing, these are highlighted here.

- Goal Alignment
- Sharing Data
- Communication
- Senior Management Support
- Job rotation
- Sharing Rewards
- Team/Structure
- Location

In order to achieve collaboration and integration between sales and marketing when hiring people in these areas, people that are hired should be open minded and good team players (Le Meunier-Fitzhugh & Piercy, 2007). In some companies' sales and marketing departments, people report to one person, i.e. vice president of sales and marketing. This can be a good way of ensuring better working relationships between departments, since the effective senior manager can sort out any conflict issues with the relevant people as they all work in the same department. A recent study showed where sales and marketing is a single department it can reduce conflict (Le Meunier-Fitzhugh & Massey, 2019).

Improved collaboration between sales and marketing should be an on-going objective for senior management in companies, as study after study shows that it can lead to improved

business performance Le Meunier-Fitzhugh & Piercy, 2007). With the right qualified sales team and training in place, sales and marketing personnel can be very good enablers for pipeline management. Suppliers who do not align sales and marketing with a joint goal will be crushed by suppliers that do (Schmidt, Adamson, & Bird, 2015). As noted previously, after 30 years of research in this field, sales and marketing today still experience many of these issues within their companies (Singh, et al., 2019). Sales and marketing have benefited greatly from technology and the tools it has provided to enable both departments. Technology/Social Media has contributed to the overall sales process and is the fourth antecedent of the SPEP Framework and this is discussed in the next section.

## **2.4 The Impact of Technology on Sales**

With advances in technology and increasing demands from the buyer, companies are being forced to review their information technology strategy to see how they can gain advantage over their competition (Xuhua, Elikem, & Worwui, 2019). Technology is challenging channels to market and providing digital paths for growth (Harrison & Hair, 2017). In a sales context, technology includes the growing area of social media. Automation and technology in the sales world act as a support role in providing information and data to the sales team. Hunter and Perrault (2006, p.96) refer to sales technology as “information technologies that can facilitate or enable the performance of sales tasks”. Companies looking to use digital sales channels will need to reevaluate their sales team and review how it will be affected in terms of people and sales process (Singh et al., 2019). Disney can connect their customers to 100 data systems in their theme parks using a ‘magic’ band that has embedded an RFID chip, a radio and a battery. They are able to stream real time data about each guest to ensure they have a good experience (Lemon & Verhoef, 2016). This is just one of the many benefits that technology plays in business. While this is a B2C example, the principle transfers to the B2B arena. Research has



shown that improved customer orientated processes assisted by SFA and social media should help a company improve its sales performance (Rodriguez, Peterson & Haya, 2014). This study supported investment in social media technology since it achieves better customer orientation processes.

#### **2.4.1 Social Media**

Social media is taking advantage of technology and is being used at every area of the sales process (Moncrief et al., 2017). Today's business environment is driving salespeople to use technology to interact and provide services to their customers and partners almost immediately (Ogilvie, Agnihotri, Rapp, & Trainor, 2018). Business markets are facing significant changes due to increasing digitalization (Ancillai, Terhob, Cardinalia, & Pascuccia, 2019) and companies need to be ready for these changes. To reach 50 million users it took the telephone 38 years, Facebook did it in two years (Rapp & Panagopoulos, 2012). A recent report identified that many companies have a lot of work to do to become a strong digital enterprise (Accenture, 2015). The report went on to state that 58% of business's surveyed look to digital to help them increase their sales by finding new customers and 56% of business's assess the impact of digital in relation to customer experience as they recognise that one of the quickest ways of increasing sales. From the survey, 63% of companies plan to improve the online customer experience. Selling to existing customers can be faster and easier provided they are having a good customer experience (Accenture, 2015). Social selling is leveraging digital channels for understanding, connecting with and engaging prospects and existing customers at various parts of the buying process (Ancillai et al., 2019). Even though technology is advancing some customers and prospects will still desire the human touch (Graf et al., 2019). Sharing content and building a network of contacts in sales are the principles behind social media (Rodriguez, Peterson, & Krishnan, 2012). In B2B sales social selling is a relatively new idea but is becoming key in

opening up opportunities to increase sales (Itani et al., 2017). Many SMEs are not using it to its full scope and potential especially in looking to gain competitive advantage (Gilmore, 2007)

In the sales context, social media can be defined as any social interaction improving technology that can be utilised by sales professionals to generate content (Agnihotri et al., 2017). Over two thirds of the world's Internet population uses social media to understand different products and services and exchange information (Agnihotri et al., 2017). Companies are using social approaches not just to communicate better with prospects and customers, but they are using it to share knowledge with their suppliers and business partners, which help keep them well informed. Using social media in business to generate leads is expected to grow from 51% to 74% by 2015 and post-sales support usage is expected to increase from 46% to 69% in the same time period (Cortada, Lesser, & Korsten, 2012). A B2B study highlighted the value of social media using a live field study where the value of data taken from Facebook accounts improved the prediction of good prospects (Meire, Ballings, & Poel, 2017). The study highlighted the richness of social media and how good it is in finding suitable prospects. Gaining technology acceptance by salespeople is critical (Schuldt & Totten, 2015). Companies are responding to these technological and social changes by moving their spend in advertising away from TV, radio, print and investing it in online advertising that reaches their captive prospects (Trainor, 2012).

Customers are well informed today and they can research online in real time to review competitors along with current market pricing. Social media plays an important part in helping turn the prospect from cold to warm. Social media is an enabler for competitive intelligence collection and adaptive selling (Itani, 2017). Even though the benefits are there, it is not being fully utilised by companies. Andzulis, Panagopoulos, & Rapp, 2012) argue that social media

when properly executed makes the content of transactional marketing obsolete. Every step in the sales process now has a role to play in social media (Schuldt & Totten, 2015). Two primary salesperson goals which are facilitated by social media are acquiring new customers and servicing existing customers. Salespeople can dramatically speed up the prospecting process by using the correct social media platform to find qualified prospects and to also help ideal prospects find them (Finley, 2011). LinkedIn's popularity is seen to be very conducive to prospecting (Oechsli, 2011). It allows a company to make an electronic introduction to potential prospects online and it can be a goldmine for uncovering good connections.

Social media is changing the way salespeople and buyers operate (Moncrief et al, 2017) and sales managers are proving slow to recognise social medias potential. It is similar to when salespeople were asked to embrace IT to help perform their jobs better and sales literature pointed towards the technology acceptance model and what factors influenced salespeople in its perceived usefulness and perceived ease of use (Ahearne & Rapp, 2010). Buyers have a great deal more information readily available and they are more sophisticated (Moncrief et al., 2017). Social media touches every stage of the sales process (Andzulis et al., 2012). A study highlighted that salespeople were using 59 social media activities in their sales job (Atkin, 2017). In a survey carried out of B2B marketers only 5% said that social media marketing was a mature and well optimised even though 55% of buyers turn to social media when searching for information (Giamanco & Gregoire, 2012). This demonstrates that one of social media's greatest potential for salespeople is at the front-end of the sales cycle during the prospecting, lead qualification and pre-sales research that may ultimately lead up to a face to face meeting with the prospect.

Social media tools enable salespeople to capture, organise and remember personal details of their customers and it also allows them gain personal detailed information about a particular customer (Agnihotri, Kothandaraman, Kashyap, & Singh, 2012). With the effective use of social media tools salespeople can communicate information to customers more effectively and provide personalised customer interactions (Ogilvie et al., 2018). Social media is described as a groundswell in which people use technologies to get things, they need from each other. It is playing a major role in reaching consumers and business people along with old acquaintances (Finley, 2011). Television and telephony increased by 150 million users and 89 million users respectively over a period of 39 years but Twitter reached these numbers within four years; this demonstrates how powerful social media is as a forum for getting a message to the market place (Agnihotri et al., 2012). In 2018, Facebook had 2.23 billion monthly users and Twitter had over 336 million users (Portal., 2018). LinkedIn had over 500 million users (Darrow, 2017) and is the world's largest professional site where most of the members have included in their profiles past and current work history as well as links to friends and colleagues. There are over 350 million blogs and 1.8 billion internet sites worldwide (Blogging.org, 2019).

Given these ever-increasing numbers and the use of social media by potential customers, salespeople are beginning to use these technologies to help manage their communication with customers and prospects and review online community discussions. One sales trainer suggested that all prospects should be treated like a person would treat their grandmother with the added stipulation that the salespersons also sees the grandmother with over one hundred thousand followers (Pink, 2013).. Social media can also have a negative impact as happened to Pfizer when a competitive drug to their Lipitor cholesterol product was prescribed by doctors and became viral on the internet and seriously reduced Pfizer's sales (Miller & Christakis, 2011) as patients moved to the lower cost drug. Salespeople can be more effective using social media

as a tool for finding new prospects. IBM used a social media tool called Blue Pages which was a directory that allowed its employees to find others with a particular set of skills to help resolve customer issues building a stronger relationship with the customer (Rosenheck, 2010).

A survey of salespeople found that almost half the buyers saw an increase in the role of social media in the buying process (Featherstonebaugh, 2010). Face to face contact is being used less often by salespeople to build and maintain client relationships (Marshall, Moncrief, Rudd, & Lee, 2012). Salespeople are having more trouble getting past voice mail and e-mails to prospects are not being returned and this also applies to regular customers. As a result some innovative companies are trying something different like LinkedIn, Facebook and Twitter and they are achieving excellent results (Johnson, 2011). However Facebook, YouTube and Twitter reported that most sales managers are proving slow to recognise social media's potential (Giamanco & Gregoire, 2012). Younger people seem to be more comfortable in building relationships through virtual means and this does not seem to have a negative impact on the relationship.

Social media will have a significant role to play in the future and may have significant changes in how people will conduct their business as even today they are using social media to demonstrate connectivity to both their host organisations and clients. Social customers no longer want to serve as passive targets for marketing activities, they want to investigate themselves through social media what is available in the market place (Trainor, 2012). These customers trust their colleagues and are connected via the web or mobile devices as much as they want and they make buying decisions based on this trust (Greenberg, 2009). As companies social media technology increases, the customer engagement initiatives increases which can lead to increased business with the prospect (Harrigan, Soutar, Choudhury, & Lowe, 2014).

Focusing on these customer relationships can make an organisation more prone to engage with customers through social media.

Companies need to be careful that they do not have social overload as research has shown that increased usage of social media messages may cause negative behaviours and prospects can decide to switch off by reducing their usage (Agnihotri et al., 2017). Social media is a critical area in sales and is creating unique potential for better performance for suppliers looking to increase their sales pipeline and profits. One area that is key is the training of the employees in social media. Research has shown where companies offer formal social media training programs social selling jumped from 28% to 74% in terms of adoption (Itani et al., 2017).

Some studies have recommended that companies hire an expert in social media in order to maximise the sales opportunities (Itani et al., 2017). Having someone focussed on building and maintaining favourable social media relationships for their customers with quality content can help improve engagement by locking in the prospect with continued interest in the content (Aladwani, 2017). Content should be matched with the customer needs, beliefs, feelings and behaviours. Customers may resonate with these terms and it may help improve the relationship with the customer and may improve rapport. A study highlighted that one of the predictors of social media usage is how competent and knowledgeable the company is with social media (Guesalaga, 2016). It highlighted another key variable is the customer engagement with social media. Literature suggests that a generation gap in which younger buyers and sellers are embracing the idea of virtual relationships while older individuals are more hesitant and might require training to adapt (Rapp & Panagopoulos, 2012). One of the challenges in relation to social media is that there is no consistent strategy and there is a lack of focus (Moncrief et al., 2017). Even though social media creates new opportunities it doesn't change the basic

dynamic and salespeople still must connect with people on a one to one basis and they still must work their way through the stages of the sales process with the prospect.

Technology impacts how knowledge is created stored and accessed (Tanner & Shipp, 2005). As a result of the focus on technology to support productivity this has led to the implementation, acceptance and utilisation of sales technology. The two, arguably most common forms are CRM and SFA systems (Baker & Delpechitre, 2013) and are the fifth antecedent of the SPEP framework and are discussed in the next section. Both tools are reviewed separately avoiding any overlap but recognising that both tools can be developed to provide one solution.

#### **2.4.2 SFA**

Sales force automation (SFA) is a technology tool that better enables sales and marketing organisations to manage their customers (Jelinek, 2013). SFA is used exclusively by the sales and marketing team to organise and manage their prospects and it can be used for sales forecasting and creating reports for sales pipeline management (Wilding, 2014). SFA can help in contact management and records, sales leads assignment, number of lead conversion, calendar appointments and to-do lists for all salespeople to view and tracking of salespeople in relation to goals and revenue targets. Usually SFA focuses on the front-end of the sales process covering sales pipeline. These SFA systems are only as good as the salespeople that use them, and the salesperson is still responsible for executing the sales process (Jelinek, 2013). SFA systems help to enhance sales force management by automating a variety of sales activities in order to improve productivity, reduce costs, increase closing rates, have better information flow within the organisation, eliminate duplicate databases, have more effective management of the sales process, share best practice and have increased flexibility with customer service (Barker,

Gohmann, Guan, & Faulds, 2009). SFA is designed to help salespeople to gather information, share product and service offerings along with sharing customer and competitor information (Malshe & Sohi, 2009). SFA helps to facilitate building relationship selling between buyers and sellers (Baker & Delpechitre, 2013). SFA provides rich opportunities to develop strong relationships between the buyer and seller. It can help the salesperson achieve greater levels of effectiveness and efficiency (Ahearne & Rapp, 2010). One study identified that one of the key benefits in using SFA is improved salesperson professionalism along with customer interaction frequency, response time and customer salesperson relationship quality (Boujena, 2009).

SFA has helped develop sales management control systems that can help align salespeople's activities and actions with their company's objectives (Malek, Sarin, & Jaworski, 2018). It is used exclusively by the sales team to organise and manage their prospects and it can be used for sales forecasting and creating reports for sales pipeline management (Wilding, 2014). These sales prospects need to be cultivated, written sales proposals need to be sent, sales objections dealt with, and post sales follow up proffered, and SFA helps accommodate these activities.

Along with tracking all sales leads, SFA can identify what stage they are at in the sales cycle including, not qualified-not contacted, qualified but not contacted, identified as qualified-called on, suspects improperly judged as qualified-called on in error, qualified non-suspects contacted and unqualified non-suspects contacted by cold calls (Jolson & Wortruba, 1992). Companies need to determine its SFA strategy according to the level of engagement with customers and what the key goals are with these customers (Malthouse, Haenlein, Skiera, Egbert, & Zhang, 2013). In addition information internally between departments within the organisation and externally with selected outside parties needs to be shared as this can contribute to a reduced sales cycle and up to date information on competitors (Erffmeyer & Johnson, 2001). Using



SFA can help give a company an advantage in winning business as it will allow a faster response time, have improved accuracy, better communications and achieve cost savings.

### *SFA implementation challenges*

Salespeople do not have a good record in keeping information and many have an inborn dislike of conforming to any system and many times have a disorganised method of keeping and accessing this information. A study highlighted that salespeople are reluctant in entering and sharing information regarding their prospects and customers and this especially applies to where they have no say on who can access the data.. The results highlighted that salespeople felt that through verbal communication the information related to the prospect was richer in nature than a written or computerised report. Salespeople felt that when they had to enter the information in a formalised computer report they had to follow the format, which at times limited the amount of information that could be inputted. In contracts when discussing their findings with the team they were able to express themselves better and they could be a lot more flexible when disseminating the information. By keeping the records it may help ensure that the salesperson is prepared when making or receiving a call from a prospect or customer (Boujena et al., 2009). Management are challenged in implementing an SFA system as it can give the “Big Brother” (Jelinek, 2013, p.640) effect where the salespeople feel that they are being constantly monitored rather than it being a helping hand.

Getting salespeople’s acceptance is critical if SFA is to be successful in the company and all of management needs to support its implementation and involvement (Malshe & Sohi, 2009). Salespeople can have negative perceptions of SFA and a study highlighted where companies introduce it to salespeople on a voluntary basis it is accepted more widely (Moutot & Bascoul,

2008). Management, supervisors and salespeople must be aligned as this can improve SFA adoption (Cascio, Mariadoss & Mouri, 2010). Training can help this and the sales team and management need to be trained on how to achieve the maximum benefit from the SFA system and all people in the sales department should use the system in order to track all sales activities (Woodburn & McDonald, 2011). Research has demonstrated that learning orientation has a positive impact on intention to adopt SFA (Jelinek et al., 2006).

As technology has developed CRM is now offering built in SFA features and vice versa so that everything can be managed within the one software package (Wilding, 2014). Companies are recognising this, and they are introducing prospecting and contact management as part of their CRM system. Where they are independent there is a very strong relationship between SFA and CRM and both can work well together in driving sales in a company (Moutot et al., 2008).. SFA has developed over a period of time and with social media and its impact on the sales process it is often referred to as CRM 2.0 (Greenberg, 2009). It takes into consideration the paradigm shift but at the same time it sees the continuation of operational and transaction-based capabilities of CRM. Added to CRM 2.0 are social features and characteristics that address the communications between the customer and their peers and CRM is discussed in the next section.

### **2.4.3 CRM**

CRM manages customer interaction throughout the customer lifecycle and all data related to customer interaction are kept in one single location. Research has shown that there is strong evidence that CRM adoption and implementation has a positive impact on sales performance, sales success and collaboration (Rodriguez & Honeycutt, 2011). CRM is a technology that balances sales, marketing and service information systems to build partnerships with

customers. The genesis of CRM traces its way back to the mid-1990s and it was used in call centres to track customer data and activities (Osarenkhoe & Bennani, 2007). In larger organisations, companies can afford to invest in software support tools like CRM. The CRM market has become more developed over the last two decades with new players like Salesforce.com, Siebel-Oracle and Microsoft providing solutions to track sales customer activity (Jelinek, 2013), and this can help the back end of the sales process (Bradford, Johnston, & Bellenger, 2016). Global CRM expenditure in 2018 grew by 15.6%, to reach \$48.2 billion (Moore, 2019). CRM software is the largest software market in the world. By 2025 it is expected to reach \$80 billion in sales (Taylor, 2019). Various studies have shown positive results in companies when CRM has been implemented. These results vary from increased customer satisfaction, improved salespeople performance, higher revenue growth and improvements in sales related behaviours (Ahearne et al., 2006; Mithas, Krishnam, & Fornell, 2005; Richard, Thirkell, & Huff, 2007). Companies need customer information to develop their business, management need to know which customers are the most profitable. They also need to know which ones can close the sales the quickest and what offers to make to the customers on upselling (Aydin & Ziya, 2008) where additional products can be sold to customers who are buying. In addition, they like to be aware of cross selling opportunities to customers and which ones can they build long term relationships with through key account management. CRM provides this information (Raman et al., 2006; Salojarvi & Sainio, 2015)

Another key area that CRM focuses on is customer retention (Thomas, Blattberg, & Fox, 2004).. A key influence in customer retention is how well the supplier performs against customer relationship quality (CRQ) and trust. Buyers sees trust as the key foundation stone as highly confidential information is going to be shared and the buyers need to feel comfortable that their data is in safe hands (Brockman, Parkb, & Morganc, 2017). Research highlighted that

some of the key areas to measure in CRQ are customer satisfaction, trust and relationship commitment (Jobber et al., 2019). A further study underlined that companies looking to win repeat business from an existing customer have a 60%/70% chance of getting the order whereas a company that has lost a customer has only 20%/40% chance. This shows how important a part CRM can play in the sales process as it can track all customer interactions. When it comes to winning a new customer the same study suggested a 5%/20% chance in winning the order (Griffin & Lowenstein, 2001).

Researchers refer at times to CRM as Social CRM and they see it as an extension of traditional CRM where the salespeople look to build relationships with the customers to strengthen rapport (Rapp & Panagopoulos, 2012). CRM enables customer relationships where the buyer and seller network. CRM helps to align business processes to the strategy of the customer in order to build long term relationships and loyalty along with profitability. CRM can be an excellent tool to help drive effective KAM since it holds all of the knowledge related to the customers and salespeople with this knowledge can succeed better than those who do not have access to this type of information (Salojarvi & Sainio, 2015).

Companies are investing heavily in CRM and one of the key points driving this is getting access to real time customer data and providing a good customer experience. Salespeople are using mobile CRM, and this is helping them achieve their targets. Innoppl, a US app development company reported 65% of salespeople using mobile CRM hit their sales target as opposed to 22% non-mobile CRM users (Taylor, 2019). Advancement in technology has seen CRM systems being used as a process of capturing information and management agreeing a strategy with the salesperson and other relevant people in order to maximise the sales opportunity (Ahearne et al., 2012).

The use of CRM allows salespeople improve collaboration with customers, increase their reach to their co-workers, supply chain partners, prospects and customers (Moore, Raymond, & Hopkins, 2015). CRM systems detail the activity levels of each customer, number of offers sent to the customers, orders placed, billings, open offers and this information is good for the salesperson to have when they are visiting the customer (Jobber, 2010). It looks at the customers and a company's sales force and how well they are performing (Trainor, Andzulis, Rapp & Agnihotri, 2014). Research indicates that CRM systems when executed fully can reap significant benefits such as customer responsiveness, improved customer satisfaction, loyalty and retaining high value customers which ultimately leads to higher revenues and profits and increasing customer lifetime value (CLV) (Malshe, 2011). Some buyers manage their supplier base rather than the other way around and they call this Vendor Relationship Management (VRM) (Malthouse et al., 2013). Customer Experience Management (CEM) is closely associated with CRM. CRM looks at data on the customers and leveraging it whereas CEM looks at the knowledge they have gained having worked with the customer and knowing how they react and behave in real time and leveraging that data. By reviewing both CRM and CEM this can help determine if the supplier's customer value proposition is giving a superior customer experience (Homburg, Jozic, & Kuehnl., 2017).

### *CRM implementation challenges*

Social CRM allows the integration of customer facing activities and technologies with social media applications to engage customers and enhance customer relationships (Trainor et al., 2014). The study highlighted that companies reviewing social media technology investments should investigate how these technologies integrate with the company's existing systems.

Reichheld, Schefter, & Rigby, (2002) highlighted four perils of CRM that are worth paying attention to:

- Implementing CRM too early without agreeing the customer strategy
- Executing CRM without having a correct organisational structure in place
- Assuming that more CRM technology is better
- Pestering not wooing customers and developing the relationship properly.

Other reasons CRM may not be successful in an organisation is due to poor planning on the pre implementation stage (Raman et al., 2006). The user's ability is also important in the success of CRM. Management need to ensure proper training is in place for the people using CRM and there needs to be a task-technology fit (TTF) (Goodhue & Thomson, 1995) where the users see the relevance of CRM (Speier & Venkatesh, 2002) and they can see how it enhances the productivity in their company. Companies underestimate the amount of training and costs involved and this can result in challenges with the implementation (Erffmeyer & Johnson, 2001). Customer interfacing employees need to be trained on CRM so they can identify opportunities when specifying customer needs (Raman et al., 2006). When CRM is not working effectively in a company some of the reasons for this are, lack of flexibility in the software, employees not trained properly and a lack of interest from the employees (Raman, 2006). Management need to ensure that the employees are involved at the pre-implementation stages of CRM as this helps get their buy in and can lead to a successful implementation (Osarenkhoe et al., 2007). It is very important that top management support and train their employees in the area of technology and information systems as these have a significant bearing on the success of social CRM adoption (Ahani, Ab, & Nilashi, 2017). Top management play a key role here and it needs to be driven top down so that employees can see

how important they are treating CRM and that top management are committed (Osarenkhoe et al., 2007).

A study highlighted four key strategies for management that can help achieve a successful implementation of CRM (Osarenkhoe et al., 2007).

- Interaction - Collect data internally from all employees involved and from customers
- Contact - Map out contact points between employees and customers
- Knowledge - Continuous knowledge by collecting the information from customers, channels, competitors, markets
- Relating - Maximise the network that is being developed by creating opportunities for value creating relationships.

Salespeople not updating CRM can also be an issue and some companies have reward structures in place to achieve the desired result and have their CRM with real time updates (Reinartz, 2004). SFA/CRM requires a team effort. It needs management to work together with all relevant departments before and during the implementation process in order to achieve success (Erffmeyer & Johnson, 2001). A study highlighted that owner managers of SMEs who are thinking about bringing in CRM must be supportive of new technology and innovation (Nguyen & Waring, 2013). In addition, they need to recognise the contribution their employees make to the implementation of CRM. There is a slow rate of adoption in SMEs when implementing CRM and more than fifty percent of them end in failure (Ismail, Talukder & Panni, 2007). An area that is starting to create a lot of interesting discussion from a technology perspective in the sales process is Artificial Intelligence (AI) and this is discussed in the next section.

#### **2.4.4 Artificial Intelligence (AI)**

The next few decades will herald the fourth industrial revolution and one of the components powering it will be AI (Syam and Sharma, 2018). There is no standard definition of AI, it was created in 1955 by John McCarthy but it went out of fashion in 1960 after much talk about computers being smarter than people and taking over jobs (Faulds & Raju, 2020). It has been described as an information-based computer system or machine that has the ability to complete tasks that require human intelligence (Yang & Siau, 2018). Only recently researchers who had previously shunned the use of the word for decades brought it back into the fold. AI technology is no longer perceived as futuristic and it is now seen in some areas as an important part of the business model of various companies (Dwivedi et al., 2019). “AI is going to make our lives better in the future” Mark Zuckerberg, CEO Facebook (Davenport, Guha, Grewal, & Bressgott, 2020, p.24). It is not a question of whether AI will change the profession of selling but rather a question of how soon (Dickie, 2019) and the impact will be profound (Syam & Sharma, 2018). The influence of digitisation and artificial intelligence is expected to be more significant and far reaching than sales technologies that were implemented to date (Singh et al., 2019). The study highlighted three areas where digitisation and AI will have more of a significant influence than previous technologies: ‘value creation, organisational issues, and individual level issues’ (Singh et al., 2019 p 18). One of the major forces driving this is the expansion of computing horsepower and AI systems can process large amounts of structured data effectively (Paschen, Wilson, & Ferreira, 2020).. Even though it is a very big industry it may take another twenty years before AI becomes mainstream in all aspects of business and day to day lives (Faulds & Raju, 2020). This is like personal computers where 1984 was the tipping point but it took over twenty years for people to own one.



AI is at a very early stage, but it is already having a positive impact on sales. AI and machine learning have the potential to have a significant impact on the selling process including forecast management, prospect engagement and CRM (Dickie, 2019). CRM suppliers are adding “intelligence” to their suite offerings for their customers and these AI plug ins are allowing customers analyse the data sets for patterns (Antonio, 2018). Companies can have their sales organisations use the data and analytics to help improve their sales strategy, customer engagement and resource deployment (Zoltners, Sinha, & Lorimer, 2020). AI can help grow revenues by making better marketing decisions on pricing, product recommendations and enhanced customer engagement and it can also help reduce company costs due to automation of certain sales and marketing tasks (Davenport et al., 2020). Prospecting, is more fully described in the next chapter, covers locating prospects, qualifying them, rating them in order of priority in terms of opportunities. AI can help build rich prospects matching the company’s customer profile, it can present predictive lead qualification and update lead generation/qualification models (Paschen et al., 2020). Salespeople can spend up to 80% of their time qualifying leads and 20% closing the sale. AI can help reduce this time significantly and deliver better lead generation/qualification than the salespeople (Syam & Sharma, 2018). The sales department has historical customer activity and marketing have website analytics and information from marketing campaigns. Combining these data sets can allow an AI algorithm to predict who may respond to future new offers (Antonio, 2018) Salespeople need to be aware of the benefits of AI and how it can help them increase their sales and allow them to spend more time developing relationships with customers versus lead generation and lead qualification.

Eighty five percent of sales managers are planning to invest in AI related sales technologies with a key focus on relational selling, being customer orientated and giving their clients good

customer experience (Arli et al., 2018). One of Bill Gates maxims on technology is that that the changes that will occur in the next two years are overestimated and the changes that will take place in the next ten years are underestimated. Since machine learning will contribute to AI getting better on its own it will become more valuable to sales organisations and the rate of improvements seen could be less than ten years (Dickie, 2019). While AI can deliver detailed information and reports, humans still must review this information and it is key that the salespeople are trained correctly on interpreting the output of AI (Paschen et al., 2020). Salespeople will need to develop new skills so that they can maximise the value and benefits from AI systems (Kaplan, & Haenlein, 2019).

Companies will need to review their sales structure to determine the most effective approach to take to deal with AI focusing on customers expressed needs versus salespeople addressing issues like customer stewardship (Davenport et al., 2019). There is an expectation that salespeople will be slow to embrace AI as they may see it as a threat to their employment. However human contact in the sales process is still critical and this can be presented to the salespeople reassuring them the human touch might even become more important to customers and that the personal connection still needs to be in place (Paschen et al., 2020). As mentioned in the introduction to this section, AI is only recently been brought back into the fold and it is an area still under researched. A recent paper on machine learning and AI identified future areas of research on this topic (Syam & Sharma, 2018).

It is important that the sales team are motivated and properly rewarded for their sales efforts. This is the sixth antecedent of the SPEP framework, and this is discussed in the next section.

## **2.5 Rewards/Motivation**

Dating back more than a century companies have used incentives to motivate and direct the activities of salespeople in order that they can achieve job satisfaction. Having a motivated sales team can, help increase productivity, drive salespeople to work smarter/harder, seek a win win result with the customer in negotiations, improved relationships with customers and salespeople can feel more relaxed with less conflict and negativity (Jobber et al., 2019). Sales management need to have a good understanding on what motivates their sales teams and what actions they need to take (Miao & Evans, 2014). Working in sales can be a lonely existence, the salesperson needs to feel that they have a support structure around them and they are not isolated along with being motivated (Piercy & Lane, 2009). Salespeople are motivated by money, but recent research has also shown that salespeople are interested in career progression, they like working independently using their own initiative and a desire to be successful (Jobber et al., 2019). People are motivated by being given autonomy, mastery and purpose (Pink, 2009). Autonomy is all about the salesperson getting the job done their way without loss of supervision and interference from the manager. Mastery focuses on providing the sales team with the opportunity to grow and continually learn. Purpose is all about making the employee feel that the work they are doing is important and meaningful.

National Cash Register was one of the first manufacturers that used incentives to motivate the sales team. John Patterson the founder of NCR in 1884 paid 50% in commission rates to the sales representatives and they made a fortune in commissions as a result. One of the reasons they paid such a high amount in commissions was that the company could not afford to pay the full salaries as they were short of cash. In the end it turned out to be a very good decision as NCR went on to be an extremely successful company and lots of other companies at the time

followed suit on large commission payments to its sales representatives (Zoltners, Sinha, & Lorimer, 2012).

Rewarding highest sales performers is key in the sales organisation. They not only add significantly to the success of the company, but it can also help motivate the skill development of peer salespeople (Miao, Evans, & Li, 2017). Rewards for employees can help motivate them to work harder, more efficiently and more productively and this can help to achieve growth in the company (Altinay et al., 2008). Two forms of variable pay that are widely used when it comes to achieving sales quotas are, lump sums (bonuses) paid upon reaching the sales quota and commissions paid on salespeople exceeding the quota (Kishore, Rao, & Narasimhan, 2013).

There are two major types of rewards, intrinsic and extrinsic and the sales manager needs to identify quickly which rewards salespeople respond to (Kumar, Sunder, & Leone, 2015). Intrinsic rewards are feelings of accomplishment, feelings of self-worth and feelings of developing one's skills and abilities. There is a need for achievement, and this can help motivate and have a positive influence on the salesperson and their performance (Amyx & Alford, 2005). The sales manager can have a significant impact on their salespeople in terms of motivating them.

Where the sales manager uses positive leader reward behaviour this helps motivate the salespeople as they feel they are recognised when they achieve good results. Salesperson characteristics are influenced by the sales manager and they have a critical role to play when building the sales team (Boles et al., 2012). The job of a manager is almost like that of a teacher in terms of inspiring people to be better (Elberse, 2013). Research has identified a positive

relationship between employee creativity and the emotional intelligence (EI) of the salesperson's manager (Lassk & Shepherd, 2013). Sales team members that are high on EI tend to have higher levels of job satisfaction and achieve high performance levels (Lassk et al., 2012).

Extrinsic rewards may include monetary income, promotion and respect from the manager. Salespeople respond quickly and enthusiastically to monetary rewards and recognition (Kumar et al., 2015). Promotion is seen to be more valued when it is difficult to attain, and salespeople can be very motivated if they gain the promotion. Profit sharing along with bonus plans have been identified as one of the ways in helping to develop an SME into a rapid growth company (Barringer, Jones, & Neubaum, 2005). In terms of bonuses in relation to prospecting companies offer these to salespeople for adding new accounts, new product placements, product mix, gross margin and revenue growth (White, 2004). Informal reward programs can be used to motivate the salespeople to hit their targets (Coombs, Evans, & Cowles, 1991) and it does work in terms of getting employees to cooperate and work well as a team (Brickson, 2000). These informal rewards may be in the form of gratitude and reciprocation. These incentives act as a good motivator for the salespeople to achieve the performance measurements set by the sales manager. Sales managers need to watch out for the symptoms in their salespeople of emotional exhaustion i.e. loss of confidence in their ability to succeed, not able to identify solutions and or a lack of motivation (Lewin & Sager, 2006). The salesperson deals with a lot of stress and conflict within their own organisation which can contribute towards burnout. Sales management need to take into consideration the organisations commitment to their salespeople along with reviewing what aspects of the sales job motivates the salespeople as this can have a serious impact on whether or not the salespeople will remain with the company (Rutherford, 2012). In a study carried out strong reliable and effective motivation strategies were seen to

help generate positive sales performance outcomes (Amue et al., 2012). Amue et al., (2012) also noted that when financial incentives are given to the salespeople in terms of salary, bonus and commissions there is superior sales force performance within the organisation.

One survey identified that the frequency of the communication between the sales manager and the sales employee is positively related to the salesperson's job satisfaction (Johlke, Howell & Wilkes, 2000). The effectiveness of the sales manager has a major part to play in the success of the sales team. Since the sales managers control role is that of commander and scorekeeper where they allocate work, follow up on target prospects, monitor the sales team revenue performance against forecast this will give them the tools needed to provide the relevant compensation or discipline to the team (Piercy & Lane, 2009). A word of caution around paying high commissions is that a company needs to be careful that the salesperson doesn't make big promises to the customer that will not be met just to get the sale and collect the commission. Salespeople may end up having money as their number one reason for staying in the company with loyalty being non-existent (Zoltners et al., 2012). These same salespeople may not complete some important tasks that they should do as their focus is on getting sales in order that they can make lots of money. If a company is using sales quotas, they need to monitor the salespeople's revenues as sometimes when the salesperson sees that they can hit their forecast, they hold off on any additional revenues with their customers until the following month. This can have a negative revenue impact on the suppliers in terms of revenues and cash flow (Kishore et al., 2013). Top sales performers earning very high commissions can have a negative effect on the rest of the sales team as they can easily become demotivated, low morale and poor productivity (Miao et al., 2017). The sales manager needs to be aware of this so that they do not end up with high sales staff turnover as a result. There needs to be a balance and it is up to the company to structure a sales incentive plan that is reasonable and fair. A company that

invests in technology that increases and eases the work performance of the sales team is seen by the team as a commitment from management and this can produce better results and a more motivated sales team (Kirchenbauer, 2011).

As the sales team delivers profitable revenues from their prospects which can be reviewed in detail in the CRM system, over a period some of these customers contribute towards a high percentage of the overall company's revenue. Positive relationships and a strong business rapport should have built up with the customer during the front-end of the sales process. These customers are called key accounts and can be developed by the sales team being proactive into significant revenue generators for the company (Brehmer & Rehme, 2009). The term "strategic account" is also used when discussing key account management, and these accounts are treated differently from standard customers, as many key accounts can make up over 80% of company revenues (Lacoste, 2018). KAM is the seventh and final antecedent in the success of the SPEP framework model and this is discussed in the next section.

## **2.6 Key Account Management**

The nature of the selling environment is experiencing fundamental change (Rajshekhar, Granot *et al.*, 2011) in the twenty first century. There is a lot more international competition as companies are able to sell in a virtual borderless Europe and there is a lot more globalisation taking place. As a reaction to these changes in their customers purchasing behaviours and demands suppliers have introduced Key Account Management (Ivens and Pardo 2007; Woodburn & McDonald, 2011). KAM supports the profitability and financial viability of companies in business-to-business markets (Guesalaga, 2016). People often talk about the "Pareto Principle" when it comes to selling to key accounts and the 80/20 rule applies where 80% of the revenues come from 20% of the customers (Stevenson & Page, 1979). Recent

studies highlighted that 70 % of sales of companies are coming from only a few key customers and these customers are putting their suppliers under pressure on improving the service and lowering the costs (Jobber et al., 2019).

Managers need to decide which customers should be targeted based on the expected contribution to the company's revenues and profits (Panagopoulos & Avlonitis, 2010). Companies are selecting strategic customers who are treated differently from standard customers (Lacoste, 2018). Customer experience is seen as an important buzzword in marketing and a good experience by the customer can help develop and expand the relationship with the supplier (Lemon & Verhoef, 2016). An important objective for a key account manager is to nurture the relationship, strengthen the ties between both organisations and to recognise any barriers that may inhibit the potential of the account (Bradford et al., 2012). In a 2005 study, half of the surveyed 200 executives at Fortune 1,000 companies reported only modest benefits from intense customer collaboration and one quarter lost money (Virtanen et al., 2015). One of the ways to measure the success of the key account is through repeat orders and to get repeat orders the supplier needs to deliver a high KAM performance and suppliers should create KAM programs that deliver this high performance (Mohd & Ahmad, 2014). The key account manager has become the custodian of the customer relationship (Storbacka, Ryals, Davies, & Neonen, 2009). A study showed that the companies that did well in building revenues with their key accounts were the ones that allocated a budget dedicated to KAM activities (Ang & Buttle, 2006) along with providing the appropriate level of resourcing (Ryals & Davies, 2011).

Salespeople have evolved into customer relationship managers and their role is to coordinate a wide range of inputs from everyone in order to satisfy the prospect's decision to buy from them (Plouffe et al., 2013). Companies are looking to gain a competitive advantage by creating



strategic alliances and closer long-term relationships with their key customers (Speakman & Ryals, 2012). Sometimes suppliers think that the relationship with their customers is healthy, but it may be the opposite. Customers may change their attitude towards a supplier. Zhang, Watson, Watson, Palmatier and Dant (2016) generated a checklist that helps identify the customer's state towards the supplier. This checklist included exploration, endowment, recovery, neglect and betrayal and applying this checklist when reviewing customers could be very useful (Zhang *et al.*, 2016). Having a strong relationship management strategy with the customers can result in a positive return on investment. In some cases, revenues increased by \$200k per customer with a 140% loyalty increase (Zhang *et al.*, 2016).

Companies can receive qualified sales leads from referrals when these key accounts recommend them to a previously unknown potential customer which may lead to more business (Chollet, Geraudel, & Mothe, 2014). The key account sales team that accurately targets those of its customers who are likely to make profitable referrals will make a much better return on its marketing investment than its competitors who do not engage in this activity (Kumar *et al.*, 2007) A study highlighted that Business Reference Value is playing a major part in helping to influence prospects to purchase and develop business with the supplier and adding significant value to the customer acquisition process (Kumar, Petersen, & Leone, 2013).

Dedicated strategic accounts are now a lot more common as sales teams are recognising the value in fostering close relationships with key strategic customers (Bradford *et al.*, 2012). Customer defection rates are a concern and the reason why they leave is not always understood. Customers sometimes see suppliers becoming complacent and lackadaisical and this can act as a catalyst to terminate the relationship (Friend & Johnson, 2017). Collaboration takes place internally within the organisation and externally with the customer's organisation. Internally

the key account manager needs to work with the various departments to create the value proposition and to understand what is being offered to their customer. A study highlighted that the higher the level of internal collaboration the higher the level of performance of the key account manager (Murphy & Coughlan, 2018). The same result applied to external collaboration and interestingly when both were present, there was a strong joint effect on performance. KAM can be made of up a dedicated team or a fluid team. Fluid teams are normally set up for a specific customer opportunity and disband once the opportunity is closed out (Lai & Yang, 2017). Successful management of customer information may be a source of competitive advantage as it can help suppliers to understand their customers better (Salojarvi & Sainio 2010). How to identify these accounts along with managing them (Georges, 2006) and retaining these key accounts (Schreier & Prugl, 2008) is extremely challenging. There are many pitfalls in setting up an effective KAM program in a company (Workman *et al.*, 2003). Key accounts may lead to bureaucracy and reduce flexibility in responding to the demands of these customers. Formalised processes are established in key account management and this may impede quick decisions that the salesperson needs to take for a key account. It may expensive, due to administrative costs or a requirement to have a dedicated person on the key account (Workman et al., 2003). KAM helps build loyalty between the supplier and the buyer but one of the drawbacks is that the stronger a customer's loyalty the greater the discount the buyer looks for (Wieseke, Alavi, & Habel, 2014).

85% of Western European companies do not know whether they make or lose money from their biggest customers, they think they do but most of them do not know. Management support plays a very central role in successful KAM programs (Ivens & Pardo 2007). The salesperson needs to have the right skills when managing their strategic accounts. Salespeople can move from their regular sales positions to strategic account managers provided management creates

a path for them and recognises the competencies that they need to be developed in. They may need to unlearn some of the skills in their sales role so that they can successfully transition to a KAM role (Lacoste, 2018).

While KAM programs are advantageous for the supplier, research has also demonstrated that there are disadvantages. Collaborative business relationships and cross business unit collaboration in selling situations have shown that in some cases it has resulted in opportunities being cancelled (Virtanen *et al.*, 2015). The customer can think that they are so embedded in the supplier's relationship that they can ask for anything to suit their business requirements and suppliers need to be cognizant of the dangers in getting too close to the customer. Suppliers will need to review their relationship management strategy as a result of e-commerce and its impact on B2B. Buyers are buying online and where this is happening, this is the main interface with the supplier. There will need to be a lot more focus on inside sales going forward as customer service will be playing a key role as they will be the main focal point when liaising with the customer (Arli *et al.*, 2018). Inside salespeople are no longer seen as order takers and they have a key role to play in building sustainable relationships with customers through key account management (Sleep *et al.*, 2020).

## **2.7 Conclusion**

Chapter 2 presented the first stage of the literature review covering the seven antecedents required to support the SPEP framework. These included: recruitment and selection, sales training, sales and marketing integration, technology/social media, SFA/customer relationship management motivation/rewards and key account management. The next chapter comprises of the second stage of the literature review covering the main steps in the front-end of the sales process culminating in the creation of the SPEP model put forward by this thesis.

## Chapter 3 Literature review: Sales Pipeline Execution Process

### 3.0 Introduction

Similar to many published sources on sales (Jobber, 2010) presents a standard sales process (Figure 3.1) covering some of the areas that need to be actioned when looking to develop the sales pipeline. Figure 3.1 is just an example of a sales process and other sales processes are somewhat similar.



Figure 3.1 Sales Process

Source: Jobber (2010)

These well-known sales processes have significant literature gaps. One of the key issues is that they are lacking in detail on many of the important steps in the front-end of the sales process

that need to be adopted when looking to increase opportunities in the sales pipeline. This literature gap is addressed through the creation of a SPEP framework. This chapter presents the second part of the literature review, covering the key elements of the SPEP, required to support the early stages of the front-end of the sales process. The order of the sections mirrors the final SPEP that emerged from this research and the key questions that were asked to arrive at the framework. The chapter starts with the idea of the Customer Value Proposition (CVP), a key component of a sales process. Once the CVP is developed, the attention turns to profiling customers and then from there prospecting to find these types of customers. Lead generation is dealt with first as part of this process and then the focus moves to qualifying the leads found. Once leads are qualified, then the prospect is contacted. Attention then turns to the contact and post-contact stages. The final section of this chapter discusses how the outcomes of the SPEP framework can be measured.

### **3.1 Customer Value Proposition (CVP)**

No marketing is going to work well unless the salespeople know what their value proposition is i.e. what is the number one reason that people do business with the company. Business marketing research has highlighted that there should be a stronger focus on creating customer value as a path for building a highly satisfied and loyal customer base (Blocker, Cannon, Panagopoulos, & Sager, 2012). Value creation is the *raison d'être* of companies (Woiceshyn & Falkenberg, 2008). Customers are demanding greater insight and knowledge, value adding solutions and quick responsiveness from salespeople (Leigh, DeCarlo, Albright, & Lollar, 2014). A company's reasons for selling are useless if they do not match the customer's reasons for buying. Customers look for and show loyalty to suppliers that deliver enhanced value (Blocker *et al.*, 2012). Salespeople need to coordinate efforts closely with their prospects needs and specifications along with building specific value into the relationship (Blocker *et al.*, 2012).

Salespeople need to be the architects of change in their customers worlds , they need to engage with customers, collaborate and add value by challenging the existing prospects paradigms (Dixon & Tanner, 2012).

Companies are more focussed these days on value and trying to get an understanding of the value they are selling from a sales and marketing perspective (Terho *et al.*, 2017). Suppliers are under pressure from buyers to deliver value and impact their profitability in a positive way (Luotola, Hellstrom, Gustafsson, & Harikoski, 2017). A study highlighted the importance of Value Based Selling (VBS) as an implementation of value based marketing at the sales force level (Terho *et al.*, 2017). Companies do not take advantage of the value they bring to their customers at times and they fall short in this area by underselling themselves. Sales management needs to ensure that the sales team are able to demonstrate to the customers their true value contributions which can help give them a sustainable advantage (Jaakkola, Frosen, & Tikkanen, 2015). Marketing can use VBS as part of their marketing strategy with the help of sales (Toytari & Rajala, 2015). Toytari and Rajala (2015) identified an approach for VBS using planning, implementation and leverage to maximise the opportunities for the suppliers in getting the message across to their customers. It is critical that management supports this effort as the study highlighted that without this support VBS would not be successful. Keranen and Jalkala (2013) identify five steps to show clearly the real value required by the customer to close the sale. One of the first steps for the supplier is to identify the customers “explicated needs” which provides a starting point. The second step is a baseline overview where the supplier finds out what the customers current situation is, the third step looks at the impact of the suppliers offering by having a trial run with the customer to see if their offering improves the current situation. The fourth step is to look long term and to check that the customer is realising the value. The final step for the supplier is to collect all data from everyone that has

been working on this prospect and to show the customer that all commitments made have been delivered on. This is important as there can be a difference between the promised value proposition and the delivered value proposition which is called the execution gap and these need to be addressed (Sheehan & Bossio, 2015). Companies creating value propositions by engaging with the relevant employees gain an advantage as it improves collaboration by learning together, builds relationship development and knowledge (Ballantyne, Frow, & Varey, 2011).

Customer value propositions (CVPs) are seen as configurations of several different practices and resources (Skalen, Gummerus & Magnusson, 2014). The genesis of the value proposition can be traced back to a project undertaken by McKinsey & Co. in the 1980s with a brief mention of the concept at that time. Later Lanning and Michaels (1988) defined the value proposition as a statement of benefits offered to a customer group and the price a customer will pay. There are three main steps, choose the value, provide the value and communicate the value (Kotler & Armstrong, 2018). For companies to increase growth in revenue with a customer the supplier needs to monitor the requirements of its customers on a regular basis and to watch out for competing value propositions (Sheehan & Bossio, 2015). CVPs are seen as a marketing message from the supplier telling prospects and customers the value they are bringing (Patala *et al.*, 2016). They communicate how companies help their customers get the work done (Johnson, Christensen, & Kagermann, 2008). It is important for the supplier to focus on what the company is looking for in terms of value for example they need to ensure they do not concentrate on the technology features of the product but focus on the actual benefits to the customer (Wouters & Kirchberger, 2015). They need to put themselves in the shoes of the customer and get an understanding of the customers business model along with crafting the value proposition and communicating the value (Terho, Haas, Eggert, & Ulaga, 2012).

Companies need to look for sustainable customer value propositions (Patala *et al.*, 2016). In addition, it is important to highlight any monetary value, if there are any savings and they also need to look at potential revenues of the product for their customer if they are selling it onwards. Wherever they can present monetary numbers it is seen as an advantage in trying to close the sale (Wouters & Kirchberger, 2015). When sharing the CVP with the customer, it is important that a granular approach is taken so that the customer can clearly see the value they are getting as this helps to increase dialogue with the customer and also they can see the unique value they are getting (Eggert, Ulaga, Frow & Payne 2018). At the core of all business relationships is value co-creation (Vargo, Maglio, & Akala, 2008).

When creating the value proposition marketing need to include sales as the sales force can play an important role in helping create the value proposition along with sustaining value to and from customers (Panagopoulos, Johnson, & Mothersbaugh, 2015). Research has shown that capabilities of the salesperson and their company perform a critical role in influencing the company's ability to create value (Cass & Ngo, 2012). The role of salespeople is changing. In the past, it was the marketing people that created value with the salespeople's task to communicate it to the prospects and customers. Sales and marketing need to co-create and communicate value and this can be achieved with customer's intimacy. A customer centric approach needs to be adopted which focuses on creating real value by individual customer genuinely understanding their needs, solving their problems and helping them make mutually beneficial buying decisions (Sheth, Sisodia, & Sharma, 2000). This value must be unique and compelling. Marketing has become increasingly customer-centric and companies are now recognising that customers are the starting point of all marketing activities, the driving force of the exchange process (Shannahan, Bush, Moncrief, & Shannahan, 2013). A study highlighted that buyers are making purchasing decisions based on their value perceptions they see with the



supplier and these need to be aligned with the buyers organisations objectives (Aitken & Paton, 2016). The same study reviewed the buyer's perception of the value proposition and it showed that buyers are more interested in value exchange meaning the amount paid versus value in use which focuses on the benefits of the product. The study highlighted that buyer specific perception value needs to be also taken into consideration when trying to close the sale (Aitken & Paton, 2016).

When executing the Value Creation Process (VCP) it should include the prospects organisation buying process along with the sales process. This will help the supplier identify how the prospect's organisation creates value in the market for its customers. Selling needs to be driven by the customer's VCP (Dixon & Tanner, 2012). A company's ability to move value to its part of the value chain can help to make them less replaceable when a competitor tries to displace them (Jacobides & MacDuffie, 2013). Creating value needs to be on going and management needs to find ways of continuing to demonstrate their company's value and they need to find new competitive advantages. Suppliers who show a willingness to understand the root causes of the issues with the prospect are the ones most likely to improve (Aoki & Lennerfors, 2013). If this does not happen then the engine of value creation can come to a halt very quickly (Zenger, 2013).

One of the mistakes companies make when defining the value they are bringing to the customer is that management embarks on a strategy and they do not consider the realities for the salespeople when they have to go out to the customer and execute the value (Cespedes, 2014). One potential reason for this is that management are perhaps years removed from customer contact and are not aware of what the actual customer perceives as real value. Sales organisations should be part of the sales strategy discussions as they deal with customers and

prospects daily. They can collect intelligence from these parties and use this when agreeing the overall company strategy.

Sales research to date has not focussed enough on the implications of the relational perspective on value creation for the sales function (Haas *et al.*, 2012). A company's value offering supports the proposition that service innovation capability is an important contributor to the creation of value for customers (Cass & Sok, 2012). The salespeople need to 'climb over the counter' and see everything from a customer's perspective by putting themselves in the shoes of the customer and it will help them develop a model that is consistent with the customers' expectations (Whittle & Foster, 2012, p. 28). One salesperson described it as not being enough to be on the skin of the customer but the salesperson needs to be under the skin (Terho *et al.*, 2012). Warren Buffett calls it "eating your own dog food" meaning that a lot of salespeople don't really know what the experience is like as a customer and he recommends that salespeople should play the role of prospect to see for themselves if they are happy with the experience. He highlights that if companies stay focussed on the fundamentals in terms of creating value for people and innovating for the better of their prospects who gives business to them, that these companies will succeed far beyond their imagination. John Chambers, the former CEO of Cisco, does not sell routers and switches that make up the backbone of the Internet. Instead Chambers sells human connections that change the way people live, work, play and learn. Organisations need to demonstrate to their prospects in simple language so that they can easily identify the benefits themselves.

The real measure of a good sales manager is their ability to have meetings with senior executives focused on creating business value. It is also important to bear in mind that purchasing departments are always looking for the cheapest price whereas CEOs are looking

for value, productivity and profit. Salespeople at times do not align themselves with the purchasing department and it is very important that salespeople work with purchasing as they are part of the decision-making process (Paesbrugghe, Rangarajan, Syam, & Jha, 2017). The study went on to identify four stages of purchasing evolution (i) passive (price focussed), (ii) independent (cost focussed) (iii) supportive (solution/innovation focused and (iv) integrative (strategy focussed). Each stage requires the sales team to apply a different strategy and it is important that sales and purchasing interact and that the sales team match the right purchasing stage as failure in this can be detrimental to the sale (Paesbrugghe *et al.*, 2017).

Suppliers can create superior value if they can understand their customers business, their challenges and their markets (Sullivan *et al.*, 2012). Existing customers can help the supplier understand what their key selling points are and once they are identified it can help future sales to prospects. Value creation through interaction between supplier and customer is key in business to business marketing (Stenroos & Jaakkola, 2012). Effectiveness in value chain means applying resources to improve the features of the product or of customer services that customers perceive as valuable (Woiceshyn & Falkenberg, 2008). Research carried out highlighted that value-based selling was made up of three dimensions (Terho *et al.*, 2012):

1. Understanding the customer
2. Crafting the value proposition
3. Communicating customer value

One of the key roles in a salesperson's job is to transfer information to customers and assist in problem solving so that they can demonstrate their creative selling skills (Groza *et al.*, 2016). Groza *et al.* (2016) identified that industry knowledge has a positive effect on creative selling

along with the importance of creativity for sales performance. Amyx and Bhuian (2009) created a sales performance scale which measures the delivery of services by salespeople. If the supplier can demonstrate that they can deliver outstanding quality service to their customers, it will help the customer see the value being added. Where the buyers are cost focussed the most suitable selling strategy is value selling as buyers are looking for input from the supplier to help them in their value sourcing efforts (Paesbrugghe *et al.*, 2017). Once this value has been established the salesperson can then focus on communicating the customer value proposition to the prospect.

The sales-oriented company needs to differentiate their business from their main competitors as this can help the decision-making process of the buyer. Salespeople look to develop relationships with the buyers, and they try to use this as a differentiator in areas what otherwise might become commodities. Buyers also are looking what they call the justifier: this is an element of an offering that would help their business and make a difference and the salesperson needs to accommodate the buyer in finding this. It can help the buyer demonstrate their reasons for choosing the supplier and it provides a clear-cut reason to management for selecting one supplier over others (Anderson, Narus, & Wouters, 2014). With the disruptive changes in technology buyers are more informed today and are demanding more from their suppliers. A study identified that sales are not paying attention to the real needs of purchasing and this needs to be addressed (Paesbrugghe, Sharma, Rangarajan, & Syam, 2018).

Research has demonstrated that the most salient aspect of the sales communication is the credible showing of the offering and its contribution to the profits of the buyers company (Terho *et al.*, 2012). Companies are using online forums to highlight the benefits of their products and services. Brand development and the supplier need to use this to their advantage

so that they can communicate an effective message. Customers are carrying out online comparisons, ratings about the product service and supplier and this phenomenon is making the task of selling tougher still (Talpos *et al.*, 2017). For relationships to survive with customers customer value propositions need to be driven around the customer needs (Bradford *et al.*, 2012). Once the CVP has been developed, the sales team are ready to move to the second step in the sales pipeline execution process, e.g. customer profiling and this is discussed in the next section

### **3.2 Customer Profiling**

One of the classic errors in prospecting is salespeople failing to identify the right customer for their product or service. Customer profiling can help suppliers become more customer friendly as they get to understand their prospects specific, and changing, needs. Another advantage in customer profiling is that suppliers can work with the customers in relation to their product range and work out what level of demand may be needed which can help determine the products life cycle (Dunk, 2004). Many sales and marketing organisations are wasting a lot of money and time targeting prospects that are never likely to buy, following opportunities that are never likely to close and implementing sales strategies that are never likely to be successful. Part of the reason for this failure is because sales and marketing departments do not define what a perfect customer looks like or what some people call the sweet spot. The sweet spot is a golf term where contact with the ball is made with the clubface at that perfect point for hitting the ball. In business terms it can be used when looking for your ideal customer, sweet spot customers are the ones a company should target and effective customer profiling can help identify these prospects (O'Dea, 2009). Complete customer profiles help sales and marketing agree on the most important attributes of their ideal customers which will help generate

qualified leads. Scoring the leads in terms of opportunities is good information for the marketing department to have as it will help them increase the quality of future leads (Jarvinen & Taiminen, 2015).

Salespeople should visit the prospects web site or review its annual report and from this they can collect a great deal of information. They can learn about initiatives that the prospects are looking at and they can see if their offering is matching their requirements. Purchasing managers have highlighted that salespeople seldom carry out this background research along with not checking what the prospects objectives are (Anderson *et al.*, 2014). This is an oversight by the salespeople as a little exploration can go a long way towards helping to close the prospect. The traditional view of sales is that they produce and deliver orders with a bundle of goods and services meeting the buyer's needs (Haas et al., 2012).

The challenge for the supplier is connecting with the right strategy at the right time and making sure everything is supported with the right resources. Provided this is achieved there is the possibility that this approach will produce the best possible results (Oliver, 2002). However, the sweet spot is shrinking dramatically as competitors are now hard wired into an instantaneous global information system and they can compress the sweet spot using other compelling arguments. It is critical that the sales manager meets with the sales team and creates a customer profile of the type of customer they are looking to close to increase revenues. They need to discuss the benefits of the products/services that they are offering these prospects, i.e. low-cost leader, technologically advanced and in essence a better offering than the competitors. Once the customer profiling has been completed and management has agreed with the sales team their ideal customer and channel to develop, the sales team are ready to move to the third key stage of the SPEP framework, i.e. prospecting, and this is discussed in the next section.

### 3.3 Prospecting

In most selling environments, nothing can happen unless the company is able to get that first appointment. Any company making sales the last step in the marketing process has its marketing program set backwards (Stevens, 2005). Unless a company has a steady stream of new customers that come in the form of strangers the company may not survive (Jones & Boyer, 2012). There are only two things that keep a company operating, profits and customers; one cannot have one without the other and without both, business will not work. Sales interaction begins when salespeople initiate communication with their prospects for the purpose of achieving a sale and ends when salespeople discontinue communication (Cicala, Smith, & Bush, 2012). Most sales managers when asked what are some of the biggest challenges they face with their sales team answer that their salespeople do not carry out enough prospecting (Greshes, 2006).

Finding new prospects and new accounts is the lifeblood of any expanding company (Hummel, 2011; Blake, 2013). Many salespeople look at prospecting as an ‘unnecessary evil’ in selling (Johnson & Marshall, 2016, p. 12). To become a successful salesperson, one has to develop a solid base of prospects. This prospect base will only remain strong if a salesperson continues to prospect successfully. It is also seen as the most cumbersome part of the selling process (Moncrief & Marshall, 2005). The key job of sales is to get the salespeople to the right place at the right time and with the right information to make a sale (Hummel, 2011).

Salespeople should target and focus their efforts on higher performing customers and prospects that can offer longer lifetime value and profits (Rapp *et al.*, 2014). In a study carried out in

relation to start-up companies more than half of the people interviewed stated that they had fully developed their products before getting any feedback from potential buyers (Rapp et al., 2014). There are excellent benefits to be achieved by speaking with the prospects in the early part of the product launch. They will gather critical feedback on product or service improvements. The prospect will feel that they are part of the process and their ideas and thoughts on the products or services are being listened to. Research has shown that it is easier to get people to commit to an idea if they are involved in its creation (Onyemah, Pesquera, & Ali, 2013).

More marketers are trying more ways to find new customers (Quinton, 2012). Successful salespeople do not prejudge, they don't assume and they do not minimise themselves, their prospects or their customers and it is this mind-set that make these salespeople successful (Greshes, 2006). In business, there are three main groups to sell to. In the Market Place (IMPs) who are actively looking for products and services; Entering the Market Place (EMPs) are buyers carrying out price comparisons and checking potential suppliers, and finally Cloistered Customers (CCs) that are buying products and services from someone else (Schiffman, 2005).

Salespeople need to differentiate between an inquiry and a lead. An inquiry is when the marketing department has it whereas a lead is when it is passed on to the sales department for follow up. Salespeople are poor in following up on commitments they have made to customers (Kaski et al., 2017). Some people have called this "getting your foot in the door" (Jolson, 1986). Salespeople can waste a lot of time on sales calls especially when they follow non-qualified leads looking to find new customers (Hummel, 2011). There is the discovery period where the salesperson looks to find out more about the prospect and their specific needs through questioning. One of the key secrets in building relationships with the customers is the ability



of the salesperson to be able to tune in and listen to the prospect (Quinn, 2004). “Listening is the selective act of physically sensing, mentally processing and responding to verbal and or nonverbal messages” (Bergeron & Laroche, 2008, p.7).

When salespeople enter the sales profession or entrepreneurs are involved in opening a new business, cold calling or what some people call “cold turkey” (Hummel, 2011) is an important component in creating an account base that generates on-going revenue. Cold calling if used effectively can be a tremendous help in developing prospects for a company (Schiffman, 2003). Many salespeople dislike cold calling (Johnson & Marshall, 2016) and when they hear the words cold calling, they avoid it like the plague (Hopkins, 1998). Companies are not encouraging their salespeople to make cold calls to their prospects, and some consider it an obsolete practice (Johnson & Marshall, 2016). The challenge for salespeople when they receive the name of a potential prospect is how to get the attention of the buyer. This thesis highlights how the salesperson can work on their prospects in collecting intelligence on them along with linking with people that may know the prospect thus reducing the lead from a cold lead to a warm lead which results in reducing the anxiety of the salesperson making the call and can lead to a successful conversion of the prospect into a customer. Warm calling to potential prospects has a better chance in moving the opportunity to the next step. This section will attempt to bring all the key points related to prospecting together to give the reader a very good understanding of this key step in the sales process. If these points are understood it may help salespeople achieve their objectives in successful prospecting.

### **3.3.1 Definition of Prospecting**

There are many definitions of Prospecting,

- A prospect is someone who consciously agrees to move through the sales process with the salesperson (Schiffman, 2003)
- Pursuing leads that one hopes will develop into customers as a way to fill the pipeline of business in the future (Johnson & Marshall, 2016).
- Locating the right people to sell to and who may buy your products or services (Hopkins, 1998),
- Finding those who want to buy (Feiertag, 2010) and the search for leads that identify potential customers (Jolson & Wortruba, 1992).
- Act and process of collecting names and contact information of those people or businesses that would make a good target for a company's products or services (Orsini, 2007).

A suspect is a subjective notion based on the personal reflections of a salesperson. A qualified prospect is a state of being based on fact without distortion by the salesperson's feelings, prejudices or hopes (Jolson & Wortruba, 1992). When it comes to sales leads companies have two choices: either have someone do it in-house or outsource the activity and use an independent sales force. Once the right prospects are identified, the next challenge is selling to these prospects the company's products or services. It is critical that sales management ensures their salespeople spend a lot of their time on prospecting. Pinpointing prospects helps increase the sales pipeline (Figure 3.2). In some organisations, the sales pipeline is sometimes referred to as the sales funnel, where customers who are 'ready to buy' are identified in the pipeline (Yu & Cai, 2007).

This sales pipeline starts at the top where initial opportunities are reviewed. Where appropriate these are moved to qualified leads and some of them become warm leads. The warm leads are

converted into sales proposals and finally some of these proposals convert into actual new customers. It is very important to have a qualified pipeline management system in place (Hughes, 2013). The pipeline can help determine what opportunities exist and what needs to be done to convert them into sales. It is essential when project work is being qualified into the sales pipeline that the company has the resources to deliver the project to meet the agreed deadlines of the customer (Cooper & Budd, 2007). This will ensure there are no issues later with the customer in terms of having a dissatisfied customer.



Figure 3.2 Sales Pipeline

Source: Created by Author

Poor revenue results can be attributed to low prospecting and bad pipeline development activity. If there is no pipeline then this will eventually lead to the premature death of the organisation (Etherington, 2010). Salespeople who are not proactive developing their sales pipeline end up panicking as they can see that they will not hit their sales forecast. This is in

stark contrast to the salespeople that demonstrate an air of confidence as they have a very proactive sales pipeline.

### **3.3.2 Why Prospecting?**

The front-end of the sales process is key, as without customers there is no company (Schiffman, 2003). Salespeople have their current customers, and these can provide a large percentage of the company's turnover. Sometimes your best new prospects are your current customers as it can be an opportunity to sell them something new, sell them an upgrade or enhancement to their existing products/services and they can also be used for referrals (Wershing, 2013). Even though this is very positive, customers do have a habit of drifting away. These customers need to be replaced and it is very important that salespeople are developing new prospects to counter this event. Another reason why prospecting is important is that sometimes customers go out of business and they need to be replaced. Buyers that salespeople know well may decide to leave the company and the new buyers may take a dislike to the supplier or have their own preferred suppliers and decide to terminate existing supplier relationships (Johnson & Marshall, 2016). Companies acquire other businesses and these new organisations have their own preferred supplier list, so contracts may be terminated, and suppliers replaced.

Sales has changed a great deal in the last 25 years, and it is very much a different discipline today. In the early 1980s there was no Internet, the laptop computer was in its infancy and salespeople looked for leads in telephone directories or yellow pages. The power has shifted as a result of the Internet and it is less in the hands of the sales organisation and more in the hands of the buyer (Moncrief et al., 2017; Arli et al., 2018). Customers are looking to deal with fewer suppliers who are really committed to working with them now and long term (Kaski et al., 2017). It is critical for salespeople to continuously look for new customers using effective

prospecting in case the buyer replaces them with a new supplier. Salespeople can become complacent when they are hitting their numbers and they think that their existing sales run will last forever. They are content in collecting their big commission cheques from their sales to a few large customers.

In the B2B sector, companies will lose business to their competition who may be offering better pricing, more product features, rebates and additional incentives to change suppliers (Hopkins, 1998). It is very important for the company to discover the customers motives for changing supplier as this is good information to have for future sales (Gitomer, 2005). It is reasonable to assume that by the law of averages a company will lose a regular percentage of their turnover which will need to be made up from elsewhere. Even most capable companies have become vulnerable to the mobility of accounts and competitors are waiting to try and win them over. Even though the study is dated, according to Boston consultants Bain and Company, the average American firm has between 15% to 20% customer turnover rate (Jolson & Wortruba, 1992). These lost customers must be replaced. It is very important that management of the B2B sector drives a continuous program of ongoing prospecting Companies look to expand their reach into the global marketplace and prospecting plays an important part in this which is discussed in the next section.

### **3.3.3 Developing prospects in a global marketplace**

Prospecting plays an important role in looking to identify the companies that are willing to deal in new international markets with suppliers. Most companies are being encouraged to go after these markets and if they do not enter these markets, they are in in danger of losing out to the companies that operate in them (Baldauf & Lee, 2011). US companies account for 28% of the global Fortune 500 companies and over a period of 5 years Asian companies have increased

their global presence by 6% (Kumar, Sunder, & Ramaseshan, 2011). Some of these emerging markets are growing at rates twice those of developed markets. Economic forecasters are predicting that by 2035 the gross domestic product of emerging markets will have permanently surpassed that of all advanced markets. This is one of the key reasons that companies should focus on these markets and plan a pro-active prospecting campaign to win business in these fast-growing markets and develop their sales pipeline. Rising foreign direct investment, international trade and the growing importance of emerging markets are creating demand for more foreign products and services (Rajshekhar et al., 2011). 2016 saw almost \$21 trillion dollars of merchandise and services exported globally (WTO, 2017).

Through the advancements in technology salespeople are able to access to overseas prospects and customers a lot easier and quicker (Sharma & Sheth, 2010). Social media influences export performance through, the quality of business contacts, being able to see the customers' needs/preferences, understanding competitors and researching what services they are providing to customers and how they are winning new business (Eid, Abdelmoety, & Agag, 2019). Sales support technology is used on a regular basis to help salespeople to deal with various sales activities i.e. prospecting, communicating, scheduling appointments and processing orders (Arndt & Harkins, 2012). National boundaries have become thinner, distances have become shorter and as a result companies are opening up new regions (Kumar et al., 2011). For most organisations today, exporting and as a result, international customers are not just a luxury, they are a necessity. In this thesis, there is little differentiation between national and international. While there are increased challenges in international markets, having a working effective sales process is a key requirement wherever, or by whatever mode, that an organisation wishes to sell their product or service. One of the key components in helping to build a sales pipeline is Lead Generation and this is discussed in the next section.

### 3.4 Lead Generation

Sales leads are the lifeblood of industrial companies (D'Haen & Van den Poel, 2013). Understanding the target customer is one of the first steps in the sales process. This is where the salesperson will research the account before making contact. The salesperson needs to gather knowledge, understand the type of company they may be calling and learn as much about the prospect as possible. Since the cost of supporting an existing customer is five times less than finding a new customer it is critical that leads are qualified in order not to waste the salespersons time along with the company's money (Johnson & Friend, 2015).

One of the key contributors in the 21<sup>st</sup> century to lead generation is social media and this is requiring sales and marketing organisations to make adjustments in their strategy (Moncrief *et al.*, 2017). Chapter 2 outlined the opportunities that technology such as social media brings to the sales process. Salespeople need to capture as much information as possible on the actual buyer and company before they make the initial contact as this will give them a better understanding of their needs along with seeing who the key decision makers and influencers are and social media can help them achieve this (Rodriguez, 2012). There is a concept named the Buyers Sphere which is a network of online influence that surrounds prospects of companies that can have a very strong influence on buying decisions. There are many avenues salespeople can use to search for qualified prospects which is by far one of the top priorities of a salesperson (Trailer & Dickie, 2006). Some companies purchase leads from lead resellers. These lead resellers maintain a network of companies in various industries and in many cases are pre-qualified. This can be a very rich database for salespeople looking to develop business with new prospects (Willis & Flo, 2016). Sales leads can also arrive at the company in the form

of telephone calls from potential customers and these need to be quickly followed up. A study highlighted that delays in following up leads affects the conversion rates (Smith *et al.*, 2006). The longer it takes the less likelihood there is of closing the sale with the prospect (Smith *et al.*, 2006). Sales effort as a key company resource can impact sales lead conversion cycle time (Bradford, Johnson, & Bellenger, 2016) and it is important for the salespeople to stay focussed.

The key function of prospecting is to find qualified leads where people can buy the supplier's product or service. Only after this process is complete should the selling begin. A B2B survey carried out by (Quinton 2012) suggested that the top prospecting channels were e-mail at 83%, followed by direct mail at 57%, and then a three-way tie at 55% among web opt ins, social network sign ups and exhibitions. When sales representatives gain experience, it was found that their network of lead generation contacts increases i.e. vendor representatives and existing customers and this can help achieve increases in the number of self-generated leads (Sabnis *et al.*, 2013). Corporate spending on online advertising focused on generating leads soared from \$12.5 billion in 2005 to \$22.7 billion in 2009 in the US and it continues to grow (Oldroyd, McElheran, & Elkington, 2011). It is key that salespeople figure out the best and most productive way to find new leads that can develop into prospects (Feiertag, 2010).

### **3.4.1 Finding qualified Leads**

Sales and marketing use various avenues to identify qualified leads which are discussed in this section.



## **Word of mouth (WOM)**

Word of Mouth (WOM) was first explored by George Silverman in the early 1970s. He characterized word of mouth (WOM) as the oldest newest marketing medium (Kimmel, 2014). With the rise of social media channels and the emergence of social influencers on these channels, this idea couldn't be more relevant and has evolved into the term electronic word of mouth (eWOM). Even though WOM is as old as the oral tradition, it has re-emerged as an important marketing phenomenon and it is an effective way of looking for new prospects (Schmitt, Skiera, & Bulte, 2011). In the past it was dismissed and undervalued as a legitimate strategy (Gombeski *et al.*, 2011) but it has attracted a lot of attention (Trusov, Randolph, & Pauwels, 2009). WOM can be defined as informal communication, both positive and negative, about a company and its products or services (Helm, 2003). Many companies are now measuring the monetary value of WOM (Kumar, Petersen, & Leone, 2010). Due to the greater connectedness of people via social media and the speed with which interpersonal messages can spread WOM has gained a new prominence and it can help acquire new customers (Arli *et al.*, 2018). It is a very prominent feature online (eWOM) and is a platform for buyers to share their views, preferences and experiences with others along with providing opportunities for companies to take advantage of WOM marketing (Trusov *et al.*, 2009). It is estimated that more than 50% of sales are made and business relationships are kept because of friends (Gitomer, 2003). People who come in contact with large groups of people on a daily basis in sales terms are sometimes known as 'bird dogs' (Johnson & Marshall, 2016) and salespeople can use them as their eyes and ears in the marketplace picking up information that may be of interest to the salespeople.

## **Competitor Intelligence**

Salespeople collect competitor information on a day-to-day basis and will learn much of this information simply by interacting with the customer (Rapp, 2009). Social media is an excellent vehicle to use for competitive intelligence collection (Itani, 2017). Attending exhibitions and trade shows can help gather information on the competition, what meetings are taking place with customers/prospects, what are the industry trends and new products being launched (Hansen, 2004). Competitive intelligence can be collected from financial results that are published. Sorensen (2009) suggested that technical employees (in their case engineers) are good at gathering competitive information as they review trends, they attend conferences and read journals.

## **Trade Shows**

In the past, trade shows were an opportunity to showcase the company's products/services which helps meet the advertising requirements for the supplier. This view has now been replaced with a view that trade shows are mainly events where products and services are sold, or new contract wins are signed. Attending trade shows/exhibitions can be an excellent way of finding out what is happening in the industry. Trade shows and exhibitions are an important marketing instrument (Caragin & Dragoi, 2012). They give companies an excellent opportunity to make useful contacts from other people in their industry and they also help promote their company. It is important that management ensures the customer profiling has been completed before attending the exhibition so that the salespeople know who the target prospects are. Salespeople play a very important role in market sensing where they look to get a greater understanding of the competition which can help them develop good strategies (Cravens,

Piercy, & Low, 2006). They need to detail the profile of the customer they are looking to reach, identify where they are at the exhibition and wherever possible agree an appointment before the exhibition starts (Caragin & Dragoi, 2012) the goals they want to achieve.

Once the leads from the exhibition are reviewed, they need to be followed up quickly as research has shown that prospects contacted within a short period of requesting information are almost seven times as likely to qualify the lead (Oldroyd *et al.*, 2011). Exhibitions can be very expensive in terms of renting exhibit space, travel, time, set up costs, signage and cost of staff a detailed review of needs and benefits should be carried out. Booth attraction numbers, quantity of qualified leads, revenues achieved along with how many visitors are planning to buy are all good measurements that can be used when evaluating if the exhibition was successful (Hansen, 2004). Some SMEs may find the cost of running their own stand at a trade show prohibitive. To resolve this issue a distributor can be appointed to handle the distribution of the product. Where the distributor participates in the Exhibition, they can display the products and the company can also participate on the stand at a very low cost and demonstrate the product to potential prospects (Gitomer, 2003).

## **Conferences**

Attending conferences that are relevant to the salesperson's industry is another great way for SMEs to develop qualified leads. Customers and prospects normally attend these events. Some of the speakers at the conferences have access to many potential prospects and building up a rapport with these people could lead to some very good prospects being identified (Orr, 2008). Conferences can also take place in parallel with an exhibition and participants attend both collecting information on what is happening in the industry. Conferences are a great opportunity for an SME to get agreement from the organisers to present a white paper to the

attendees and they get a chance to get recognition of their company and brand and they can follow up with any interested prospects later (Stevens, 2005).

## **Referrals**

Trying to find new ways to stand out in a crowded market and get the attention of prospects to grow the sales pipeline and the business, requires creativity and non-standard thinking (Flaxington, 2011). Referrals are one of the easiest ways of passing from one prospect to another and the opportunity should not be lost. One of the most influential factors is convincing a buyer to choose a supplier are referrals (Salminen & Moller, 2006). Companies should build a good relationship with their customers and to gain referrals from them as this can have a positive impact on the sales team's performance (Odhiambo & Kennedy, 2013). Besides closing a sale, referrals are one of the most coveted prizes in selling (Gitomer, 2003). Understanding how customers feel about the company and the salesperson and what they are prepared to tell others about this as it can have a serious influence on future revenues and profits (Kumar *et al.*, 2007). Companies also receive a referral when a third party recommends them to a previously unknown potential customer which may lead to more business (Chollet *et al.*, 2014). It is imperative to remind salespeople that referrals from satisfied customers represent an excellent introduction to finding these qualified prospects (Calvin, 2001). They make a salesperson's life easier and they are easy to get, despite this most businesses have no formal systems for generating referrals (Clay, 2009). There are many benefits in an SME having a proactive referral strategy in their company. A key benefit is that SMEs do not have large marketing budgets to search for new customers in the marketplace and by using referrals there are no costs. Another benefit is that SMEs normally have a low profile as a company as it is difficult to build a large reputation and having third parties discuss the company in a positive

manner can help increase the prominence of the SME and it makes it more attractive as a trustworthy supplier without the SME incurring costs (Chollet *et al.*, 2014).

A company that accurately targets those of its customers and suppliers who are likely to make profitable referrals will make a much better return on its marketing investment than its competitors who do not engage in this activity (Kumar *et al.*, 2007). A study highlighted that Business Reference Value (BRV) is playing a major part in helping to influence prospects to purchase and develop business with the supplier and adding significant value to the customer acquisition process (Kumar *et al.*, 2013).

CEOs can also play a major part in generating business referrals through their business network and personal relationships. The stronger the ties in an SMEs CEOs network the more business referrals they can achieve (Chollet *et al.*, 2014). The average value of a referred customer is at least 16% higher than that of a non-referred customer (Schmitt *et al.*, 2011). Sometimes salespeople are afraid to ask their customers for referrals. Eighty percent of customers are willing to give a referral but only twenty percent of salespeople ask for one. Salespeople have been taught incorrectly that asking for referrals is wrong (Wershing, 2013). LinkedIn and Twitter have very good referral sources (Andzulis, 2012) and one Irish company had significant success in having prospects contacting them and their blog in 2011 had 220,000 visits (O'Dea & Turley, 2012). LinkedIn provides employment information, location of the contact, title and this can help qualify the prospect at the pre-contact stage so that no one's time is wasted. This is far better than the past where the salesperson would contact the prospect as they had no way of really knowing if the prospect matched the customer profile. Some companies are offering customers rewards for recommending new customers. Some of these programs include vouchers and gifts and they have significant potential to affect companies' performance (Ryu

& Feick, 2007) along with additional incentives where companies work out the actual Customer Referral Value (CRV) (Kumar *et al.*, 2007). Some customers are offered deeper relationships with the company as in providing easier access to key people along with access to product teams with potential input into design of products (Gallo, 2010). Companies that recommend a new customer are rewarded and in addition if the new customer comes on board the new customer also receives a reward as an incentive for coming on board. Offering rewards increases referral likelihood and companies should consider this carefully in terms of implementing a reward program.

## References

References can play a role in two stages of the buying process, the pre-qualification stage and the final selection of the supplier. References can be a big contributor to the growth of the supplier and if not used correctly it can also inhibit the supplier's growth (Salminen & Möller, 2006). Customer references give credibility to the supplier's customers value proposition (Kumar *et al.*, 2013). A study highlighted that leveraging customer references have advantages internally within the supplier's organisation and externally with the customer (Terho *et al.*, 2017). The study went on to recommend suppliers detailing various references that serve their new targeted prospects and that they should look to develop a customer reference marketing portfolio. Buyers like to hear customers of suppliers give testimonials and references on the suppliers. According to the founder of Salesforce.com they have won significant business from customers standing up at exhibitions & stating how good salesforce is as a CRM product (Hartmann *et al.*, 2018). The key methods used by sales and marketing to identify prospects have been reviewed, and the next section discusses lead qualification since it is critical that the salespeople are contacting leads that have a very high chance of being converted into a sale.

### **3.5 Lead Qualification**

One of the sales team's key responsibilities is to capture and retain customers (Murphy & Coughlan, 2018). Lead generation is one of the first steps in the sales process, and this journey involves the identification of good sales leads, making initial contact with the prospect, and advertising in order to create new leads (Moncrief & Marshall, 2005). A qualified prospect is a company with a need, the buying power, and the receptiveness to receiving a call from a salesperson (Jolson, 1986). Success in sales is very much dependent on building an extensive customer base that can be relied on for repeat orders. As the company develops, the process of cultivating new customers while maintaining established accounts is key to building a successful territory. In terms of customer retention, one of the main foundations of business is service and it is vital that suppliers provide the correct level of service to keep the customers happy (Brehmer & Rehme, 2009). If salespeople do not prospect, it not only affects their professional satisfaction, sales opportunities, potential financial security and their careers, it also causes major challenges for the sales manager and the organisation (Schiffman, 2003). Salespeople are expected to continually cultivate new customers, regardless of how well their region or company are performing.

Many salespeople believe that a lead is anyone that can fog a mirror (Trailer & Dickie, 2006). For leads to be developed into potential revenue opportunities they have a higher chance of being converted into a sale if they are qualified (Jobber et al., 2019). Studies have shown a poor 10% closing ratio with non-qualified leads but with qualified leads the closing ratio jumps to 60% (Hopkins, 1998). Research has highlighted that a great deal of time is lost pursuing bad prospects and 20% of a salespersons time is spent on selecting prospects (D'Haen & Van den Poel, 2013). The main benefit in lead qualification is that it protects salespeople from wasting a lot of their time working on unproductive leads (Hise & Reid, 1994). Having an effective

sales process where leads are analysed and qualified helps to drive short term wins and increases their conversion into sales (Stoddard, Clopton, & Avila, 2002). Some companies have their administration staff screen the leads and qualify the prospects and in certain cases they schedule appointments for the salespeople (Cooper & Budd, 2007). Salespeople spending their time chasing poor leads due to not qualifying the leads properly hurts sales productivity and restricts their time developing relationships with customers (D'Haen & Van den Poel, 2013).

Some companies are using prospecting criteria and creating a look-alike model where they are matching their current customer data base with prospects and this is helping in predicting qualified prospects (Blattberg, Kim, Kim, & Neslin, 2008). D'Haen & Van den Poel (2013) created a model to help companies win new customers. The model looks to generate a high-quality list of prospects that can be converted into qualified leads and then to customers in a B2B environment. Since the list of prospects are of a higher quality it makes it easier for the salesperson to convert them into a customer. The algorithm has three phases that must be executed chronologically and phase one inputs data of existing customers and prospects. Each phase needs to be reviewed to see if it meets the supplier's criteria in terms of identifying accounts that they want to work with. The final phase uses a weighted list of prospects to prioritise the top prospects. Companies can motivate their sales representatives to follow up on marketing leads by requiring their marketing departments to prequalify leads and ensure that their sales managers monitor the sales representatives in following up on these leads (Sabnis *et al.*, 2013). Leads can vary from very good to high profit revenue opportunities or resource sapping dogs that eventually die (Monat, 2011). Once the qualified leads are identified the next step is to make contact with the prospects. This can happen via email or the telephone. Being prepared and making contact with the prospect is discussed in the next section.



### 3.6 Contacting the Prospect

Part of the proposed framework covers the execution of a three-stage call plan to prospects (i.e. pre, actual, post) by the salesperson, leading to more successful prospecting. With the amount of prospect information available on the internet today, salespeople can successfully research their prospects. While research has demonstrated that face to face sales calls are fifty percent more productive due to the importance of non-verbal cues (Cano, Boles, & Bean, 2005), phone calls with prospects still play a major role in the selling process. Salespeople are rejected by prospects, but perseverance plays a key role in successful cold calling (Clay, 2009). As Clay outlines in Table 1.1, only 8% of salespeople ask for the order a fifth time, and this is the group that has the best opportunity in closing the sale.

#### Cold Calling Statistics

- 44% of salespeople give up after the first rejected call
- 22% give up after two rejections
- 14% give up after three rejections
- 12% give up after four rejections

Table 3.1: Cold calling statistics  
Source: Adapted from Clay, 2009

Salesforce.com highlighted that it can take between six to eight touches to generate a good sales lead (Poyry, Parvinen, & McFarland, 2016). There are three main stages that the sales manager needs to ensure that the sales team takes into consideration when they are getting ready to make initial contact with the prospects (White, 2004): pre-call, actual call & post-call. These stages are critical and if dealt with effectively can help the salesperson move closer to closing the sale and also ensure that the buyer has been qualified as the right person who can decide on the transaction (Gitomer, 2003). It can allow the salesperson to develop a positive relationship and find out who the real influencers are along with who has the genuine power.

One of the key lessons for all people in business is building good relationships with the customer (Sugar, 2010). Developing good strong business relationships can be a double-edged sword. If implemented correctly the relationship will develop and the prospect will look to work with the salesperson. However it needs to be handled carefully to ensure the prospect does not get the wrong impression as this can cause it to backfire for the salesperson (Niculescu & Payne, 2013). They can work out the strategy from the call and find out what the buying process is within the prospect (Hughes, 2013). The salesperson needs to present their CVP which needs to be compelling (Leigh *et al.*, 2014). They also need to understand the pain points of the buyer so that they can present their solution that will help relieve the buyer's challenges.

It is essential that the salesperson uses a customer orientated sales approach as this benefits the salesperson and the company as it has got very positive associations with customer relationships (Varghese & Edward, 2015). The study showed that a salespersons customer orientation has a positive influence on individual sales performance (Varghese & Edward, 2015). Sales managers have also a key role to play in their salespeople being customer orientated by ensuring management are committed in supporting them. In addition, a strong salespersons customer orientation influences buyers as whether they switch suppliers or not (Jones, Buschb, & Dacinc, 2003). Customer orientation also helps to build trust with the customer (Guenzi, 2007). These types of salespeople aim to build long term relationships with their customers by understanding their needs in order to concrete solutions with them. (Goad & Jaramillo, 2014). Research carried out on sales orientated and customer orientated salespeople have shown that the more customer oriented a salesperson is the less selling oriented that salesperson will be. Both these orientations can co-exist and can positively impact the sales process (Goad & Jaramillo, 2014).

### 3.6.1 Pre-contact stage

The salesperson can contact a prospect by email or phone. The discussion here applies to phoning the prospect, but many of the actions can also be taken when contact is made via email. The salesperson needs to review the type of call being made and define the objectives of the call. Where the salesperson is not experienced, it would be helpful for them to sit with their sales manager for coaching purposes especially if the call is of high importance (Sharma, 2016). At this stage, the lead has been qualified, graded and the database has been updated. Creating value for the prospect was discussed earlier as a key action to win business with the prospect. In order to achieve this superior value acquiring an in-depth knowledge about the prospects world and their specific use situations is paramount (Blocker *et al.*, 2012). A study highlighted some of the traits to look for when talking with a potential prospect and these are identified in Figure 3.3 (Adamson, Dixon, & Toman, 2012).

- Accessible and agreeable to meet when asked
- Provides good information that is not available to outside suppliers
- Is predisposed to support the supplier's solution
- Is good at influencing others
- Speaks the truth
- Is considered credible by colleagues
- Delivers on commitments
- Will help the salesperson network and connect with other stakeholders
- Conveys new ideas to colleagues in a savvy and persuasive way

Figure 3.3 Prospect Traits (Adamson, Dixon, & Toman, 2012)

It makes it easier for a salesperson to listen and respond to customers as they can see specific messages that may be critical for the buyer in building relationships with suppliers (Agnihotri *et al.*, 2012). Social media helps the salesperson observe competitors, benchmark competitive products and track what the competition is doing in terms of marketing, promotions and special offers. The salesperson needs to understand the customers' expectations in relation to value creation (Kaski *et al.*, 2017). These steps have to be completed. Without such qualification the salesperson may have to call twenty times to identify a qualified prospect. Successful salespeople practice and prepare when they are about to call their prospects (Greshes, 2006).

Practitioners estimate that up to forty percent of salespeople suffer from intense levels of sales call anxiety when making contact with prospects for the first time (Belschak *et al.*, 2006). The fear of rejection stops the salesperson trying to make appointments or even talking with prospects whose reaction is unknown and in the initial stage of prospecting it can even stop the salesperson from making the introductory call as they feel it is a waste of time. It is even more challenging for the novice making the call and it can be a nerve wrecking experience for them (Somjit, 2012). As a result of some of these people being socially anxious, they tend to be conservative and protective which can lead to unsuccessful cold calling to the prospects (Belschak *et al.*, 2006). Call reluctance is a manifestation of a salespersons negative beliefs about prospecting for new business, in order to overcome this salesperson needs to change their beliefs (Kadansky, 2011). On the other hand, the salesperson who wins is the one who believes that there will always be a prospect somewhere looking for their products/services.

Sales is all about numbers and opening new accounts is going to require the salesperson to make numerous prospect calls before they get that first appointment. In some cases, they may

need to make 10 calls to get 1 appointment. That is a 10% closure appointment ratio. The remaining 90% of rejection is not going to make the salesperson feel happy about themselves and it can result in lower morale in the sales department (Davies, Ryals, & Holt, 2010). A study highlighted no correlation between call quantity and sales performance but making quality calls helped improve the lead conversion ratio (Ohiomah, Andreev, Benyoucef & Hood, 2019). However, 85% of the available new business goes to the 8% of salespeople who know the secret of successful prospect calling.

Research has found that salespeople are naturally more engaged and motivated when selling a brand where they feel a personal connection (Allwood, Flaherty, Jung, & Washburn, 2016). Sales brand attachment is important as it can help not just achieve the company's goals in terms of revenues but also the salespersons personal goals as they have an affiliation with the brand. Higher performance by salespeople can be achieved through better pre-call planning activities (Leigh et al., 2014).

Salespeople need to make contact with the people in a customer's buying centre where they need to establish a rapport with industry experts, lead customers and decision makers as all these people may have an influence on the buyer making a positive decision in buying the suppliers product or service (Verbeke, Dietz, & Verwaal, 2011). Successful sellers concentrate on objection prevention not on objection handling (Rackham, 2011). The salesperson needs to sell benefits and not features in terms of ensuring that the customer can see how the product or service will help their company (Gitomer, 2003). Setting objectives for the call may include moving the sale to the next phase of the sales cycle, finding out who the key influencers are, addressing specific objections raised by the prospect, exploring potential revenue opportunities that may exist now or in the future to get the customer interested in the product/service so that

they will agree to making an appointment with the salesperson (Moncrief & Marshall, 2005). When selling technical solutions it makes sense for the supplier to get the technical team involved as salespeople have a tendency to agree to most things that the customer is looking for and by having the technical team dealing with the customer it brings a balance and ensures nothing is committed to unless it can be met and delivered (Rodriguez, Roman, & Wood, 2017).

The effectiveness of the salesperson during the interaction with the prospect is critical to the sales success (Varghese & Edward, 2015). Salespeople are able to research the prospect's company's website, check out social media on the prospect and use LinkedIn to build a profile of the person they are calling. Peterson, Rodriguez and Krishnan (2011) highlighted having a good understanding of the prospect and the decision-making process can help companies convert leads into sales. In the first two minutes of the call with the prospect crucial decisions are made which will influence the rest of the sale (Rackham, 2011). Salespeople who carry out thorough research on the prospect are better prepared in making contact with the prospect and the call can become a warm call and they also may be able to detect "buying signals" (Monat & Jamie, 2009, p. 20). Research on voice to voice calls has highlighted key skills that are required of the salesperson making the calls to prospects, e.g. attentiveness, trust, perceptiveness and responsiveness (Salomonson, Aberg, & Allwood, 2012). Additional calling skills required to become an effective caller are product knowledge, sense of humour which is seen as one of the most important communication strengths needed to master in the selling process (Gitomer, 2003). They need to be good with numbers, sensitive, persistent, tenacious, not a clock watcher, selling skills, language skills, problem solver, good telephone manner, desire to be the best, perseverance and market knowledge. The salesperson needs to ensure that they are not push selling but more attraction selling along with moving from projecting value to creating value (Hughes, 2013).

Buyers are recognising that they need to develop trust with their suppliers as they can see how this can help their operations and also it can help them to be competitive (Aoki & Lennerfors, 2013). It will also lead to faster problem solving and it will help create an atmosphere where suppliers are comfortable making suggestions. People often ask how many calls they must make to win a new customer. Research results have indicated that an increase in sales call frequency has a positive effect on lead conversion (Roman & Martin, 2008; Sabnis et al., 2013). Stage 2 is the actual call stage where the salesperson contacts the prospect, and this is discussed in the next section.

### **3.6.2 Actual contact stage**

The landscape of selling is changing (Kaski *et al.*, 2017) and the sales environment has become a lot more challenging as a result of more internal decision makers and educated buyers accessing product information (Peterson *et al.*, 2011; Adamson, Dixon, & Toman, 2013). It is very important that the salesperson frames the questions to the prospect correctly as this can have a direct impact on the type of response received from the prospect. First impressions are very important for prospects as they tend to make judgements early in the evaluation process of the call (Niculescu & Payne, 2013). Buyers are busy and do not have too much free time for small talk. Where a buyer has little discretionary time with the salesperson the salesperson needs to be brief and to the point. If the salesperson takes too long on the call then the discussion is likely to be evaluated negatively by the prospect (Szymanski, 1988). The salesperson needs to work hard on getting strong engagement with the prospect as this can help influence value (Blocker *et al.*, 2012). The salesperson needs to be well prepared when they introduce themselves to the prospect, they need to thank the prospect for taking the call and start to look

to build a rapport with them and to get the appointment (Orsini, 2007). There is no single event that will end a call faster than when a buyer realises the salesperson does not have sufficient product knowledge. The salesperson needs to understand that every customer interaction is a critical episode in a potentially long-term relationship (Salomonson *et al.*, 2012).

As part of the customer interaction, the salesperson needs to demonstrate good empathy since it involves understanding the prospects perspective and this can lead to a positive working relationship between the buyer and the seller (Hall, Ahearne, & Sujan, 2015). Empathy is being able to understand the customers challenges and needs and to feel as the buyer does (Pryor *et al.*, 2013; Jobber *et al.*, 2019). The salespeople need to focus more on helping the customer define the problem they are trying to solve and put together a complete solution (Fogel *et al.*, 2012). This initial contact period is a perfect opportunity for the salesperson to establish what the expectations are of the buyer (Kaski *et al.*, 2017) and it can result in the start of relationship building between both parties. Salespeople need to learn to engage customers earlier, preferably well before customers fully understand their own needs (Adamson *et al.*, 2012). They need to use clear, concise language which will help transform these prospects into customers and customers into evangelists (Gallo, 2010). When investigating the opportunity, the salesperson needs to be able to frame the problem in interesting ways in order to see what the problem really is before jumping in to solve it (Pink, 2013). They need to be able to recognise buying signals from the prospect as they may lose the sale if they fail to recognise them (Gitomer, 2003). They need to avoid buzzwords and complexity on the call as this may disengage the prospect. Buyers are demanding a self-service buying process and they are looking for clear messages that cut to the chase (O'Dea & Turley, 2012). Buyers have expressed their exhaustion in dealing in the purchase process with suppliers, and they have used terms such as, “painful”, “awful”, “hard”, “minefield” and “frustrating” (Toman, Adamson, &



Gomez, 2017). They feel it takes twice as long as buyers expect to complete the buying process. Toman *et al.* (2017) highlighted that where a proactive prescriptive approach by the suppliers takes place, this increases the ease of purchase by 86%. Suppliers who make the buying process easier are 62% more likely to close the sale. Even though (Ingram *et al.* 1992) is an old study, all of the reasons for salespeople failure are resonant today and the implementation of the theoretical framework model may help reduce such frustrations, improve the buying process and eliminate some of these failings. When the right sales processes are in place and executed effectively, performance improves (Jordan & Vazzana, 2011). Empathy is seen as a key skill for callers to have and buyers can recognise this on the call and if handled properly it can help bolster the buyer's perception of the salesperson making the call (Pryor *et al.*, 2013). Some researchers have highlighted that the balance of power has moved forever from the supplier to the customer and that is why companies need commitment, resources and seamless integration within the firm so everyone understands the challenges and overall strategy of the company (Baer, 2010). Asking effective follow through questions helps to focus on what the challenges of the buyer are and will benefit the salesperson while they are creating their customised CVP for the prospect (Jones *et al.*, 2005). The salesperson needs to get to the point quickly and they need to do their best to wow the prospect (Gitomer, 2003). The salesperson should aim to have good accurate intuitive judgements as this can help improve their sales performance with the prospect by enabling more appropriate initial sales strategies (Hall *et al.*, 2015). These accurate judgements improve the effectiveness of the salespersons performance and they also help to reduce the amount of selling time.

The final approach in this stage of the call process is to identify the need pay off questions where the seller focuses once the implication questions have been identified on what solutions they can offer to take care of the explicit needs and how these solutions can achieve a payoff

for the prospect in terms of benefits (Rackham, 2011). The salesperson needs to avoid selling too early. They need to make sure they ask questions and listen first (Cassell & Bird, 2009). Salespeople also are aware that a very good product pitch can have a temporary effect on a prospect but a week later it may be forgotten by the prospect therefore the salesperson needs to amplify the call and move the prospect to agree the next step (Rackham, 2011). In some cases the sales manager may make the call with the salesperson and this can act as a motivator for the salesperson as they may feel that their manager is interested in them and wants to support and help them succeed on the call (Piercy & Lane, 2009). Some salespeople record the actual call so that later when they review the actual call, they can see what areas they need to improve on. These last two practices are also possible opportunities for coaching by the sales manager.

Towards the end of the call the salesperson needs to have identified if there is a potential revenue opportunity with the prospect. IBM when qualifying leads get their salespeople to determine if the prospect has an approved budget (B) for the expenditure, if they have the authority (A) to make the decision, if the company have a need (N) for the product or service and finally what is the timeline (T) for the placing of the purchase order, for which they developed the acronym BANT (Giamanco & Gregoire, 2012). Some suppliers call these, or similar stages, “customer verifiers” where they get clear indicators that the prospect has moved from one purchase phase to the next (Toman *et al.*, 2017). Good suppliers support customers in their buying decisions by mapping the journey so far, showing what the barriers are, creating new prescriptions to deal with these barriers and tracking the progress of the opportunity. This information will help the salespeople improve their accuracy in their forecasting of potential closed sales that they will achieve. Another key area that salespeople need to be trained in is ensuring the post contact stage is followed up and this is discussed in the following section.

### **3.6.3 Post-contact stage - The Next Step**

This should commence immediately after the call has been concluded while everything is fresh in everyone's minds. The next step from the call is discussed and any actions that need to be followed up on, are followed up. Once Guinness Peat Aviation made their calls to their prospects, they followed up with every single lead that they had including taking long flights to meet a prospect. Their attrition rate for deals was very high and out of 6 prospects only one materialised (Aldous, 2013). In some cases salespeople do not follow up on the relevant actions from the call and they can leave large amounts of business on the table because of their inability to take the relevant action (Greshes, 2006). Salespeople that follow up with the relevant actions in a timely manner along with meeting any commitments/concerns they presented to the prospect dramatically improves the buyers perception of the salespersons commitment which can lead to the buyer being more committed to the relationship (Hamwi, Rutherford, Barksdale, & Johnson, 2013).

Once the call has been completed it is good to discuss with the sales team and admin people at the weekly/monthly sales meeting any further follow up for potential prospect preparation of presentations and proposals along with reviewing why a particular prospect decided not to move forward (Cassell & Bird, 2009). In some cases, salespeople map out the prospect's organisation chart detailing who the key players are along with the decision makers. They highlight the customer's selection, negotiation and procurement process. A key decision taken by buyers when deciding to buy from a supplier is their perception of risk (Monat & Jamie, 2009). Not aligning with the buying organisations processes can be a serious weakness along with inaccuracy in forecasting by the salesperson (Hughes, 2013). The salesperson should

ensure that there is nothing they don't know about the prospect can reduce the risk of losing the sale. In a B2B situation, this step is very important as this client could be a potential key account in the future. A key element of the SPEP framework is the measurement of the sales activity at the front end of the sales process. The next section focusses on these measurements.

### **3.7 Performance Metrics- it is all about the numbers**

Sales is all about numbers and it is critical the salesperson monitors their activity levels on initial contact with prospects, appointments and conversion. It is a numbers game but will only work if the salesperson is well prepared (Gitomer, 2003). Sales managers are inclined to measure their salespeople on a qualitative basis. They need to look to developing more quantitative measures when reviewing how the salespeople are performing (Harmon *et al.*, 2002). Sales managers should always be reviewing how they can improve sales performance. They need to identify what sales revenue will come from existing customers as opposed to new prospects or existing prospects to meet the sales budget forecast. These prospects need to be qualified in or out since it is important to have a sales pipeline that is accurate. This information will help highlight what sales need to be generated from the prospecting activity-taking place within the company. The sales manager can then break this number down by salesperson in each of the territories and measure the salespeople against these prospecting revenue targets on a regular basis. When Tony Ryan set up Guinness Peat Aviation he told the Board at his first meeting that he estimated that it might be necessary to follow up 50 leads before actually winning some business with a customer (Aldous, 2013). The sales manager needs to track key prospecting activities and Table 3.2 outlines the key sales pipeline metrics.

<b>Pipeline Measurement Metrics</b>	<b>Frequency</b>	<b>Reference</b>
Number of leads generated	Weekly	(Trailer & Dickie, 2006)
Number of qualified leads generated	Weekly	(Schiffman, 2003)
Number of referral Calls	Monthly	(Schmitt et al., 2011)
Number of social media leads generated	Weekly	(Agnihotri et al., 2012)
Number of Cold Calls made	Weekly	(Schiffman, 2003)
Number of advancements	Monthly	(Rackham, 2011)
Number of continuations	Monthly	(Rackham, 2011)
Number of rejected cold calls	Weekly	(Calvin, 2001)
Number of decision makers spoken to	Weekly	(Stevens, 2005)
Number of agreed appointments	Monthly	(Roman & Martin, 2008)
Number of demos requested	Monthly	(Calvin, 2001)
Number of agreed proposals to be sent out	Monthly	(White, 2004)
Percentage of time spent on prospecting	Weekly	(Sabnis et al., 2013)
Number of prospects requesting literature	Monthly	(M. A. Jolson, 1986)
% closing ratio	Monthly	(Schiffman, 2003)
Revenue from new prospects	Quarterly	(Calvin, 2001)
Numbers of successful cross-sales to customers	Monthly	(Jobber, 2010)
Number of sales objections	Weekly	(Cassell & Bird, 2009)
Number of signed contracts	Quarterly	(Calvin, 2001)
Using SFA/CRM Yes/No	Weekly	(Barker et al., 2009)

Table 3.2 Pipeline Measurement Metrics

By measuring all of the above, the sales manager will be able to see what the averages are and what each salesperson is achieving. This will help them identify which salespeople are underperforming and they can then work with the salesperson to help identify what the issues are. The Performance Metrics (Table 3.2) needs to be filled on a regular basis so that the sales team can review what activities are taking place in prospecting and if the qualified leads are being converted into actual sales. There needs to be a pipeline process to convert opportunities into sales, this can include, qualification of the opportunity, the strategic approach to the customer, product/service presentation, design of an offer, objection handling and closure of the sale (Sohnchen & Albers, 2010). When marketing and sales are aligned along with a weighting for the leads there is a higher conversion rate in closing the sale (Jarvinen & Taiminen, 2015). Considering the following numbers 293-149-49-83-10, how are these related to a salesperson? This salesperson picked up the phone 293 times during a 10-week period. During that time, the salesperson spoke to 149 people and set up 49 appointments.

The 83 represent the total number of sales visits. 10 represent the number of sales. This salesperson set up approx. 5 appointments a week, made 30 dials or six dials a day. Their personal goal was to add one new customer a week and they achieved their goal because they understood the numbers (Schiffman, 2003).

Salespeople must have a strong will power as they get rejected many times by buyers but if they are persistent, they can achieve positive results. In sales there is the expression that a salesperson has to kiss a good few frogs before they find their prince as in new customer (Brooks, 2011). There are various ways of salespeople increasing their sales and making a good commissionable income: (A) double the number of qualified calls; (B) get through to the right person more often; (C) get more appointments; (D) close more sales; and (E) generate more

revenue per sale (Hopkins, 1998). All of this is doable if the salesperson evaluates what numbers they need to process to hit their financial goals. There are some salespeople that know the mileage in their cars, but they don't know how many calls or appointments they make on a weekly basis.

Salespeople need to have a strong qualified sales pipeline if they are going to hit their sales forecast. A steady stream of worthy leads is practically nirvana for the salesperson (Trailer & Dickie 2006). If the sales pipeline is not full then salespeople are going to be under pressure. By having the pipeline full of qualified prospects, it demonstrates to the sales manager that this is as a result of consistent sales activity by the salesperson (White, 2004). The sales pipeline can help track, individual prospects, their name, size of deal, where they are in the sales cycle and the date it is likely to close (Cassell & Bird, 2009). Ideally this should be in the SFA/CRM system. It can also include a percentage probability of the sale happening. Sales managers agree the definition with the salespeople of what a qualified prospect is. An example could be that a qualified prospect must have a need for the product/service and can sign an order within ninety days. The main purpose of the sales pipeline is to maintain a base of qualified prospects that can be developed and moved along the sales cycle. The pipeline should identify the name of the prospect, date the prospect was entered into the pipeline, product to be sold, potential revenue of the product, sales cycle i.e. cold call, appointment, demonstration, proposal and finally close (White, 2004).

The sales cycle is important in relation to the pipeline as it identifies where exactly the revenue opportunity is in the buying cycle and this can help determine if forecasts are going to be on target or corrective actions need to be taken (Schiffman, 2002). It is important to review all deals to determine if any of them are dead. If this activity does not take place, then they may

end up with an over inflated pipeline which looks good on paper but nowhere resembles reality. All opportunities have a shelf life and meeting with the sales team on a regular basis helps to cleanse the pipeline. Pipeline management needs to focus on value, velocity and win rate. This is seen as the essential pipeline success formula (Apollo, 2014). Management need to define what a qualified sales opportunity should look like in terms of pipeline value and share this with the sales team. Sales cycle velocity looks at the amount of time it takes for an opportunity to move from start to finish and from stage to stage as this can be used to help forecast the probability of closing the prospect. In terms of win rate, measuring whether the deal was won, whether a competitor won it, whether the prospect implements an internal solution, or the prospect takes no action needs to be highlighted. This type of intelligence is critical in the development of the sales team in achieving future sales. A study showed that nurturing leads where the supplier will contact the prospect frequently and focus on their area of interest including online behaviours of the prospect can help move the lead to warm with a greater chance of converting the lead into a sale (Jarvinen & Taiminen, 2015).

### **3.8 Conclusion**

The benefits of each element of the framework was discussed in this chapter including improved pipeline forecasting and how companies can reduce the amount of quality sales leads falling into the black hole (Sabnis et al., 2013). The SPEP framework deals with the initial phase of the front end of the sales process focussing on finding, developing and winning new customers. Each of the elements are linked and are dependent on each other to achieve maximum success in developing a qualified sales pipeline that can lead to increased revenues by closing the sale. Combining the SPEP antecedents from chapter 2, the SPEP elements from chapter 3 and implementing them effectively may lead to an increase in the number of new



customers, higher revenues and overall a better level of sales performance. Prospecting is one of the first major steps in the front end of the sales process and this research identifies clearly how the pipeline management process can work within an SME and how effective it can be if applied correctly. Without an effective pipeline management process, SMEs will not function to the best of their ability from a revenue perspective, increasing their number of customers and creating new business development opportunities. The next chapter covers the research methodology and the reasons why qualitative research was used in the research, as well as the aim and objectives of the study.

## **Chapter 4     Research Methodology**

### **4.0     Introduction**

Chapter Four begins by discussing the research problem, the aims and objectives of this study and from there, the following sections review key aspects of qualitative research (Silverman, 2017) which is the chosen methodology for this study. Supporters of qualitative research highlight that reliability and validity are observed in qualitative research and they may be different from quantitative research, but they are not inferior (Sarantakos, 2013). Regardless of what research design is adopted, it is important significant attention is paid to rigour throughout this process as this is seen as the “Holy Grail” (Hasson & Keeney, 2011, p1695).

Following on from this, the chapter moves to the approach adopted for the research including research methodology. The choice of methodology is dependent on the problem being addressed. There is not a one size fits all in research methodology and equally one research methodology is not better than the other. Answers to research problems are influenced by the philosophy embraced by the researcher. Various paradigms are discussed including positivism (Crotty, 1998) interpretivism (Chua, 1986) and pragmatism (Kelemen & Rumens, 2012). There is a more detailed discussion on the philosophy adopted for this research, critical realism, along with its ontological assumptions (Bhaskar, 1978).

Yin’s design plan for the research (Yin, 2016) was adapted to make it suitable for the planning of the research. The research consists of two phases and to collect the data the instruments used were interviews and case studies. Each of these phases are discussed in this chapter including qualitative interviews, open ended questioning (Rangarajan, Sharma, Paesbrughe, & Boute, 2018) and best practice in face to face interviews (Opdenakker, 2006). The

remaining sections in the chapter discuss the collection of the data (Dooley, 2002) along with the reviewing of the data (Castleberry & Nolen, 2018) and the approach to thematic analysis (Braun & Clarke, 2008). Ethical issues that require safeguards to protect people's identities and of the companies being researched are also discussed (Denzin & Lincoln, 2008).

#### **4.1 Overall Aims and Objectives**

Before embarking on the PhD journey, the sales literature was investigated. There was a great deal written about key account management, relationship selling and how these work in conjunction with issues such as value selling, CRM, negotiation and the seven steps of selling. Reflecting on these findings it was evident that there was a lack of literature on finding a customer and building a sales pipeline so that management can achieve their company growth plans. The question was then posed: Is there any literature on the challenges that salespeople face daily in looking to build revenues and grow their customer base by developing prospects into customers? Coming from a practitioner background the researcher was very familiar with the term farmers and hunters. Farmers are typically key account managers looking after key customers with a view to growing revenues by selling more of the existing product/service or by upselling or cross selling (Johnson & Friend, 2015). However, to have a key account you first of all have to find a customer that has grown to a certain level to merit this attention and this is where the hunter enters the arena in search of those new customers. These salespeople are looking to build their sales pipeline with qualified leads so that they can have a high sales conversion rate and win this business to meet their sales forecast and receive commissions (Kishore *et al.*, 2013). No business exists without someone selling something and sales is the lifeblood of the business economy (Moncrief *et al.*, 2017). It is clear that many salespeople

‘hunt and ‘farm’ but this thesis is more focussed on the gap in the literature on “hunters” It is this gap in the research literature that motivates this study.

#### **4.1.1 The Research Aim**

The aim of this study was to “Develop a framework to help SMEs at the front-end of the sales process”. Given the relative lack of literature on this issue and also the comparative neglect of the SME sector specifically, a two-stage approach was deemed to be the most appropriate way to get data to help to develop the framework. The exploratory research carried out in phase one helped to identify various issues in sales. Key themes emerged and one that was universal in all of the nine companies was the participants challenges in winning new customers. This helped to focus the research on the front end of the sales process, and as a result the aim of the study was crafted as it currently stands. Many of the SMEs have no formal sales process in place and in some cases, it is just by chance that they find new customers. This research is focussed on SMEs and the creation of a framework that will contribute towards filling the gap in the academic literature and have managerial relevance in that it may help SME management to increase revenues and win new customers. It may also help to replace lost revenues from customers who have decided to change suppliers (Jolson & Wotruba, 1992). While this research thesis takes an SME focus the proposed framework can also apply to larger organisations. Research has shown that companies at the early part of their start-up period often expand very quickly when they want to extend their markets (Gray & McNaughton, 2010), and the framework may help them achieve this objective. Based on this aim, a set of three objectives were set as follows.

#### 4.1.2 Objectives

**Research objective 1:** *To understand the key challenges facing SMEs in the sales arena.*

While the literature clearly pointed to a gap in the area of the front end of the sales process it was not clear if this was an issue in practice. Research objective 1 was set so that the thesis would be relevant for industry in addressing the gap in the literature. It was important to meet with these companies to collect data on the key issues they are facing in their company. Having a detailed discussion with the participants, an understanding was gained of their sales infrastructure, processes and how they managed their sales. As a result of the data collected the aim of the thesis was refined with a focus on different issues that were important for the front end of the sales process, and that conceptually were comparatively neglected in the literature in the context of this key stage of the sales process.

After phase 1 of the research was complete, and the data was collected to achieve research objective 1, several issues emerged. The outcomes of phase 1 are discussed in detail in chapter 5. However, at this stage, it is worthwhile noting that this meant that the initial literature review needed to be revisited to increase the coverage of issues that proved important. Building on this new base and reflecting on the results of stage 1, two objectives were set which formed the basis for the Sales Pipeline Execution Process (SPEP) that is the main contribution of this thesis. The first of these, objective 2, was about the process itself, and the second, objective 3, was about the antecedents/enablers of the process.

**Research objective 2:** *To understand the key elements of the front end of the sales process*

The final literature review, as per chapters 2 and 3, discussed key topics including CRM (Agnihotri et al, 2017), social media (Itani et al., 2017), CVP) (Wouters & Kirchberger, 2015)

and technology (Harrison & Hair, 2017). Published literature has progressively shown how the selling process has evolved from being transaction based to building long term relationships between the buyer and seller in the selling process (Moncrief & Moncrief, 2005, Arli et al., 2018) to customer retention (Daniel, Wilson, & McDonald, 2003) to adding value and satisfying the customer's needs (Haas et al., 2012). These developments have added to the selling process, despite the issue of relational selling in the front end of the sales process not yet being fully addressed. In addition, there are very few publications that discuss prospecting, sales lead conversion and sales pipeline management, along with connecting the dots and creating a pipeline process. A 2015 paper on lost and cancelled leads highlighted that their study was the first attempt to empirically examine this area (Virtanen et al., 2015) and they termed this the 'neglected dark side of selling'. Numerous books of a sales training nature have been published on the subject of prospecting, covering various individual parts of the front end of the sales process, but they do not present a complete front-end sales process, and tend to be very practitioner focussed. Taking all of these points into consideration it is evident that there is a significant gap in the academic literature to be addressed. In order to meet objective 2, six sub-objectives were set.

*Objective 2.1: How compelling are customer value propositions when looking to attract new customers?*

CVP's help build a rapport with the prospect as they can see the value that the supplier is bringing to the relationship. Having a strong value proposition is important (Woiceshyn & Falkenberg, 2008). This can help convince the buyer to work with the supplier. Salespeople need to understand what the buyers needs are both in terms of service or products (Wouters & Kirchberger, 2015) and they need to give a superior customer experience (Homburg, Jozic & Kuehnl, 2017). Seeing if companies present their value proposition to customers and how

compelling it is in closing the sale will help contribute towards the research. It is important to determine when they contact the right prospect what role value plays.

*Objective 2.2: How effective is customer profiling when looking to acquire new customers?*

Salespeople can waste a lot of time contacting the wrong prospect and this can result in upset prospects as their time is being wasted. In addition, it takes up time for the salesperson which could be better spent elsewhere. Profiling a prospect requires the salesperson to identify their ideal customer (Whittle & Foster, 2012) or what is sometimes known as the “sweet spot” (O'Dea, 2009). By knowing the profile of the ideal customer salespeople have a better chance in identifying qualified leads. Investigating if companies use profiling as a tool to acquire customers may help contribute towards the building of the framework.

*Objective 2.3: What are the most successful routes in lead generation to locate qualified sales leads?*

A regular issue in sales that emerged from phase one was the lack of pre-qualified leads in sales. Sales leads are the lifeblood of companies (Monat, 2010). Knowing what the best routes are to acquire qualified leads can help companies grow their revenues and can help reduce the sales cycle. Sales and marketing use various avenues to identify qualified leads. (White, 2004) identified lead generation routes that can be taken which require very little investment for SMEs and are useful sources for lead generation. Identifying from the research the most successful routes to generate leads may help reduce the sales cycle.

*Objective 2.4: How important is lead pre-qualification when looking to acquire new customers?*

SMEs do not have large budgets to spend, time is of the essence and if they can get qualified leads then this could help sales achieve their revenue goals. Studies have demonstrated that 70% of these sales leads generated by marketing are never contacted by the sales department and often the sales leads disappear into the “black hole” (Sabnis et al., 2013). Qualifying a lead can help reduce time wasting and reduce the sales cycle. Salespeople are expensive assets for a company, and they need to spend their time more effectively by calling qualified prospects (Moncrief & Marshall, 2005).

*Objective 2.5: What approach/strategy is adapted when making contact with a prospect for the first time?*

Three main stages were identified in the literature review where the sales manager needs to ensure that the sales team takes into consideration when they are getting ready to make initial contact with the prospects (White, 2004): pre-call, actual call and post-call. These contact stage opportunities allow the supplier to build up a rapport with the prospect and enhance the relationship. This can help get closer to closing the sale (Gitomer, 2003). At all of these contact stages, relationship selling can take place in order to build good relationships with the customer (Sugar, 2010). It would be good to understand from the research how these companies approach their prospects and what methods do they use to build a positive rapport with the prospect. Also, at what stage if any does value come into the conversation as the literature showed the importance in having a compelling value (Leigh *et al.*, 2014).

*Objective 2.6: How do sales departments/functions measure performance at the front end of the sales process?*

Sales measurements are key in order to track the activities that are taking place within the sales department at the front end of the sales process. In addition, reviewing the salespeople's



performance against their targets helps to see how they are performing and is important as it will help identify the salespeople that are performing (White, 2004). The sales targets help build the sales pipeline and the sales team need to ensure they have strong qualified leads in order to hit their forecast. Having these leads for the salespeople is a high motivator (Trailer & Dickie 2006). The sales pipeline can help track, individual prospects, their name, size of deal, where they are in the sales cycle and the date it is likely to close (Cassell & Bird, 2009). All this information is key to the management team when reviewing sales progress and it is important to review how these SMEs measure their sales progress /performance within their respective organisation.

**Research Objective 3:** *To explore the antecedents/enablers of the framework*

The literature suggested that this process would not work without key enablers. As a result, objective 3, and its associated sub-objectives, were put in place to evaluate the role of each element and its role in supporting the framework.

*Objective 3.1: How important a role does recruitment/selection and sales training play in organisations?*

Since effective recruitment and selection processes in the area of sales are key in an SME to their survival and growth (Ongori & Temtime, 2009) it is important to explore this as part of the research. If SMEs do not hire the right salespeople, they will find it challenging to achieve their objectives (Piercy & Lane, 2009). A key objective of all SMEs is to ensure that individuals hired are suitable candidates for the position (Cameron *et al.*, 2010). Recruitment and selection are two of the of the most critical human resource decisions an organisation can make (Sullivan, Peterson, & Krishnam, 2012), and are sometimes seen as the single hardest task in organisational life (Cappelli, 2013). Since SMEs are very dependent on an above average

motivated and qualified sales workforce, it is critical that they hire the right team with the proper skills set (Behrends, 2007). Once the salespeople are on boarded, management need to ensure they have the proper training. They need to be trained on all the aspects of the sales process so that they can implement a successful prospecting program. Many companies see the benefits of sales training for their sales team and are leveraging sales training to create strategic advantages which can improve the company's overall firm performance (Lassk *et al.*, 2012). It is important the sales manager ensures that their salespeople receive the relevant training and experience that can help develop their closing techniques along with managing various customer situations (Johlke, 2006).

*Objective 3.2: What part does relationship selling/KAM play in building the sales pipeline?*

Relationship selling is discussed extensively in the literature when it comes to key account management and it is often linked with important customers (Ivens & Pardo, 2007). It is seen as key in business growth, with researchers evaluating the number of relationships within the buying and selling area of the sales process, and how these can be maximised to increase sales (Borg & Young, 2014). While key account management is seen to be important, since it is at the back end of the sales process acquiring new customers is also critical and what role does it play at the front end of the sales process? Can it help drive the closing of the sale?

*Objective 3.3: What is the role of collaboration between sales and marketing in supporting the sales process?*

Numerous papers have been written about the importance of sales and marketing working well together (Biemans & Brencic, 2007; Le Meunier-FitzHugh & Piercy, 2011; Madhani, 2016; Malshe, Johnson, & Viio, 2017). Understanding how effective it is in these organisations will help contribute towards the research findings. Since sales and marketing are two key customer-

facing departments that play a very important role in their organisation's successful revenue growth plans, especially in the area of lead generation (Malshe & Khatib, 2017) it is important to research this area. Sales and marketing departments need to be aligned as they play a crucial role in the success of the initial phase of the sales pipeline process (Rouziès & Hulland, 2014).

*Objective 3.4: How critical is technology (including CRM/SFA, Digital (Social Media) and AI) in sales and what are the perceived benefits of adoption of such technology?*

Technology acts as an enabler to companies looking to grow their sales. It can also be an inhibitor. Understanding both is key and seeing what lessons can be learned. With advances in technology and increasing demands from the buyer, companies are being forced to review their information technology strategy to see how they can gain advantage over their competition (Xuhua, Elikem, & Worwui, 2019). Technology is challenging channels to market and providing digital paths for growth (Harrison & Hair, 2017). In addition, technology tools are enabling the sales process including social media, SFA, CRM and artificial intelligence (AI). Companies looking to use digital sales channels will need to reevaluate their sales team and review how it will be affected in terms of people and sales process (Singh *et al.*, 2019). Technology impacts how knowledge is created stored and accessed (Tanner & Shipp, 2005). Higher levels of IT acceptance can help salespeople improve their knowledge of the prospect, help their presentation skills and their first contact with the prospect (Ahearne, Hughes, & Schillewaert, 2006). Understanding from the research how technology has impacted SMEs is important since it can play such a key part at the front end of the sales process.

*Objective 3.5: How important is motivation and rewards in driving the sales team?*

Since sales and profit are key performance indicators for companies it would be good to explore how companies motivate their sales team. Some companies present cash bonuses, travel

incentives, commissions and other rewards to motivate their sales team. Salespeople respond quickly and enthusiastically to monetary rewards and recognition (Kumar *et al.*, 2015). Rewards for employees can help motivate them to work harder, more efficiently and more productively and this can help to achieve growth in the company (Altinay *et al.*, 2008). Commissions are paid to salespeople who exceed their sales quota (Kishore *et al.*, 2013) and this can act as a motivator. Salespeople are motivated by money but recent research has also shown that salespeople are also interested in career progression, they like working independently using their own initiative and a desire to be successful (Jobber *et al.*, 2019). With extrinsic and intrinsic rewards being adopted by companies as a means of motivating the salespeople, seeing which ones they respond to is key (Kumar *et al.*, 2015). Exploring what type of rewards salespeople aspire to achieve e.g. cash bonus, salary increase or recognition (Woodburn & McDonald, 2011) would be good to understand. Recognition can include mentoring, fast track group and invitations to special company events. Sales management need to have a good understanding on what motivates their sales teams and what actions they need to take to keep them motivated (Miao & Evans, 2014).

## **4.2 Methodology**

Positivism, and positivist research, is still the most dominant type of research in the social sciences (Sarantakos, 2013). It is critical to apply the appropriate research methods in order to achieve increased reliability along with having competent analysis of the rich data as this can help lead to successful research (Collingridge & Gantt, 2008). Credibility is key when carrying out research and it all starts at the planning stage (Robson, 2011). The research methodology used in this research was a multi-phase qualitative design to answer the research aim and objectives of this study. Saunders metaphor of the Research Onion (Saunders &

Tosey, 2013) contributed towards the development of the research strategy executed for this research.

#### **4.3 Rationale for using a qualitative research for this study**

Qualitative research is applicable when looking to understand processes, including how a business is managed and how people perceive things and respond to situations (Silverman, 2017). It is process oriented where validity is critical and where real rich data with depth is collected (Desphande, 1983). The research topic under investigation is sales pipeline processes in SMEs and to get a full understanding of this, a qualitative approach is more appropriate as it will allow in-depth studies to be carried out (Yin, 2014) on how companies manage the critical front end of their sales process in the area of sales pipeline.

#### **4.4 Features of Qualitative Research**

Key features of qualitative research are that it is set in a naturalistic background and it is field focussed. Qualitative research is multimethod research that uses an interpretive approach to its subject matter (Denzin & Lincoln, 2018). It is dynamic and reality is captured. It can provide real examples of key management issues and concepts that enrich the field (Gephart, 2004). It can also rehumanise research and theory by highlighting the human interactions and meanings that underline the phenomena and relationships as opposed to quantitative research which is grounded in mathematical and statistical knowledge. Qualitative research can provide thick detailed descriptions of actual actions in real life contexts (Marshall & Rossman, 2011). It is very much subject centric where information is gathered and verbally presented in a detailed and complete form. It can be value laden where opinions are swayed from people's biases and

it is normative. It respects self-awareness and it is very much open with no preconceived ideas, there are no hypotheses and no limits to its scope.

Qualitative research looks to understand people and not measure them, and it is flexible. It is focussed on communication and it values subjectivity and commitment. It is very much holistic reviewing the whole study subject (Sarantakos, 2013). It addresses questions about how social experience is created and given meaning and produces representation of the world that make the world visible (Denzin & Lincoln, 2000). It builds social science constructs from participants and looks at socially constructed nature of reality (Gephart, 2004). Qualitative research creates stories through both its data and theory narratives which can be engaging and also pushes out the frontiers of research (Bansa & Corley, 2012).

#### **4.5 Benefits of using qualitative research**

One of the advantages of qualitative research is that it permits engagement directly with the organisation and it can be seen first-hand what is really going on in the organisation while also being an opportunity to make a significant contribution to the field (Gephart, 2004). The data collected in qualitative research can help understand a phenomenon (Patton, 2002). Qualitative research helps advance the field by providing distinctive, notable, socially important and theoretically meaningful contributions. Qualitative research is a good approach to this study as it is looking to address “how” questions rather than “how many” and the focus is on examining and articulating processes which is suited to qualitative research (Pratt, 2009). Qualitative data has specific strengths for understanding processes due to its capacity to capture temporally developing phenomena in rich detail (Langley, 1999).

A key part of qualitative research is its ability to expose theoretical boundaries and push theoretical insights (Bansa & Corley, 2012). One of the benefits of theory building from cases is the likelihood of creating novel theory (Eisenhardt, 1989). Qualitative research can offer insights into the question of why people engage in particular actions or behaviours (Petty, Thomson, & Stew, 2012) and it helps to understand human experience and meaning. Qualitative research provides a way to get an in-depth understanding of the underlying reasons, attitudes, and motivations behind various human behaviours (Rosenthal, 2016). This depiction and understanding of actual human interactions, meanings and processes that make up real life organisational settings is an important value of qualitative research (Gephart, 2004).

#### **4.6 Research Approach**

Social research normally takes place against a background of some tradition of theoretical and methodological ideas and these traditions are seen as paradigms (Blaikie & Priest, 2007). Actions are guided by the systems of belief created and interpreted knowledge claims about reality (Chua, 1986). These belief systems are expressed by their answers to three sets of questions related to ontology, epistemology and methodology. Ontology refers to what is out there to know, epistemology looks at what and how can we know about it and methodology looks at how we go about acquiring that knowledge. Kuhn (1970) used the term paradigm on numerous occasions in his writings. A paradigm is a 'set of linked assumptions about the world which is shared by a community of scientists investigating that world' (Suppe, 1977, p.19). These assumptions deliver a conceptual and philosophical structure for the organised study of the world.

Quantitative methods predominantly verify and confirm theories whereas qualitative mostly consider discovering or generating theories (Reichardt & Cook, 1979). A key element of this study involves case studies and the units of examination are organisations and relationships which are hard to access and problematic in structure (Easton, 2010). Case studies have been used effectively in sales research (Jalkala & Salminen, 2009; Osarenkhoe & Bennani, 2007; Storbacka *et al.*, 2009). Case studies provide a significant amount of qualitative data which can be written up offering insights into the nature of the phenomena. When reviewing what philosophy was best suited to answer the research question, various paradigms were investigated to determine which one was suitable, and these are discussed in the next section.

#### **4.6.1 Positivism**

Positivism centres on a strictly scientific empiricist method planned to produce pure data and facts uninfluenced by human interpretation or bias (Crotty, 1998). Applying this philosophy, the focus is on discovering visible and measurable facts and only phenomena that can be observed and measured would lead to the production of credible and meaningful data. Positivists look to advance the truth about the world through prediction, measurement and control of events (Hunt, 1991). Reality as a concrete and objective structure that is external to the researcher (Ryan, Scapens, & Theobald, 2002). Positivists typically use existing theory to develop new hypotheses which are then tested and measured (Saunders, Lewis, & Thornhill, 2016). Researchers are detached, unbiased, they maintain an objective stance and they are independent of what is researched. Positivism is typically associated with quantitative research (Desphande, 1983). Positivist researchers often look to facilitate replication and they use a highly structured methodology to achieve this (Gill & Johnson, 2010). Since many of the studies have large samples, the results are quantifiable and statistical analysis is usually



carried out. Since this research is looking to develop theory and knowledge in relation to the phenomenon of the sales pipeline positivism is not suitable. This requires exploration at organisational level events that are related to sales pipeline and requires interaction with the participants in this research to collect this data. As there is a significant gap in the literature, there is no tried and tested set of methods to enable a positivist approach to meet the research aim.

#### **4.6.2 Interpretivism**

The interpretivist researcher believes that social reality is constantly emergent and subjectively created: “All actions have meaning and intention that are retrospectively endowed and that are grounded in social and historical practices” (Chua, 1986, p.615). The structure of the world is strongly influenced by the culture, the social context, the language or the history in which people are absorbed and that forms their perceptions. Interpretivism is used as a way of defending the use of case studies (Easton, 2010). Researchers interpret cases providing their own interpretation using their data capture and analysis but there is no standard of interpretation showing one interpretation is better than the other. Interpretivism states that humans are different from physical phenomena because they create meanings and then interpretivists study these meanings (Saunders et al., 2016). One of the key requirements when using interpretivism is that an empathetic stance needs to be adopted the social world understood from the research participants perspective. This can be quite a challenge and can be very open to misperceptions and misinterpretations along with multiple meanings and realities. One of the challenges for the interpretivist researcher is creating connections between the local and global level of analysis in order to transfer the overall concerns that motivated the researcher to enter the field (Malsch & Salterio, 2016).

### 4.6.3 Pragmatism

Pragmatism is based on the work of Dewey, James and Peirce from the US (Seale, 2001) and its use has become widespread (Mitchell, 2018). Dewey sees a need to abandon traditional notions of rationality, objectivity, method and truth (Garrison, 2018). Pragmatism had a very deep influence on the development of 20<sup>th</sup> and 21<sup>st</sup> Century philosophy (Talisie, 2018). Pragmatism offers a view of knowledge as generated in action and reflection in order to tackle particular problems (Hammond, 2013). Pragmatism proclaims that concepts are only relevant where they support action (Kelemen & Rumens, 2008). It argues that the meaning of an event cannot be given in advance of experience (Denzin & Lincoln, 2018). The emphasis is on the consequences and meaning of an action or an event in a social situation. Pragmatists know that there are many ways of interpreting the world and carrying out research. There is no single point of view that can show everything and there may be multiple realities. Pragmatists look for methods that help them collect reliable, credible, well founded and relevant data when they are carrying out research (Kelemen & Rumens, 2008). Pragmatism subscribes to the use of different research methods (Feilzer, 2010) and a study highlighted that a continuous cycle of inductive and deductive reasoning can deliver beneficial knowledge and can be used for achieving robust rigour (Mitchell, 2018).

Pragmatic thinking is more focused on the future than the past and pragmatists are interested in action not for themselves, but they want action as a way to change existence (Kelemen & Rumens, 2012). Pragmatism considers words and thoughts as tools and instruments for prediction, problem solving and action. Pragmatists argue that most philosophical topics e.g. nature of knowledge, language, concepts, meaning, belief, and science are all best viewed in

terms of their practical uses and successes. The philosophy of pragmatism emphasizes the practical application of ideas by acting on them to test them in human experience. It is flexible and diverse, and it does not offer a paradigm by which research should take place as it depends on what is appropriate in certain circumstances (Hammond, 2013).

#### **4.6.4 Critical Realism**

Critical realism, closely associated with Roy Bhaskar (Bhaskar, 1978), is developing as a viable philosophical paradigm for carrying out social science research (Wynn & Williams, 2012) and this is the philosophical approach adopted. Critical realists look to explain and evaluate social conditions which helps make it possible to produce solid policy recommendations for action on social problems (Fletcher, 2017). Critical realism is very compatible with qualitative data as it is the research question that drives the method needed and the research question is obtained from theory (Robson & McCartan, 2016).

Roy Bhaskar was an English philosopher and is seen as the initiator of the philosophical movement of critical realism along with Rom Harre, (Harre & Madden, 1975). Critical realism is placed as an alternative to the positivist and interpretivist paradigms. Critical realism adopts a view of reality as an open system that is beyond our ability to control directly (Bhaskar, 1998). Critical realism is seen as a form of post positivism where it is more dominant and reflects what scientists do (Blaikie & Priest, 2007). What one sees and experiences can mould the observed events (Saunders *et al.*, 2016) and also of events that occur whether experienced or not along with any underlying structures and mechanisms that produce these events. Critical realism uses a two-step approach to view the world: it starts with events and feelings experienced and later thinks about the mental processes which occur after the events. Bhaskar

was in agreement with the description of critical realism as ‘ontologically bold but epistemologically cautious’ (Ouchwaite, 1987, p.34). Critical realism is moving attention towards real problems that people face along with the main causes and away from an emphasis on data methods and analysis (Mingers, Mutch, & Willcocks, 2013).

The main objective of the critical realist is not to identify generalisable laws (positivism) or to identify the lived experience or beliefs of social actors (interpretivism), it is to develop deeper levels of explanation and understanding. With these deeper levels it is important to understand the mechanisms that produce the empirical events (Danermark, Ekstrom, Jakobsen, & Karlsson, 2002). Critical realists have two main issues with positivism: (1) it looks at noticeable events but does not take into consideration that these events may have been influenced by previous theoretical frameworks; and (2) it deals with relationships between the various components of social systems on their own (McEvoy & Richards, 2006) and it does not take into account all of the interactions that are taking place (Collier, 1994). Critical realists believe that the real world works off an open system where events happen and why they happen needs to be investigated further. Positivism does not permit this further analysis to take place. When critical realist researchers look at events that have occurred and want to scrutinise further, they look at the components and interactions within reality so that they can explain the event. Critical realism develops explanations for the way mechanisms act and how they are able to do this.

The concept of causality is important in critical realism as it refers to ‘the relationship between an action or thing (cause) and the outcome (effect) it generates’ (Gregor, 2006, p789). One of the main goals of critical realism is to deliver clear, succinct and empirically supported statements about causation with particular focus on why and how the phenomenon happened.

Critical realism is a form of realism that sees the world and entities that establish reality, actually exists independent of human knowledge or our ability to see them. Critical realism used in this study is looking to posit descriptions of reality based on reviewing the experiences observed and interpreted by the participants.

#### **4.6.5 Ontological Assumptions in critical realism**

Ontology is concerned with the nature of objects being studied including the nature and characteristics of the various entities that exist in the world and whether this reality exists objectively or subjectively relative to humans and how the world is viewed (Chua, 1986; Crotty, 1998). Ontologically, critical realism is based on the following assumptions: independent reality, stratified ontology and an open systems perspective (Collier, 1994). Critical realism acknowledges the world and entities that make reality exist “out there” (Wynn & Williams, 2012) independent of human knowledge or our ability to perceive them. This independence is not dependant on any direct knowledge or subjective beliefs. Critical realism identifies that it is not that easy for us to reduce our perceptions and experience of the world. Therefore, it is not that easy to grasp reality or measure it which means that humans only experience a part of it.

Bhaskar discusses one of the key aspects of critical realism is the stratification of reality into three domains (Bhaskar, 1978). These three domains, Figure 4.1 are: the real domain or deep structure and mechanism that generate phenomena; the actual domain is where events happen whether we experience them or not; and finally the empirical domain which encompasses what we experience directly or indirectly which we can experience via perception or measurement.



Figure 4.1 The Three Ontological Domains

Source: Adapted from Bhaskar (1978)

Entities that constitute reality actually exist independent of human knowledge or our ability to perceive them. (Wynn & Williams, 2012). In critical realism, structure is defined as a “set of internally related objects or practices” (Danermark *et al.*, 2002, p.47), that make up the real entities we look to investigate in a specific contextual situation. The companies used as part of this research strategy are an example of structure. Mechanisms are nothing other than the

ways of acting of things (Bhaskar, 1978). These mechanisms cannot be understood directly as they are not open to observation, but they can be inferred through empirical investigation and theory construction (McEvoy & Richards, 2006). An event is seen as something that has happened as a result of a mechanism that has taken place. Experiences are events that we can observe directly.

Critical realism adopts an open system view (Bhaskar, 1998) which we are not able to control directly. While in a laboratory, experiments can be carried out and results of the tests reviewed, social systems in organisational settings cannot sufficiently be controlled in the real world like a laboratory experiment. A major part of this study involves case studies and the key units of examination are organisations and relationships which are hard to access and problematic in structure (Easton, 2010). Events taking place depend on the causal powers available and it also must take into consideration the changes that are taking place on a regular basis. In critical realism the variable reality of open systems moves the focus on to looking at the tendency of mechanisms to act within a specific contextual environment at a specified time (Sayer, 1992). A key part of critical realism is that the ontological focus changes from the empirically observable events themselves to the underlying mechanisms which creates those events (Danermark, 2002). Critical realists want to know if an event did not take place why it did not happen as the information may provide useful information (Easton, 2010). Critical realists look at what we experience versus what actually happened and what are the underlying mechanisms (Bhaskar, 1978). These ontological assumptions are applicable to a study looking at sales pipeline management within an organisation especially in relation to stratified ontology and the three domains. A key commitment of critical realist research is that there are deeper levels awaiting discovery (Sayer, 2000) Using critical realism for this

research will help to uncover the underlying mechanisms and these deeper levels that drive sales pipeline management.

#### **4.6.6 Critical Realism Epistemology**

Epistemological assumptions look at what counts as acceptable truth by stating where the source came from, what are the characteristics and assessment of truth claims (Chua, 1986). In addition, how knowledge is acquired is defined, how truth is evaluated, credibility checked and measured against current knowledge. Critical realist-based case study research helps to understand the essence of theorising by providing deep reasons on why the event took place (Grover, Lyytinen, Srinivasan, & Tan, 2008). As noted earlier critical realism is emerging as a viable alternative for conducting social science. The research phenomenon in this study are the events that relate to sales pipeline and what causes these events to happen. How sales pipelines function in companies in relation to process, procedures, powers, liabilities, interaction internally and externally with people and relationships are all important events to capture. Past and present events need to be explored at all times along with understanding why these events happened or are happening (Easton, 2010), and there needs to be an awareness of the challenges linked with interpreting the data back to the real entities and their actions.

#### **4.7 Selection of participants for the Research**

Figure 4.2 outlines the approach taken to this study. The research strategy executed consisted of two phases. Phase one was exploratory interviews with nine sales managers/CEOs in Irish SMEs. The second phase involved an in-depth analysis of six case companies (three Irish,



three UK), where 17 participants with positions ranging from Managing Director to Operations Manager were key informants of the research. The criteria used for the companies that participated in phase one and phase two was,

- Size of company: SME
- Industry Type: Manufacturing and Services
- Channel: Selling B2B
- Years in business: Over 3 years

Convenience sampling is a sampling technique that qualitative researchers use to recruit participants (Silverman, 2017) and this was used for the purpose of this research. A network of contacts was activated, and this network was able to recommend companies that matched the set criteria. These companies were contacted using the referrals from this network and a one hundred percent success rate was achieved in getting the companies to come on board for the research. The participants from phase 1 were recruited completely from the researcher's personal network. In relation to phase 2, the researcher was part of the UK Vistage Group which enabled access to a network of respected business leaders and from this the UK companies were recruited. In Ireland the researcher is involved in the International Selling Programme managed by Enterprise Ireland and TU Dublin and through this network was able to recruit the Irish companies.

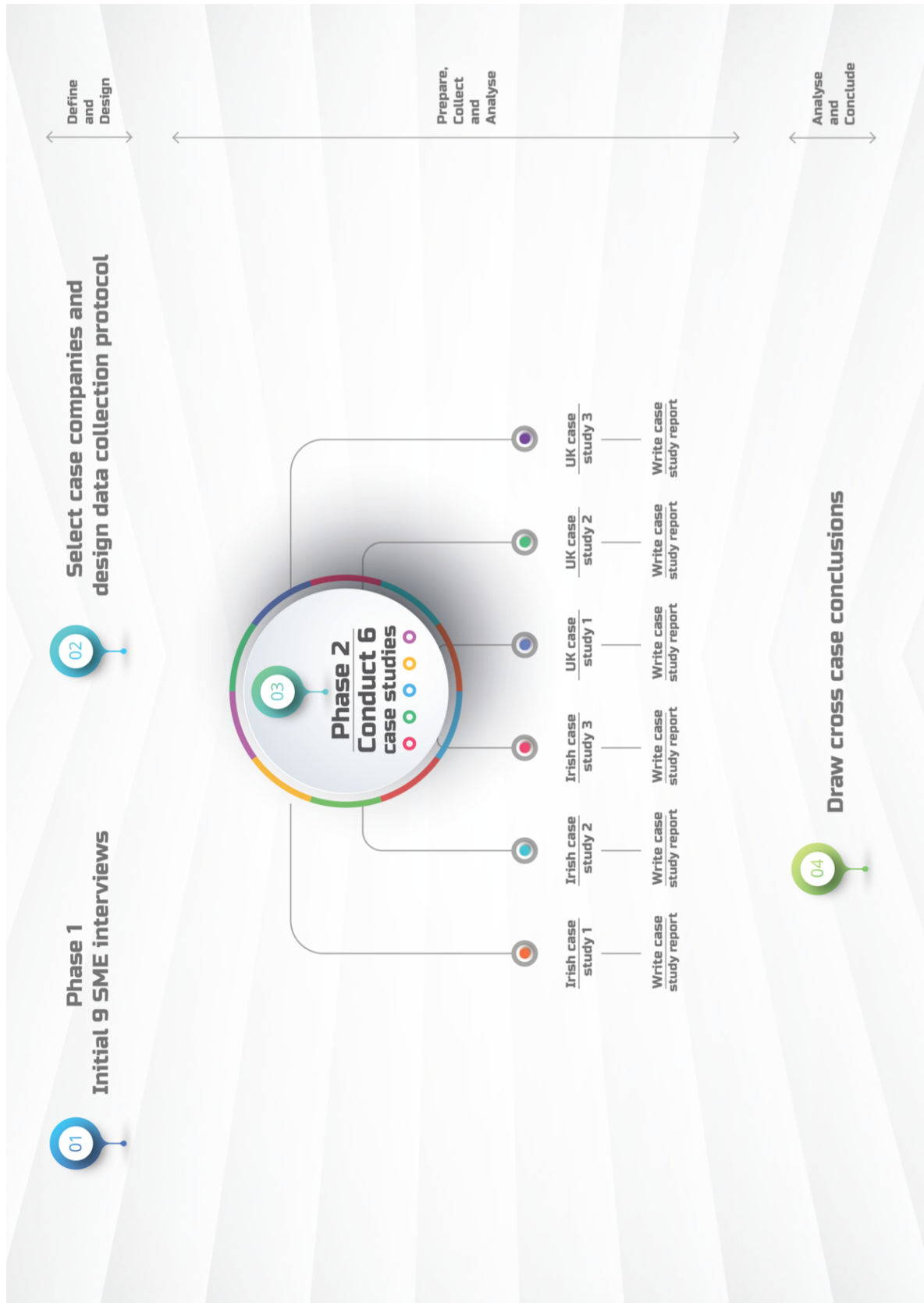


Figure 4.2 Research Process  
Source: Adapted from (Yin, 2016)

## 4.8 Qualitative Interviews

Interviews are used widely in qualitative research as a method of data collection. There are various examples of sales research studies carried out using interviews to collect data. Guenzi & Troilo (2006), when developing marketing capabilities for value creation in customer organisations, held 12 in-depth one to one interviews lasting between 45 and 90 minutes each with marketing/sales managers and CEOs and is very similar to the research carried out in this study in terms of the roles of the participants. The participants operated in different sectors and the interviewers used probing questions to collect data. In Heikka & Natti, (2018), a sales study on customer value propositions, interviews were used to collect data. A total of 26 interviews took place in their research and more than one person in the organisations were interviewed. Similar to this study, all of the data for Heikka's study was recorded and transcribed (Heikka & Nätti, 2018). The authors of Heikka's paper knew all of the companies they interviewed whereas in this research there was very little knowledge of the people that worked in the organisation. Rangarajan *et al.*'s (2018) study on aligning sales with operations used extensive in-depth semi-structured interviews with senior management from ten companies in the B2B area. Similar to this research the interviews lasted between 45 to 75 minutes each. Semi-structured interviews were used and open ended questions were asked to collect the data (Rangarajan *et al.*, 2018).

Interviews may be structured, semi-structured or unstructured (Robson, 2011). Carrying out structured interviews is similar to a questionnaire type approach yielding a shallow level of response. Semi-structured interviews used in this research, involves a few pre-determined areas of interest with possible prompts to help guide the conversation. Unstructured interviews

involve a broad area to explore and the direction of the participant is followed. Interviews can be carried out face to face, by telephone or via the internet. Interviews often take between 30 and 90 minutes to complete and are typically recorded for analysis (Robson, 2011).

Semi structured in-depth interviews can provide rich data (Yin, 2014) and they are widely used in qualitative research (Diefenbach, 2009). They are the most widely used interviewing format for qualitative research and can occur either with an individual or in groups (Bloom & Crabtree, 2006). These are the type of interviews executed as part of phases Interviewing managers face to face in companies was an excellent way in collecting rich data. Managers prefer to sit down and discuss a topic that is of interest to them and relevant to their current work (Saunders *et al.*, 2016) than filling out a questionnaire. Since sales is an interesting subject for a manager to talk about it was easy to get agreement with the participants to sit and discuss the topic. Questionnaires can be very time consuming to be filled out and managers may be very busy and decide to pass them on to someone else in the department to complete them or as in many cases they may ignore them completely which results in a low return in the collection of the data. Also, in a questionnaire a participant may interpret the question incorrectly and not give a reliable answer (Silverman, 2010). Clarity to any questions which were not fully understood by the participants was achieved during the meetings and this helped contribute to the rich data collected.

#### **4.8.1 Interview approach in this study**

From the initial literature review carried out, certain assumptions were made when working on this study. On examination of which data collection approach would provide the best information to answer the research question, numerous how and why questions were used to

explore this social phenomenon. Since the key focus was on looking to explore in-depth the experiences and views of individuals, semi-structured interviews were the best method to use (Robson, 2011). The interviews were scheduled in advance, and the owners of the companies or the person who was responsible as Head of Sales were met. This was important in order to get their buy in to the research study being carried out. All of the companies were SMEs selling into the B2B channel as this was a key focus of this research. Companies were identified from several different sectors in order to explore if these sectors had similar challenges or were the challenges sector specific. In addition, by reviewing companies who were selling products and services it helped determine if the problems they were facing applied to both. The sectors researched included Manufacturing, Services, Software and Channel Sales.

Rosenthal (2016) created an in-depth interview checklist (Figure 4.3) and this was used as part of this study.



Figure 4.3 Interview Checklist  
Source: Rosenthal (2016)

According to Brinkmann and Kvale (2015), there are three types of interviewers: (1) the pollster who is mainly interested in opinions and attitudes of the interviewees and they do not challenge the interviewee; (2) The prober who wants to take a deeper dive to get a good understanding on what is happening; and (3) the participant when asking questions challenges the interviewee and they actively participate in developing the dialogue. The style used in this research was receptive questioning which ensured the participants did not feel that control had

been taken away from them which would have made them feel uneasy (Wengraf, 2001). This was a natural style given the roles of the participants and the researchers experience in the industry.

#### **4.8.2 Questions used for interviews for phase 1 and case studies in phase 2.**

The approach taken in the selection of the questions for phase 1 was aligned with the research objective that was set which was to understand the challenges SMEs were facing in sales. The questions were reviewed by the researcher's supervisor who gave feedback and recommendations. The opening question focussed initially on the participant where they were asked to share their background/work experience and this was followed by getting an overview of the company in terms of products/services sold, revenues, number of employees and organisational structure. It was important to get an understanding of the sales structure within the company and how sales are managed and who it reported to within the organisation. This helped set the scene and created context in relation to the company, its products/services and organisational structure. The questions for phase one were developed from the initial literature review carried out with particular emphasis on how companies acquired new customers. The participants were asked to discuss the process of a typical sale in their business and what steps they went through from finding the sales lead to closing the sale. As the participants discussed the steps taken, follow on questions which were developed from the literature were asked in order to get a deeper understanding of how their sales leads are closed and to identify if they had a sales process in place. These questions included how they tracked sales leads, the managing of the sales team, marketing and if they use any technology to automate sales. The participants were asked about sales forecasting in order to see what planning they put into this area and how they set targets with existing and new customers. As

the interview progressed with the participant from each company other challenges in sales were highlighted which opened up additional questions and copious notes were taken in relation to these points. They were also asked about areas in sales that they could improve in and this helped to identify additional challenges. As a critical realist the various layers from empirical to actual to real were addressed and this helped explore the phenomena and collect rich data on their sales challenges. Most of the challenges identified in this phase were related to customer acquisition. Phase one resulted in the creation of a Prospecting Implementation Process (PIP) and the findings from phase one are discussed in detail in Chapter 5.

The questions for the case studies carried out in phase two were developed from the findings from phase one and from the literature review carried out as part of phase two. The list of questions was also pretested by sharing it with two sales and marketing academics from TU Dublin to get their opinions which helped enhance the questionnaire. Validation of the questions was achieved from feedback from both supervisors. The focus was on the front end of the sales process where the PIP was created from phase one which needed to be developed further. Similar to phase 1, the opening questions were related to background of participant, company details including industry, revenues, organisational and sales structure. The Sales Pipeline Execution Process (SPEP) was developed and the list of the selected questions presented to the participants were based on the SPEP. The following section will present a few examples on why these questions were selected as part of the research. The participants were asked to describe their ideal customer and the reason for this was to see if they profiled their prospects before making contact with them. The discussion on CVP was to determine if they knew why their customers bought from them, what was the value they were offering and if all the sales team were using the same language when speaking with prospects. Since the focus was on the front end of the sales process it was important to ask detailed questions on



lead generation along with lead qualification and how they make contact with their prospects. The literature highlighted the importance of sales and marketing collaboration in the sales process which is one of the antecedents of the SPEP and this topic was explored with the participants. Questions were asked in relation CRM/SFA and how companies were tracking and reporting their sales leads as this is another one of the antecedents of the SPEP. The impact of digital in particular social media on the front of the sales process was explored and numerous questions were asked as the literature review demonstrated that social media is now becoming a key enabler in sales. The participants were asked about sales performance management and what metrics they have in place to measure the salespeople on customer acquisition. In addition, case study one, once completed informed on case study two and this was the process used all the way through to case study six to ensure success. This led to the collection of excellent rich data and the findings are discussed in detail in Chapter 6. The interview questions for both phases are listed in appendix 1 and appendix 2.

#### **4.8.3 Interview strategy**

Participants from SMEs were interviewed to review their sales process and to see what major challenges they were facing and to match these against the themes that were covered in the preliminary literature review. Steinar (1983, p174) defines the qualitative research interview as "an interview, whose purpose is to gather descriptions of the life-world of the interviewee with respect to interpretation of the meaning of the described phenomena". Interviews can be carried out individually or one could have focus groups. Individual interviews took place so that the interviewees would feel relaxed and would open up and share their real experiences whereas in a group scenario they do not feel as comfortable and they may hold back on sharing key information (Chilban, 1996) given commercial sensitivity. Having this open

dialogue with the participants is key to ensure the participants were motivated to answer the questions and the interviewer played a stimulating but not dominating role (Sarantakos, 2013). It was important that the participants when they shared confidential information knew that it would remain confidential and trust was seen as the “magic key” to building strong field relations (Wengraf, 2001).

It was explained to the participants that certain information would be kept confidential and anonymity would be assured by changing the details so no one could be identified. However the data collected would remain intact so that the social science research value from the study would not be destroyed (Wengraf, 2001). Ethical issues of consent, confidentiality and trust are very closely linked (Seale, Gobo, Gubrium, & Silverman, 2010) and all three of these were treated with respect when working with the participants as it helped collect rich data.

#### **4.8.4 Best practice interviewing**

Qualitative interviews are normally organised around a set of prearranged open-ended questions, with other questions emerging from the discussion between interviewer and interviewee (Bloom & Crabtree, 2006). The key task of the interviewer is to collect information while listening and encouraging the interviewee to speak. The quality of the data collected during the interview is mainly dependent on the interviewer (Patton, 2002). It is important that the interviewee feels at ease and safe with the information they are sharing during the interview and the anonymity of the interviewee in relation to the information shared will be maintained. There may be times during these interviews that the interviewee shares information and their frustrations that could put their own jobs or position in danger and this information must be protected (Bloom & Crabtree, 2006). This can be one of the challenges

in using interviews to collect data: the interviewee does not feel comfortable and will not open up which can result in poor data being collected. Inexperience in carrying out interviews (Sarantakos, 2013) or not having received any training or having the required skills can create issues when the interviews are taking with the participants (Yin, 2014).

One of the challenges for the interviewer when asking a question is that they need to listen carefully to the response and they may have to ask follow up questions which takes them away from the original set of questions they had pre-set and this can eat into the time allocated by the interviewee (Wengraf, 2001). While carrying out the interview notes were taken and marked off the completion of each question to make sure all questions were covered. Normally the interviewer has control of the meeting and covers the list of pre-determined questions at the meeting (Bloom & Crabtree, 2006). The profile of the interviewees and the interviewer can determine the outcome of the research. This can be a challenge if the interviewee is aggressive or has a strong opinion on a particular topic that is of interest. In addition, the interviewee may not be the engaging, cooperating type opening up on the questions being asked and this can result in limited data being collected.

While these are negative points in using interviews to collect the data where an experienced interviewer is involved this can negate these points. When these scenarios presented themselves, it was possible to navigate around these challenges using experience to ensure good data was collected. As the interview ended, the participants were thanked for their cooperation. In a few instances when the interviews were being wrapped up they even continued giving additional content (Wengraf, 2001) as they felt good how the interview was conducted and they wanted to make sure they provided as much information to ensure a successful study. Where data needed to be clarified with the participants during the analysis

phase, they did not have any issues answering any additional questions to clarify the points raised. They were very friendly, and it proved that closing out the face to face interview professionally is critical for any follow up support that may be required later.

#### **4.8.5 Face to face interviews**

Face-to-face interviews have long been the leading interview technique in the field of qualitative research (Opdenakker, 2006). However, in the last two decades, telephone interviewing became more and more common. By having face to face interviews, there is no real time delay when asking a question, the interviewer and the interviewee can react immediately on what is said at that moment in time. Face to face interviews in this research helped take advantage of any social cues e.g., voice, body language, intonation of the interviewee. It was possible to see first-hand how the interviewee responded to the questions. Having face to face interviews can be expensive with travel time, meeting various people from the company, seeing their facility, the actual interviewing time and in some cases, it took a complete day to meet with just one company.

Some of the case study research was held in the UK and this was an additional cost, but it was worth it as rich data was collected in the UK and in Ireland. Another advantage of a face to face interview is that it is easy to close the interview at the end, cues can be picked up on when to wrap up the meeting once everything has been covered. Good qualitative interviewing can be challenging and requires a lot of work and it is a lot harder than designing a questionnaire with a set of questions (Mason, 2004). It can be very exhausting carrying out these interviews and to have good results, a great deal of planning is required (Mason, 2004).

#### 4.8.6 Open ended questioning

These semi structured interviews involved the design of clear open-ended neutral questions for the companies on sales pipeline. This allowed follow up probing questions so that a very good understanding of the participants, their experiences, opinions, facts, processes, phenomena, knowledge and to collect good data was achieved. Before the interviews were held as discussed previously a list of open-ended neutral questions that were designed to be thought provoking. The quality of the data can be dependent on the level of thought put into the questions. It needs to be high in order to ensure rich quality data is collected from the participants since they were giving up to 90 minutes of their time. Only one topic was discussed at a time so as to ensure no distractions in collecting the data.

Since the interviewer plays a major role in the success of the interview it is important the questions are presented in a coherent fashion. Otherwise the interviewee may lose confidence in the interviewer along with being frustrated and switch off which can result in poor data being collected. It is important when asking questions to the participants plenty of time was allowed for them to answer and they should not be interrupted (Malsch & Salterio, 2016). One of the disadvantages in carrying out interviews for research is that the interviewer may be biased, and mis-lead the interviewee by asking questions that give an answer in line with the persona views. The interviewer is a key part of the research process and brings their own view in addressing the research questions and they need to ensure this background does not interfere with the findings (Corbin & Strauss, 2014). To avoid this from happening in this research questions were asked in the same tone of voice so that no interviewee could pick up any personal biases (Saunders *et al.*, 2016). The interviewee can also be biased and responses may be distorted due to politics, frustrations along with the actual state of the interviewee when

the interview is taking place (Patton, 2002). In preparing the list of questions they were broken down into various headings (Figure 4.4) using Patton's list (Patton, 2002).

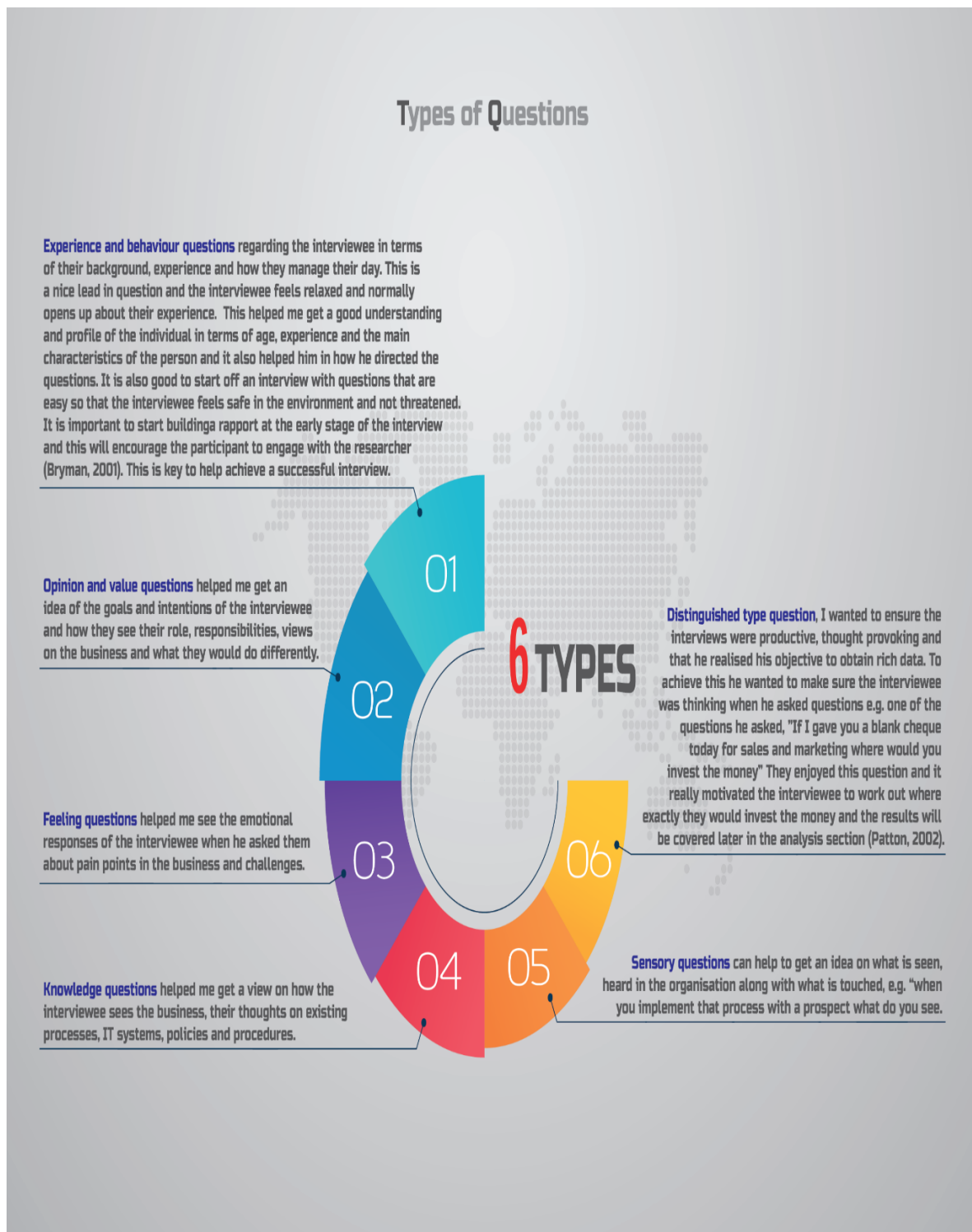


Figure 4.4 Types of Questions

Source: Patton (2002)

Using Patton's set of six open-ended questions were used to observe the reaction of the interviewee which may not have achieved if another research method is used. Asking some questions on a more informal basis can help to break down any barriers which may occur during the interview (Saunders et al., 2016). This open approach helped collect factual information as the interviewees were relaxed enough to share with their experience, intentions, goals and objectives along with providing specific insight into their business.

Where the participants have challenging work issues or emergencies going on in the business this can lead to a rushed interview with poor data being collected. Before every interview it was explained to the interviewees that their customer is number one and if an urgent item came up during the interview it could be paused, and they could go away and work on the issue. They really appreciated this gesture and apart from one situation, all interviews ran as planned. Cultural differences also need to be taken into consideration as this can be a major disadvantage when using interviews if the interviewer is not cognizant of this and this can impact the data being collected (Yin, 2016). For phase one this was not an issue as all interviews were held in Ireland and the participants were Irish.

#### **4.8.7 Phase one Interviews.**

From the network referrals were used to establish contact with companies requesting them to participate in interviews to discuss this topic. Table 4.1 lists the nine companies who agreed to contribute to the research. The names of the companies are anonymised, but the list includes an identification reference assigned to each company including the sector and channel they are selling into. These interviews were carried out from February 2013 to November 2013.

Phase 1 Company Background Details					
Interview reference number	Type of Business	Title of Participant	Annual Revenue	Number of employees	Years in business
A1	Services - B2B	Managing Director / Owner	€850K	12	3 years
B1	Manufacturing - B2B	Managing Director	€15 million	84	15 years
C1	Services - B2B	General Manager / Head of Sales	€7 million	42	10 years
D1	Manufacturing - B2B	Managing Director	€11 million	64	26 years
E1	Software - B2B	Managing Director	€7.5 million	36	5 years
F1	Channel Sales	Managing Director / Owner	€23 million	71	21 years
G1	Channel Sales	Sales Director	€9 million	36	14 years
H1	Manufacturing - B2B	Managing Director/ Head of Sales	€17 million	65	20 years
I1	Software - B2B	Managing Director/Head of Sales	€1 million	21	6 years

Table 4.1 Phase 1 Interviewees

Samples for qualitative research are normally smaller than what is expected in quantitative studies (Ritchie, Lewis, & Elam, 2003). Qualitative research is very labour intensive, and it can take a lot of time analysing data. It is important to work out an appropriate number of interviews so that the sample size is large enough to assure everyone that most of the key perceptions are uncovered. By applying the key principles of qualitative research, sample size in the majority of qualitative studies should generally follow the concept of saturation when the collection of new data does not shed any further light on the issue under investigation (Glaser & Strauss, 1967). Nine companies were a sufficient number to collect the initial data from this exploratory stage and it was observed at the eighth and ninth company that the pattern was the same as the other seven interviewed and saturation point had been reached.



There is a point of diminishing return to a qualitative sample as this study showed and it doesn't mean that more interviews lead to more information (Mason, 2010).

As previously stated, a list of questions was created and discussed at each interview in Phase one (Appendix 1). The opening question was always related to the background of the interviewee as it was important to see if they had a commercial or technical background and what role they played in sales in the company. At times the interviewees moved to various topics in the discussion and this was allowed to take place so that the interviewees could feel that they had the liberty to discuss any issues as it helped collect excellent data. All of the questions prepared before the interview were answered by the participants & the questions were very focussed on the company and how sales are managed in the organisation. It was important to understand if the company had a sales process and what were the main challenges facing the company in relation to sales. Trying to understand how they won and retained new customers was key and what marketing was taking place in the company and if they had a separate department managing marketing. How they capture sales activity was relevant to the research and what forecasting processes they had in place. As a critical realist getting a deep understanding of how they generated and managed revenues in their business was key. The focus was also on how the sales team communicated with internal management and updated them on what progress was being made in relation to sales. Finding out their pain points in sales was very important as this helped to get an overall view of their issues and which pain points were the most critical. Each interviewee opened up on this part of the discussion and they were extremely honest and open with on addressing their challenges. The participants were comfortable speaking about this, and there was a genuine interest shown when the questions were being asked. This was a key moment in the research, and it helped to determine clearly the topic of the research as many of the themes coming through the interviews in phase

one were very similar. Discussions took place with the participants on how they saw sales developing in their business in the future and if they had any specific plans. These exploratory interviews helped scope out the various issues in sales. Since the complete sales process would be too large to investigate from the data a decision was taken to focus on prospecting and the front end of the sales process as this was seen by the interviewees as a critical issue at their firm. With the data and literature review an initial conceptual front-end sales process was developed and this is discussed in Chapter 5.

#### **4.9 Capturing the data**

All the interviews were recorded with the interviewee's approval which helped to achieve an understanding of the phenomenon in question. Recording the interviews was a huge help in the post interview analysis as it was possible to capture all of the content and no rich data was lost (Opdenakker, 2006) or key concepts (Castleberry & Nolen, 2018). Two recording devices were used during the interviews so that if anything went wrong there was a backup. One device was a dictaphone and the other a smart phone with recording capability. This proved to be extremely fortuitous, in the second interview even though the mobile was in silent mode when it rang it disconnected the recording. The was only discovered after the interview and having the back-up dictaphone recording saved the day. The big lesson from this was to ensure he brought a second recording device in case something goes wrong with one of them. One disadvantage of recording the meetings is the length of time it can take to transcribe the interviews, a one-hour recording can take up to six hours to transcribe (Bryman, 2012). Since there were a total of nine interviews it took up a lot of time transcribing them. One of the challenges in transcribing interviews is trying to capture the spoken word in text form. If careful consideration is not taken it can cause issues with the data being collected which can

have an impact on the overall study e.g. important quotations being left out, incorrect phrases being picked up and key words missing (Poland & Holstein, 2002).

#### **4.10 Data Triangulation**

For validation purposes and to ensure accuracy in the findings, data triangulation (Yin, 2014) was used to collect information from multiple sources in order to corroborate the same fact of the phenomenon and to ensure that the events were supported by more than a single source of evidence. One of the key strengths of case study data collection is the opportunity to use many different sources of evidence. Case studies using multiple sources of evidence are rated more highly in terms of their overall quality than those that rely on single sources of information (Denzin et al., 2008) a few different data collection techniques were used.

##### **4.10.1 Secondary data**

The companies and participants were investigated before meeting with them by using secondary data from company websites, blogs, customer reviews, LinkedIn and by reviewing published financial reports on each company.

##### **4.10.2 Observation**

During the visits to each company a tour of the facility was given, and this allowed the opportunity to observe first-hand how the company operated and it gave a heightened awareness on what was really going on. As the researcher has extensive experience from his procurement days visiting and assessing suppliers this experience proved to be advantageous.

During this observation various people were met from different departments including production, quality control, R&D and supply chain management. This allowed the opportunity to build up trust with the organisation as they could see a genuine interest in understanding how the company operated and as a result, they were very open in answering any questions (Saunders et al, 2016). This helped achieve a very good overview of the business and the culture of the company and later validation was accomplished by reviewing what was seen and heard during the observation stage against the data collected during the interviews with the participants. In company L the managing director advised that the company had made various investments in the business. During the plant tour this was validated from the brief discussions with the various people. At company K it was possible to see both sales and marketing co located and how well they worked together, and it confirmed the data collected from the sales manager where he stated this to be the case.

While carrying out the interviews the participants presented documentary evidence of how they managed their customer/prospecting activity. In company F the managing director opened up his filing cabinet where he stored all active customers/prospects and presented these for review. At company N the sales director presented online a detailed review of all active customers/prospects along with forecasts, pipeline opportunities and also shared the internal sales reports. Due to the confidentiality and ethical considerations it was not possible to collect copies of this information, but extensive notes were made on what was observed and these were used for validation purposes.

#### **4.10.3 Semi-structured interviews with the participants.**

A multi actor narrative in relation to the case studies was created. As a critical realist it was important to ensure each layer i.e. empirical, actual and real were reviewed to get to the generative structures. To help achieve this, meetings took place independently with three people from each company. These included the MD/Owner, sales director and the marketing manager. Where there was no marketing manager available, meetings were set up with the operations manager. This triangulation approach was a tremendous help in achieving validation and collecting a vast amount of rich data.

#### **4.11 Phase one: Initial findings**

After analysing the transcripts from these initial nine interviews, one of the key themes that emerged were the problems SMEs face when looking for new prospects/customers. This data was compared to the preliminary literature review that was carried out and a preliminary conceptual framework was carried out by creating a Prospecting Implementation Process (PIP) using an inductive approach to develop the theory further (Saunders *et al.*, 2016). These findings will be discussed in greater detail in Chapter 5.

#### **4.12 Phase two: Case Studies**

After phase one, the literature review was revisited and updated. Areas that were revisited included customer value propositions, profiling, sales and marketing collaboration, social media, impact of technology in the sales process with particular focus on CRM, value selling, relationship selling, lead generation, performance measurements, motivation and rewards. A

decision was taken to focus on the front end of the sales and that multiple case study research would be an appropriate method to investigate this topic. Six case companies were identified: three in Ireland and three in the UK with a total of 17 participants. A thematic analysis identifying the key themes was carried out. Case study research is very relevant in this type of study (Yin, 2016, 54). Case study research is concerned with methodological rigor, validity and reliability (Dooley, 2002). Critical realism was discussed earlier in this chapter, but it is worth noting that many critical realist researchers identified case study methods as the most suited to explore the interaction of structure, events and actions (Ackroyd, 2009). This approach would help give a deep understanding of the human interactions, meanings and processes on how companies manage the front end of their sales process. In multiple case study research theory development as opposed to theory testing is the key objective (Eisenhardt & Graebner, 2007), and this is relevant for this study which focuses on a relatively neglected part of the sales process.

A case study is an in-depth inquiry into a topic or phenomenon providing first-hand information within its real-life setting (Yin, 2016). It employs methods that encourages acquaintance and close contact with the participants. Case studies are frequently used in industrial network research (Dubois & Gadde, 2002). The case study method has been gaining acceptance in the small business and entrepreneurship community (Perren & Monder, 2004) and it is one of the most popular research methods for researchers in industrial marketing (Easton, 2010). Case studies can help to generate insights from intensive and in-depth research and can help in identifying what is happening and why (Eisenhardt, 1989). The interaction between a phenomenon and its context is best understood through in-depth case studies (Dubois & Gadde, 2002). Different data collection processes can be used in case study research e.g. questionnaires, interviews, participant observation, surveys and document

analysis (Dooley, 2002). Hagen & Zucchella's (2014) research on 'Born Global' is an excellent example of multiple case study method being used in sales and its effectiveness.

There has been criticism of case study research in terms of it not being able to provide reliable and theoretical contributions to knowledge. It has been criticised for its lack of theoretical depth and rigor (Rule & John, 2015). Comments have been made that one cannot generalise from a single case and that case study research is more suited as a pilot than a fully-fledged research study. In addition, people see that people can put their own biased views behind it which questions the validity of the research (Flyvberg, 2011). In some instances, case study research is only used to validate a fixed position, and this negates the complete study (Yin, 2014). Case study research cannot be replicated and there is no guarantee of objectivity, validity and reliability (Sarantakos, 2013). It is important to be open to opposing evidence and not fixed in their ways. People have questioned the results of case study research from a credibility perspective since they rely on analytical interpretation (Dubois & Gadde, 2002). However counter arguments have been made against this and the value of this type of qualitative research is being recognised more (Buchanan, 2006).

Case studies have an important part to play in business research and can be used for analysing and solving business problems as well as for building and testing business theories (Dul & Hak, 2008). One key advantage of case study research is that it can help present a holistic view of the process and this helps to study various aspects and how they relate to each other (Ebneyamini & Moghadam, 2018). Flyvberg (2006) carried out studies using case study research and his peers criticised him for this, so he decided to research it further. One author who was against case study research was Campbell (Campbell, 1975) but later Flyvberg discovered that Campbell had made a 180-degree turn on his views on case study research

and became one of its strongest proponents. Campbell was not the only researcher who changed their views. Eysenck saw case studies as nothing more than a method of producing anecdotes but later also changed his views. Eysenck (1976) talked about keeping our eyes open and looking at individual cases not hoping to prove anything but in the hope to learn something. Walton (1992, p.129) observed that “case studies are likely to produce the best theory”. Flyvberg (2011) used some of Campbells later works and other researchers worked to develop his study. With this research, his paper was published on mitigating the five common misunderstandings in relation to case study research. These five misunderstandings are (1) Knowledge of theory is more valuable than practical knowledge; (2) It is not possible to generalise from a single case study and as a result of this there is no contribution from case studies; (3) Case studies are only useful for generating hypotheses whereas other methods are more appropriate for hypotheses testing and theory building; (4) Case studies are biased; and (5) It can be challenging to summarise precise case studies (Flyvberg, 2006).

Case study research is a necessary and sufficient method for research tasks in the social sciences and it is a method that holds up well (Flyvberg, 2006). A study highlighted four dimensions of the theory and how it can relate to the actual case study: (1) the theory of the case showing how the case is constructed and selected; (2) the theory for the case where cases can test the actual theory to see if it is suitable and then determine the findings; (3) the theory from the case where new theory can be generated from it; and (4) viewing the relation between theory and case as dialogical where one would use the theory to define, select and show the challenges of the case but use the case itself to develop a new theoretical viewpoint (Rule & John, 2015). This fourth approach, which the used for this research, has the potential to contribute towards the delivery of a successful outcome in the research. When employing a case study strategy, it is important that to minimise the disadvantages and maximise the



advantages (Perren & Monder, 2004) as this can help achieve success. Case study research can use various data collection processes e.g., participant observation, document analysis, surveys, questionnaires and interviews (Dooley, 2002). The one chosen for this case study research were interviews.

Six case companies (see Table 4.2) three SMEs based in the UK and the other three SMEs based in Ireland were identified. All sold into B2B markets. A study highlighted conditions that can help determine the sample size of the qualitative research and the requirements were matched against these (Malterud, Siersma, & Guassora, 2016). This study is narrow and focused on a specific topic - sales pipeline management, and the participants in the case studies are highly experienced and specific to the research area. Information power is strong in relation to the interview dialogue where there is very clear communication between both parties during the interview and the qualitative sample size will hold a large amount of information and as a result lower number of participants are required (Malterud *et al.*, 2016). Eisenhardt (1989, p.545) stated that “while there are no ideal number of cases, a number between 4 and 10 will usually work out well”. It is important to ensure that the companies chosen for the study can provide the rich data for the topic being researched. The criteria used for selecting the six case companies were: 1) SME; 2) industry type; 3) selling B2B; 4) Location and 5) in business over 3 years.

Similar to phase one of the interview analysis and findings, the focus was on products and services in phase two to see if the theory applied to both sectors and similar industries were chosen as in phase one e.g. Services, Manufacturing, Channel Sales and Software selling into the B2B channel. There was also a focus on carrying out a cross case analysis on Irish and British companies to see if the findings were applicable to all countries or they were country

specific. The cases identified were rich cases which are worthy of in-depth studies since this is a key requirement to help achieve a successful study (Crabtree & Miller, 1999; Patton, 1999; Perry, 1998). Phase two research took place between September 2018 and March 2019. Yin's case study protocol for conducting case studies was used (Yin, 2016). This covers key areas that need to be taken into consideration when carrying out the case research. Yin had four sections in his protocol, and these are briefly discussed in the next section (Yin, 2016).

Phase 2- Case Study Company Background Details					
Interview reference number	Type of Business	Title of Participant	Annual Revenue	Number of employees	Years in business
J1	Services - B2B	Managing Director / Owner	£4.7 million	47	15 years
J2		Operations Manager			
J3		Marketing/C.E. Manager			
K1	Manufacturing - B2B	Managing Director / Owner	£21 million	245	30 years
K2		Sales Manager			
K3		Marketing Manager			
L1	Services - B2B	Managing Director / Owner	£25 million	120	12 years
L2		Marketing Manager			
L3		Sales Manager			
M1	Manufacturing - B2B	Sales Director	€36 million	154	30 years
M2		Sales Manager			
M3		key Account Manager			
N1	Software - B2B	Managing Director / Owner	€32 million	200	10 years
N2		Sales Director			
N3		Marketing Manager			
O1	Channel Sales	Managing Director / Owner	€10 million	31	7 years
O2		Technical Sales Manager			

Table 4.2 Case Companies

#### 4.13 Case Study Protocol

Since this research is primarily focussed on SMEs the companies identified for this multiple case study research were SMEs selling into the B2B channel. Using the research from the literature review key readings were used as a basis in creating the list of questions. From these

questions the focus was on exploring and determining how an organisation managed the front end of their sales process. At the start of each interview a general question asking the participants to share with him their background was presented. This made them feel more relaxed as they started to talk about themselves, their experience and how they got to their current position. With the participants feeling at ease at each interview it presented the opportunity to progress with the list of open-ended specific questions and from their answers further probing took place to get to Bhaskar's third layer 'the real' (1978).

#### **4.13.1 Data Collection procedures**

While the fieldwork was been carried out there was comfort factor meeting with the participants and discussing the management of their sales pipeline, and areas where they were successful and challenged in this process. To achieve the aim of investigating the phenomenon in relation to sales pipeline completely, in-depth semi-structured interviews were held with the Managing Director/Owner, Sales Director and Marketing manager. This helped observe all of the variables and their interacting relationships (Dooley, 2002). The preference was to meet with the marketing manager but when there was no marketing person, the operations manager was presented as this position is key in terms of customer facing and sales and operations are having closer working links and collaboration (Storbacka *et al.*, 2009). There was a strong push to get meetings with these people as it was felt at these levels in the organisations, participants would know how the business is managed. Appointments were scheduled by working around the interviewee's diaries in terms of availability especially for the companies in the UK as these individuals tend to travel extensively for their work. Since meetings were taking place with three senior people individually from each company it was a challenge trying to get to meet everyone on the same day as this would have been more

suitable since travel had to take place to get to each company. In some cases, this was not possible, and meetings had to be re-scheduled to go back another day to meet with participant(s) who were not available the first day.

A list of questions during the interviews with the participants did not follow the sequence. The participants, as expected, did not follow the sequence planned and diverted to various issues they had in the company along with anecdotal evidence on the positives and negatives in the business. It is important that the cases represent good and bad practices along with failures and successes as the cases are reflecting real life situations (Dooley, 2002). All of the questions were tracked to ensure they were all answered, and this was achieved despite the break in sequence. These participants have very busy schedules, and this was respected with the added point being made that if an urgent issue came up during the interview a break could take place as their business is the number one priority. By adopting this approach, the participants greatly appreciated it, and, in some cases, it contributed to the collection of the rich data. All the relevant materials for the meetings including recording devices, list of questions, pens and notepad were prepared beforehand to ensure nothing was left out and to ensure a productive meeting could take place (Yin,2016).

#### **4.13.2 Protocol Questions**

It was important to keep on track with the list of questions that had been developed as the participants time was valuable and it needed to be used to maximum affect for these cases. A checklist reminder was used for the data that needed to be collected and why. This helped to ensure that time was not wasted on off topic discussions and the research stayed focussed on achieving the objectives. The questions created for each case represented the line of inquiry.

From the results of the literature review a deep dive was taken with the interviewees to investigate how relevant the literature review results applied to their companies. Similar to phase one, the opening question was based on the background of each interviewee with an additional question on how much experience they had in sales. Understanding how these case companies won new customers and what activities were used in the development of their sales growth was important to accomplish. This was followed by a detailed discussion on the front end of the sales process using the data from phase one and the subsequent literature review. There was a discussion on the value their company delivered to their customers and what were the compelling reasons they did business with them. Finding out how sales and marketing engaged in the case companies was good as it helped give a strong insight into their business.

The participants reviewed the impact technology has had on their business including social media and what forms of lead generation were the most successful in finding qualified prospects. Making initial contact including cold calling with prospects and the methods used for tracking sales leads along with forecasting and pipeline management were assessed. Communication and training of the sales team and what performance measurements they have in place was covered and a review of how they motivate/reward the sales team. There was a discussion on what their definition of success in sales looked like and what investments they were making in the sales department going forward. Examination on how they manage their key customers and if they used any upselling or cross selling techniques was researched. Understanding any major threats to their business was good as this covered various question areas including competitors and how they monitored them. A scenario was presented of an investor giving them a blank cheque and seeing where they would invest the money in sales and marketing in the company. This was a real help to them in creating a vision of what the

future of their sales and marketing department could look like and they were extremely motivated in exploring this during our discussions.

#### **4.13.3 Outline for the case study report**

Yin (2016) points out that it is important to think about writing up the case study even before you carry out the first set of interviews with the participants. Since a lot of data is being collected for the research rather than wait at the end to decide where everything was going to be located, it makes sense to have some planning in place at this preparatory stage. That way when the information was collected no one was overwhelmed with the volume of data and losing sight of any of the key data collected.

The respondents were selected using a convenience sample. A network of people was contacted for support in providing a list of the names of companies that might be interested in participating in the research. E mail and phone numbers were provided, and these companies were contacted using a referral approach. Once the referrer name was mentioned at the start of the call it helped enable the conversation and led to securing the interviews. A one hundred percent success record was achieved when these companies were contacted asking them to agree to meet with for the research. In preparation for the interview a significant amount of public data (website, social media profiles, key news items) for each organisation was reviewed so that there was an awareness of any key issues and who were the main people in the company. Visits took place to all the case companies including the ones located in the UK and a day was allocated to each company. The visit included a tour of each facility and this gave an excellent insight to their business and how it was all connected. This is another

reason why having face to face meetings is an advantage especially if one has the meetings at the interviewee's location

Interviewing practices were discussed in section 4.3 of this thesis and these were also applied to phase two of this study. As in phase one of the research saturation point was reviewed and observed and when this occurred appropriate actions were implemented (Eisenhardt, 1989). After meeting with three senior people from each case company, it determined that three people were sufficient as enough data had been collected to validate internally. One of Lincoln's criteria to determine when it is appropriate to end data collection is exhaustion of sources (Lincoln & Guba, 1985). Meeting with additional people would not produce any additional insights and would have been a waste of everyone's time since saturation point at this stage was reached (Malsch & Salterio, 2016) at the case level.

#### **4.14 Reviewing Data**

Qualitative data can be time consuming and quite laborious as it requires iteration to go back and forth between data collection and data analysis, this is then followed by an iterative process (Petty *et al.*, 2012). The way in which qualitative research is evaluated is a contentious issue. Data analysis consists of examining, categorising, tabulating, coding and bringing together any evidence that addresses the research question and combining the evidence that addresses the research study along with conclusions and seeking verification (Dul & Hak, 2008). The analysis of the case study is one of the least developed aspects of the case study methodology. There was a reliance on experience and the literature to present the evidence in various ways, using various interpretations (Tellis, 1997). Different epistemological assumptions of qualitative research require different criteria to that of quantitative research.

The commonly accepted criteria that are applied across approaches are summarised in Figure 4.5. Transferability is contingent on credibility, which in turn is contingent on dependability and confirmability (Erlandson, Harris, Skipper, & Allen, 1993). Credibility and trust were very strong with the participants and they were very open, and they showed their soft and hard copy confidential reports as they were really interested in making sure that a very good understanding of their business was achieved. There was a strong commitment to ensure all confidential information would be protected with full anonymity (Wengraf, 2001) and helped satisfy the participants on the trust side and this played a big part in getting access to the data. One participant from the case company opened up his filing cabinet and showed all of the sales files and allowed a thorough review of the information to take place and to answer any follow up questions. Where qualitative researchers adopt dependable qualitative methods and conduct their analyses in a competent manner this usually results in the delivery on an enriched study (Collingridge & Gantt, 2008).



Criteria for quality in qualitative research		
Criteria	Descriptor	Strategies
Confirmability	The extent to which the findings are the product of the inquiry and not the bias of the researcher	<ul style="list-style-type: none"> <li>• Audit trail of the process of data analysis</li> <li>• Triangulation</li> <li>• Member checking</li> <li>• Reflexive research journal</li> </ul>
Dependability (consistency, auditability)	The extent to which the study could be repeated and variations understood	<ul style="list-style-type: none"> <li>• Audit trail of procedures and processes</li> <li>• Triangulation</li> <li>• Reflexive research journal</li> </ul>
Credibility (truth value)	The degree to which the findings can be trusted or believed by the participants of the study	<ul style="list-style-type: none"> <li>• Prolonged engagement</li> <li>• Persistent observation</li> <li>• Referential adequacy materials</li> <li>• Peer debriefing</li> <li>• Member checking</li> <li>• Triangulation</li> <li>• Negative case analysis</li> <li>• Reflexive research journal</li> </ul>
Transferability (applicability, fittingness)	The extent to which the findings can be applied in other contexts or with other participants	<ul style="list-style-type: none"> <li>• Thick description</li> <li>• Purposive sampling</li> <li>• Reflexive research journal</li> </ul>

Figure 4.5 Criteria for Quality in Qualitative Research

Source: Adapted from Erlandson et al., (1993).

When analysing the data collected from the interviews and case studies various data collection approaches can be taken. Yin (2016) outlined a general framework when analysing data e.g., collect, record, analyse, display and disseminate the data which is useful. Another approach is to use a three step formula such as Describe, Compare and Relate (Bazeley, 2009). Good practice suggested two stages for data analysis: the analysis within case data and searching for cross-case patterns (Eisenhardt, 1989). Other researchers identified three steps in the process of analysing data, correspondence and patterns, direct interpretation and naturalistic generalization (Stake, 1995).

#### **4.14.1 Analysing data for this research**

With the open-ended nature of data, using qualitative research, compared to numbers only as in quantitative research, can prove challenging as the data can include interview transcripts, newspaper articles, images, diaries, field observations and videos and it can be difficult to see patterns than numbers of data (Castleberry & Nolen, 2018). Rich contextual data was collected to ensure it was used to maximum effect. Richards suggested five signs of sufficiency for the analysis of the data: simplicity, elegance/balance, completeness, robustness and that it makes sense to relevant audiences (Richards, 2005).

Figure 4.6 outlines an approach in relation to reviewing qualitative data and interpretation. This template was taken from the methodology section of a sales related paper where they used qualitative research successfully (Jalkala & Salminen, 2009) and the layout was good and with some editing and adjustments, it proved beneficial to use as part of the data analysis. Castleberry & Nolen (2018) also presented a five-step process for analysing and interpreting

data which will also be discussed in the next section. Using both of these helped contribute to the successful analysis and interpretation of the data.

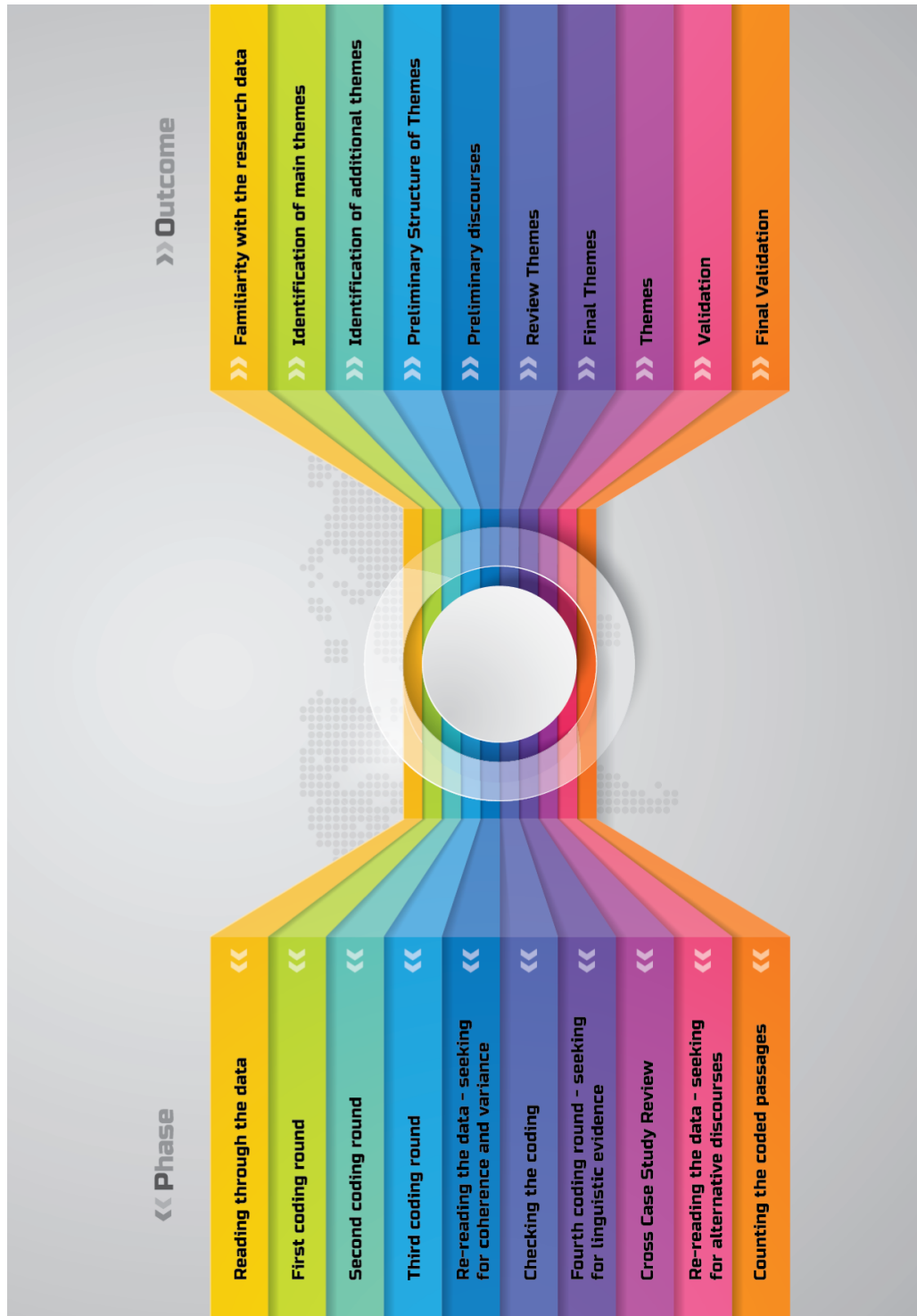


Figure 4.6 Qualitative Data and Interpretation

Adapted from Jalkala & Salminen (2009)

It is important to make the connections between the various themes to build a case supported by the data. Thematic analysis is a method used to analyse data focusing on themes (Boyatzis, 1998). A theme captures some key information regarding the data and is linked to the research question along with representing a patterned response within the data set (Braun & Clarke, 2008). This was the approach taken and the data was reviewed as the study included a wide variety of research questions and topics and the responses were transcribed from the recorded interviews with the participants (Gibbs, 2007). This involved reading the data numerous times and applying a bespoke coding system to phrases, sentences and paragraphs and lines from the transcripts. Thematic analysis offers an accessible and theoretically adaptable approach to analysing qualitative data. A study highlighted five steps that can be used as a framework when carrying out a thematic analysis and these steps were used in the study and this is discussed next section (Castleberry & Nolen, 2018).

#### **4.14.2 Compiling**

The data was collected from nine interviews which covered phase one and seventeen interviews across six case studies with observations during phase two. As mentioned, these interviews were recorded and later transcribed. Each of the recordings were listened to numerous times so that familiarity with the content could be achieved. This was a tremendous advantage as it helped to get to know the data and become very familiar with it. Once this was completed successfully the analysis could be progressed to the next stage.

#### **4.14.3 Disassembling**

Once the data has been compiled and organised it needed to be separated. This involved taking the raw data apart and identifying themes and converting them into usable data. Rather than using qualitative data analysis software a manual coding exercise applying a bespoke colour coding system using 3M post it notes. This helped achieve an increased understanding of the content along with identifying comparisons and differences in the data. This included reviewing transcripts along with the field notes and assigning labels to component parts that looked like they were of potential theoretical significance or appeared to be important within the phenomena being studied. This coding served as a shorthand device to label, separate, compile and organise the data (Charmaz, 1983). Getting familiar with the data contributed towards delivering a thorough analysis. After identifying the main themes, a second round of manual coding, this time looking for any emerging additional themes. This moved to a third round of manual coding on the basis of looking for patterns, common themes, shared features and reviewing any variances. The fourth round of manual coding looked for specific references and common language used during the case studies. All of these reviews led to the final themes being closed out. This manual coding exercise produced a thick description paying attention to contextual detail in observing and interpreting social meaning while carrying out the qualitative research (Geertz, 1973) and it helped achieve a rich account of the details of the data collected. A thick description provided a database that described the phenomenon in sufficient detail for making decisions about the possible transferability of findings to other milieux (Lincoln & Guba, 1985).

Qualitative research differs from quantitative research in that qualitative data analysis is largely inductive allowing meaning to emerge from the data (Kuper, Reeves, & Levinson,

2008) along with patterns, themes and interrelationships (Patton, 2002). A thorough review took place on what was happening in the text of the transcripts, what the interviewees were saying, what are the explicit and explicit reasons why certain things were happening and how these events occurred.

#### **4.14.4 Reassembling**

The next stage was to review all of the manual codes and to try and put them into context with each other to create themes. Thematic analysis is a method for identifying, analysing, and reporting patterns, themes within the data. It minimally organises and describes the data set in rich detail and interprets various aspects of the research topic (Boyatzis, 1998). Braun & Clarke, (2008) list of five questions Figure 4.7 was used when looking to develop themes and each of the five questions were reviewed in detail using the following approach. From the array of coloured post it notes that were all placed on a wall, the first task was to identify the themes along with their quality. A theme captures something important related to the research question and represents a level of responses within the data set to ensure that there is enough meaningful data to support the theme which was identified from Braun & Clarke's list of questions on themes. An analogy used to describe codes and themes is a house where the codes and themes are the bricks that comprise the walls or themes. This analysis involved a constant moving back and forward between the entire data set, the coded extracts of data being analysed, and the analysis of the data being produced to determine the quality of the theme. Writing is a key part of the analysis and it should not be left to the end like statistical analyses (Braun and Clarke, 2008). Writing started at an early stage in this study by making notes of the proposed themes, their quality and the boundaries of each theme along with ideas and potential coding schemes. This process continued right through the entire coding/analysis

process. An example of the themes and key words that started to emerge from the data were value propositions, profiling, lead generation, performance metrics, relationship selling, sales and marketing and recruitment.

Using lead generation as an example of the first order category which emerged as a key theme from the data. Second order categories included referrals, WOM, exhibitions, conferences, LinkedIn, inhouse events inviting customers, blogs and websites. This approach was used throughout the analysis and these first and second categories captured an important element of the research topic. The quality of the themes was reviewed by re-reading the entire data set to confirm that the themes worked in relation to the data set and to code any additional data within the themes that had been missed in earlier coding stages. It can be necessary to recode from the data as coding is an ongoing organic process. Once the coding was completed, an investigation was carried out identifying patterns, relationships, similarities and variations. In some cases, these themes were too diverse and wide ranging. An example of this from the data set was conflict between sales and operations and the negative impact it was having in some of the companies. It was not a key theme for the topic being researched in this study, but the data was noted and discussed in chapter 7 as part of future research to could be carried out. In the final stage of the analysis the number of themes were reduced by grouping them together which distilled the key issues and helped reach theoretical saturation and there was no need to review further (Bryman, 2012). It was important to reach this point, by not reducing the data it will be more or less impossible to interpret the data (Bryman, 2012). Bringing the codes together using Braun & Clarke's (2008) questions on developing themes helped create a bigger picture in terms of what was being portrayed. This allowed the research to progress to the next stage, interpreting the data which is discussed in the next section.



Figure 4.7 Theme questions  
Source: Adapted from Braun and Clarke (2008)

#### 4.14.5 Interpreting

This was a crucial stage of the research as analytical conclusions needed to be determined from the manual coding and themes. It was important to ensure that the views were a fair reflection of the raw data collected and value was added to the actual understanding of the topic. From all of the information reviewed a thematic map was created showing the themes along with their relationships and this will be discussed in Chapter 6. This thematic map also helped to place the themes in the larger context of the phenomenon. Once the data was



analysed and the findings written up, the literature was reviewed and all of these combined helped the create the SPEP framework.

#### **4.14.6 Concluding**

Conclusions focus on the response to the research question or purpose of the study. Research should commence with a plausible research aim or question and when the analysis has been completed it should always answer a question. Sometimes the question may move slightly during the data analysis phase, as it did in this study. When concluding, it is important that the research produces results that are open for thorough examination into the decision making throughout the analysis process. This can be achieved with a detailed description of the coding procedures and criteria used. Conclusions where qualitative research is conducted are not usually generalisable as the conditions in which the research has been carried out can often not be replicated which was the case in this study.

#### **4.15 Ethics**

Researchers need to balance what objectives they are looking to achieve against any harm it may cause the participants involved from a psychological, employer or legal point of view (Blaikie & Priest, 2007). Informed consent seen as a key requirement in research (Salkind, 2014) involves telling the participants who are being interviewed about the purpose of the research, what is involved and also to highlight any potential risks and benefits for the participants involved in the research (Brinkmann & Kvale, 2015). Permission also needs to be sought to use and analyse the data collected and where applicable to have the right to publish or reproduce the data (Mason, 2004). It is important to remind the participants again at the start of the interview what the topic is about and how the recordings will be used (Wengraf, 2001). There can be ethical challenges when carrying out interview research due

to the intricacies of researching people, their companies and placing information in the public domain (Birch, Miller, Mauthner, & Jessop, 2002). Before embarking on the field of study, ethical approval was sought and achieved by the Ethics Research Committee of Technological University Dublin. Ethical issues should be kept at the forefront as they can have an impact from the start of the research to the final report (Brinkmann & Kvale, 2015). The seven-research stage process for evaluating ethical issues as per Figure 4.8 (Brinkmann & Kvale, 2015) was used in this research.

Research subjects are entitled to know that they are being researched, what area is being researched and that at any time they can decide to withdraw from the research (Seale *et al.*, 2010). Participants can be asked to participate on a voluntary basis and their participation should be based on complete open information (Denzin & Lincoln, 2008) and they should not be forced to attend (Salkind, 2014). An ethical dilemma can occur when research participants give their informed consent, but the researcher is carrying out covert research and they are not being honest, and they are deceiving the participants. It is important to share openly with the participants the research plans and to ensure the participants privacy is not violated or they are not compromised in any way from information they may share (Marshall & Rossman, 2011).

## Seven Research Ethical Stages

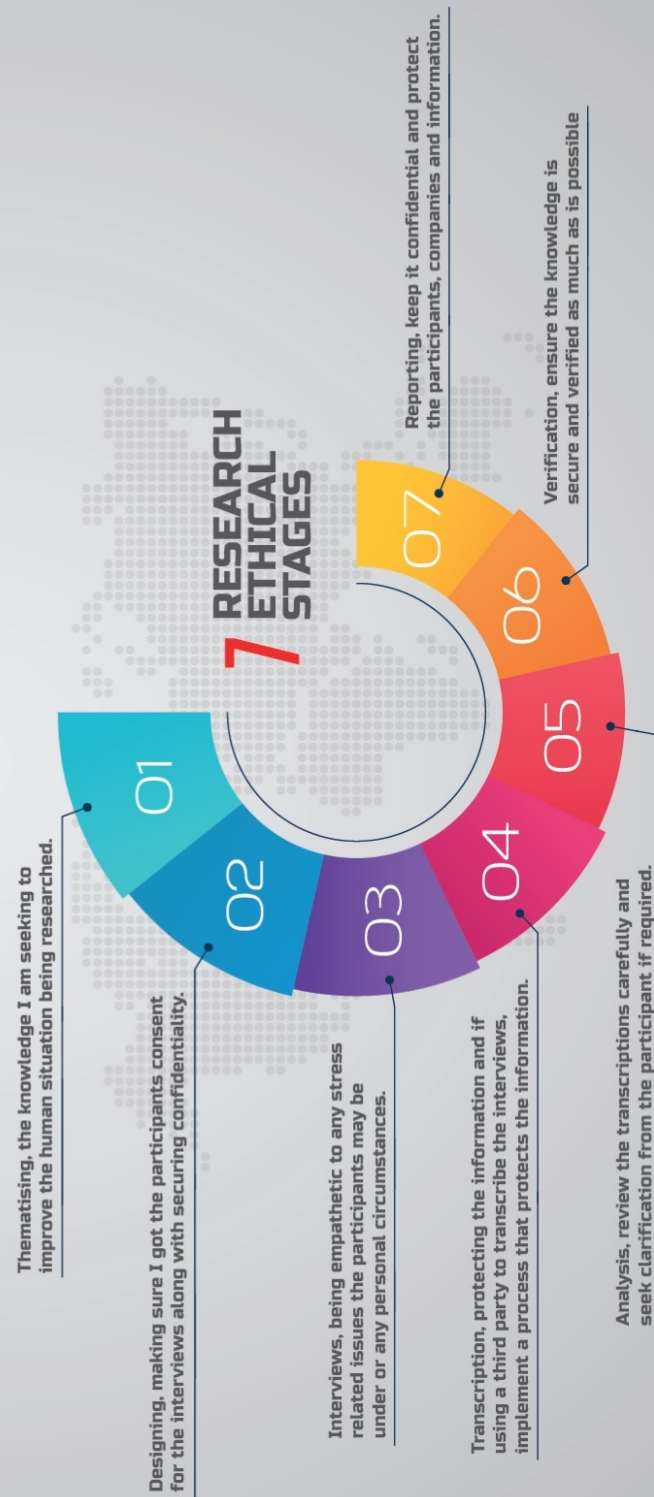


Figure 4.8 Research Ethics Stages  
Source: Adapted Brinkmann & Kvale (2015)

Codes of ethics require safeguards to protect people's identities and of the companies being researched (Denzin & Lincoln, 2008). It is important promises of anonymity are not given they can definitely be enforced (Wengraf, 2001). During the initial calls with the identified participants for the research it was clearly explained to that all participants that company, competitor and partnership information would be anonymised, and private and confidential information would be protected at all times. Any data shared externally would be coded and all company confidential information would be on a number coding only basis and would be protected at all times (Salkind, 2014). The participants were very happy to hear this as some of them initially expressed their concerns as they would be sharing a core part of their business plans including revenue numbers, customers, new product development, challenges and how they win new business.

#### **4.16 Conclusion**

Chapter 4 has explored the research methodology for this study. A multiphase approach was taken with two phases in the research process including interviews and case studies. The richness of the data collected was excellent and the research methodology applied proved to be correct as the aims and objectives of the research were met. Chapter 5 discusses the findings from phase one of the qualitative research carried out, where nine interviews took place with the managing directors/business owners or sales directors of a number of SMEs. Chapter 6 covers the second critical phase of the qualitative research, using a rich data set from the six case studies carried out.

## **Chapter 5     Analysis of Phase 1**

### **5.0     Introduction**

After an initial review of the literature, phase one of the qualitative research was carried out. Nine Irish SMEs participated, and interviews were held at their facility with key decision makers in the organisations. Table 5.1 repeats the details of the companies and the interviewees. The company name and the name of the participants are not listed to protect people's identities of the companies being researched (Denzin & Lincoln, 2008) and in line with university ethics procedures. Where there is a line \_\_\_\_\_ this means that the names of people, companies and customers have been removed. All participants were promised complete anonymity to ensure they were very open during the interviews so that as much rich data as possible could be collected (Wengraf, 2001). The companies are in a broad spectrum of industries which helped explore if sales challenges were industry specific or not. The annual revenues of the companies ranged from €850k to €23 million. A wide spread of revenues was used to identify if there was any correlation between size based on revenue and the quality of the sales process. The number of years in business were from 3 years to 26 years and to see if there was a difference in the sales challenges the companies faced over a time period. The interviews lasted on average 45 minutes and they were all recorded and fully transcribed.

The main aim of this phase of the research was to identify what challenges SMEs were facing in sales and to see what themes were emerging and if any patterns could be identified. It would be remiss not to mention that the participants from these SMEs have achieved sales growth and they consequently are doing some things right in their organisations. The core

objective for this part of the research was to understand the key challenges facing SMEs in the sales arena.

Table 5.1 Phase one Company background details

Phase 1 Company Background Details					
Interview reference number	Type of Business	Title of Participant	Annual Revenue	Number of employees	Years in business
A1	Services - B2B	Managing Director / Owner	€850K	12	3 years
B1	Manufacturing - B2B	Managing Director	€15 million	84	15 years
C1	Services - B2B	General Manager / Head of Sales	€7 million	42	10 years
D1	Manufacturing - B2B	Managing Director	€11 million	64	26 years
E1	Software - B2B	Managing Director	€7.5 million	36	5 years
F1	Channel Sales	Managing Director / Owner	€23 million	71	21 years
G1	Channel Sales	Sales Director	€9 million	36	14 years
H1	Manufacturing - B2B	Managing Director/ Head of Sales	€17 million	65	20 years
I1	Software - B2B	Managing Director/Head of Sales	€1 million	21	6 years

This chapter analyses these interviews. It discusses the issues from each interview that were creating challenges for these companies in sales. These challenges were analysed against the initial literature review and created a sales prospecting framework (PIP). When writing up this section, he closed each interview analysis with the term ‘Major Gaps’ or ‘Minor Gaps’ in the company’s sales process. The results of phase one gave a deeper understanding of what challenges these SMEs were facing in sales and it helped clarify the research topic and question.

## **5.1 Company participants and background information**

The following is an overview of the nine companies from phase one highlighting the participants title, sector, annual revenues and number of employees.

### **Company A background**

The respondent was the Managing Director/Owner (A1). This is a services company with annual revenues of €850k. The company is in operation 3 years and they have 12 employees. The background of the owner is that he was a priest, and he liked working with technology. He decided to leave the priesthood and set up his own services company selling B2B.

### **Company B Background**

The respondent was the Managing Director (B1). The company is a manufacturer and sells B2B. The MD's background is engineering with no sales experience. The company is in business 15 years. They employ 84 people and recently they were taken over by a major Blue-Chip organisation. Their turnover is €15 million selling into the UK, Germany and Ireland.

### **Company C Background**

Company C is a sub-contractor providing outsourced services to manufacturing companies in the technology sector. They sell in the UK and Ireland and interviews were held with the Managing Director (C1) whose background is in procurement and the interview was held with him. Their annual turnover is €7 million, and they employ 42 people.

### **Company D Background**

Company D manufacture special products for the B2B market. It is in business 26 years and employs 64 people with an annual turnover of €11 million. Its main markets are the UK and Ireland. The background of the Managing Director (D1) is engineering, and he considers himself an inventor. The interview was held with the Managing Director.

### **Company E Background**

The interview was held with the Managing Director/Owner (E1) and company E are a software company. He has an engineering background and is also a software developer with no sales experience. They employ 36 people with annual revenues of €7.5 million and they have been in business 5 years.

### **Company F Background**

The interview was held with the MD/owner, they are selling into the B2B Channel. The company employs 71 people and have an annual revenue of €23 million and have been in business 30 years. The owners background is in working on fishing boats with no sales experience.

### **Company G Background**

Company G sell into B2B Channels. They employ 36 people and have a turnover of €11 million. The interview was held with the Sales Director who reports to the CEO. His background is business with no formal sales training.



### **Company H Background**

Company H is a manufacturing company selling B2B. They have 65 employees with a turnover of €17 million and are in business over 20 years. Their main markets are UK and Ireland. The interview was with the owner of the company. The senior leadership team have participated in a one-year International selling programme which has benefited the company with respect to their sales process.

### **Company I Background**

The interview was with the Sales Director (I1) of company I, and they sell B2B. They have a turnover of €10 million and have been in operation 6 years. They sell globally and the MD's background is in general business.

## **5.2 Emerging themes.**

The key themes that emerged from the phase one interviews were all focussed on key areas that can contribute to revenue generation and these are discussed in this chapter

## **5.3 Recruitment and Selection**

Selling is a science, an acquired skill, and management need to ensure that they recruit the right person for the job (Gitomer, 2003). Effective recruitment and selection processes are key to any organisation, especially in the area of sales as they encourage innovation, survival and growth of the SME (Ongori & Temtime, 2009). All of the participants have major recruitment and selection issues and this is despite sales recruitment being crucial to the success of the organisation (Altinay et al., 2008). C1 highlighted recruitment as a key concern,

“That is a great question & it is a huge problem for companies today in my opinion. I help on the HR side & I constantly am challenged on this one. Over the last 12 months, one of the biggest challenges we were faced with when the company grew & that was finding the right people” (C1)

The participants generally recognised the importance of the function but they have not taken proactive steps to deal with the challenges. In some cases, the Managing Director also had responsibility for sales. Two of the nine companies implemented O’Driscoll’s report on hiring graduates which they saw as a positive step (O’Driscoll, 2004). The negative side is that one of the companies (F) hired graduates because they were cheap. The firm did not give the graduates any professional sales training. This respondent also highlighted that hiring graduates is a much slower process in winning new business than hiring experienced people and compared the two as follows:

“With graduates I would still be going around today, this experienced guy delivered because he knew he could” (F1)

Survival, growth and motivation to innovate for an SME is dependent on effective recruitment and selection processes (Ongori & Temtime, 2009), yet in these SMEs even though they had some recruitment processes, they were haphazard at best. In company B, they hired a salesperson because “he had the gift of the gab”. From Rosen’s (2008) list of where managers struggle in terms of finding the right people, finding good talent and training the right salespeople, it is clear that all of these issues also apply to these companies. Additional constraints that restrict companies from growing is the availability of qualified salespeople (Pajo, Coetzer, & Guenole, 2010). The companies interviewed had similar challenges when

searching for qualified salespeople. Even though Cappelli (2013) identified various routes to hire salespeople including bringing in experts/consultants to hire people some of the SMEs have not discovered a successful solution in finding the right people. C did try various routes and so far, all have been unsuccessful.

“I have tried every single source for recruitment, Irish government bodies you get free ads, upside, you get the odd good person but you get grave diggers that have no experience, Agencies, got some people in, looked fantastic, hired them & fired them, came in with big reputations, they were wasters. I have gone to Internet recruitment sites, paid money to them, hired them, useless, not successful, I have not found the perfect solution yet & this is going to be a huge problem as we are expecting a new contract soon which will double our business & we need to have the right management team in place” (C1).

This experience is in line with (Pajo *et al.*, 2010) findings that one of the key constraints on business investment and expansion was the availability of qualified sales employees. D did use recruitment agencies which was one of the routes (Cappelli, 2013) identified and they had a very bad experience,

“I hate recruitment agencies, they haven’t a clue about your business, they don’t know if the person will fit in & they are only interested in picking up a fee” (D1).

G1 identified verbal communication as a key skill a salesperson needs to have when working with prospects and customers.

“Communication is key, they need to be a good communicator, and this is the most important” (G1).

All of the participants recognise the importance in having the right salespeople as part of the organisation. They still have serious challenges in looking to recruit good salespeople. Even though they tried various routes to recruit salespeople they have not been able to agree a preferred or a more successful route. The challenges that were identified in the literature review in the area of recruitment and selection resonated with all of the interviewees. All of the participants were not concerned that some of the salespeople have a close personal relationship with the customer and if they left this could have a serious impact on revenues (Schmitz et al., 2020). They have no contingency planning in place for this potential event.

#### **5.4 Lead generation**

All of the participants have issues with the lack of leads being developed in their organisation and finding new customers and in some cases, they classed lead generation as “a lucky stroke” (A1). The leads were either difficult to identify or challenging to get a first meeting with the prospect or close the opportunity. H1 provides a good example of this.

“the majority of it [lead generation] comes through existing customers, the best opportunities come with 2 of our large existing customers, we have taken on local customers here but if truth be told they found us more than we finding them. We are not good at finding new customers” (H1).

Johnson and Friend (2015) highlighted that selling to an existing customer is five times less expensive than finding a new customer. It is also very important that the SME investigate ways of increasing their success rate in finding qualified leads as they may lose some of these key customers. H1 is a good example of the Pareto principle where 80% of the revenues comes from 20% of the customers (Stevenson & Page, 1979) and this can place them in a challenging environment as their customers increase pressure on them demanding more (Jobber et al., 2019). Andzulis *et al.* (2012) argue that one of the key benefits of social media is lead generation and yet none of the participants use social media as a driver in lead generation. The sales teams at the organisations seem to be quite inexperienced in sales and as a result they were not able to deliver qualified leads through their contacts.

“Yeah, in fact one of our new customers that we started doing work for late last year is literally 5 factories down the road from our facility and they didn’t know what we did, we never identified them as a lead”. (B1)

Sabnis *et al.* (2013) suggested hiring experienced salespeople as they can bring a network of lead generation contacts and this would potentially avoid the issues B1 identifies. Some of the participants wanted to hire experienced people as they could see that they could bring lots of qualified leads with them through their network. An example is given by respondent F1.

“I say hire people with experience, you can’t beat experience, that’s why I liked that sales guy we hired, he told us he had the contacts, he knew what he was doing, he knew the buyers. This guy delivered because he knew he could”. (F1)

Sales organisations need to develop a lead generation strategy and they need to find a way to find new leads that can be developed into prospects (Feiertag, 2010). The participants were sadly lacking in this area and the poor results in delivering qualified leads probably played a part in inhibiting their growth. D1 didn't think he needed a lead generation strategy/process in place, and he had his black book of contacts and that was enough,

"I have over 30 years' experience in the lighting business Kieran, I know every mover and shaker in this business, it's a community, everyone that is good knows what is going on" (D1).

This approach does not help the rest of the sales and marketing people in the company as they do not have sight of the activities and cannot see the data in one location (Hartmann et al., 2018). When it came to making contact with the prospects A1 identified:

"Persistence and hard neck are prerequisites for cold calling:" (A1)

This supports Clay (2009) as his study highlighted that the most successful salespeople winning new customers are the ones that persevere the most with the targeted prospects. The MD of E was not aware whether they cold call or not even though they have an annual turnover of €7.5 million, he felt the opportunity to sell was in developing relationships with the prospects and that this was key (Palmatier *et al.*, 2013).

"I don't know if we cold call, what we do is we play the Irish card, we play relationships, I had been in the industry in Ireland for 12 to 14 years, I had been in the US before,

that is where I got my technology skills, sales skills really started when I came back to Ireland, with sales skills you develop relationships” (E1).

Company A uses cold calling and they have seen how successful it has been for them in winning new customers:

“Any of the actual Cold Calling we would have done, we would have done a bit of direct marketing stuff, e mailing newsletters going into them, we did a flyer into them and we sent it around to each centre and we would have gone to their National Representative body as well. Then we would follow up directly with a cold call” (A1)

The lack of sourcing qualified sales leads is an issue for all companies. Some of the participants prefer to rely on existing customers where they can upsell or cross sell to them. The salespeople are not very qualified in the companies and as a result they have not got the experience to generate high leads. In addition this lack of sales experience is resulting in strategy being agreed to generate effective sales.

## **5.5 Marketing**

Some of the organisations were restricted in the amount of money they could spend on marketing due to financial constraints,

“We are getting through it, we will come through, it is a lot of work, we need some marketing to generate more enquiries and we will invest later on in this as we don't have the budget now” (C1)

Even though sales and marketing play a crucial role in the success of pipeline management (Rouzies & Hulland, 2014), some of the organisations recognise this but have taken no action. Others have their own marketing person based in the target markets to help generate leads and they have been successful in this space. Some also outsource some of their marketing activities to a third party,

“We have one person working in the UK in marketing, he is based in the UK, we want to try & develop leads and online marketing so we can contact all our customers on what we are doing. We also use an external marketing company; they are quite good and get a good message out there” (D1).

Some of the companies would like to have marketing to help them in many areas including customer profiling (O'Dea, 2009), having a stronger presence in the market, PR, website and press releases,

“We have to do a better job in customer profiling, and this is something marketing can help us on. Also, in some places we don't have a strong enough market presence i.e. \_\_\_\_\_, we might be well known in one department but not in many other departments. It's hard to fund marketing, we have a lot to do i.e. PR, press releases, web site. This is something we need to work on” (E1).

Other companies such as H do not see the value that marketing brings and they prefer to use the term “sales support” and this is who conducts their marketing activities in the company,



“Yes, we call marketing here sales support, yes, I think it should, marketing has different connotations in different companies. It is not highly respected in departments like engineering, quality and production. One of the guys in Stanford said that marketing is where your dollars go to die. You spend money, how do you measure the impact, that’s the bit I always struggled on, in retail it is easier to measure in our business very difficult. I wouldn’t dismiss it, it has a value, and we look at it like sales support” (H1).

Some companies used web sites to generate leads as they saw this as an easy way of locating leads and they also used references wherever possible (Jalkala & Salminen, 2009). There seems to be no clearly defined marketing strategy in the organisations. They have had some success with marketing campaigns, mail shots, advertising, online but there is no coordination. A1 describes this issue:

“We would have done a bit of direct marketing stuff, mail shots, e mailing newsletters going into them” (A1).

However, they do not measure the results of the campaigns (Albee, 2010), they do not know what is working well and where they should continue to invest their money to generate qualified leads. In relation to referrals which is a great way to identify qualified leads (Kumar *et al.*, 2007) company C have had some good success but they have not put a process in place to build on this success and this may be because they have no dedicated sales person in place and they are all working excessive hours supporting the existing business which is one of the challenges of SMEs due to their size and lack of funding,

“Referrals from existing customers & suppliers base that gets us our business, would we generate more if we had a guy on the road, we know that, but we cannot afford it, it is too expensive. We have been working terrible long hours for the last 4 years, I work 6 days a week, 11 hours a day every day.” (C1).

Another area highlighted during the interviews where a company can achieve benefits is both sales and marketing departments working together to demonstrate to the customer the value they are delivering (Terho et al., 2017). They both want to give the customer a good customer experience as they know that they can help develop and expand the relationship with the supplier (Lemon & Verhoef, 2016).

“Sales and marketing leaves a lot to be desired and we need to really start working on this soon. In my opinion it makes sense for marketing and sales to work closely together and I would look at having both organisations reporting directly into myself” (I1).

Respondent I1 recognised that there are issues between sales and marketing in terms of conflict within his company (Le Meunier-Fitzhugh et al., 2011). Even though they have a common goal there are challenges as they are not communicating effectively (Biemans *et al.*, 2010).

“They have a fraught relationship, marketing on our side is trying to drive sales through the public whereas sales are trying to drive sales through retail and the distribution channel by trying to convince a buyer. They are at odds in a way even though they do have a common goal, I have some experience in the past and they don’t communicate well and they go two different ways” (I1).

Previous research has shown that having both departments working close together can help reduce the conflict (Rouzies *et al.*, 2005) but this is not what respondent D1 has experienced when he tried to do this,

“If you put them together to explain what they are doing there is going to be conflict because they are both working different issues” (D1).

He also believes marketing should report into himself as sales director and he is pushing for this to happen with the MD. This interviewee felt that sales carries a negative stigma and does not sit well with marketing people and this doesn't help.

“In my opinion it makes sense for marketing and sales to work closely together and I would look at having both organisations reporting directly into myself” (I1).

G1 feels that sales and marketing should report into one manager and that would help everyone working together. He is also strong in making the point that sales is a tough and more stressful job than marketing. This is an interesting observation as recent research has indicated that sales and marketing reporting into one person has benefits (Le Meunier-Fitzhugh, & Massey, 2019).

“They should report into one manager but that manager has a more challenging role then because he has got to get everyone working together, that is a tough job. He has got to keep them aligned. Sales is a tough job, you are out there pounding the streets trying to win business, and you are on the phone making calls trying to convince someone to buy the product. Whereas marketing are sitting behind a desk

with ads and add copy, looking at ways they can help promote the product, it is an easier job than the actual sales job” (G1)

E1 sees the benefits of sales and marketing and that it is important they work as a team.

“Absolutely, they are a team as well, anything that can help the salespeople increase the sales then they will get along with them” (E1)

The literature review highlighted various reasons why marketing and sales have conflict including sales trying to convince a prospect to buy (Homburg *et al.*, 2008) while marketing are carrying out desk research (Kotler *et al.*, 2006). D1, G1 and I1 experienced this in their respective companies.

As per (Homburg *et al.*, 2008), any marketing activities within the organisations I interviewed did not report into sales. These organisations have not grasped the opportunities that can be achieved at the front end of the sales process with good marketing and sales integration (Madhani, 2016). Where sales and marketing departments existed conflict was highlighted as an issue. Steps were taken to try and relieve the stress between both departments but to no avail. The participants had some additional ideas in resolving the conflict including having both departments reporting into one line manager. Everyone recognised the value that sales and marketing working well together can bring to a company in particular helping to generate qualified leads. This would need to be explored further in phase two of the research as it has such a critical part to play in the front end of the sales process.

## **5.6 Technology/SFA.**

Five of out of nine companies track all of their sales leads either on a word document or an excel spreadsheet. They do not use the available technology and tools in the marketplace to help them manage this critical area in prospecting. Despite some of these companies having significant revenues and sales activities taking place none of them have any SFA or CRM in place. D1 is a good example:

“We don’t have any CRM or tracking system in place, I know what is going on. We have sales meetings every month or we have a conference call. Every 3 months we have a meeting all together at a suitable location. We go through the numbers, accounts & where we are in the business” (D1)

Since prospects need to be cultivated and written proposals need to be sent along with the relevant follow up, SFA can help the salespeople in this area including predicting if the lead can be converted into a sale or not (Monat, 2011). Sales leads are the lifeblood of companies, and thus tracking this information is key. SFA can be used to organise these prospects and they can feed into the sales pipeline (Wilding, 2014) giving sales management a total overview of the opportunities being harvested. Some of the companies have purchased prospect data bases and they go through each prospect manually using no automation or tracking: H1 describes their process in this area.

“what we will do is pick a market segment that we may wish to target and purchase data bases to find out who the key players are, the key contacts and start working down. You could start with a target market audience of 400, work down from that” (H1).

Database marketing requires investment and SMEs must invest in computer hardware, database software and skilled personnel in order to be successful (Jobber, 2010). As mentioned earlier, the sooner a salesperson follows up on a sales opportunity the better as studies have shown a quick follow up has seven times the opportunity to convert the sale (Jarvinen & Taiminen, 2015). Some of the SMEs had a concern how the salespeople would react in entering all sales activities on a system, and would it be perceived as “Big Brother” is watching and this may turn the salespeople against reporting activities,

“We monitor the activities but we need to make sure the salespeople do not think it is big brother watching or else we may alienate them”. (G1).

“They don’t like being watched all the time” (H1).

If management can get their salespeople involved in setting up an SFA or CRM system there is a greater acceptance in implementing these systems (Baker & Delpechitre, 2013). I discussed the potential use of their website and if this had a positive impact on their business since buyers can access information very quickly when looking for suppliers on the web to meet their requirements (Jalkala & Salminen, 2009). The responses were poor with many of them saying.,

“Our website needs to be updated, (C1).

“I identified the website early as a priority when I joined as MD but haven’t got around to it yet” (B1).

“As you can see even from our website, I don’t think we do a particular good job doing it” (I1).

A company needs to pay attention that even though these forums along with their website may generate significant traffic, it doesn’t necessarily mean that the targeted prospects will buy its products/services (Albee, 2010). Some of these SMEs will be impacted due to buyers using digital sales channels going forward and these companies are not prepared for these changes and have not re-evaluated their sales team and the impact it will have on their business (Singh *et al.*, 2019). The tracking of sales leads is an important step in the front end of the sales process and over 60% of these companies fall short in this key area. Technology can help enable this part of the process and will need to be explored as part of phase two since it is such a critical area. As Moncrief *et al.* (2017) highlighted, the world of business is going through major changes with the advancement of technology/social media and companies will need evaluate the impact this may have on their business.

## **5.7 Key Account Management**

One of the interesting issues that emerged from the interviews was the interviewees mind set when it came to key account management. Even though for some of them, revenues from a few customers accounted for 80% of their total revenues (Stevenson & Page, 1979), they had no desire to apply an account strategy to these customers and some of them felt it was a waste of money. As in Virtanen *et al.*'s (2015) study, several of the companies surveyed did not see many benefits from this level of customer collaboration.

“The MD is not a big supporter of Key Account Management as he feels it is a very big unnecessary expense. My own feeling in the case the KAM for us with our big customers is he would be drinking their tea and eating their buns, but he wouldn’t be pulling enough business out of there for us” (B1).

One of the key objectives of KAM is to nurture and strengthen the relationship so as not to inhibit growth (Bradford *et al.*, 2012). Some of participants went as far to say that they would never tell a customer that they are an important account,

D1 “We don’t tell them & I don’t agree with customers being told that they are key accounts. I would not tell them anything else, we have to negotiate with them if they know you can’t do without them otherwise in the negotiations, they would screw you”.

Some of the interviewees were afraid the buyers would take advantage of being a key account and would look to drive them further down on price and have additional demands,

“No, they will simply look for more, more discount, more freebies, and better prices (G1).

“This guy wanted us to jump thru hoops for them, he wanted us to put in buffer stocks, everything” (C1).

Wieseke *et al.* (2014) had highlighted that a stronger customer loyalty between the buyer and seller can result in the buyer being more demanding for higher discounts. Some customers think they are so embedded in the supplier relationship that they feel they can ask for anything



(Virtanen *et al.*, 2015) and perhaps the feedback from the interviewees have a point in terms of their position on KAM. The interviewees highlighted from their experience, buyers are in a stronger position and have more detail available to them as they can search online (Rodriguez *et al.*, 2012) and that the Internet has changed the selling process dramatically (Albers *et al.*, 2015). Buyers have a great deal more information readily available and they are more sophisticated (Moncrief *et al.*, 2017).

“We have seen that the purchasing people are becoming more experienced/knowledgeable with the Internet, they are a different breed today. They are bright young graduates, being mentored, coached, put on fast training programs where they are very sharp by the time, they are 26 or 27, they are really able to negotiate and push the suppliers very hard” (H1).

Lacoste (2018) had stated in her article that companies are selecting strategic customers and treating them differently, however there was no evidence of this in any of the interviews. One participant said that they treat all of their customers the same and they do not believe in classification of customers.

To be honest Kieran we try to deal with our smallest customer like we would a big customer and we treat them all the same” (C1).

Even though KAM is initiated as a proactive management driven and opportunity-based solution, it is not being pushed by senior management in the companies (Brehmer & Rehme, 2009). Relationship selling is important in developing the customers, some of the interviewees mentioned that they do not want to have any feelings of emotions with customers. They just

want to sell the product/service, get paid and make a profit. They also highlighted that buyers move jobs; they get promoted and they do not see any point in building relationships with people that are going to move on.

“Our experience dealing with the big multinationals is that relationships still matter but less. Why, because we notice that the customer’s personnel change every 18 months, they do this by design, we would have people here a long time in our company, the personnel on our side are fixed whereas the customer changes so we don’t get a chance to become friendly with them” (H1).

This is not in line with positive relationships between suppliers and customers being a prerequisite for success and building relationships with the right people in the buying organisations (Hughes, 2013). Since the companies do not focus on their key accounts it is not a surprise that they do not have a CRM system. As a result, they are not able to see all of the knowledge related to their customers in one central location and they are losing out as salespeople with this knowledge can succeed better (Salojarvi & Sainio, 2015). Company A supported KAM and they have seen the benefits from it as they implemented it with a few of their key accounts.

“I think it is very important, I think if I look at the example of the \_\_\_\_\_ one I could over the 4 years that we worked with them I could look at huge benefits we got; now we might not have called it KAM but it was what we were more or less doing with them. We got a lot out of sitting down with them every 6 weeks and also once a year having a formal meeting to review everything. I could see we got huge benefit and I also could see some things we didn’t do well like one of our competitors got under our fecking

noses and won some business that we could have done. When looking at KAM I can see many positives“ (A1)

F1 shared a horror story in relation to their business and this has changed their perception on how they manage key accounts. They had one major customer that contributed over 80% of their revenues. This customer went out of business and as a result almost forced F1 to go into receivership. Going forward they do not ever want a customer to be more than 10% of their total revenues. They would prefer to have a large number of customers.

“We don’t want big customers, we want a bucket load of small customers, and never again do we want big customers. If you are getting orders of course you can’t refuse them. I am very happy to say that we have no customer today that is over 10% of our business. We structured this like that and if I see a customer getting too big I will say, hey hold off here a minute this customer is getting too big, let’s not grow it any further, no we don’t want it, we learned our lesson, we are not going to make the same mistake again” (F1).

The literature review is quite extensive in relation to key account management and its importance in business (Moncrief & Marshall, 2005; Guenzi et al., 2009; Arli *et al.*, 2018). The theme in relation to KAM coming from these interviews is that all of the companies are suspect in telling a customer they are a key account. They are afraid it will give the customer additional leverage to use when negotiating on price or looking for special terms in relation to payment, delivery or other support. These companies are extremely cautious in telling their customers anything in relation to their importance. One company was adamant that having a KAM programme is a waste of money. Others are concerned that the company may be too dependent

on a particular customer and if they lose that customer, it could have serious consequences as was the case in company F.

## **5.8 Training**

Various companies leverage formal sales training to create strategic advantages and improve performance (Lassk *et al.*, 2012) but this finding was out of line with all of the SME participants interviewed. None of them have formal sales training in their company. The salespeople are very busy and pressed for time and if they are participating in sales training this can reduce the time they have to spend with customers (Atefi *et al.*, 2018). D1 and G1 talked about sales being part of your DNA and you either have it or not and you don't need training,

"No, it's DNA, my brother went to Australia and my mother said he would be very successful because after one year he will know everyone & it was & he did very well" (D1).

"DNA in my opinion, you can't be trained in that, and it is part of your personality" (G1)

Company EI work on the basis that salespeople can get the best training by working closely with their manager

"It is on the job training and mentoring and provided they are with an experienced person this will suffice" (E1).

This may work to the company's advantage as the new salesperson has the opportunity to mimic the work behaviours of their manager (Bradford *et al.*, 2017). Even though sales training

and development can help reduce employee turnover, with particular focus on the knowledge, skills and abilities of the salespeople (Powers et al., 2013) these SMEs do not seem to have the time or budget to invest in this key area,

“We do not have the budget for sales training and we usually craft them to suit ourselves, we train them to our culture” (F1).

There is very little coaching taking place within the SMEs even though this can have a significant impact on the development of the sales team (Mathieu & Pousa, 2011). B1 was adamant that once a salesperson could talk that was enough to have to do the sales job.

“The one thing I would say to you Kieran in an Irish context and I have seen it, we always put the guy with the gift of the gab into the role, don't we, they don't need training or coaching, they have it already” (B1).

SMEs can be constrained due to budgets and people not having the time to attend courses as resources can be thin on the ground. All of the companies have an opportunity to develop their salespeople from a training perspective as this can have a major bearing on how well the company performs and the future value of the salesperson (Kumar et al., 2015) but they tend not to see the benefits and treat it as a priority. Technology is affecting and changing the selling process and impacting sales teams. Since this is such a key area it is very important that top management support and train their employees in the area of technology and information systems (Ahani et al., 2017). Various interviewees highlighted how important listening is as a key skill for salespeople and complained how many of them lack good listening skills,

“The funny thing about it, a lot of sales guys don’t have it, technical sales guys do, we can listen, what do they want, whereas pure sales guys to me and where I have seen it, you have to remember Kieran I am talking from experience” (B1).

This supports (Kaski et al., 2017) that salespeople should be trained in active listening skills.

Training is not seen as key in these organisations and any training that does take place is mostly on the job training. This is where the salesperson will sit with their manager at meetings internally or externally and learn from them. Depending on how effective the manager is can have a positive or negative impact on the success of the salesperson. Since sales training has been identified as an important enabler in sales this needs to be researched further in phase two. One of the restrictions for SMEs in the area of sales training is a lack of funding. In addition, because SMEs are heavily involved in firefighting and day to day activities with customers, they seldom find the time to participate in any training.

## **5.9 Summary**

One of the key objectives for phase one was to review sales practices of nine SMEs in Ireland and to determine their key challenges. All of the participants have serious issues and gaps in sales, and this is affecting negatively their sales growth in terms of increased revenues and adding new customers. Table 5.2 presents an overview of the key areas where these companies have issues.

Phase 1 Interview Summary Findings														
Interview reference number	Type of Business	Title of Participant	Has participant a sales background	Annual Revenue	Number of employees	Years in business	Recruitment and Selection Process	Sales Process Front End	Marketing Department	Lead generation process	SFA/ CRM	Performance Measurements	Training	Key Account Management
A1	Services-B2B	Managing Director / Owner	No	€850K	12	3 years	Poor	Poor	Outsourced	Poor	No	No	On the job training	No
B1	Manufacturing B2B	Managing Director	No	€15 million	84	15 years	Poor	Poor	Outsourced	Poor	No	No	On the job training	No
C1	Services-B2B	General Manager / Head of Sales	No	€7 million	42	10 years	Poor	Poor	No	Poor	No	No	On the job training	No
D1	Manufacturing B2B	Managing Director	No	€11 million	64	26 years	Poor	Good	Yes	Good	No	No	On the job training	No
E1	Software- B2B	Managing Director	No	€7.5 million	36	5 years	Poor	Poor	No	Poor	No	No	On the job training	No
F1	Channel Sales	Managing Director / Owner	No	€23 million	71	21 years	Poor	Poor	No	Poor	No	No	On the job training	No
G1	Channel Sales	Sales Director	No	€9 million	36	14 years	Poor	Poor	Yes	Poor	No	No	On the job training	No
H1	Manufacturing B2B	Managing Director / Head of Sales	No	€17 million	65	20 years	Poor	Good	No	Good	Yes	No	External training	No
I1	Software-B2B	Managing Director /Head of Sales	Yes	€1 million	21	6 years	Poor	Good	Yes and outsourced (hybrid)	Good	No	No	On the job training	No

Table 5.2 Phase 1 Summary Findings

Reviewing this table, it was difficult to understand how a company with a €7 million annual turnover company has no salespeople, no formal sales structure or formal sales strategy in place. It is clear that all of the companies are challenged in the area of sales. Their lack of ability in finding new customers (Sohnchen & Albers, 2010) and having a good front end to the sales process to support them is front and centre in all companies. As discussed in the literature review, sales is the lifeblood of the economy (Moncrief et al., 2017) and of industrial companies (D’Haen & Van den Poel, 2013) and the sales pipeline plays a major part. If there is no pipeline then this will eventually lead to the premature death of the organisation (Etherington, 2010). Most of the companies lack sales process in their respective organisations.

Out of the nine SMEs interviewed seven of them have major gaps in their sales process with the other two having minor gaps. There was very little sales training in the companies, and it was not seen as a priority even though it can help create strategic advantages which may positively contribute to companies overall performance (Lassk et al., 2012). H was the most organised company and a good example of the benefits of having sales training. The salespeople in this company were placed on an International Selling Programme for nine months and this had a positive impact on their sales as they have implemented some of the learnings from the programme. The literature shows that sales training provides major benefits for everyone in sales (Jelinek et al., 2006) and H1 has shown from their results that this approach works for them.

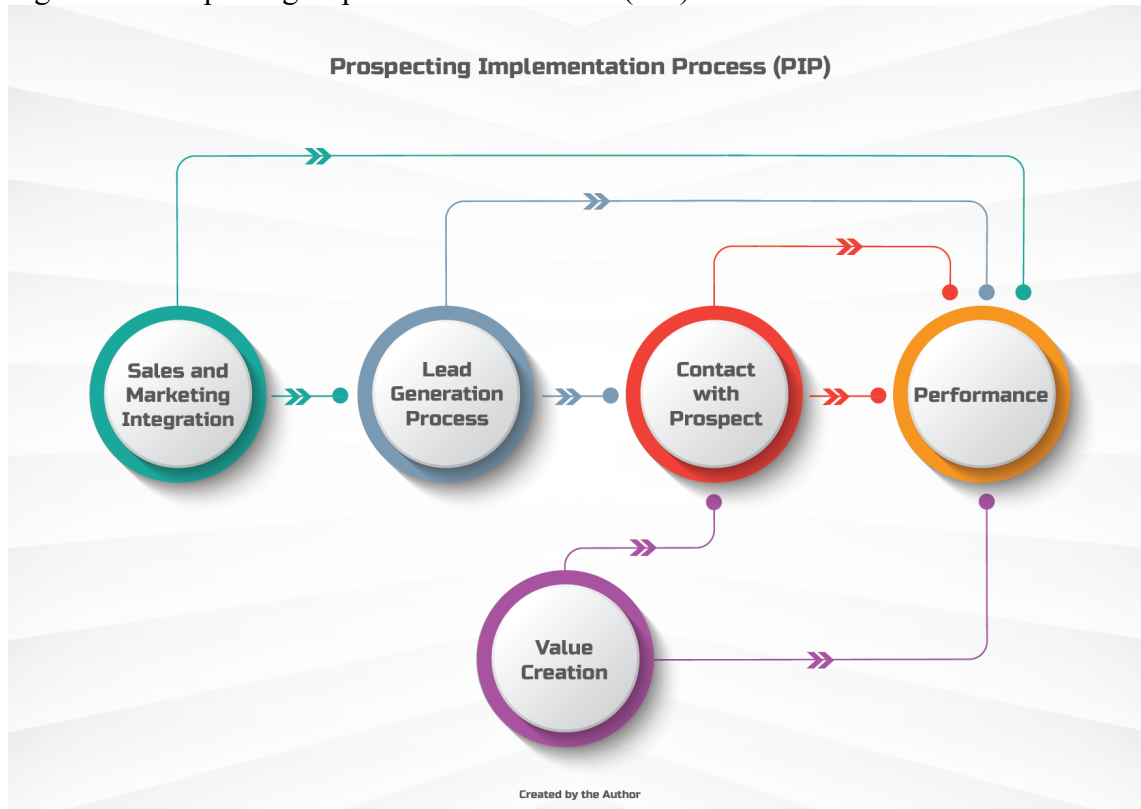
One of the key issues emerging from the interviews was in relation to finding and winning new customers. In most cases, there were either no or minimum formal sales processes in place. Lead generation was very poor in several of the companies even though it is critical at the front end of the sales process. The literature highlighted various routes to generate leads (White, 2004) and many of these were not being used by these companies. Recruitment and selection processes were also very weak in all companies when it came to hiring salespeople even though it is crucial for the sales organisation's success (Altinay et al., 2008). Apart from one participant, all of the others had no prior sales experience before joining the company and they were responsible for sales. There was a very lethargic view on marketing with minimum investment taking place and no motivation to support key account management (Ivens & Pardo, 2007; Woodburn & McDonald, 2011). There were very few performance metrics in place (Trailer & Dickie, 2006) and sales activities were either not captured at all which may have led to sales leads not followed up on (Sabnis et al., 2013). Sales leads were discussed at meetings



haphazardly and tracking them were typed up on an excel spreadsheet with no SFA systems in place (Baker & Delpechitre, 2013). Most of the participants felt that salespeople were not appreciated and, in some places, salespeople were frowned upon (Yang, Hansen, Chartrand, & Fitzsimons, 2013). The results suggest that a salesperson needs to accept a lot of nos (Calvin, 2001) in order to change the prospect from a poor prospect to a customer and that it was important to sell on value (Blocker et al., 2012).

During the reflective period after the interviews it was clear from the results of the analysis and findings from phase one that the emerging themes were related directly and indirectly to the front end of the sales process which is a critical part of sales. It was also apparent from the literature review that there are gaps in this literature. From the literature review and nine interviews carried out in phase one, this provided strong data on sales in SMEs and it facilitated the creation of a what was named a Prospecting Implementation Process (PIP) as depicted in Figure 5.1. This PIP came from synthesising ideas about the sales process and aiming to take the key challenges and put them in some logical order.

Figure 5.1 Prospecting Implementation Process (PIP)



The purpose of the PIP was to act as a potential framework for sales management to have their sales team implement at the front end of their sales process. By having a framework, the aim was to help salespeople develop and win new customers. The PIP looked at the importance of sales and marketing and how much both departments can contribute to the success of sales within the company in particular generating qualified leads (Malshe & Khatib, 2017). It is critical that both departments work well together as there are major benefits to be achieved when they have very good collaboration between them (Guenzi & Trolino, 2007). The companies identified the contribution both sales and marketing can make and where no marketing department existed due to a lack of budget the participants still recognised its importance. The word value (Woiceshyn & Falkenberg, 2008) was highlighted during the interviews as a compelling reason why customers bought from the companies and the importance of the sales function in helping to create this value with the customer (Haas et al., 2012).

This then led to the next step which was lead generation as this was seen by all companies to be a very important area in the survival and success of their business (MacSweeney et al, 2019). Despite being a key area in their business it lacked process with very little lead qualification taking place. It was very haphazard with limited tracking of opportunities and potential sales leads being lost. This was an area that needed to be explored and developed further. With qualified leads generated the next step was to make contact with the customer. The results of the research showed that the participants were not using technology to their advantage in checking out the prospects and using social media (Chase, 2010) to their advantage. Sales pipeline activities need to be measured and this can be achieved by having performance metrics in place so that progress can be reviewed (Rajagopal, 2010).

From the results of phase one, steps including sales and marketing integration, value, lead generation, making contact with the prospect and performance measurements were deemed to be important steps at the front end of the sales process. These were incorporated into the PIP model. By companies focusing on these key steps it may help them acquire new customers.

Reflection on the PIP in the light of the literature identified a number of shortcomings. Firstly it was quite mechanistic and it was not clear that relationships worked in this particular way. Secondly, the model looked very quantitative in nature even though this was not the intention. Thirdly, this model did not capture key issues that influenced the elements of the model and that in some cases were antecedents. Finally, it was overly focussed on performance when the main aim was to consider the issue of process. As a result, phase two of the research was planned to take a holistic view with a main focus on sales pipeline management. The results of the findings and analyses from phase two are discussed in the next chapter.

## Chapter 6 Analysis Phase 2

### 6.0 Introduction

As discussed in Chapter 4, six case companies were chosen for this phase of the research. Table 6.1 lists each case company by type of business, title of participants, annual revenues, number of employees and amount of years in business.

Phase 2- Case Study Company Background Details					
Interview reference number	Type of Business	Title of Participant	Annual Revenue	Number of employees	Years in business
J1	Services - B2B	Managing Director / Owner	£4.7 million	47	15 years
J2		Operations Manager			
J3		Marketing/C.E. Manager			
K1	Manufacturing - B2B	Managing Director / Owner	£21 million	245	30 years
K2		Sales Manager			
K3		Marketing Manager			
L1	Services - B2B	Managing Director / Owner	£25 million	120	12 years
L2		Marketing Manager			
L3		Sales Manager			
M1	Manufacturing - B2B	Sales Director	€36 million	154	30 years
M2		Sales Manager			
M3		key Account Manager			
N1	Software - B2B	Managing Director / Owner	€32 million	200	10 years
N2		Sales Director			
N3		Marketing Manager			
O1	Channel Sales	Managing Director / Owner	€10 million	31	7 years
O2		Technical Sales Manager			

Table 6.1 Case study company background details

The results of the analysis from phase one of the research along with the literature review helped clarify the research topic, aims and objectives. Phase one of the research identified a literature gap in the area of sales pipeline management. The exploratory interviews highlighted practitioners' challenges in relation to winning new customers and the key

outcomes was that they did not have a formal sales process for the front end of their sales process, i.e. pipeline management.

Phase two involved meeting with senior executives from SMEs (Table 6.1) using semi-structured interviews to address issues of sales pipeline management. The average interview time was 55 minutes. In five of the case companies, three senior executives were met. In relation to case company O two senior executives were involved as saturation point was hit with this company (Mason, 2010). The case company executives included,

- CEO/Managing Director in order to get an overview of the company and what their vision was in terms of growth plans along with their challenges.
- Sales Director/Manager as this was a key area of the study to understand fully how sales operated in the company with a particular focus on the front end of the sales process.
- Marketing manager since marketing emerged as key from phase one and it was important to explore further the relationship between sales and marketing and how well it worked in the companies and if there were any issues.

The criteria for interviewing two additional executives from each company was to achieve validation on what the MD had covered and to collect further data as this was very important in terms of securing rich data. These executives were able to provide supplementary information on the front end of their sales processes and help achieve a deeper understanding of the issue. Where there was no specific marketing function in the company, meetings were held with the operations manager as it was felt this was also an important department that has lots of interaction with sales. The case companies were SMEs from manufacturing, services,

software and channel sectors and all were B2B. The sales channel covered companies selling to distributors who sold on to their customers i.e. dealers/resellers, retail or online. Companies were chosen from different sectors to investigate if sales pipeline worked differently in one sector versus the others. Three of the case companies were based in Ireland and the other three were based in the UK. This helped explore if the issues in Irish SMEs were similar to those in the UK SME companies in relation to sales pipeline management. Since the meetings were held with senior executives, all of these people were based at their headquarters. For each case company the first participant was the managing director in order to understand their thoughts on how their respective companies managed the front end of the sales process. After this meeting, the other participants were met in no particular order apart from their availability to meet with him.

The PIP emerged from phase one of the research as the challenges identified showed that the front end of the sales process was not functioning effectively. As a result, phase two was based on the PIP and looking to expand this further by specifically focussing on sales pipeline at the front end of the sales process. The core issues as per objectives 2 and 3 (and their sub-objectives) was to identify the elements of the process and the antecedents. The results from phase one along with the second stage of the literature review helped me create a list of questions on the key sales areas to focus on in relation to sales pipeline management. Appendix 2 highlights the list of questions used during phase two. The data collected from meeting these six case companies assisted in the review of the PIP model which was created from the results of phase one. It contributed towards the creation of a more comprehensive model. In addition, the results from phase two contributed towards closing out the literature gap identified in chapter 1 of the thesis.

This chapter reviews the findings from the six case companies. In section 6.1 of this chapter, there is an overview of the six case companies including: (a) background information on each company and participant including the sector they are selling to and (b) an overview of their sales organisation. This is followed by a consolidated overview of the findings from the six case companies covering key themes and linked to the literature. Each research objective from section 4.1 is discussed in this chapter.

## **6.1 Phase Two: Company background details.**

The following is an overview of the six case companies highlighting the company, participants and their respective sales organisation.

### **6.1.1 Case Company J**

#### **Overview of the company and participants**

The company was founded by two people in 2003. They are an advertising agency and are selling B2B. In 2017 their turnover was £4.7 million with a 35% gross margin and they employ 47 employees. The key participants for this research were the managing director (J1), the marketing manager (J2) and the operations manager (J3). J2 confirmed that J1 was a key person in the company and that she was responsible for growing the revenues and developing sales in the company. With over 14,000 advertising agencies in the UK the company was in the Top 100 agencies in 2017.

#### **Overview of the Sales Organisation**

J1 is the managing director and sales director. She manages sales and marketing as she has a very strong commercial background and loves selling and meeting prospects and customers.

They have four salespeople, two key account managers, one person works closely with the customer, she is called the customer experience director and a business development manager responsible for bringing in new business. The key account managers work closely with their important customers who want to build long term relationships: they call this “land and expand”. The key account managers goal is to upsell and cross sell their services as the company offers a wide variety of services and this has worked successfully for them. They focus on the network within their key accounts and use this to their maximum advantage. According to the interviewees, the sales team get on well with each other and there is a good team spirit in the sales organisation. J2 and J3 discussed the experience the sales team had. They both confirmed that apart from J1 they are not trained salespeople and prior to joining Company J they had no sales experience. One of the areas where Company J is very exposed in that they are heavily dependent on one key customer. They are looking at reducing this exposure by bringing on new customers as they understand the challenges this over exposure can bring in terms of having more demanding customers looking to lower costs (Jobber et al., 2019). This is one of the reasons why they need to aggressively drive the front end of the sales process so that they can win new customers and not be over reliable on just a few customers.

“Yeah. I would say the biggest threat to the growth is if we lost\_\_\_\_\_ our super tier that would be, you know be significant but what we’ve been trying to do every year is reduce the exposure of that, and hence why new business came in because we wanted to try and push this up” (J).

Company F from phase one of this research who are in the channel sales sector already demonstrated how close they were in going bankrupt as a result of being totally dependent on one customer.



### **6.1.2 Case Company K**

#### **Overview of the company and participants**

K is a family-run manufacturer of water treatment products based in the UK and it was established in 1988. In 2017 they had 245 employees with an annual turnover of £21 million. They work with large distributors and numerous resellers in the channel. The key participants for this research were the managing director (K1), the sales manager (K2) and the marketing manager (K3) who both report to the managing director. The company is going through significant growth and they have aggressive sales plans and their goal is to achieve £100 million annual turnover by 2022. K1's background is in engineering and he has been with the company 5 years. He has had no prior experience in sales. K2's background is also in engineering and he was asked by his company if he would work in sales as the company had a shortage of salespeople. K3's background is advertising and marketing with over 18 years' experience working for very big brands.

#### **Overview of the sales organisation**

K1 reports to the Board of Directors. The sales manager and marketing manager report to K1. They have 20 sales representatives and they report to the sales manager and they do not have any dedicated key account managers.

### **6.1.3 Case company L**

#### **Overview of the company and participants**

The company based in the UK was founded by an entrepreneur (L1) who identified an opportunity in providing IT services for global managed service providers. They have been in business over 20 years. Their annual turnover in 2017 was £25 million with a 45% gross margin

and they employ 120 people. They successfully acquired a cyber security company in 2016 as they recognised that this was going to be a major growth area. They are selling these services on a B2B basis globally. The key participants for this research were the managing director (L1), the marketing manager (L2) with 25 years' experience working in key account management and marketing and L3, the sales manager who has over 15 years' experience in IT sales.

### **Overview of the sales organisation**

L1 manages and drives the sales organisation. He has seven salespeople that are his direct reports and he has two administrative people supporting the sales and marketing teams. Similar to company J, company L is also very dependent on a few customers. A small number of accounts make up a significant part of their revenues (Stevenson & Page, 1979) hence the reason why they need to acquire new customers so that they can minimise their exposure.

L, "We do rely quite heavily on a couple of our clients, they are 70% of our revenue, that's a worry. If we mess up, we then put measures in place to ensure that those issues don't happen again"

### **6.1.4 Case Company M**

#### **Overview of the company and participants**

This company was founded in 1998 and they are the only manufacturer in their sector in Ireland. They sell in the domestic and global markets; they had an annual turnover of €36 million in 2017 with a 35% gross margin and they have 154 employees. The key participants for this research were the sales director(M1), the sales manager (M2) and a key account manager (M3).

### **Overview of the sales organisation**

The organisation has a sales director with two sales representatives on the road visiting prospects and customers. They have two sales managers based in the office looking after and supporting overseas sales and three people working inside sales. These inside salespeople are a key resource in the organisation and are taking on additional responsibilities that the outside sales team would have been executing in the past (Sleep et al., 2020). All of these people report to the sales director and they have had no formal sales training and they were all put into the sales positions without any sales experience.

#### **6.1.5 Case company N**

##### **Overview of the company and participants**

The company was founded in 2008 and they are based in Ireland. The key participants for this research were, the managing director (N1), the sales director (N2) and the marketing manager (N3). The managing directors background is engineering. They are a machine vision, hardware and software integration company selling B2B. They have 200 employees with an annual revenue turnover of €32 million in 2017 with a 60% gross margin. N1 is very passionate about sales and he feels it is a critical part of life and business.

##### **Overview of the sales organisation**

The sales director is responsible for sales and marketing and he worked in manufacturing before he was asked to take over sales. The marketing manager has been with the company two and a half years and he is based in the UK reporting to the sales director. His background is in sales, he worked for Yellow Pages for 14 years selling advertising space by cold calling prospects,

### **6.1.6 Case Company O**

#### **Overview of the company and participants**

The company was founded by two food scientists in 2011 and they first started trading from their home garage. It is an Irish owned and operated private label manufacturer of sports nutrition, weight management and lifestyle nutrition products. They have their own research and development laboratories and manufacturing facility. They sell white label product globally to major brands. Their annual turnover is €10 million with a gross margin of 48% and they have 31 employees. The key participants for this research were the managing director (O1) and the senior technical sales manager (O2).

#### **Overview of the sales organisation**

O1 is responsible for sales and he has no prior sales experience. He has four technical salespeople reporting to him., one of them is the senior technical sales manager and they have no prior sales experience and O1 does not see this as an issue. Selling their product requires people with a food science background as their prospects require suppliers with this knowledge. He feels that having salespeople with technical know-how is a big advantage when presenting products to prospects. No one in the company receives any formal sales training.

## **6.2 Analysis**

In reviewing phase two of the research at a macro level, it was interesting to see how each of these case companies operate from a sales perspective. The UK and Irish SME case companies have similar challenges in sales and there is nothing that stands out in either region that shows fundamental differences. This may be due to the SME environment they are working in as all of the participants demonstrated a lack of resources, lots of work pressure/stress, a shortage of

funding to invest in sales, no clear agreed sales strategies, work being carried out on a haphazard basis and no formal sales training. A rationale for this was given as follows,

“Because the people in sales are maxed out at the moment, and can’t push on with new things, we are all very busy” (O1).

That said, these companies have achieved revenue growth and have won new customers and it does ask the question if they had effective sales processes in place how successful could they grow their businesses? All case companies did not outsource any of their salespeople as they recognised the benefits in having their own inhouse sales team (Good et al., 2019). Many of these case companies do not use industry sales terms such as, customer profiling, customer value proposition, pipeline management, relationship selling or performance measurements but as a critical realist (Bhaskar, 1978), they are actually implementing these but not calling them by name. L1 is very strong on supporting good sales processes in his business and he sees the benefits it can bring.

“We also need a good sales process, good qualification parts and follow-up from qualification delivery and implementation, and execution. It’s all about execution. I’m a firm believer that good salespeople are the guys who really get the process, and not the guys who can talk the talk. They’ve got to walk the talk. So, to me it’s all about sales process” (L1).

The results of phase one introduced the PIP framework and the next section discusses the findings from phase two. These findings enhance the SPEP framework further and include customer profiling, Customer Value Proposition, sales and marketing, lead generation,

technology, social media, measurements, relationship selling, trust and rewards/commissions. Technology is a key area in sales as it helps enable the sales process. This research explores various headings in relation to the front end of the sales process. Technology has an important role to play in some of these key headings including social media, relationship selling, referrals and lead generation. Under each relevant heading, technology will be discussed and the role it plays in the organisation. Artificial Intelligence (AI) was reviewed with the case companies and this will be assigned a stand-alone heading under technology.

The literature review highlighted the benefits in using technology in the sales process and the case companies recognised this. They could see first-hand the impact but apart from company L who are in the tech industry, the rest of the case companies were not very proactive in this area.

“I think it’s about a USP with your customers, you’ve got to stay ahead of that game. You’ve got to be innovative constantly, and probably be looking to be disruptive to get any mind share. We are investing heavily in technology” (L1)

### **6.3 Objective 2.1: Customer Value Propositions**

Despite customer value propositions being one of the most widely used terms in business (Anderson, Narus, & Wouter, 2006) the case companies reported that they do not use the term customer value proposition in their company. They were challenged on this point in order to find out why customers buy from them. Similar to Skalen et al.’s (2014) findings, these case companies value propositions are made up of configurations of different practices and resources. The key values that they offered their customers were, quality, trust, empathy, integrity and fast turnaround time. They also did not just sell anything to the customer, they

wanted to ensure what they delivered would meet the customers' requirements and expectations (Dowell, Heffernan, & Morrison, 2013). Without these values they would have not grown as a company. Respondents J1, L1 and O1 outline their CVP next.

"So, customers are choosing us because we're local and very responsive. We're high quality, we're independent plus then it's a matter of our creative reputation and the chemistry of our team, trust plays a significant part in winning new customers. We'll not just going to kind of sell you anything business. In this industry because you're not really selling a kind of really tangible, you know product a lot of the time. Really, you're asking people to hugely trust you on an idea that you think is a good idea that will lead a campaign that they will spend thousands of pounds on it" (J1).

"So, my strategy has always been that we want to have a proposition which demonstrates thought leadership in the industry, the industry being technology. The key value proposition that I come across as managing director of the business, and when I'm talking to existing customers is that the Western markets are recognised as having far better process and due diligence. We offer very good penetration testing; we have strong relationships with customers who trust us and respect us already. Turnaround time is also key" (L1).

"We have a very good quality product. We buy a lot of Irish dairy – one of the best in the world, so we have that going for us. We're not the cheapest, but the other thing we offer is integrity. If you come to us looking for whey protein with 80% protein, that's what you'll get, whereas there are players in Europe with a diluted down

version...down to 10 or 20%, etc. and there's all varying degrees of that...so a lot of people who come to us know we're by the book" (O1).

The literature review highlighted that there should be a stronger focus on creating customer value as a path to build a highly satisfied and loyal customer base (Blocker et al., 2012). Value creation is the *raison d'être* of companies (Woiceshyn & Falkenberg, 2008) and the sales function has a key role to play in creating value in supplier-buyer relationships (Haas et al., 2012). Customers are demanding greater insight and knowledge, value adding solutions and quick responsiveness from salespeople (Leigh et al., 2014; Heikka & Natti, 2018). A company's reasons for selling are useless if they do not match the customer's reasons for buying. Customer value propositions are seen as configurations of several different practices and resources (Skalen et al., 2014).

All case companies articulated why customers buy from them and what value they are delivering. There were no real differences in what the companies were offering from a CVP perspective. Even though CVPs are seen as an important marketing message where the supplier can message their customers and prospects on the value they are bringing (Patala *et al.*, 2016) no case company had their customer value proposition written down on their presentations, marketing materials or website. While discussions took place in this area with the participants many of them struggled to articulate clearly what value they bring to their customers. They are all underselling themselves by not having this value on their website or marketing materials. For relationships to survive with customers, customer value propositions need to be driven around the customer needs (Bradford et al., 2012; Skalen et al., 2014). Many of the case companies were engaging with customers which helped place themselves in the shoes of the customer (Wouters & Kirchberger, 2015). They were able to give advice to their customers as



they could see first-hand what the issues were once, they had dialogue with the customer (Terho et al., 2012). However, they are not marketing their true value with their customers or prospects and they are bringing in external resources to help them.

“Yeah, and we have struggled with a succinct value proposition to be fair they’re not buttoned down. “We’re going to bring somebody in to do it. We’ll get an agency in to help us with this” (K1).

Anderson et al., (2006) suggest conveying value to customers would be valuable for these companies to adopt as they could clearly state what the benefits, favourable points of difference and resonating focus are. They could use this as part of their marketing materials ensuring their value proposition is distinctive, measurable and sustainable. All of the case participants recognised that value creation through interaction between supplier and customer is key in business to business marketing (Stenroos & Jaakkola, 2012). They meet with their customers technical people on a frequent basis as they are looking to increase the trust between both parties (Hamwi et al., 2013). They drive innovation with their customers (Storbacka, 2012) as they work with them in developing unique solutions and they build specific value into the relationship (Blocker et al., 2012) provided they understand their customers business, their challenges and their markets (Sullivan et al., 2012). By analysing the customer’s needs, the competitor offerings and the company’s strengths it can help develop the customer value proposition (Sheehan & Bossio, 2015) but does not seem to be happening in all the case study companies and if it is there, it is haphazard at best.

“We help the resellers to advertise our brand so that they can generate sales with their customers. (K2).

They are all selling on value (Heikka & Natti, 2018) in terms of what their customers/ prospects are looking for. At the beginning of the engagement, many of them want to build a good relationship with the prospect (Arli *et al.*, 2018) as they see the benefits that this can bring to the business. By looking to understand their customers business, their challenges and markets this can help create superior value (Sullivan et al., 2012).

“I think you need to go with them and build the relationship at the start. I actually like going out and meeting people” (M1).

While these companies have customer value propositions in place, even though they are not articulated as such, it is really value selling that they are participating in and can help to enable the sale. All of the case companies could benefit by sitting down with the relevant employees and collaborating in the value creating process as this can lead to co-learning and co-development of new skills and knowledge for the team (Ballantyne et al., 2011). Rintamaki, Kuusela, & Mitronen (2007) outlined four key dimensions of value propositions: economic, functional, emotional and symbolic and these would be useful for the case companies when they are creating their value proposition. Salomonson et al., 2012) highlighted three communicative skills that are key in supporting customers: value creation, attentiveness, perceptiveness and responsiveness. Once the value has been created they need to communicate the value to their customers and they need to measure their performance against the value they committed to deliver to the customer (Skalen et al., 2014) since customer value assessment is key (Keranen & Jalkala, 2013).

#### **6.4 Objective 2.2: Customer Profiling Effectiveness**

Many of the case companies understand the importance in having the right prospects connecting with the right strategy at the right time being supported with the right resources from their company (Oliver, 2002). However, SMEs look to survive and when they are going through tough times it is difficult for them to turn away business.

“So, we kind of took everything on, and a lot of those customers just weren’t the right fit for our business. I think it’s easy to find new customers but I’m just not sure it’s easy to find the right new customers” (J3).

Customer profiling focuses on suppliers evaluating customers and ensuring they are paying special attention to their specific and changing needs so that they can support them (Dunk, 2004). Completing customer profiles can help sales and marketing agree on the most important attributes of their ideal customers which will help generate qualified leads. Even though many of these case companies had never heard of the term customer profiling or sweet spot they are very clear on their ideal customer that they would like to onboard. They recognise where their target prospects lead to a perfect alignment of potential customer’s needs they have an excellent opportunity in winning new business (O’ Dea, 2009). They all provided a clear description of their preferred prospect. This was important to them as they recognised it can help them identify qualified leads. They wanted to make sure all of their salespeople are on the same page when it comes to locating these qualified leads.

“They need to be working in large organisations, we want our salespeople to work with large corporates who have marketing teams or commercial teams, internal commercial teams in the sort of fifty-mile radius. It would also be someone who has got a

marketing theme or someone that needs marketing, or who have got a large number of employees who would need a certain amount of internal communications and support with that as well” (J2).

“Yeah, our sweet spot would be the reseller. They would have some money to invest, and they would be in an area that is uncontested with experienced installers. They would have an ambition to grow and they would have a sales background” (K1).

“The ideal customer is in private labelling who put in big orders and have a minimum order of 150 kilos per product and per flavour” (O2)

Once the profile of the ideal customer has been identified company N use LinkedIn to review the key decision makers in the company and they look to create an overview of the prospect’s organisation.

“So, we would profile a company who’s the MD, main contacts in the company and we would draw an organisational chart and check the people out on LinkedIn” (N2)

Prospects who are achieving growth in their business is a common theme coming through as part of the customer profile (O’ Dea, 2009) and makes sense as companies preferably want to work with healthy customers. Scoring the sales leads in terms of opportunities is good information for the marketing department to have as it may help them increase the quality of future leads (Jarvinen & Taiminen, 2015). The case companies advised that they do not apply any scoring to the leads though it would make sense to score them. This information can be extremely useful later when analysing the data to confirm if quality leads have been identified

as it can lead to more of a focus in this particular area. If the data reports poor sales leads, they can explore the reasons why and ensure they do not waste money and resources going down that route again. Customer profiling has helped these case companies as they understand what the customer requires and they are able to put themselves in the shoes of the customer (Whittle & Foster, 2012).

## **6.5 Objective 2.3: Lead Generation Routes**

The literature review discussed various routes to generate qualified leads and the findings from the data from the case companies identified the top three routes; referrals (Helm, 2003), word of mouth and LinkedIn. The number one lead generator was referrals, and this concurs with the literature as one of the most influential factors in convincing a buyer to choose a supplier are referrals (Salminen & Moller, 2006).

### **6.5.1 Referrals**

Referrals (Chollet et al., 2014) is a key route for these companies to win qualified leads. It has proved very successful for all of the case companies. In one company they reciprocate with leads to their customers. LinkedIn (Oechsli, 2011) is one of the successful lead generation social media tools they use but most of the case companies are not using social media (Itani et al., 2017) proactively.

“So, referrals are our highest numbers of getting new business. Absolutely, so that will be either existing customers or also existing customers moving to other organisations is a real winner for us which we would see as a referral to some extent” (J1).

Company K gets referrals from the customers that they have very good relationships with.

“So, we get the ongoing relationship, and we get the referrals” (K3)

There was no employee or customer reward programmes in place for referrals presented to the sales team (Ryu & Feick, 2007). Since M and O do not have a big marketing budget, creating an internal referral programme strategy could be useful and a good way to win new leads (Chollet et al., 2014).

All of the case companies recognise the importance in building close relationships with their customers and this helps them to generate referrals (Odhiambo & Kennedy, 2013). Many of their first customer wins came via referrals (Chollet et al., 2014) and they were able to get access to the key decision makers quickly. These referrals came through WOM which is an effective way in looking for new prospects (Schmitt et al., 2011). All of the case companies saw the benefits of WOM (Gombeski et al., 2011). M and O supply sales leads to their customers which is a very interesting approach and the customer appreciates this and they reciprocate the gesture by supplying leads back to them. LinkedIn can be a very good platform for generating leads (O’Dea & Turley, 2012) and company J and O use LinkedIn for referrals and in line with (Andzulis et al., (2012), it has proved to be a very successful tool.

Company J and O use the benefits that technology can provide, and they have a dedicated person working on LinkedIn searching the platform for qualified leads and this has proved to be very successful. In addition, they track all contacts that their employees work with and when a person moves to another company, they contact them with a view to becoming a supplier. In company J, they have 254 employee contacts at one key account, and this could prove very beneficial in time as some of these people will move to new companies and will be able to recommend J as a potential new supplier.

“LinkedIn is a very good channel for us. So, I probably have may be fifteen hundred contacts in my network bearing in mind I get one of our commercial team to manage my account with me because every single one of our customers is a potential referral” (J1).

I’d live on it [LinkedIn] and that’s where I find names but I’ve also found from a sales perspective or finding a prospect is sometimes if you go straight to the top and just say look I know you’re not the guy I need to be talking to but would you mind just pointing me in the right director (N2)

“There’s a guy in the company and he deals with LinkedIn solely” (O2).

Case company O give sales leads to their customers and they feel this is a very good way to build up a relationship.

"It’s a relationship with the supplier. They buy off me, giving good business ... here’s a lead for them, or a recommendation to a client. So that’s how it goes, focus on the industry” (O1).

Company O won an account with one of the biggest global online company the week the research was taking place. This customer heard that the company were a good supplier in the industry and had a very good reputation. As a result, they reached out to O1 and placed a £250k sample purchase order with them. The management of O are wondering if sales is more than just going out and collecting sales leads.

O1, “They came to us, they had done their research...Yeah, so like, the only conclusion you could make is that sales isn’t all about going out there and making leads...and then with \_\_\_\_\_ could blow the roof off this...it’s frightening...it’s nearly too big”

Sales leads are the lifeblood of industrial companies (D’Haen et al., 2013) but despite this many companies approach this problem in a haphazard manner (Hummel, 2011). Driving sales leads can be very time consuming for salespeople and it is important that they focus on leads that have a higher chance of converting into sales. Leads can vary from excellent high profit opportunities to ‘resource sapping dogs that eventually die’ (Monat, 2011, p19). The case companies acknowledged that they had no systems in place where they could predict which leads might convert into a sale (Monat, 2010).

#### **6.5.2 Databases**

K, L and M purchase databases and they have generated leads. They also distribute up to date company information on products to their database to keep them informed of what is happening in the company and it is an opportunity to cross sell (Jobber, 2010).

“We purchase database from ----. We use these for our sales. It works for generating leads. We worked out the demographic for resellers by using it. So, we used it backwards and then we targeted those areas with some good wins” (K3).

“As part of our lead generation we are purchasing databases. We are engaged with one of the vendors who specialise in telemarketing campaigns” (L3).

“We purchase databases of architects” (M2).



Company N have had a bad experience with buying databases and will not use them going forward and this supports (Yu & Cai, 2007) where some companies purchase databases and they need to be careful since a lot of the time crucial data is missing.

“We buy databases, lots of them and in terms of researching that database we would use LinkedIn a lot. A lot of databases are shit. They are outdated or there might be one or two good ones in there but the percentage of quality leads are poor” (N3).

In relation to databases the new 2018 EU GDPR regulations are having a serious impact as companies can no longer send out promotions or mailshots to customers or prospects without first getting their approval (Goddard, 2017). In addition, this regulation has restricted companies contacting prospects from a telemarketing perspective as they need their approval before they can e mail them.

“GDPR has had a massive impact. It has decimated our database. A massive impact, we were sending out HTML emails to people, we had a database of several thousand. That three thousand has been reduced to less than two hundred, so one of the reasons we haven’t been strong on continuing that element of our marketing is because at the moment we haven’t got the database for sending out to” (N3).

The findings show that in some of the cases databases were used as a successful route to generate sales leads while in others they had issues with the accuracy of the data as the information on the prospects was outdated and not very relevant. Even though trends are showing that buyers are demanding quicker answers and telesales is in more demand (Moncrief et al., 2017), this did not emerge from the research.

### **6.5.3 Trade Shows/ Conferences/Workshops**

A key route for lead generation for L, M and O was trade shows/conferences and they present white papers and collect a number of leads (Orr, 2008).

“We’re taking an initiative with Vistage. Vistage is a trainee academy for chief executives and COOs, three-and-a-half thousand members in the UK. They have open days, and we take a stand at those shows to try and promote the product to all Vistage members on the basis that Vistage members are deemed to be running more successful businesses. We collect a large number of leads from these events” (L3)

“We would go to the conference as delegates and we’ll still pay five or six hundred just to go but again we’ll work the room now at lunches and whatever and pick up some great leads. We give educational talks on what we do at conferences and we publish white papers” (N2).

Trade shows and exhibitions are an important marketing instrument (Caragin & Dragoi, 2012) and they have given case company O an opportunity to make useful contacts from other people in their industry and they also helped promote their company and their image (Hansen, 2004). Despite having invested in participating at trade shows, the organisations do not seem to measure the efficiency of this prospecting activity (Caragin & Dragoi, 2012). It would make sense to have a list of measures that they review after the show to determine if it was beneficial (Hansen, 2004). Some of the case companies attend conferences in relation to their industry and it helps them build a rapport with their key customer contacts by spending quality time with them and they can also find potential prospects (Orr, 2008). The MD of company N felt

that trade shows were a waste of time and money and that the Internet had a huge part to play in this.

“Shows in Ireland are gone. I mean they’re gone many years ago. The internet killed them. Even shows in England are very poor, you know” (N1).

SMEs may not have the budget or funds to participate at exhibitions or trade shows and what some of the case companies are doing is have an event at their own facility and invite customers and prospects to them. They find this a successful and low-cost way of winning new business.

“We market our own little events. They’re like workshops and \_\_\_\_\_ runs those and they’ll be on topics that will be interesting to the people that we are targeting. things like challenges of marketing in 2019 or how to engage your employees. Trends within the industry so like video. How to up your email game? Things like that, and then we invite people and they’re free, and they come along and it has worked really well” (J2).

N1 is not a supporter of trade shows as they find them very expensive. They plan to build a demonstration centre at their facility and invite customers and prospects.

“I’m investing about a hundred grand now in a demo room down where we’ll have all our own products, so I’ll be able to do all our own shows here and invite customers. And bringing people here, and at the moment that’s a better spend of a hundred grand than doing three or four shows externally” (N1).

#### **6.5.4 Other lead generation routes**

Customer references are a very strong lead convertor and there are numerous advantages in using this as a route to win new prospects (Jalkala & Salminen, 2009). References can be a big contributor to the growth of the supplier (Salminen & Moller, 2006), they give credibility to the supplier's customers value proposition (Kumar et al., 2013). Case company J finds using customer references very useful as it helps to give them credibility.

"Yes. so, we'll ask them are they happy for us to use them to reference your campaign in the case study, and then they would agree. Well we put credentials and things on the website but no customer name, Yeah" (J1).

Even though case company O recognise this they are not willing to compromise their customers by displaying who they are doing business with. As a result, many prospects actually respect this and are willing to award their business to case company O on the basis of trust, confidentiality and credibility.

Case company K who are in the manufacturing sector uses advertising to promote their company and products and to help generate leads both for their company and their customers (Moncrief & Marshall, 2005), Hummel, 2011). They also had an issue trying to convert sales leads into actual sales (D'Haen et al., 2013).

"We help the resellers to advertise our brand so that they can generate sales with their customers. We spent this year testing all sorts of things like newspapers, you know,

we had tried sponsorship radio. Radio sponsorships inserts in papers. Initially it did well pulling in leads but we struggled to convert them.” (K1)

Case company J who are in the advertising agency sector review customers that they have lost in the past (White, 2004) and old leads that were never converted into sales with a view to winning them back (Thomas et al., 2004; Liu, Chugh & Leach, 2015) and they have an account team that work closely on this. It is important to find out why the customer left in order to ensure they do not have a repeat Liu, Pancras & Houtz, 2015).

“We also look to regain lapsed customers who go inactive. So, for the commercial team a big job is to regain customers” (J3).

## **6.6 Objective: 2.4: Lead pre-qualification**

As can be seen from research objective 2.3 all of the case companies have successful proactive lead generation processes in place. Despite the literature identifying the importance in qualifying sales leads no case company had an agreed strategy on the process that needs to be applied when qualifying these leads, (D'Haen et al., 2013; Jobber et al., 2019; Stoddard et al., 2002). All of the case companies recognised during the interview that this step needs to be completed and they recognise the benefits it can bring to the salespeople.

“Yeah. Most of the leads that come into the business, most of the quality leads that come into the business tend to be referrals, so we do have a very good there but we do very little on qualifying them” (O2)

“We also need a good sales process, good qualification parts and follow-up from qualification delivery and implementation, and execution” (L1)

While they understand what their ideal customer looks like they do not forensically qualify the lead before the sales team deals with it. This has resulted in a lot of time wasted by the salespeople and the sales team at company J have encountered these challenges.

“We know if we get that right, and the prequalification is right good quality leads will drop into the in box, and then it’s about converting. So if one guy is spending sixty/seventy per cent of week trying to generate inappropriate leads, and then setup appointments and make presentations that to me is all wasted” (J1)

The case companies use social media platforms to identify domestic and global contacts (Eid et al., 2019) at their targeted prospect as part of the overall lead generation process and this is discussed in the next objective. There is a disparity between the literature and practice. One of the issues here is that the literature is quite generic (qualify leads is the usual exhortation), whereas more research is needed to investigate this issue in more detail. The study conducted for this thesis starts this process by asking organisations the question about how they do the activity. During the interviews, this prompted reflection and acknowledgement of the issues. The literature is remarkably silent on these issues that are important for the operationalisation of the sales process.

## **6.7 Objective 2.5: Making first contact**

Company M believes that it easier to grow the business with existing accounts since they are already dealing with them (Accenture, 2015). When making the initial contact with the

prospect some of the case companies use cold calling. Company O when it was first established won their first customers by cold calling them and over a period of time the business has grown extensively.

“We had no customer when we first started. We set up a kind of a cottage industry at home so we could get something off the ground, and approach people who were distributing to health food shops in Ireland. They said they would be very interested, and they also wanted capsules...certain capsule type products. So, we did a pilot to make them – to make capsules and vitamins, and dabbling really...small scale, and then they said what about powders, that they had a good market for powders” (O1)

This cottage industry has now grown and as a result of their success they moved to a 2500 square meters state of the art facility in Q4 2019. However, the case companies highlighted their displeasure with having to cold call (Johnson & Marshall, 2016). They prefer not to cold call as they do not see it as a successful method in winning new business. They don’t believe in it and they see it as a total waste of time. Company L who are in the IT services sector doesn’t feel that cold calling works in the cyber security industry as it is difficult to cold call a prospect and ask them to share confidential information about being hacked or if they have had any data breaches. Company J’s competitors use cold calling so they are going to try it out. They want to cold call the prospects but present a value add to them in the form of free reports to try and get their attention. Cold calling is industry specific as it may work in some sectors and not in others as outlined here.

“We’re not a fan of cold calling but our competitors use it massively. We’re going to trial some calling but it’s not going to be ‘hello can we have your business? It’s going

to be we've got this really interesting report we think you might like to use, we've got some very nice people that we know have some specific challenges that we're going to ring and target but that will be the first we dip our toe into cold calling, for me" (J1).

"Cold calling is not something that is currently happening. I know, well I guess if you called people on our Salesforce database, they are potentially cold calls at this stage because the database. It is a very difficult thing to phone a company from scratch asking them about their cyber security and have that dialogue with them unless you've had a prior relationship" (L3).

The sales manager of Company M, who are in the manufacturing sector, doesn't see any benefit in cold calling as he can't get past the gatekeeper or receptionist. However, one of his sales managers has his sales reps carrying out cold calling both on the phone and visiting prospects at their premises without a pre-arranged meeting.

"There's no value to it, because quite often the gate keeper won't let the information or the person past the front desk" (M2).

However, the sales director likes cold calling and he pushes his sales representatives to make cold calls from the company's database.

"We do cold calling, the reps would actually call from the databases or if they were passing by someone they would call in for an appointment" (M1).



Company N who are in the software sector are also actively involved in cold calling and see it as part of the salesperson's role and they have no issues in making contact with prospects using this forum.

"So, my brief is to grow and manage the UK business. My role is pretty much back to coal face selling, so literally getting in front of customers and selling software. Yeah, yeah. It's very much cold calling." (N2).

Company O who are selling nutritional products into B2B channels are not supporters of cold calling. They feel that the number of times they have to phone a prospect who they don't know (Etherington, 2010) is too high to secure a customer. This was an interesting point as they secured their biggest customer from having a high call frequency to them (Roman & Martin, 2008).

"...if you cold call people, you have a higher chance of failing, because they may not be looking for what you're offering. When there was nothing happening, cold calling was big for us, it's like the soccer player that runs in for the rebound 20 times – you get one. That was the case with one of our customers. He's still one of our biggest clients. So, that's kind of a cold call success story, but we do it less and less" (O1).

Later company O added that if he had a referral, they would not have a problem phoning the prospect or they were contacting a very reputable brand.

“We knew they were dealing with some very reputable brands we would hear through a referral, and by inference we said they must be a decent player, so we cold called them” (O2).

Company M had a similar experience and as a result of his perseverance with the prospect and not accepting no as the final answer he was able to close a major account (Jolson & Wotruba, 1992). Salesforce.com highlighted that it can take between six to eight touches to generate a good sales lead (Poyry et al., 2016).

“Anyway, I sent one of our reps out to see them, and he came back and said ‘no, they don’t really use much aluminium’, so I said that’s not what I think. He had obviously got the brush off so I phoned myself and I saw they were actually buying in lots of extrusion, and so I knocked on the door quite a few times, and there was a guy there – \_\_\_\_\_ was his name – very receptive and I built up a very good relationship with him from the start” (M1)

All of the case companies carried out pre contact research on the prospects using social media before they made contact (Giamanco & Gregoire, 2012). They investigated the prospects using the Internet with special focus on LinkedIn (Oechsli, 2011) which was discussed earlier in this chapter.

“We use LinkedIn whenever we would meet anyone, we would check them out before and it gets you to people that you might not necessarily know. Sometimes when I go to a company, it can be hard to know who I should speak to, whereas if they’re on

LinkedIn, there's a good selection of people in companies – who is looking after purchasing, who is their technical person.” (M2).

The main route used to contact prospects was via the telephone. The salespeople looking to build a rapport early by demonstrating to the prospect their value. Cold calling is used with one sales director being a big proponent of it. Persistence (Clay, 2009) can lead to success in making contact with the appropriate decision maker.

### **6.7.1 Technology Issues**

Technology plays an important role in the lead generation process as we have seen from this section. The case companies did touch on technology and demonstrated that they are using some form of sales support technology (Arndt & Harkins, 2012) but they had no clear implementation plan or strategy for the future. They have notions and ideas and even though they recognise that technology can help speed up the sales cycle (Tanner & Shipp, 2005) it is not seen as a key priority. They all recognised that the Internet is an excellent source of new revenue (Aaron, 2009) including collecting information on competitors and that the Internet has changed the selling process (Albers et al., 2015).

It can be used to build databases where prospects can be contacted with a view to converting them into customers. LinkedIn has shown here the valuable contribution it makes to sourcing new sales leads along with investigating the prospects to see if they match their customer profile. In addition, LinkedIn can be used to identify who the key decision makers they need to speak with in the prospects organisation. N also discussed technology in relation to social media and he feels it will have a very big impact when looking for sales leads and that they need to be ready for it.

“Now is technology going to influence marketing? It already is and will continue to do so, and I think social media will be huge in that, Facebook, Twitter, LinkedIn and Instagram, and we’re not there yet but we will be able to monitor dialogue conversations, intelligence going on in the marketplace and that ultimately will define our product development and our marketing. A lot more word of mouth, internet-based research, social media conversations, contact lists become that much more important” (N3).

With the use of technology company M have had a positive experience finding new customers on the Internet and doing business with them (Kuruzovich, 2013).

“I keep saying it to our sales lads, these people find us. We’re not finding them; the reps are not finding them. This fella from the States \_\_\_\_\_ is his name. He was on the internet, he wanted to set up a business in Ireland, they do a lot of business with data centres. I was outside having a coffee at 11 o clock at night in Portugal, and I got an email in from this fella in Utah. So, what did I do? I answered him back straight away. He couldn’t believe it & they have about 20 dies with us now. (M1).

“Marketing and I and one of our sales reps watch them [competitors] closely. Also, what they’ll do is they’ll put up the projects that their customers have done on their website. We have won a lot of business from our competitors doing this” (K3).

## **6.8 Objective 2.6: Performance Measurement**

Company J rate the closing potential of their prospects from their pipeline by colour coding them in terms of probability in closing the opportunity.

“Well that’s a really good question. I’ll tell you what we will be tracking that conversion rate, so I wouldn’t know off the top of my head but we will be tracking it because what we track every quarter as well is exactly how many leads, how many, you know, in the pipeline, the size of that pipeline, the value. That’s what I tend to look at is the value of the pipeline. What will happen is our account managers will say look these customers here are green, that means they’re staying active. We’ve got more projects in the pipeline, everything is going well. It’s amber if they go do you know what after this project, I can see there’s nothing coming so they’re a little bit amber. So, the commercial team know I might have to step in if it goes red” (J1).

Apart from company O, all other case companies have some form of performance metrics measurement in place to review sales activities (Trailer & Dickie, 2006). At company J and K, the numbers are reviewed and driven by the financial director at the weekly meetings. This is despite a sales director also attending the meeting. At the meetings they review each lead to determine at what stage it is at in the sales process (Rajagopal, 2010).

“The whip is cracked by our finance director. So, what happens there is we have a forecasting spreadsheet where every lead is on there and the account managers whoever they’re looking after it’s their job to predict what that forecast is going to be. So, they look at it sort of every quarter but we hone in every month. So, they will put in that figure for that client, and that gets fed up to finance and then finance will spit

the report out and they'll look and they'll go okay this is our forecast, and we'll have the discussion every month, are we on track? What's happening? Why has it dropped off? Is there anything else that's going to come in?" (J1).

At company M they had a sales manager who was not very proactive in sales and he did very little in reviewing the numbers and looking to see what opportunities could be closed with the prospects (Jordan & Vazzana, 2011).

"They employed a sales manager on the word of somebody else, saying that he was a great fella, and then gave him no direction, he set no measurements, he had no motivation and what happened is he took a flyer as to what he thought would be the right thing to do, and spent a lot of money and then, a couple of months later he packed it in" (M1).

This has now changed and they can now see the benefits in having sales measurements for the salespeople including the number of sales appointments with new prospects.

"We used measure nothing in sales, I saw that as being zero value at all, so the salespeople were glorified taxi drivers, so now what we've done is we measure them based on quotations received by customers, the product information being passed out. Historically, let's just say, take in take in in excess of 300 tenders a year, of which 200 we could identify and trace back as won, so there was a huge lack of information or no information, so now, as the sales reps are going in with real time information. The requirement is that every sales rep has to do appointments...two appointments per day, confirmed" (M2).

Company L set key performance indicators (KPIs) for any events they attended where they were looking to develop new business. They set the number of prospects to be contacted (Hamwi et al., 2013) number of leads they wanted to gather from this event (Trailer & Dickie, 2006) and what conversion rate they wanted to achieve (Schiffman, 2003).

“We are looking at having six hundred delegates who are registered members of Vistage, and the KPI that we have currently established is a ten percent of that six hundred individuals who are visiting, and we are probably looking at anywhere from thirty to fifty percent of conversion from those ten percent individuals” (L2).

Company L measure the salespeople’s performance individually on the number of prospects they have identified (Jobber et al., 2019), number of phone calls to prospects (Trailer & Dickie, 2006); (Gitomer, 2003) and how many appointments with these prospects (Schiffman, 2003).

“So maybe he’ll do thirty phone calls & I’m saying he needs to setup three appointments a week, and I’ll go and see them and that sort of thing. So hard hitting, good closing, great feature proposition.it keeps us track of every closed opportunity even open opportunities and lost opportunities. That gives us a ratio of how many opportunities did this person or this particular individual worked on. How many have they managed to close within the particular window of let’s say one month to three months. So, every month we can have a review with them” (L1).

Company K and N review their target numbers with the team on a monthly basis and are very focussed what is in the pipeline (Peterson et al., 2011). They review existing business, new business and any renewals that are coming to the end of the contract

“Well so we have weekly, monthly & we have quarterly targets now because we’re growing rapidly, I split the business into quarters. We have quarterly targets and I developed those with the finance director which is also in line with how much money do we have because as we have to grow the market, so we have to spend and then wait, and spend and wait” (K1).

In my sales element in this role it is an annual target, and that’s how it is. We go through a process of measuring inputs on a monthly basis, inputs being quotes we got out, first meetings, renewal meetings, purchase orders and we measure the matrix there which I think is very helpful for the business” (N3).

Company M set no revenue sales targets for each individual salesperson even though their annual turnover is in excess of €36 million. They determine what annual revenue number they want to achieve and they work towards achieving this.

“We don’t set targets for them individually. It’s a very hard thing to quantify. You can’t really, you see, they’re calling to architects and they’re trying to get stuff specified ... it’s a long-term thing” (M1).

Company N uses percentages to rate probability closure and all of these three case companies see the benefits in using this probability process.



“We colour code the opportunities, if the colour code is green. We’re dealing with them. There’s my thirty-four million and so now for the next year I’m trying to do forecasting, but quickly and sorry I’ve to come back to sales for next year because it’s not sales received, it’s sales forecast, so if I go into 2020 These are all jobs I have out for proposals at the moment. I’ve €38.8 million up in the pipe, and if I can quickly go through it” (M1).

“Look we’re expecting a quote back from engineering by this date because the customer is expecting it by then. Expected in three days is when we expect him to PO. The important one for us is the probability. We work twenty-five, fifty, ninety percent on how close we are to closing it. Here is an example, there’s ninety percent probability that we’ll get the PO on the 31<sup>st</sup> March, so you see this job has just moved actually today, and so we’re a week ahead of schedule. we have €14.1 million that I know that I’m guaranteed €14.1 million sales next year because we have contracts that are being renewed. This is in the bag already” (N2).

Bradford et al., (2016) highlighted by having a better understanding of the issues that impact converting sales leads opportunities can help management in their forecasting. In addition, it can help to achieve higher revenues and contribute towards making the sales team more efficient. Table 6.2 highlights the key measurements along with the frequency that the case companies use in their organisations to track the performance of their salespeople. These measurements can be reviewed by management with the salespeople and they can be used to monitor activity against the revenue forecast. This will also help to hold salespeople accountable for their performance.

Sales Performance Metrics	
Measurement	Frequency
Number of qualified leads generated	Monthly
Number of quotations received	Monthly
Number of appointments with prospects	Daily
Number of outbound prospect calls	Weekly
Number of renewals secured	Quarterly
Number of opportunities by salesperson	Monthly
Product information sent out to prospects	Monthly
Sales conversion rate by salesperson	Quarterly
Number of opportunities closed	Monthly
Revenue generated by salesperson	Monthly
Value of pipeline by salesperson	Monthly
Number of lost opportunities	Quarterly
Revenue versus Forecast	Quarterly

Figure 6.1 Sales Performance Metrics

## **6.9 Objective 3.1: Recruitment/Selection and Sales Training**

The case companies highlighted that one of the challenges they have is finding the right people to meet the organisations demands (Cappelli, 2013). They also recognised that they fell into sales as a career with limited experience and training (Powers et al., 2013) and never set out at the start of their career to work in sales. In some of the case companies' senior management did not like using the word sales when speaking with customers. They saw it as creating a negative perception with the customer. They did not have any data or research to back up their thought process, but it was just how they felt. One of the participants is the MD and their background is commercial but she still does not like using the word salesperson and she changed the titles of the people working in sales.

"Oh, I think they want to sell me something. Yeah we changed all the titles. I don't want to be sold to myself but I want to be supported and guided and helped, so I think I feel quite uncomfortable with the word salesperson" (O1)

She sees trust as a key factor in building customer relationships and she doesn't believe trust is a word that sits well with salespeople. This is an interesting finding as sales is aiming to be more professionalised.

"This is all about relationships and it's all about trust the last thing we want is to be using the word salesperson" (O1)

Some of the case companies highlighted that technical people are good salespeople. They felt that they had better credibility with the customer as they could be trusted more and were seen as an intelligent source of information and don't tell lies. The case companies liked bringing

their technical people to the meetings with the prospects. In one instance the salesperson requested the technical people to attend the meeting as they could see the advantages in having them at the meeting and that their positive contribution could lead to the closing of the sale.

“Technical side is a strength that you can bring when talking to customers” (K1)

“So I think as a team we need to understand where there might be value in putting a technical person in front of a client” (L3)

One of the key skills they identified for salespeople to have was listening as they felt it was very important when speaking with prospects and customers (Pryor *et al.*, 2013).

“More listening than talking” (N2)

This finding sits well with the literature on team-based selling (Lai & Yang, 2017) already identified in this review. It must be acknowledged that the team-related literature often takes a KAM focus due to the inherent collaboration as part of that framework. However, the findings in this thesis extend that to other non-key account situations.

Since most of the participants did not receive any formal sales training before they moved into sales with these case companies, it was not a surprise to see from the data that the amount of sales training carried out was minimal.

“But there’s no formal sales training” (M3)

“So sales training is relatively low and the training that people get tends to be product and technical based training. This is a bit of beef of mine” (N3).

They did not use sales training to give their salespeople the tools to improve their company’s performance (Lassk *et al.*, 2012). The sales managers were not proactive in arranging sales training for the salespeople even though it was their responsibility (Johlke, 2006).

“For the first two years I was absolutely useless. I had no sales training” (K2)

The sales director of one of the case companies with a turnover of €36 million highlighted that he had never received a days sales training in his life. There were no formal sales training plans in place in most of the case companies even though they recognised the importance in the development of their salespeople. Some of the case companies highlighted the criticality for the salespeople to learn and train on the job and that this was their best induction.

“Not as such, no... I mean, we guide them on the job” (O2)

This is in line with a study that highlighted that some sales managers feel that a lack of prior sales experience is not that important as they can mould the new salesperson to the company’s need (Bolander *et al.*, 2020). This was achieved by the salespeople visiting customers and prospects with experienced sales team. They felt this was a big advantage for the salespeople seeing first-hand how the senior management teamwork with prospects and customers. Coaching skills was identified as a critical attribute for sales managers to have in the development of the salespeople (Mathieu & Pousa, 2011) but the data showed minimal coaching taking place. Even though they do not invest in sales training many of the case

companies advised that they would invest heavily in sales training if they had the budget available.

“And unfortunately we probably need to do more of that and if I’d a blank cheque I’d spend a lot more money on on-boarding training” (K2)

It seems therefore that sales training is not a priority for organisations even though they recognise its benefits. While some of it is due to the competing demands for SME budget, the lack of training may also cause other issues such as lack of awareness of the importance of SFA/CRM data entry that are causing these organisations some worries. This is despite strong academic evidence of the benefits of sales training (Jelinek *et al.*, 2006; Koponen *et al.*, 2019). Case company K and L stated that they would invest money in people and talent as they see as a critical area in the growth of their business.

“I think it would certainly be people” (K2)

“People buy from people, and as a result I think my biggest investment idea would be invest in people, the right people actually who will allow, enable the business to multiply and replicate growth” (L1)

### **6.10 Objective 3.2: Relationship Selling / KAM**

Relationship selling was a very strong theme that emerged from all of the case study companies. This was an important finding from the research especially the part it plays at the front end of the sales process where prospects can be developed into customers and it was one of research directions proposed by (Arli *et al.*, 2018). Trust was a key component of relationship selling and this is also discussed in this section. Salespeople are looking at ways

of improving the relationships with customers (Dixon & Tanner, 2012) and the case companies are focused on this area and seeing relationship selling at the early part of the sales process as a potential differentiator. They also recognise that they need to work closely with the prospects to understand the expectations of the buyers decision making unit so that they can look to retain the business long terms (Mahapatra, Ramani, & Kulkarni, 2019). They want to build personal relationships with the buyers, and they see this as a key part of their overall strategy when looking to build long term relationships (Schmitz et al., 2020).

“Relationship selling is very important here as we work very closely with the customers and they know what activities are taking place with the customers” (M1).

“We need to be very close to what our customers are going to buy in the future, and make sure that we are positioned to be able to price and deliver what they want to buy. We spend much more time on working in a partnership arrangement with our customers where you’re sitting down this time of the year and you’re saying okay what is the big thing that’s happening next year. That’s very important to us” (N2).

The case companies saw this as a key strategy in developing long term relationships with their customers. Many of them talked about the importance in building the relationship at the very start when they made contact with the prospect for the first time. An example is J1,

“Culturally we tend to fit well with people who like long-term relationships, like the kind who want to grow and work in partnership from the start”(J1).

Company J developed this further by hiring a customer experience manager. She interfaces with all prospects and customers to ensure they are being supported and that their expectations are being met in terms of what they promised to deliver in relation to value (Homburg, Jozic, *et al.*, 2017). Company J's company strategy is to build relationships early with the prospects and to turn them into long term relationships.

"We have a customer experience director working daily with all our customers making sure they are being supported. We monitor that customer experience right from the start. It's more about early relationships building into long-term relationships" (J2).

Many of the case companies identified early relationship building as key as they could see first-hand that this was an opportunity to engage with the prospects and demonstrate to them their professionalism as a company and individual. They can also show how responsive they are and buyers like to see this along with suppliers being innovative (Kaski *et al.*, 2017).

"So very often the customer wouldn't have a deep understanding of how the products are made, and the nutritional stuff...some do and some don't. So, we would offer the product development to them so it's the technical sell, nearly always...and it's quite involved, so in the product development process you build up a relationship with the client early, impress them. So, the relationship side is key. think the relationship is the most important" (O1).

Company K identified the importance of customer lifetime value in their company. They value the benefits of this in terms of growing revenues in their business (Malshe, 2011).



“We have that relationship with customers. The Holy Grail at the moment is customer lifetime value. I always get on my soapbox, if you put the customer at the heart of all decisions you won’t go far wrong, you will have a great business relationship” (K3).

“My business is relationship selling from the start and upselling to the customers that I have serviced very, very well for the last number of years” (N1).

They understood key account management and how it can help them grow their business (Mohd & Ahmad, 2014) and the importance of relationship building in growing these key accounts. They also recognised the opportunity to upsell once the account and relationships were established (Johnson & Friend, 2015).

“Because it’s my business as a business relationship manager. Matching how is our businesses doing for you. So that’s the goal. One of the most successful selling things that we did was setup with our key customers a quarterly review meeting that helped bring us closer to the customers. We have a brilliant, brilliant relationship with our customers. So, we’re upselling within the customers and what we find is that it is a lot easier to sell to an existing customer than find new ones” (N3)

However, their strategy was more than just key account management. It was about developing relationships right from an early stage and that trust played a major part in helping to achieve this (Dowell *et al.*, 2013). Since trust is a key component of relationship selling it will be discussed later in this section of the thesis. They also felt they could have stronger customer retention than waiting for the customer to grow and become a key account.

“The opening bit is quite key because you’re engaging with a client and building up their trust with them because they’re trusting you with their data security, information security, and they want to know who you are as an organisation. So, it’s all about that first point of contact, how you speak and how you conduct yourself” (L3)

“It’s the attention you give to customers, very receptive and I built up a very good relationship with him from the start. And the key to all that was the service we gave at the start and having a good relationship with the main people. We now do that with every customer that we have, we keep customers, if we have a customer, we tend to hold on to them. We do not lose customers; we have great relationships with them” (M1)

Companies K, M and O highlighted how customer centric they are (Quinn, 2004). They looked to create value by customer and were very focussed on their needs (Sheth *et al.*, 2000). They saw the customer as number one, but this did not always work in their favour. Being customer centric where there is a single view of the customer within the company this has the added benefit in helping companies manage the integration gap between sales and marketing (Sleep *et al.*, 2020). The customers looked for additional benefits when they saw that they were a key account (Wieseke *et al.*, 2014). Company O appointed a key account manager who had no experience in sales and never worked with customers in the past. Shapiro (2002) highlighted that it is important to hire people with experience as they will help achieve long term relationships with the customers and as mentioned earlier company O did not follow this route as they appointed a person with no key account experience.

“we would be very customer-centric, we kind of do the Fergal Quinn thing – the customer is king – and sometimes it goes against us in the longer term, you’re developing a very sound relationship” (O1).

“It’s coming from a customer centric view rather than previously we were a little bit focused on our own opinions in business. We thought we knew what was right.” (K1)

“Our approach to customers is very much based on what that customer wants” (M3).

L3 highlighted the importance in having the right people with the correct sales skills including being able to adapt (Dubinsky, Chonko, Jones, & Roberts, 2002) when looking to build relationships with prospects and customers. O1 was adamant that the human element will always play a major role for salespeople when working with customers despite the advancement in technology.

“People buy from people, and as a result I think my biggest investment idea would be invest in people, the right people actually” (L3)

“I don’t think artificial intelligence will replace a relationship. I have a feeling there will be a role for salespeople. It might be managing more clients with the help of technology, but I think there will be a huge human element” (O1).

A key component identified by the case companies in relationship selling is trust. This was a strong theme that emerged from the data when trying to build relationships with the prospects and this is discussed in the next section.

### 6.10.1 Trust

Some of the case companies customers are selling their products into the channel and by developing trust between the suppliers and customers it can help them achieve competitiveness (Aoki & Lennerfors, 2013).

“This is all about relationships and it’s all about trust” (J1).

“It’s the old saying people, buy from people they like and trust, and the big one for me is trust, and how you build trust is knowledge of your product, and being a really nice person” (K2).

They are also very customer oriented and this can help build trust between both organisations. (Guenzi & Troilo, 2007). They listen to their customers’ needs so that they can provide concrete solutions to them (Goad & Jaramillo, 2014).

Trust was seen as a key variable in building relationships with the customers (Morgan & Hunt, 1994; Wagner & Mai, 2015), and buyers look for this when speaking with potential suppliers (Kaski *et al.*, 2017). The case companies achieved better collaboration when the buyers trusted them and both parties worked well together as a result (Ballantyne & Varey, 2008).

“It’s trust. We’ll not just going to kind of sell you anything business, you’re asking people to hugely trust you on an idea that you think is a good idea that will lead a campaign that they will spend thousands of pounds on it. They need to trust that you’ve done all of your work and you’re thinking on that” (J3).

When the customer feels they have been treated fairly by the supplier this helps to build the trust (Zaefarian *et al.*, 2016) and product knowledge and expertise is also key (Dowell *et al.*, 2013).

“I believe knowledge is really important if used in the right way. It’s the old saying people buy from people they like and trust, and the big one for me is trust, and how you build trust is knowledge of your product and being a really nice person” (K2).

Company L and O highlighted the importance in building trust at the pre relationship stage (Gaczek, Leszczynski, & Zielinski, 2018)

“We have strong relationships with customers who trust us and respect us already. The opening bit is quite key because you’re engaging with a client and building up their trust with them “ (L3).

“We get business on that from a confidentiality and trust point of view” (O2).

A key theme discussed with the participants from the case companies was the importance in hiring the right people when it comes to relationship selling and growing the business (Altinay *et al.*, 2008).

“It’s the old saying people buy from people. Make sure we’re hiring the right salespeople and investing in all our people because the people make a difference in my opinion” K1

“The biggest inhibitor to the growth is probably the ability to build a huge service business and finding and keeping the right people and developing that talent. N1

All of the case companies supported the importance of relationship selling and they could see first-hand the benefits they have achieved executing it within their organisation. They were all very strong on the human interaction and they were adamant that no matter how advanced technology is there is still a major role for the salespeople interacting with the prospect/customer.

#### **6.11 Objective 3.3: Sales and marketing Collaboration**

As in phase one, marketing does not seem to be recognised as a priority despite some of these companies exceeding revenues of €30 million. In an SME environment it can be quite chaotic with a lot of activities taking place and the number one priority seems to be to win revenues and to support customers. This revenue needs to be secured to pay the running costs of the business and to also achieve profit for the shareholders.

“I think marketing isn’t that great at the moment. \_\_\_\_\_hasn’t historically done anything proper in marketing” (L3).

“So, our marketing has traditionally been weak, so the company is led by a guy who did the selling twenty years ago” (N2).

Some of the findings in relation to working in an SME environment are similar to (Sashittal & Jassawalla, 2001) outcomes. Few SME companies have time to conduct formal market

planning because they are continuously firefighting and where they have some plans, they do not commit them to paper.

“Not good enough because they’re too busy dealing with the firefighting of today’s customers that are active. We just feel really busy and think we need more people” (J3)

They are working on keeping customers satisfied and this is their number one priority. Companies N and O do not have someone in a marketing position in the company. Some participants felt it was an unnecessary expense with one of the main themes being that they do not have the budget for a fulltime marketing person and they did not see it as a priority, This is despite recognising the contribution it can make to the overall business. N have a marketing person on board, and they are happy they made the investment despite N1s deep reservations.

“I suppose over the years our own operations manager and to a degree our MD probably thought that marketing was fluff” (N2).

“There’s a lot involved in it, going around the country to health food shops and pharmacies, so the costs involved and the return in Ireland wouldn’t be in it” (O2)

Some of the case companies were looking to change this and had agreed with management to bring a marketing person on board. Examples from L1 and M2 are,

” Marketing are bringing an additional person into the business to help on lead generation because there’s a massive digital presence that you need” (L1).

“Our literature and our brochures have been non-existent, we are probably the worst marketed company, we just hired a marketing person. I would update our marketing capability, website, processes, literature, everything and use the technology out there. We are a fantastic company, but terrible at letting people know what we can do. Marketing is one of the main things I’ve been banging on [M1’s] door about. We also need to do some digital marketing” (M2).

Case company L are also going to outsource parts of their marketing (Park *et al.*, 2011) as they had a bad experience doing it internally and they do not have the expertise in-house:

”Sales is internal so we are part of the business, however, what we’ve noticed is having an internal marketing individual has not historically gone well. So, the productivity levels haven’t been then that great. So, as part of that we’ve noticed that marketing, getting an external marketing agency is definitely beneficial” (L3).

Case company O carry out very little marketing as they have no time due to their workload (Sashittal & Jassawalla, 2001). Any activities that need to take place in this area are dealt with by the technical sales team. They manage exhibitions and any conferences. They have achieved very good success from trade shows which has helped develop good quality leads for them. O1 is aware of the shortfalls in the company on the marketing front but everyone is too busy to address all of the challenges. A good example of this is when they assigned a person with no sales experience to the position of key account manager,

“A girl left, her role was key account manager, so I took over her role in the business. Yeah, it’s challenging” (O2).



At J, K and N sales and marketing departments exist and in all of them the relationship is working very well between both departments and there is excellent collaboration evident from the interviews. Management in some of the case companies understand the criticality of both sales and marketing working together to generate revenues (Malshe & Sohi, 2009). K had very bad experiences working in other companies in relation to sales and marketing and they saw first-hand the issues that can arise when the relationship is poor.

“In my previous life I’d be going fingers crossed that we find the golden egg but absolutely petrified if you got a hundred or thousands of lower quality leads, and the damage that can do. With \_\_\_\_\_ we don’t have that here” (J3).

“It’s not always an easy relationship, I think it depends on the culture but in other organisations there’s been friction in marketing and sales because sales want stuff done a certain way, marketing wants it done another way, and never the two will meet” (K3)

This negative experience helped them at their new employer, and they worked to ensure that conflict did not take place and that they worked well together. They understood the cultural aspects of sales and marketing in terms of people being different (Kotler et al., 2006). In discussing this in more detail with them they identified some of the reasons for the successful collaboration between both departments.

“We’ve had quite a few learning curves I must say because up until about I would say three years ago probably not. I think marketing and the account team work well. We also have some fairly robust systems underneath” (J2).

Both departments meet on a regular basis which Kotler *et al.* (2006) had recommended in his paper. They discuss their plans, objectives, customers and forecasts so everyone is aware of what is going on, no one feels left out and it is seen as a team effort. This was identified in the literature review when various authors discussed mechanisms to improve the sales and marketing interface. These included having formal meetings, communicating the vision, shared goals and resources (Le Meunier-Fitzhugh & Piercy, 2007; Dewsnap & Jobber, 2000; Biemans *et al.*, 2010). I observed when I had a tour of the facilities of case J that sales and marketing were both alongside each other and worked very closely. The participants did not state that co-location resulted in better collaboration but as in previous studies (Le Meunier-Fitzhugh & Piercy, 2009) having both departments together was the preferred choice of management.

“We spend about ten percent of our turnover on marketing, we’re not like loads of other businesses, nothing, no conflict. Marketing generate the leads, and marketing generate the awareness. I run a meeting every week so it brought everybody together” (K1).

Distrust does not seem to exist between both departments, and they see this as a key factor on why the employees get so well with each other with excellent teamwork (Madhani, 2016). They do not see any of the colleagues working other issues and they feel that they can be very open with very strong credibility between the teams (Malshe, 2010).

“Here we’re all quite close, everyone is supportive” (J2).

Hiring the right people with the correct attitude is critical and they felt very strong that it is all about people and this has a huge contribution to their successful relationship. This supports (Rouzies *et al.*, 2005) findings for improving sales and marketing integration by hiring the right people who are open minded and team players.

“I think the challenge is always about the people” (J1).

“We just recruit the right people, and it’s the right blend of people” (K1).

Company J, K and N’s preference was to invest in hiring suitable candidates (Inyang, Agnihotri, & Munoz, 2018) with the right experience who can adapt to the fast-changing business environment.

“So I would put it into a couple of these really strategic salespeople that are sort of real front of house who could go in and potentially, you know, take us where we need to be, and be the face with right kind of clients” (J1)

At company J, K and N marketing and sales report into one director who is responsible for both departments and no one felt that this created a negative value of the business and it was not poorly perceived by customers (Sleep *et al.*, 2020). The directors feel that this works very well as they can oversee everything that is taking place between both departments and this evidence may be contributing to the successful collaboration between both departments. The results of a study carried out by (Le Meunier-Fitzhugh & Massey, 2019) highlighted where sales and

marketing are structured as a single department it can help to reduce conflict. Where there is one team, they tend to share information more and have an understanding of what everyone is trying to achieve. The same study also identified the positive effects in having cross functional meetings where joint decision making and information sharing takes place. These meetings help to keep everyone informed, any future plans can be discussed along with objectives and what the key priorities are going forward and these three case companies have taken this approach. For example, N2 notes,

‘I’ll have to say that because I’ve got a foot in both camps” (N2).

The participants highlighted that the marketing people did not feel that they were at a higher status than the salespeople (Malshe, Johnson *et al.*, 2017). The salespeople did not feel that they needed to execute what the marketers told them because they may have the support of senior management. The case companies did concur with Malshe, Friend, *et al.*, (2017) where the salespeople felt that marketing were working in the salespeople and the company’s best interest and that there was positive alignment. All case companies recognised the valuable contribution marketing can make to an organisation. Where they did not have a stand-alone marketing department they had plans in place for future investment in this area.

## **6.12 Objective 3.4: Role of Technology**

The findings from the data presented under this objective will covered under the following sub sections: SFA/CRM; Digital; and AI. Technology plays an increasingly important role in the front end of the sales process. SFA and CRM are combined as these literatures have effectively merged over the years given that SFA systems have CRM attributes and vice

versa. This was also evident from the cases where the term used in the organisations was CRM.

#### **6.12.1 SFA/CRM**

There are numerous papers showing the benefits of having SFA/CRM systems in place (Ahearne *et al.*, 2006; Bradford *et al.*, 2016; Hartmann *et al.*, 2018). However, companies J, N and O noted that while they recognise the advantages in having good systems in place to track sales leads opportunities and customer activity, they do not see it as being of strategic importance (Graf *et al.*, 2013). Company K, L, M and N have a CRM system in place. Case company J, and O do not have any CRM/SFA systems in place and everything is recorded on excel spreadsheets and they track any e mails related to the prospect.

“We put our leads into a spreadsheet and then what we did was we actually did little posts on LinkedIn, sent those out to these leads. We’re nurturing them through emails and through communication and so on. We need to invest in our sales monitoring maybe with a CRM package” (J1)

At company O, despite an annual revenue turnover of €10 million, have a manual system where they track everything in a diary or notepad, and they do not see this as a big issue since they sit in the office close to each other. They had an unusual concern that if they had an SFA system in place there would be too many sales leads and they would not have enough time to follow up on them. This is due to having limited resources in the company to drive the sales lead opportunities.

“\_\_\_\_\_are the two owners. I’m literally at the same desk as them, so everyone is kind of kept in the loop. Well, we don’t actually have a system there, but you know through the orders that have come in. We aren’t efficient like that in tracking all activities. Yeah, we use a notebook, a diary...it’s probably not good enough, I’ve heard good things about CRM but we have not invested in it” To be honest, if we monitored the leads, we would have an awful lot of leads that would be wasting our time, and we kind of don’t manage them at all” (O2)

Company K have an old system in place managing their back-office activity that is not fit for purpose. They are looking at investing in a new system. They are also implementing a CRM system. They are outsourcing this activity to an external company as they recognise that they do not have the expertise inhouse. Outsourcing is an option that many companies takes (Graf *et al.*, 2013).

“No, that system has been here for ever and it’s a huge challenge for us now because it’s not fit for purpose anymore. It’s an organically grown system so structurally it’s not as tight as it needs to be. Yes, we’ve outsourced in the first instance because we clearly recognise, we don’t have the skills, and we need to have the skills and we’re not prepared to compromise. ” (K1).

Company L use a CRM system and it works very well for them and they monitor the activities on a regular basis including leads that have been generated and customer expenditure. They are the most proactive of all of the case companies in recognising the benefits of CRM and they have seen the positive effect of their investment in CRM (Salojarvi & Sainio, 2015). Maybe they are proactive because they are in the high-tech sector and are using up to date

technology. This is also what their customers want to see as per their CVP, they need to innovative and to be seen as a leader in the field.

“We’re operating on a Salesforce.com CRM tool which is very straightforward. It’s a good tool. There are other tools out there but the key point is that everybody needs to know what everybody is doing” So, I can’t evangelise enough about things like Salesforce.com where we have that level of connectivity” (L1).

At company M, the sales director did not know what CRM system they were using and he thought it was Salesforce and his sales manager confirmed later when I met him that they were using Microsoft. M1 doesn’t use the CRM system and prefers to refer to a notepad and again the sales manager confirmed this. Since CRM/SFA success is dependent on management support (Homburg *et al.*, 2010) at company M management are not using the tools. The findings here also concur with Nguyen & Waring (2013), where the adoption of CRM can be hindered by a lack of support from management.

“At the moment, I’m working off a writing pad here, next to me...as I’ve gone through the bits with the lads, I just write them down so that I don’t forget about them and I remind the lads about them” (M1).

N2 had one of the employees create a program and he inputs everything on this. He didn’t like the CRM system because it was too slow. Companies M and N, both sales directors do not use the CRM system and they work off written notepads or diaries to review sales lead activities. (Osarenkhoe & Bennani, 2007) findings highlighted once top management support the

implementation, the results are successful and all of the cases with the exception of company L demonstrated a lack of management support.

“Pick up is very slow with them, they don’t want us to see what they are doing and they think we are watching them too much. No, the sales director is not using it” (M2).

These findings concur with (Agnihotri *et al.*, 2012) where the most experienced salespeople are the most reluctant to use new technology. The marketing manager did know which CRM system they were using but his challenges was that not all salespeople were using the system. (Ahearne *et al.*, 2006) identified ‘IT acceptance’ as the amount a salesperson integrates IT tools into their day sales activities and in many of the case companies it lacked this acceptance. As a result, not all salespeople used the CRM system and it was not embraced as it was not pervasive throughout the company (Ahearne, Rapp *et al.*, 2012). Company M also highlighted that one of the reasons there is a slow take up is because of the big brother effect where the salespeople feel they are being watched by management (Barker *et al.*, 2009).

“Yeah we do have a CRM system. It’s off-the-shelf but it has been manipulated, it’s Microsoft. It serves the business well in terms of forecasting but in the true sense of, you know customer relationship management it doesn’t service at all. So, you’ll find all the salespeople do not use it. I’ll speak from my own experience. We have in the IT department we have one guy \_\_\_\_ and the guy is super. \_\_\_\_ has been in our sales workroom as well around recording this and getting sales reports We’ve everything in the folder here but from a reporting perspective then because I found CRM quite slow so here’s my active sales” (N3)



At company M the external sales representatives did not update management in the past on any sales activities, but this has now changed with the CRM system in place and they are being updated.

“The external sales reps visited these accounts before but told us nothing” (M2).

The data showed that the case companies did not demonstrate clear benefits they were achieving from having a CRM system. Reinartz et al.'s (2004) findings showed that companies achieve better performance by having CRM processes but this did not emerge from the findings with these case companies. Implementation of CRM systems were carried out in a haphazard way with no team meetings or planning put into it. At company M, the CRM system was implemented without the buy in from the sales director.

“Yeah, the reps write the reports in the CRM, some of the reps use it, I don’t. I think it’s *Salesforce*, I’m not 100% sure that it’s *Salesforce*, but whatever package it is, it’s deemed to be better than \_\_\_\_\_. I wouldn’t be a great driver for that, I get reports every Monday morning, Tuesdays sometimes” (M1).

Raman et al., (2006) identified that salespeople need to be brought in at the development stage of CRM and this can help achieve a successful implementation. Many of the findings in the data agree with (Reichheld et al., 2002) where he highlighted some of the perils of CRM. These include executing CRM without having the right organisational structure in place and implementing CRM without deciding what the customer strategy is. At company N there was no real planning that took place when the CRM system was introduced and this contributed to some of their challenges (Raman et al., 2006).

“It’s not working well for the sales reps, we looked to roll it out for the other facets of the business, but there was no take-up, so we are gradually rolling it out to specific people that could supplement the information” (N1).

In addition, there were no incentives/rewards for the employees to encourage them to use the CRM system (Baker & Delpechitre, 2013). There was no accountability or ownership if the relevant employees in the company did not use the CRM system. Having no support or involvement from senior management in the implementation and execution of CRM can contribute towards the issues that Company M experienced (Osarenkhoe & Bennani, 2007).

“It should be driven top down but top down here doesn’t work, because at the top they won’t really have an idea of what implementing it entails and some of them are getting information from excel spreadsheets still internally. What was happening, before the CRM, was that they were submitting weekly reports on Word and nobody was reading them” (N2).

The case companies have not invested heavily in this area. Many of them are still using excel spreadsheets and writing pads and are not embracing technology. At company O the MD recognises that he is not into technology but sees the value it can bring, he prefers to concentrate on the relationship with the customer,

“I think technology can do a lot for you...I’m a bit of a luddite, I’m not a techy person, not on social media much. So, I think the relationship is the most important” (O1).

All of the salespeople at company K have iPads and they see this as productive for their salespeople as they can update their system in real time..

“The sales team are all running around with iPads. All their jobs are on their iPad” (K3).

The lack of senior management support in SFA/CRM and they not embracing the technology and using it had led to some employees not using the system. This has reflected poorly on sales as senior management are not leading by example.

### **6.12.2 Digital**

Digital marketing is key going forward in terms of potential buyers interacting with their suppliers (Jarvinen & Taiminen, 2015). The case companies recognise the benefits of social media but despite knowing that social media can help personal selling and sales management (Guesalaga, 2016) and being the ‘communication phenomenon of our time’ (Nunan, Sibai, Schivinski, & Christodoulides, 2018, p.31) many of the case companies have not developed social media or used it that much in the company (Itani et al., 2017).

“We’re very, very poor on digital marketing”. N3

These findings support the viewpoint that managers in B2B recognise that social media is important (Lacoste 2016) and will have a significant effect on their business, but they do not fully understand what the impact and ramifications will be. They are also aware see that they have invested very little in marketing and that it needs to be addressed. They have taken some actions to start this process by hiring people in marketing.

“Our literature and our brochures have been non-existent, we are probably the worst marketed company, we just hired a marketing person, she is looking at Twitter. I think social media will be huge in that, Facebook, Twitter, LinkedIn and Instagram, and we’re not there yet” (M2).

All of the case companies have not received any formal social media training which can be a significant benefit to increasing sales (Itani *et al.*, 2017). Management in the case companies are particularly slow to embrace social media (Giamanco & Gregoire, 2012) and it has not been driven from the top down. As in Marshall *et al.*’s (2012) findings some of the case companies have implemented some social media which the sales team are using.

“Currently, we’re not active on social media, and that’s I think more down to limitations of time really, and people’s focus. We do need to have a focus on social media” (N3)

“Increasingly but slow traction. I think social media is a very powerful marketing tool. I’m not sure we are making one hundred percent use of it at the moment” (K3).

“We need to be doing kind of more activity in Social Media, you know” (L2).

“I’m not a techy person, not on social media much” (O1).

This lack of attention seems to be mainly due to work overload and not having the budget to invest in social media. The investment cost can be prohibitive, and it is difficult for organisations to achieve a fast ROI and it doesn’t necessarily mean an increase in revenues as a result of investing in social media (Agnihotri *et al.*, 2012). It is recommended that companies

should review the most appropriate tools for their business and identify which ones they could implement in their company (Moore *et al.*, 2015). LinkedIn is seen by the case companies as one of the key social media platforms to use in sales and marketing.

“The most effective, I mean I think LinkedIn is great when we’re trying to do thought pieces. Our website is where we hold all our blogs so that features quite nicely because what happens is when we’re on Twitter we’ll try, we’ll look at our followers every month and sometimes the girls upstairs in social media they will see if they can pull some more followers in that might be of interest. So, Twitter works very much in that way, and then you have LinkedIn which is very much a bit more thought leadership. Then you’ve got Instagram” (J2).

The marketing manager of company L expanded on this further and she is very focussed on social media within the company,

“I think Twitter is good when it comes to putting relevant comments around certain findings, or events updates are quite good. LinkedIn is quite a professional social media platform compared to Twitter or Facebook. So, LinkedIn acts as one of those social media platforms which we focus more on, so it allows us to, you know, with the premium membership it allows us to refine the roles within organisations.as part of the activities that we’re doing is, is to come up with blogs and to be able to publish that on the social media” (L2).

Most of the case companies plan to review social media but they have no definite plans and timelines.

“I feel that we probably need more focus on social now because it’s not just Facebook” (K1).

Company O recognise that this is a lost opportunity from a lead generation perspective and is hoping to address this in time (Andzulis et al., 2012). All case companies use social media when looking for new prospects, information on a prospect or customer, sharing positive news and monitoring activities in their industry (Schuldt & Totten, 2015).

“It is social research is probably how I would term it. A lot more word of mouth, internet-based research, social media conversations, contact lists become that much more important” (O2).

N1 did not know if they had a Facebook page or not and the MD of company O doesn’t use social media.

“I’m sure we probably have a Facebook page. I really don’t know” (N1).

Company J and K are using blogs, webinars and social networking sites (Ferrell, Gonzalez-Padron & Ferrell, 2010). The case companies noted that their websites were not up to date and needed a lot of development and investment, but they had no planned dates to address these issues. Since buyers are spending a lot more time on social media looking at supplier details, references, products, expertise, capability and overview of the company which in the past would have come from a salesperson (Moncrief et al., 2017) it is important to have the website up to date (Jalkala & Salminen, 2009).

“We updated it a year ago, completely refreshed it. Our previous website was very practical based. Our website now is much more of an emotional website It’s better than the one before but we need to invest more money in it” (K3).

“A well-constructed website properly addressing the requirements of potential users of the website I think it’s far more likely to generate significant qualified leads” (L2).

“I would like a very good website, and up to date on products, and very easy to navigate, our site is very out-dated” (M3).

Company N doesn’t see the website as a positive revenue contributor to the company and had achieved very little return.

“So, we have put a lot of emphasis on changing and updating our website. We did a huge splurge about a year ago. Virtually nothing, we get the odd piece” (N3).

Towards the end of the discussion with company L when asked about the biggest threats to their business, they highlighted one which is related to social media ( Moncrief *et al.*, 2017).

“That’s a very, very good question. I must admit what I’ve noticed is recently everything is online, and as an organisation if you don’t match up with the trend, the current trends I think that can seriously deteriorate one’s growth as a company” (L1).

Some of the case companies are planning future investment in this digital marketing including outsourcing the activity as they are aware, they do not have this expertise inhouse. Customers/prospects now interact with suppliers through a myriad touch points in multiple channels (Lemon & Verhoef, 2016).

“I would probably put a little bit of money into probably the digital side of the team” (J3)

Company L and N are reviewing how they can maximise the benefits of the Internet by complete Internet integration into the selling process (Long *et al.*, 2007). This can help a salesperson work smarter by having better information and analytical tools available.

“Yes, we absolutely are focussed on digital marketing. there’s a massive digital presence that you need. We’ve outsourced in the first instance because we clearly recognise, we don’t have the skills, and we need to have the skills and we’re not prepared to compromise. I’m working closely with the sales director, and the digital marketing individual” (L2).

“I would put a bit of a chunk into our digital strategy around touch points that I think that, you know, the buyer these days could be anything, as some people say it could be up to fourteen touch points before they’ll eventually buy off you especially in a new situation” (N3).



### 6.12.3 Artificial Intelligence

Since recent journal articles have focussed on artificial intelligence it made sense to discuss this with the case companies to see if it was having any impact on their business especially in the area of sales. The participants from the case companies had some interesting views on this subject along with the human aspect of selling. They do not see the death of a salesman (Baumgartner *et al.*, 2016) happening in the very near future and they are very strong on the salesperson's human contact with the customer even in a high-tech global world (Graf *et al.*, 2013). Since company L are in the tech sector they are very focussed on the positive impact of AI (Syam & Sharma, 2018) and they can see the benefits and they want to work on this over the coming period.

"I see more and more process and business moving to AI, and to digital proposition, and the salespeople should, therefore, become far more productive because the stuff they're doing will be getting to know the customer upfront, and not the prequalification and the heavy lifting that goes through the process today. If we can try and cut that out as you say with a good digital proposition is the main thing, and we can bring ourselves better quality qualified leads" (L1).

The data from the other case companies highlighted that they were not looking at artificial intelligence and how it could transform their current sales processes (Singh *et al.*, 2019). Some of them felt that AI would not replace the salesperson (Moncrief *et al.*, 2017) but they did not know how it was going to transform them either. The case companies highlighted empathy and trust as a key trait that a salesperson needs to have (Delpechitre, Rutherford, & Comer, 2019) and they did not see a machine being able to deliver this (Dwivedi *et al.*, 2019).

“Artificial intelligence is a really interesting one going forward. So yeah and big data and you know, all the buzz. Now we’re going to be selling technology within the sale. I personally think it’s going to be a long while before artificial intelligence or any of those kinds of technological advancements can replace a human sales contact. Relationship, empathy, and you know, I don’t believe there are machines that can replicate that. My sales director is a brilliant relationship salesperson. Incredible entertainer with customers both in a meeting context and a social context. There’s never going to be, and I’ll say this now, there’s never going to be a machine and this might come back to haunt me that would be able to replicate how good he is at that element of the job” (N1).

“I don’t think AI will replace a relationship. I don’t think so. I think technology will help people that bit more. I have a feeling there will be a role for salespeople. It might be managing more clients with the help of technology, but I think there will be a huge human element” (O1).

Most of the case studies focussed on the people element of sales and how important it was in the generation of revenues in their business more than automation.

L3, “I think as the saying goes people buy from people they like. People don’t buy from machines they like. People buy from people, and as a result I think my biggest investment idea would be invest in people, the right people actually” (L3).

### **6.13 Objective 3.5: Motivation and Rewards in driving the sales team?**

Excluding Company L, no commissions were paid to the salespeople and this is creating conflict at some of the organisations. Salespeople at company L are very well compensated and there is also an additional incentive for them if they break through their revenue target as they can receive additional bonuses (Kishore *et al.*, 2013). The literature review highlighted the importance in having a motivated sales team (Piercy & Lane, 2009) in realising the sales goals of the business. Salespeople can be motivated intrinsically and extrinsically and this was explored with the case companies.

“Our salespeople are offered 5% of the revenue that they bring into the company considering that is within the twelve calendar months, and this is taken into account their specific targets given to those individuals on an annual basis. Should they proceed to hit or exceed their annual target there is something called an enhancer or a booster of revenue which is 7.5%” (L3).

Company O also pay their salespeople company bonuses if they perform well in sales.

“We do look after them, at Christmas time especially. We do give them very generous bonuses at Christmas depending on their performance. I wouldn’t be against commissions we just formally laid it out that way. We’ve had people move from low 20s to a near six figure salary” (O1)

Intrinsic and extrinsic rewards motivate the salespeople (Kumar *et al.*, 2015) and apart from N2 many of the case companies management advised that the salespeople were content in their jobs and they felt they had been adequately compensated.

“I feel fine about not being paid commissions, I’m doing relatively well” (M2)

The salespeople from the case companies felt motivated and were committed in the best interest of the company (McKay, 2017). They felt a sense of achievement and pride in their work when they performed and this was enough motivation for them (Amyx & Alford, 2005). However, the sales director from company N was very upset and wanted his salespeople to be paid commissions or otherwise he could not see them being motivated. There is a conflict between the MD and the sales director on commissions as the MD believes that no commissions should be paid.

“We could probably get rid of half of the people in the organisation and still hold a lot” (N1).

“On the other hand, no commission, no real motivation for the sales reps so I can see the advantages in paying commission,” (N2 - Sales Director)

Like company J, the MD of company N sees the operations people playing an important role in supporting the customer and he doesn’t subscribe to the view that the salespeople should receive all of the commissions. I got the impression from the discussion with the sales director that it is such a big issue with him that he has threatened to resign over it. This is the same sales director that is not using the CRM system that they implemented in the company. This person could be considered a ‘lone wolf’ as he prefers to work alone, not adhere to processes and feels he can do it a lot better his way (Dixon, Gassenheimer, & Barr, 2003).

“We don’t pay commission. The guy that sold twelve million is hugely supported by operations and marketing. So, he has all the customers that have been with us forever, and so on but he is particularly good. So, can I commission him?” (N1 - MD),

“Okay, that’s an area that has been a massive bone of contention topic of conversation. When I came to the company first, we had commission. We did away with commission, and we found that if we had a company target that the team worked better. They were able to share leads; I don’t agree with it and \_\_\_\_\_ have many arguments on it” (N2).

At company K, the salespeople were motivated by making more commissions and this drove them to increasing sales (Zoltners et al., 2012)

“Yeah, yeah, it works really well for them. They make very good money, about a hundred grand a year on commissions” (K1).

One of the challenges some of the case companies want to address is that they don’t know who to pay the commissions to. There are so many people involved in the sale that it is difficult to identify the right person and they did not want to upset other people in the team.

“Yeah, no. Well we haven’t ever put targets in and part of the reason for that is that who should get what target because winning a piece of business which might be helped by our customer experience team but they might not even be the ones that present in the room, and they certainly won’t be the ones that do all the creative to get

us into that pitch room so what percentage of us winning that pitch will actually come from them. (J1).

Most salespeople who have worked in sales for a long period of time expect to be paid commissions on their sales. Perhaps since the majority of the salespeople I met have never worked in a sales environment and have no prior sales experience they accept the status quo for non-payment of commissions. Miao *et al.* (2017) highlighted retaining top sales performers is key in all organisations. Part of this retention plan is ensuring the salespeople are financially rewarded with attractive incentives. This may become an issue as the salespeople gain more experience in the company. Apart from the sales director at company M, there was no disquiet or salespeople upset that they were not being paid commissions on their sales. They felt they were compensated enough with a good salary.

## **6.14 Emerging Themes**

During the interview's issues came up that were not planned. These issues proved to be important across the interviewees and generally were in the area of collaboration between sales and other functions in the organisation. While the interviews specifically focussed on collaboration between sales and marketing in the light of the extensive literature in the area, interviewees also brought up other collaborations, and these are discussed next.

### **6.14.1 Sales Collaborations**

There are relationship issues between sales and operations sales and finance, and this is causing conflict and affecting performance of the company. These are key departments that need to collaborate as they are customer-facing. Close cooperation between operations and finance is

critical for the success of the company (Rangarajan *et al.*, 2018). Finance need to support sales on customer financial limits, gross margins, forecasting commission payments to salespeople and debt collection from the customers. Operations need to deliver on time, within budget, potentially leading to higher revenues being generated with the customer.

“Because I’d go into you, you’re the operations guy, and I’d say grand I’ve got a PO here. Here you go, here’s the quote. What the ‘feck’? You’ve got three days in here, we need ten. Nobody told me. How was I supposed to know? So, we had big problems, and big issues because we probably would have either been ‘pissing’ the customer off because we’re now looking for seven more days, or we’re just saying okay we’ll suck it up and the lads will say we’re losing money” (M1).

“Well look it’s a constant battle that any sales manager will have with operations. If operations had their way, they would design the perfect project that nobody wants to buy” So, we have big problems, and big issues because we probably would have either been ‘pissing’ the customer off because we’re now looking for seven more days, or we’re just saying okay we’ll suck it up and the lads will say we’re losing money” (N2)

The data showed that finance are playing a more active role in driving sales within companies. At company J the finance director work closely with the MD when reviewing sales opportunities/forecasts and the finance director drives the weekly sales pipeline review meeting with the sales team. At company K the finance director also works closely with the sales team and is actively involved.

“Well me but with themselves and our finance director so on a quarterly basis. So, they will put in that figure for that client, and that gets fed up to finance and then finance will spit the report out and they’ll look and they’ll go okay this is our forecast, and we’ll have the discussion every month, are we on track? What’s happening? Why has it dropped off? Is there anything else that’s going to come in? Sometimes we’ll put a little stretch target on that as well, and we call it a purple line and then we really are focusing every week. The whip is cracked by our finance director“ (J1).

“Yeah. Yes, she [Finance Director) certainly has the eye on the figures but for us so she’s a support for us as well. Yeah, she’s very involved with that [sales] yeah” (K3)

This section shows that the literature that discusses the issues affecting the relationship between sales and marketing might be mirrored in other parts of the organisation. There is very little literature in these areas and therefore could be a future research direction.

## **6.14 Summary**

The above are the key themes from phase two research of the six case companies against each of the objectives. These companies have achieved some element of success in terms of sales and developing their business, some more than others. Similar to many SMEs they are challenged from the day to day activities taking place in their business. The participants opened up about their business and were helpful in explaining how they operated including some key internal sensitive issues.



From the data collected and analysed from phase two along with the literature review, a framework model covering the front end of the sales process was created. This model is called a Sales Pipeline Execution Process (SPEP) Figure 6.2 and this SPEP can be used as a tool for companies driving their sales pipeline. The next section will briefly discuss the stages of the SPEP and a more detailed discussion on this will take place in Chapter 7.

The SPEP can contribute towards the sales pipeline process. The first stage of the SPEP is for the company to identify with marketing where relevant what the customer value proposition (Woiceshyn & Falkenberg, 2008) is including value selling (Terho et al., 2017) and what they are offering the prospects. This should be agreed with every key stakeholder and placed on the company's website and all marketing materials. The next stage is profiling the ideal customer (Whittle & Foster, 2012) or what is sometimes known as the sweet spot (O'Dea, 2012). When the sales and marketing teams know the profile of the ideal customer/channel they are selling into, it can help reduce time wasting for the salespeople as they will not have to deal with unqualified leads (Jolson & Wortruba, 1992). Once the profile has been completed attention is then paid to acquiring these qualified leads (Hughes, 2013). Various routes collected from the data and literature review have been discussed in the thesis. The top lead generation routes from this research are referrals (Salminen & Moller, 2006), LinkedIn (Andzulis, 2012), WOM (Gombeski *et al.*, 2011) and exhibitions/events (Rouzies *et al.*, 2005) held externally or at the company's site. Researching the prospect before making contact with them is key as the call can move from a cold call to a warm call (Monat & Jamie, 2009). One of the best forums identified from the data to carry out this investigation is LinkedIn. Once contact is made via email or phone with the pre-qualified sales lead, the value proposition is delivered, and the salesperson looks to start the relationship selling with the prospect. Any follow up from the call with the prospect is closed out by the salesperson and the SFA system (Baker &

Delpechitre, 2013) is updated. Management will review the qualified sales leads on the SFA system and examine the sales pipeline in real time. As the business develops with the customer the company will need to review the activity and this can be actioned on a CRM system (Bradford, Johnston, & Bellenger, 2016). They will also review the prospecting performance measurements (Trailer & Dickie, 2006) that have been set by them against the salespersons actual results and take the relevant corrective action where appropriate.



Figure 6.2 SPEP Process

Figure 6.3 highlights key antecedents that management should execute to support the SPEP. They have been identified partly from the interviews and also from the literature review. These include recruitment and selection (Inyang, Agnihotri, & Munoz, 2018), which was identified in the data as a key concern for the companies. It is very important to have the right salespeople

with the correct set of sales skills. Sales training is needed for the development of the sales team (Lassk *et al.*, 2012) to ensure they are able to support the changing landscape in sales and that they are fully trained on how to use internal sales tools including CRM. Sales and marketing working in collaboration (Le Meunier-Fitzhugh & Piercy, 2007) with each other is critical in the success of the SPEP. It plays a major role in various stages of the SPEP including CVP, Profiling, Lead Generation and sales pipeline. Technology (Harrison & Hair, 2017) is an enabler in sales specifically in the area of social media, CRM and more recently artificial intelligence. Intrinsic and extrinsic motivation (Kumar *et al.*, 2015) drives the sales team to achieve their objectives and this needs to be reviewed by management to ensure there is a motivated sales team in place. Once the customers revenue increases, they can be moved to a key account accounts (Ivens & Pardo, 2007) where relationship selling can be developed further and brought to another new level.

The next chapter will discuss the contributions from the research, cross case analysis along with the implications for sales management, the research implications, future research and conclusions.

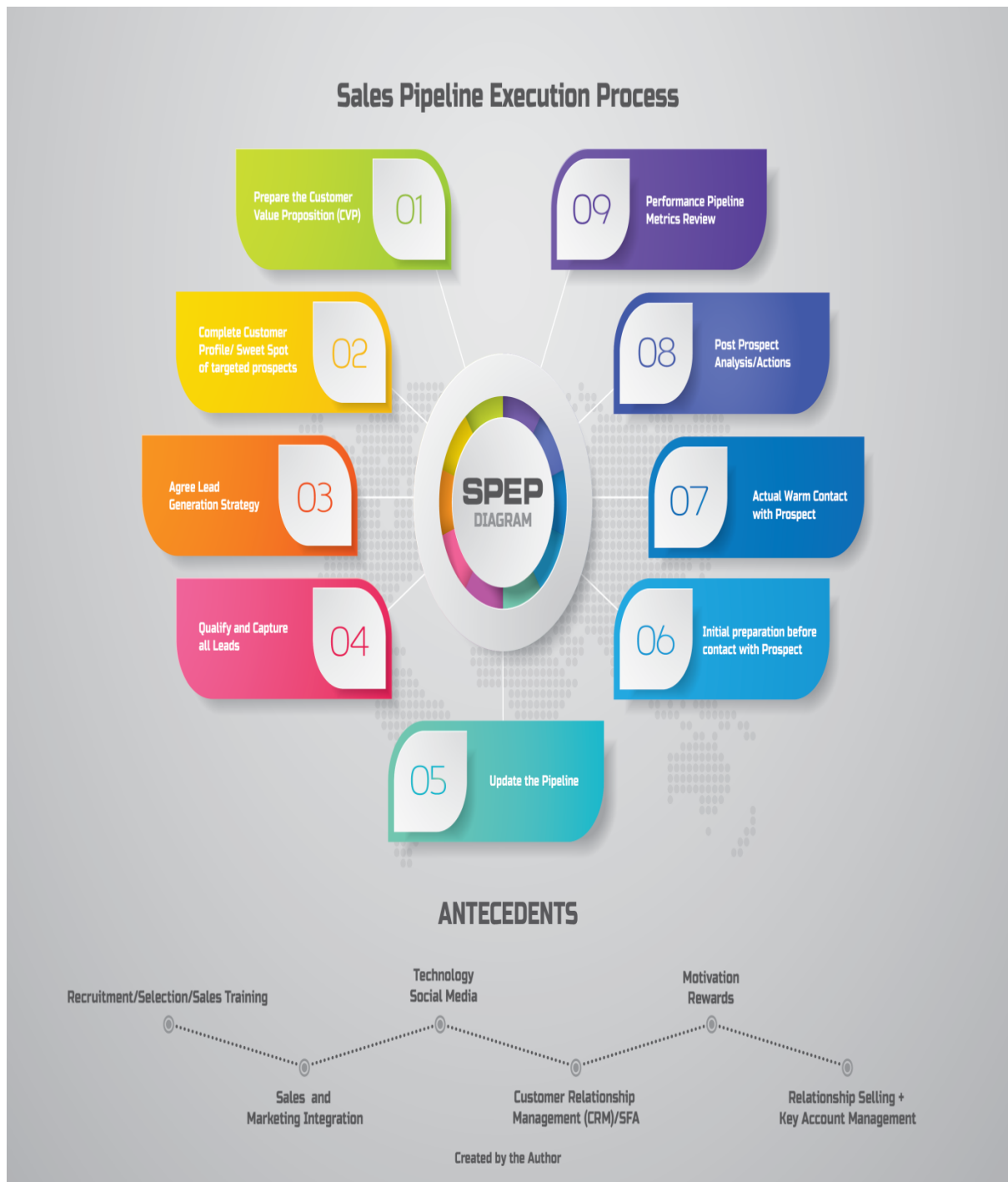


Figure 6.3 Full SPEP and Antecedents

## **Chapter 7     Conclusions**

### **7.0     Introduction**

This study aimed to develop a framework to conceptualise the front end of the sales process and fill an important gap in the literature. A key consideration was that the research would help SMEs at the front end of the sales process. Prospecting is the lifeblood of companies (D'Haen et al., 2013) and this study demonstrates how critical a part it plays in the future financial health of the organisation. This chapter will highlight the contributions to theory, practice and policy. The outcomes mainly draw on data across the six case companies though also include insights from the nine individual interviews carried out in phase 1. Having carried out a cross case analysis of all case companies, it was interesting to note that the challenges SMEs face in the UK are almost identical to Irish SMEs. Both regions have issues in winning new customers and building their sales pipeline and most of the case companies are being managed by people who “fell” into sales with no sales experience or sales training.

One of the challenges SMEs typically face is a lack of funding as they rely on profits from revenue generation to fund the business, and this came through in the research. Many SMEs have limited budgets and do not have sufficient spare cash to invest in technologies such as CRM that may enable higher productivity and greater automation. Sales processes in some of these SMEs are manual at best and most of the interviewees felt that their organisations were under-resourced and as a result, sales departments were struggling to get ahead of the curve. All participants work extremely long hours which seems to be endemic of the SME culture. Some of the case companies are proactive in elements of the SPEP framework and this is helping contribute towards their revenue achievements. Conclusions from reviewing both

phases of the research, managerial implications along with the limitations of the research and avenues for future research are discussed in this chapter.

## **7.1 Contributions to Literature**

Firstly, this thesis contributes to the academic literature by shedding light on the front end of the sales process. This neglected part of the literature on sales is worthy of investigation as it brings to the fore, the key element that underpins the majority of the sales literature – how to get a customer. While as noted in chapters 2 and 3, there is a rich literature on different elements of the sales process, this literature lacks a central foundation – how organisations get customers in the first place. It is this key issue that this thesis focuses on. The literature review conducted in chapters 2 and 3 contributes to closing the gap discussed in chapter 1 and it demonstrates that the early stages of building relationships with prospects leads to strong trust and commitment between both companies. The traditional seven steps of selling are highlighted as the oldest paradigm and are still applicable in the 21st Century (Moncrief et al., 2005). The literature has reviewed elements of these seven steps, (Verbeke et al., 2011; Borg et al., 2014; Arli et al., 2018). A recent paper on research directions in sales (Arli et al., 2018) outlined a number of topics that are germane to sales and academic research in sales. This thesis contributes to answering their calls for research. However, a gap still remains in terms of the early stages of this seven-step process, and this is the focus of this thesis.

The five central contributions from this research are as follows,

- Development of the Sales Pipeline Execution Process. (SPEP.)
- Social Media is central to the front end of the B2B sales process and the number one digital tool in lead generation is LinkedIn.
- Building relationships early enables customer acquisition.
- The research did not support the literature on the benefits in having a CRM system and it was not recognised as strategic.
- Key Account Management can have negative consequences.

Even though they are not main contributions, analysis of the data highlighted some interesting minor contributions that evolved during the research and merit a discussion in this chapter.

These are as follows:

- Persistence with prospects can lead to success in customer acquisition.
- Hiring of non- qualified salespeople may inhibit growth and the development and successful execution of the Sales Process.
- A performance metrics template to measure pipeline activities
- Sales collaboration with other departments outside of marketing are not well studied even though they can impact sales growth.

The section ends with some final reflections on two issues. Sales and marketing collaboration is discussed as it is an important element of the SPEP framework. Finally some thoughts on the issue of Artificial Intelligence (AI) are provided to round off on an emerging topic in the sales literature.



### **7.1.1 Development of the S.P.E.P.**

One of the key themes that emerged from phase one was that all of the SME companies had serious challenges in the area of sales. This applied in particular to the front end of the sales process where there were no formal structures in place to generate or capture sales leads. Sales was carried out in a haphazard way with no formal planning in place. Apart from the Director of company N, all other directors had no prior sales experience or formal training and they more or less fell into sales by default (Powers et al., 2013). They are self-taught in sales and learned as they developed the business over a period of time. This may be one of the reasons that their sales process is poor. With a lack of an effective sales process in place this had the knock-on effect on their lead generation process being poor in many cases. The participants were not able to articulate their ideal customer and there was minimum customer profiling taking place (Whittle & Foster, 2012). When they tried to engage with a prospect, they did not have an agreed strategy on how they would impress the prospect on the value their company could bring to the engagement with the prospect (Blocker et al., 2012). The participants could see clearly the advantage in having a customer value proposition in place and they recognised that they need to improve the messaging in this area to their customers and prospects.

The early stages of the sales process have been comparatively neglected in the literature with Virtanen et al. (2015) noting that it is the neglected dark side of selling. Virtanen et al. (2015) approached this using a single case study and developing a regression-type model to investigate collaboration and lead generation. This study approaches this issue from a more open perspective and is more process driven considering how the sales process evolves and what the components and interdependencies of the process are.

The key contribution of this research is the SPEP framework (Fig.7.1). It adds to the seven steps of selling cited by numerous authors (Moncrief et al., 2005; Verbeke et al., 2011; Borg & Young, 2014; Arli et al., 2018) with specific focus on the front end of the sales process thus creating a closed loop prospecting process. When reviewing the SPEP and its antecedents these case companies are using some of the stages which are helping them build their sales pipeline. The SPEP makes a contribution to theory as it covers each stage at a micro level at the front end of the process.

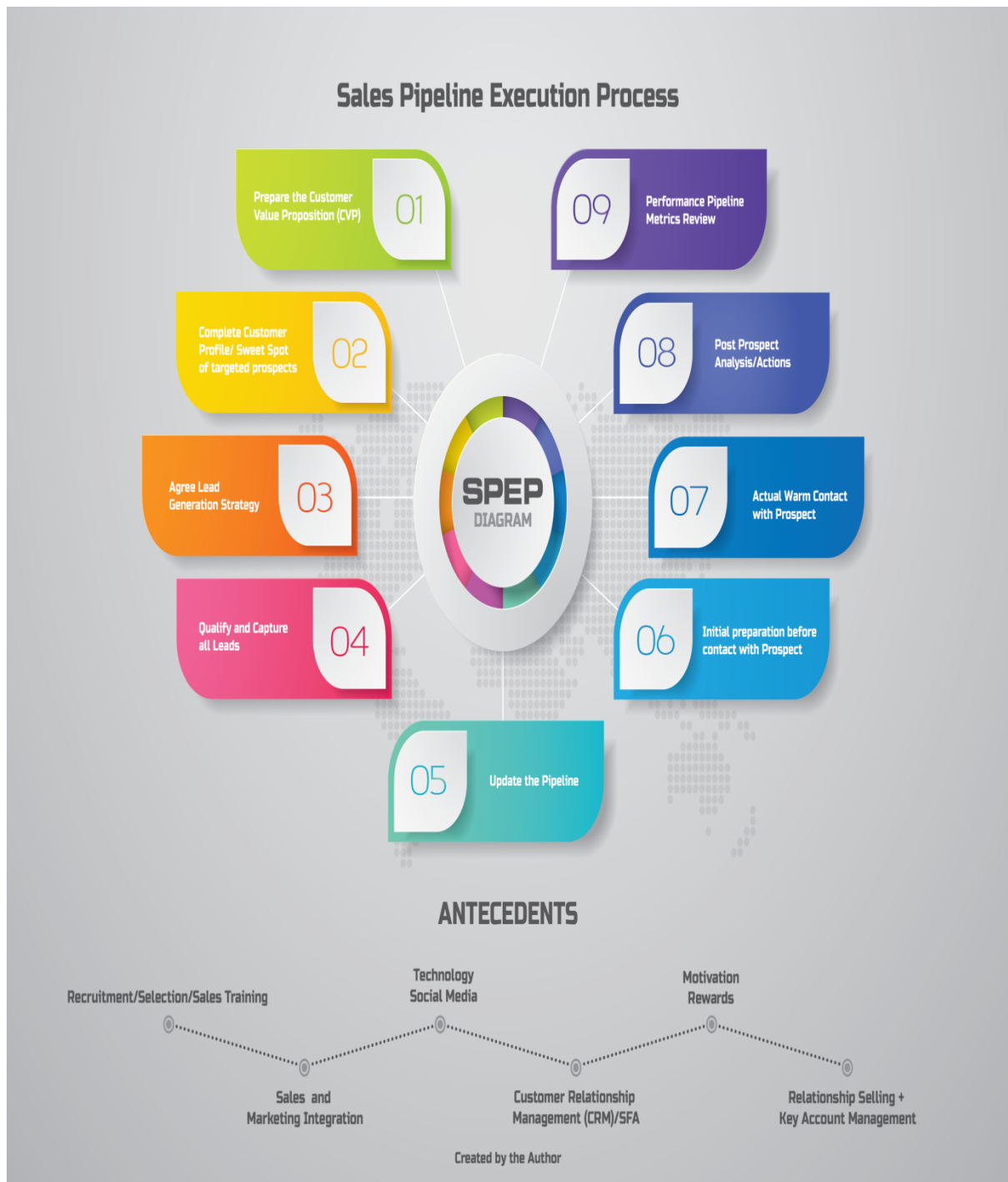


Figure 7.1 Sales Pipeline Execution Process (SPEP).

### **7.1.2 Role of Social Media.**

LinkedIn was seen as the most successful social media prospecting technology tool in all of these case companies in searching for new prospects and collecting intelligence on them before they make contact and they discovered that it was an excellent tool for a number of reasons including: Checking out a prospect before they make contact with them; Generating quality leads by matching them against their customer profile; Promoting their own business; and Tracking where their network has moved to when they change companies so that they can approach them and win new customers.

Two of the case companies have a dedicated person working on LinkedIn as they found it very beneficial in generating qualified leads. Given the lack of investment in SFA/CRM noted in chapter 6 and in the introduction to this chapter, the investment in a dedicated person is an interesting use of limited resources. This individual tracks all of the people the organisation connects with via LinkedIn when carrying out work for these customers. One case company has 254 touch points with one of its major customers. The LinkedIn dedicated team work exclusively tracking these people and if they move to another company, they contact them as these people already have had experience working with them and in many cases, they end up doing business again. The organisations decided to invest in a dedicated resource as they could see the benefits of this investment from the amount of qualified leads they gained. They also recognised social media as an important tool for buyers checking suppliers, their capabilities and that buyers are a lot more sophisticated as a result (Moncrief *et al.*, 2017). The companies recognised that social media has changed the landscape in relation to buyers being able to

access information quickly on suppliers checking out their products/services, prices and value and it placed the buyers in a stronger negotiation position (Moncrief *et al.*, 2017).

Sales and social media in the B2B environment are relatively new areas of inquiry (Itani et al., 2017; Lacoste, 2016) with a recent review by Salo (2017). Moncrief, Marshall & Rudd, (2015) suggested that sales organisations were somewhat slow to adopt social media, but these results seems to be at odds with the outcomes from this, admittedly small, sample, and there has been a significant move online since the publication of the article. Social media, and in particular LinkedIn, seems to be central to the B2B sales process of the firms and this is an important contribution that is not, as yet, well developed in the sales literature. LinkedIn generated significant qualified leads (Oechsli, 2011) and as a result dedicated people in the company were hired to work exclusively on this lead generation route. Companies might want to consider having a resource proactively driving LinkedIn to achieve similar results.

Data from all case companies demonstrated that the most successful lead generation programme which led to sales being converted were referrals. Referrals were used by all case companies to win new business and it was seen as the most fruitful hunting ground to win new customers. They recognised that referrals can help close the sale with the buyer as they contribute towards convincing them to buy (Salminen & Moller, 2006). The importance of referrals in a B2B context is not perhaps new but the dependency of the organisations on referrals suggest that a relationship is being built between firms and their customers. This relationship, which generates referrals, seems to be leading to success. This is partially in contrast with the work of Virtanen et al (2015) who suggest a move away from relationships towards a more transactional approach based on their study of one organisation's sales process.

All of the case companies recognise the importance of lead qualification and they recognise the benefits it can bring to the salespeople. While they understand what their ideal customer looks like they do not forensically qualify the lead before the sales team deals with it. As discussed in chapter 6, there is a disparity between the literature and practice. The literature is quite generic (qualify leads is the usual exhortation), whereas more research is needed to investigate this issue in more detail. The study conducted for this thesis starts this process by asking organisations the question about how they do the activity. During the interviews, this prompted reflection and acknowledgement of the issues. The literature is remarkably silent on these issues and has highlighted a gap in the literature which could be considered for future research.

### **7.1.3 CRM**

Despite the case companies seeing increasing demands from buyers, they are not using sales technologies such as SFA or CRM to gain an advantage over their competition (Xuhua *et al.*, 2019). While they recognise the benefits of technology and how it could help them in their sales process, they do not have a technology strategy in place. Technology impacts how knowledge is created stored and accessed (Tanner & Shipp, 2005) and the case companies recognised that they have not done enough in this area to help their sales process and it is something that they want to invest in further especially. Most of the case companies have an electronic or manual system in place for tracking sales leads and opportunities and they find this effective. They do not recognise the advantages in having an SFA/CRM system in companies even though it can help align sales activities and develop management control systems (Malek *et al.*, 2018). The core contribution of this thesis in relation to CRM found that the findings did not support the literature on the benefits of having a CRM system (Ahearne *et al.*, 2006; Bradford *et al.*, 2016; Hartmann *et al.*, 2018) and they did not see CRM as strategic

in the company (Graf et al., 2013). The data did not agree with the advice from academic papers that by having CRM processes in place the company can achieve better performance (Reinartz et al., 2004), which is at odds with the literature. Salespeople felt it was costly, time consuming, not all salespeople were using it and that it created a Big Brother (Jelinek, 2013) effect. This may be that much of the extant literature takes a large company approach and this thesis with its focus on the SME is highlighting differences between the published literature and how small companies use technology in the sales process. The discussion on the Big Brother effect is particularly interesting given that these are SMEs and a smaller span of control is perhaps already in place.

A further contribution highlighted that where CRM was successfully implemented, the findings supported bringing in the salespeople at the development stage (Raman et al., 2006) so that they could make their contributions and feel part of the process. The findings upheld previous studies (Reichheld et al., 2002) on the perils of CRM and how important it is to have the right organisation structure in place and that before CRM was implemented companies need to decide with the salespeople what their customer strategy is. The findings supported the literature that CRM implementation needs management support and involvement in order to execute it successfully (Osarenkhoe & Bennani, 2007; Ahani et al., 2017).

This research has shown that there are challenges in adopting CRM/SFA systems in SMEs. While this is not surprising to some extent, the fact that some of the companies are technology-oriented, that they invest in other technologies and that they have a strong sales focus, it is interesting as to why they do not invest in this type of system which they know will have benefits. The issue of non-compliance with data entry for SFA/CRM is well known (Raman et

al., 2006) though it is somewhat surprising to see this in SMEs where the organisational culture is tighter, and the success or failure of the organisation can have more immediate effects.

#### **7.1.4 Relationship Selling.**

Arli et al. (2018) carried out an in-depth review of relationship selling where they emphasised that companies need to seek ways to add value, be more efficient in communication and make sure responses to buyers are timely. They highlighted that much remains to be learned about the effectiveness of relationship selling strategies for customer acquisition. Borg et al. (2014, p.550) discuss relational selling and they presented a multi- level selling process model with the focus on interpersonal relationship elements and they highlighted that ‘the phenomena that we seek to understand- the flow of activities which constitutes the sales process - will undoubtedly continue to evolve’. This research contributes towards closing these gaps. A key finding from all of the case companies was the importance of building relationships early in the customer acquisition process with the buyers (Hughes, 2013) and how critical a role this plays for future business – not alone for sales but also the referrals emanating from this process. The participants brought a new dimension to this by stressing the criticality in building relationships with the prospects at the early part of the front end of the sales process. The participants felt that this was key as it was a perfect opportunity to demonstrate to the prospect that they knew what they were doing by responding quickly to customer enquiries and that they could deliver on their commitments. They also acknowledged that this helped to build credibility and trust between the supplier and the buyer, and it would bode well for the future relationship and increasing sales. The research highlighted that building trust (Kaski *et al.*, 2017) with the prospect/customer was critical and without this trust no business or partnership would take place. Arli et al. (2018) discuss trust and commitment and refer to Morgan and Hunt's (1994) seminal paper on the importance of this. This research upholds their findings



that trust, and commitment are key in achieving relationship benefits with the customer with the added dimension of seeking this early at the front end of the sales process. All participants felt that it was important to build up trust (Guenzi & Troilo, 2007) early with the prospect and to respond quickly to any requests they have (Salomonson et al., 2012). The issue of persistence and building trust fits well with the relationship aspect of B2B sales that is prevalent in the literature (Hughes, 2013; Wagner & Mai, 2015). Integrity also came across from the research as important especially when making commitments to the customers.

### **7.1.5 Key Account Management and negative consequences**

While the focus of this research was on the front-end of the sales process where early relationship building was seen to be key, the data collected on key account management presented a different scenario. While close collaboration with the customer helped create opportunities, it was also seen as a gateway for customers to look for unrealistic demands and further demonstrates the complexity of the impact of collaboration on sales outcomes (Virtanen et al., 2015). Three of the case companies monitored their key accounts and they recognised the importance of KAM and how it can help them grow their business (Mohd & Ahmad, 2014). Many of the participants from phase 1 and phase 2 expressed serious reservations in having a KAM programme and did not support it. Company F went into receivership as a result of relying on one key account and they committed to never having a customer contributing more than ten percent of their revenues. Virtanen et al. (2015) highlighted that collaboration with customers can bring relational complexity and suppliers are often challenged in getting the benefits of this close collaboration. The participants from their research found that close relationships with customers can have positive and negative consequences. Their findings are upheld in this research. This research demonstrated more negatives than positives and it was

not seen in a favourable light and there was an adverse reaction to KAM. The participants felt that if customers knew they were a key account they would use it as leverage to win additional benefits from them and that they could ask for anything (Wieseke et al., 2014). The companies had to invest a lot of their time developing this collaboration and in many cases, they did not see the benefits.

#### **7.1.6 Persistence with Prospects**

One point that stood out clearly from the participants was that persistence was key when looking to make contact with the prospect and one should not give up on the first attempt (Clay, 2009). Company O identified a high frequency of phone calls to their prospect as a reason for their success in winning their biggest customer (Roman & Martin, 2008). The concept of persistence has been used by Schulman (1999) amongst others in a sales context, though their use is primarily to overcome adversity. This research uses persistence in a slightly more positive way as a way to engage with customers and build relationships. This ties into the extant work on goal orientation in selling (Jelinek *et al.*, 2006; Pink, 2009) and the wider issue of motivation (Jobber et al., 2019; Miao & Evans, 2014; Pink, 2009). Participants researched the prospect before they made contact and this was usually carried out through the use of social media (usually through the use of LinkedIn) and general internet searches to build a profile of the prospect in terms of the company and the prospect (Peterson et al., 2011). Companies are happier making contact via the phone with their prospects especially when they are given a referral.

### 7.1.7 Performance Metrics

The majority of the case companies have some form of performance metrics measurement in place to review sales activities. At their sales meetings they review each lead to determine at what stage it is at in the sales process (Rajagopal, 2010) and they look to see what opportunities could be closed with the prospects (Jordan & Vazzana, 2011). Some of the case companies are starting to see the benefits in having sales performance metrics for the salespeople including the number of sales appointments with new prospects.

“We used to measure nothing in sales, I saw that as being zero value at all, so the salespeople were glorified taxi drivers, so now what we’ve done is we measure them based on quotations received by customers, the product information being passed out” M1

Other measurements from the case companies that are reviewed include number of prospects to be contacted (Hamwi *et al.*, 2013), number of leads to gather from events held (Trailer & Dickie, 2006), and what sales conversion rate they are looking to achieve (Schiffman, 2003). They measure the salespeople’s performance individually on the number of prospects they have identified (Jobber *et al.*, 2019), number of phone calls to prospects (Trailer & Dickie, 2006; Gitomer, 2003) and how many appointments with these prospects (Schiffman, 2003). They review existing business, new business and any renewals that are coming to the end of the contract period. Typically, they tend to set targets.

Table 7.2 presents a consolidated version of the sales performance metrics that the case companies use. A wide variety of metrics with different time frames are used. They also use

percentages to rate probability closure and they recognise the benefits in using this probability process. This is in line with Bradford *et al.* (2016) who highlighted that by having a better understanding of the issues that impact converting sales leads opportunities can help management in their forecasting. While the literature briefly mentions individual measurements of sales activity it does not present an overall template. This sales performance template presented in Table 7.2 helps close the gap in the literature which has been absent in this area. It can also help companies monitor sales pipeline activities that contribute towards making the sales team more efficient.

Sales Performance Metrics	
Measurement	Frequency
Number of qualified leads generated	Monthly
Number of quotations received	Monthly
Number of appointments with prospects	Daily
Number of outbound prospect calls	Weekly
Number of renewals secured	Quarterly
Number of opportunities by salesperson	Monthly
Product information sent out to prospects	Monthly
Sales conversion rate by salesperson	Quarterly
Number of opportunities closed	Monthly
Revenue generated by salesperson	Monthly
Value of pipeline by salesperson	Monthly
Number of lost opportunities	Quarterly
Revenue versus Forecast	Quarterly

Figure 7.2 Sales Performance Metrics

### **7.1.8 Unqualified Salespeople and execution issues**

All participants fell into sales with no prior sales experience and had limited knowledge on sales process and the development of the salespeople. This acted as an inhibitor to the growth of the company. If experienced sales managers and field/inside salespeople are hired by senior management what impact does this approach have on the business in terms of sales process, recruitment, sales targets and turnover of sales employees which is expensive for companies? Arli et al. (2018) called for future research in the area of recruitment practices in sales. The results of this research showed that all of the participants have major recruitment and selection issues, and this is impacting their sales growth. This is despite sales recruitment being crucial to the success of the organisation (Altinay et al., 2008). The research upheld the findings of Pajo *et al.* (2010) that one of the key constraints on business investment and expansion was the availability of qualified sales employees. The participants recognise that their salespeople have very close relationships with their customers and if they decided to leave the company this could have a negative impact on revenues (Schmitz et al., 2020). While this expedites the necessity to reduce this exposure by hiring additional salespeople, some of the companies have no plans in place to negate this vulnerability.

The case companies believed that on the job training was the most successful induction method to use when training salespeople and investment in sales training was minimal. Management also felt a lack of prior sales experience was not that important. The MD of one company thought it was a badge of honour that in his many years working in sales he had never received a sales day training in his life. The case companies felt by having them shadow one of their experienced salespeople on customer visits the new sales recruits can be moulded to the company's need (Bolander et al., 2020). This is despite strong academic evidence of the benefits of sales training (Jelinek *et al.*, 2006; Koponen et al, 2019) and demonstrates some

naivety from sales managers and this could be due to their lack of experience in sales in the first place.

### **7.1.9 Collaborations outside of Marketing**

Two of the case companies highlighted conflict between sales and operations and they are not aligned. Sales felt that operations were being unreasonable in not meeting the commitment that the salesperson had given to the customer. They also acknowledged that at times salespeople overcommit to customers and the pressure is on operations to meet the unreasonable lead-time. As a result of the conflict there are issues with customers, and this is leading to serious conflict. There is not close cooperation between sales and operations and this is resulting in revenue loss and poor customer relationships which confirms (Rangarajan *et al.*, 2018) findings. It is important that operations work with sales through the sales funnel understanding the customer expectations so that they can plan any projects taking into consideration their capacity (Cooper & Budd, 2007). The finance director plays a very active role in sales at case company J and K and they meet with the sales team regularly in two of the case companies. They go through in detail each opportunity and they push hard to increase the revenues. These relationship issues between sales and other departments are not well studied and learning could be taken from the extensive literature on sales and marketing collaboration or lack thereof.

### **7.1.10 Final reflections**

The research supported existing literature on how to minimise conflict between sales and marketing. In some cases where both departments reporting to one director the results were favourable. Three of the case companies had both a sales and a marketing department and two

of the companies felt that these departments worked very well together in looking to grow their revenues (Malshe & Sohi, 2009). There was minimal conflict and one of the reasons for this success that emerged from the research was that both departments collaborated because part of the management had previous experience in other companies where they worked in a negative environment in sales and marketing. They understood that people working in marketing and sales are different and they respect the culture (Kotler *et al.*, 2006). These case companies communicate on a frequent basis with each other and they meet to review the plans sharing their objectives with each other (Le Meunier-Fitzhugh & Piercy, 2007). They set joint goals and they were able to create synergy between both departments (Johnson *et al.*, 2019). They had regular discussions communicating various marketing campaigns and they appreciated each other's opinions which made them feel like their voice mattered (Biemans *et al.*, 2010; Dewsnap & Jobber, 2000). Sales and marketing in these companies worked alongside each other in the same office location. While the research did not present findings that showed this in a positive light it was clear from the visits to the facilities and observations there was a very positive recognisable atmosphere and being co-located was an advantage (Le Meunier-Fitzhugh & Piercy, 2009).

In one of the case studies, sales and marketing reported to the managing director. In the other two cases companies' sales and marketing reported to the sales director. Where sales and marketing reported to one director it was seen as a positive development as the director had sight of all issues and was able to manage them effectively. Having sales and marketing as a single department may have contributed to minimal conflict taking place (Le Meunier-Fitzhugh & Massey, 2019) between both departments as they had an excellent relationship with each other. While some of the case companies did not have current sales and marketing issues as they did not have a marketing department, the fact that they are investing in hiring marketing



people for the first time may create issues for the future as the company grows in terms of people and senior management and how well both sales and marketing collaborate

Arli et al. (2018) called for future research on individual differences on the adoption of new technologies and this section highlights the results of the case studies in relation to Lead Generation/Qualification, SFA/CRM, Digital and how their employees are embracing these in their organisation. Artificial Intelligence (AI) was discussed with the participants as recent articles have focussed on AI but none of the case companies were able to demonstrate the use of artificial intelligence and a contribution to automation in the sales process. When AI was probed further with the participants, they made the point that even though they see the advantages in AI they did not believe it will replace the human touch. They were adamant that the human interaction is key in building relationships and resulted in the winning and development of customers. It will be interesting to review ongoing literature in the development of AI and its impact on the sales process.

## **7.2 Closing the literature gap.**

The key gap in the literature was the lack of attention to the early part of the sales process. In order to fill this gap, three case studies of companies based in Ireland and three based in the UK were undertaken after an initial phase of nine interviews. It was interesting to note that the challenges SMEs face in the UK are almost identical to Irish SMEs. Both territories are challenged in similar areas at the front end of the sales process. The sales teams are being managed by people with limited sales experience and have received very little sales training which is an inhibitor to their growth (Powers *et al.*, 2013). One of the challenges for SMEs is a lack of funding as they rely on profits from revenue generation and this also came through in the research. SMEs may lack funding as they rely on profits from revenue generation and this

also came through in the research. Many of these SMEs have limited budgets and are not very cash rich to invest in systems i.e. CRM (Hartmann *et al.*, 2018) social media (Moncrief *et al.*, 2017) and sales training (Jelinek *et al.*, 2006) which may help them achieve increased revenues and greater automation in their sales processes.

Sales in some of these SMEs have manual processes and the general theme from most of the people interviewed was that their organisations were under resourced, they were working very long hours and as a result people were struggling to get even keep up with let alone get ahead of the curve. Some of the case companies were proactive in parts of the SPEP and this is helping them achieve revenue growth. They have succeeded in increasing revenues and they have added new customers as part of their growth plan. All case companies recognised that they could do better in having a more effective sales process but identified their limitations as a reason for not developing them. They want to invest in CRM, marketing, digital, social media, recruitment of qualified salespeople and sales training but as mentioned there are budget and time constraints as the focus is very much on customer satisfaction as they recognise that repeat business with existing customers (Johnson & Friend, 2015) is important for them to grow.

The literature review and the case studies helped create the SPEP along with its antecedents as per Fig 7.1. Each stage of the SPEP covers in detail the front end of the sales process. This SPEP should provide firms with opportunities for early relationship building (Borg & Young, 2014) by integrating the changes in the evolution of the early stage sales process and help build a sales pipeline. This approach will complement and enhance the seven steps of selling (Moncrief *et al.*, 2005) and contributes to (Arli *et al.*, 2018) proposed research directions. This framework closes the literature gap and provides salespeople with a framework for successful sales pipeline management at the front end of the sales process.

Relationship selling at the front end of the sales process was a very strong theme in all of the case companies. Most of the participants talked about the importance in having strong relationships (Palmatier *et al.*, 2013). By moving through each stage of the SPEP process supported by the antecedents it can help achieve successful relationships with prospects. In addition, it contributes to practice as it can act as a framework in helping companies manage their sales pipeline effectively. This SPEP can have very positive implications for management and this is discussed in the next section.

### **7.3 Contribution to Practice**

There are numerous implications for sales management from this study. Sales being the lifeblood of all companies (Moncrief *et al.*, 2017), this framework can be used by management to drive revenues for new and existing business. The data has shown the challenges facing sales management when looking to managing the front end of the sales process. Being under resourced and trying to manage various issues in the organisation is a difficult task and this study has highlighted some of the reasons these SMEs are not able to pro-actively pursue the opportunities. The SPEP brings a framework where all salespeople can have a formal sales process in place for winning new business. The SPEP will bring formality in sales at the front end of the sales process. A key requirement in achieving the successful execution of the SPEP is sales training (Powers *et al.*, 2013). The sales and marketing teams need to meet regularly to agree each stage of the SPEP including, sales and marketing integration, CVP, customer profiling, lead generation strategy, making contact with the prospect and performance measurements. All salespeople should be included in these discussions so that it has everyone's buy in. Also, by having all of the relevant people involved they will feel that their opinion is valued, and they will contribute at the meeting

The research has shown the benefits for the salespeople building relationships in the early part of the sales process with their prospects. The execution of the framework will help the salespeople achieve this. By having an agreed customer value proposition (Skalen *et al.*, 2014), which they can articulate to their prospects will help the buyers build trust and credibility with the suppliers.

Salespeople waste a lot of time trying to develop non-qualified leads. Sales management need to get together with the relevant people including all of sales and marketing and agree their ideal customer. If they can agree this with all of the salespeople, then everyone will understand who their sweet spot customer is, and all focus will be on trying to identify these leads. Clearly from the research, management should have all their salespeople focus on referrals (Chollet *et al.*, 2014), word of mouth (Kimmel & Kitchen, 2014) and from a social media perspective LinkedIn (O'Dea & Turley, 2012) as part of their lead generation strategy. These are the most successful routes in delivering high quality sales leads. By ensuring that everyone focusses on these areas it may contribute to increasing revenues and winning new customers. A key finding in the research was the monitoring of all contact touch points at the customers site. This helped drive referrals significantly and resulted in the winning of new customers over a short time frame. LinkedIn was also successfully used for carrying out research on the prospect to ensure the sweet spot was met and that all information on the prospect including the decision makers was carried out. This ensures that the salespeople are well prepared before they make contact with the prospect on this warm call.

Management need to evaluate which CRM system they need to implement to monitor all sales lead activity. The research has shown that part of the success in CRM implementation is to

involve all relevant people that have a part to play in CRM (Raman et al., 2006). CRM needs to be driven top down and management needs to support its implementation (Osarenkhoe & Bennani, 2007) and they also need to put in place mechanism to ensure everyone is inputting the data on CRM. One of the case companies highlighted that they pay a licence fee per user per month which makes it affordable for any company to invest as budget constraints were a concern on previous CRM attempts.

Management need to introduce sales pipeline measurements (Trailer & Dickie, 2006) for their sales and marketing people and these should be reviewed on a weekly basis. Table 7.2 details a sales performance metrics that can be used in organisations for companies evaluating their sales pipeline at their weekly review. All sales and marketing people, senior management, operations and finance should attend this review. Discussions need to take place on each of the measurements presented by sales and marketing. Any challenges need to be discussed at the weekly review and all progress monitored.

The recruitment of sales and marketing people needs to be reviewed by management as both positions require a different skill set. A key success factor in sales and marketing working together is having people with the right skill set and qualifications (Jobber *et al.*, 2019). In addition, management need to ensure the salespeople they are hiring have the right sales skills for the job (Cassell & Bird, 2009). This was one of the key concerns from the research and management will need to review their recruitment process to ensure they hire the right qualified people for the job. While discussing the recruitment of sales and marketing people in this section, motivation and rewards should also be reviewed by management. Salespeople are motivated intrinsically and extrinsically (Kumar *et al.*, 2015). The data from the case studies highlighted how strong some of the salespeople felt on earning more money and that this

motivated them (Amue *et al.*, 2012). The case companies also identified unrest with senior management on the sales team not being paid commissions on the sales. Management didn't feel that the salespeople receive commissions as other people outside of sales were involved in the closing of the sales, so they decided to pay no one. Research has shown where sales and marketing have an aligned reward scheme it may help reduce conflict and have a positive effect on collaboration (Le Meunier-Fitzhugh *et al.*, 2011). Since it is important to have a motivated sales and marketing team, it makes sense to review the reward structure with the relevant people, agree the terms and have sales and marketing buy in.

The lack of sales training (Lambert, 2010) for the salespeople was very evident from the research as over 90% of the salespeople had no formal sales training. This needs to be reviewed by management as the absence of sales training can be an inhibitor to growth.

#### **7.4 SPEP Implementation Issues**

Rolling out the SPEP in a company would require a series of workshops with the relevant people covering each of the stages. The first key requirement is management's buy in as this is very important. We have seen from the literature review covering various sales topics the importance of management's buy in and the fact that it needs to be driven top down in the company (Osarenkhoe & Bennani, 2007; Dewsnap & Jobber, 2000). A workshop would need to take place between the key stakeholders in the company and the SPEP presented in its entirety. At this workshop each stage of the SPEP would need to be presented and a detailed discussion taking place on each of the stages. The benefits can also be presented to the stakeholders and they can see first-hand the opportunities this SPEP can bring to their company and this will help get their buy in. Once management have signed off on the implementation

of the SPEP the next action will be to meet with the various departments that have an input into the creation and execution of each stage.

## **CVP**

Since Value creation is the *raison d'être* of companies (Woiceshyn & Falkenberg, 2008) the first step is to create a compelling customer value proposition (CVP) (Woiceshyn & Falkenberg, 2008). CVPs are key in helping to build an early rapport with the prospect, as the buyer will see the value that the supplier is bringing to the relationship. They can also help to convince the buyer that the CVP is compelling enough to make the decision to buy. Where marketing is active in the company they will need to sit with sales and agree together the CVP. It is critical both marketing and sales work together on this as it can help build a good rapport between both departments. By having these joint meetings, they are sharing knowledge and information with each other which can lead to improved collaboration (Le Meunier-Fitzhugh & Massey, 2019). As highlighted from the literature review when relations between sales and marketing are poor, the communication, coordination, and collaboration that are critical for the delivery of an overall customer value proposition may be deficient (Madhani, 2016).

## **Customer Profiling**

The research from the literature review and the data, highlighted the amount of time wasting that can take place by the salespeople chasing non-qualified leads (Hummel, 2011). It is important that the company is connecting with the right prospects and have the correct strategy in place as this can help produce the best possible results (Oliver, 2002). A workshop between the various internal departments discussing who their ideal customer (Dunk, 2004) is along with the sales channels they sell into will help focus the company. Marketing need to be part of the workshop as they play a key role as they generate leads for sales.

## **Lead Generation**

The data from the research identified the top three routes to successfully generate sales leads. These are, referrals (Chollet *et al.*, 2014), WOM (Gombeski *et al.*, 2011) and LinkedIn (Oechsli, 2011). This is where the focus needs to be when it comes to lead generation strategy in the company. Meetings would need to be set up with the sales team including marketing where a discussion can take place on the lead generation strategy covering each of these three routes. The research data identified marketing people in their companies who track all people that their employees interface with at the customers site. If any of these people are promoted or move to another company it is immediately flagged and a follow up contact is made to the individual by the relevant sales individual. This is a task can should be allocated to an employee as it can result in very successful qualified leads being generated.

## **Capturing sales leads**

This is key in the SPEP process as many sales leads get lost in the black hole (Sabnis et al., 2013). Both the literature review and the data identified the monitoring of sales leads as an issue. Ideally having a CRM system in place can help reduce the challenges and it brings a lot of benefits (Rodriguez & Honeycutt, 2011). However as seen from the data if management are not supporting it then it may not be successful (Osarenkhoe & Bennani, 2007). The key stakeholders would need to meet to discuss the tracking of sales leads since it is such a key area in building the sales pipeline.

## **Contact with the prospect**

At this stage the ideal prospect has been identified, the CVP is complete and the pre-qualified leads have been submitted. The benefits of researching the prospect before making contact with



them came across both in the data and the literature review as a very important stage of the SPEP. This ensures the salespeople are well prepared before they make contact with the prospect. The number one route identified by the case companies when researching a prospect or customer was LinkedIn as there is a lot of information available both from a buyer and company perspective. When the salespeople are making contact with the prospect it is no longer seen as a cold call but more of a warm call. The salespeople will have gathered lot of information at this stage when they are making their first contact. This should help speed up the buying process as Toman et al. (2017) highlighted proactive prescriptive approaches by suppliers increase the ease of purchase by 86% and lead to a 62% chance in closing the sale. At times it is not easy to get through to the relevant buyer but perseverance is key in order to make successful contact with the buyer. There are various examples of this from the data and the literature (Clay, 2009). As discussed earlier, it is very important to capture all of the activities with these prospects and to ensure the salespeople update the CRM system. Actions will need to be followed up by the salespeople after the initial contact and by tracking these on CRM sales management can monitor them to ensure they are closed out. The sales pipeline will need to be updated along with the scoring of each opportunity. By scoring opportunities, it can help future sales lead generation strategy as the scoring will identify how successful the current sales leads were (Jarvinen & Taiminen, 2015).

### **Performance Metrics**

The results from the data and literature identified measurements for the front end of the sales process that management can implement to review progress on the prospecting activities taking place. Table 7.2 could be extended to include a number of different measures including:

- Tenders submitted versus number won

- Prospects identified (Jobber et al., 2019),
- Prospects contacted (Hamwi et al., 2013)
- Prospect appointments per week
- Contacts generated from events held (Trailer & Dickie, 2006)
- Qualified leads generated
- Phone calls to prospects (Gitomer, 2003)
- Renewals won
- Referrals
- Conversion rate (Schiffman, 2003)
- Orders closed

Bradford et al. (2016) highlighted by having a better understanding of the issues that impact converting sales leads opportunities can help management in their forecasting. Part of the SPEP implementation plan is for management can meet on a regular basis with, the salespeople, marketing, operations and finance to review the sales pipeline and see what progress has. The pipeline review can show how the opportunities are progressing and how close they are to finalising the sale with the prospect (Peterson *et al.*, 2011). Where appropriate corrective action can be taken to address any issues.

The above is an implementation plan for the roll out of the SPEP in a company. The antecedents in the SPEP need to be taken into consideration as they are key in its success. These antecedents are a work in progress over time and are not a quick fix. However, by addressing them it can contribute to the success of the SPEP implementation of the front end of the sales process and lead to effective sales pipeline management. The next section will discuss the implications for policy in this area.

## 7.5 Contribution to Policy

The O'Driscoll (2004) report *Ahead of the Curve* identified a lack of qualified salespeople in Ireland as a major inhibitor to Ireland's economic growth. One of the key recommendations was for Ireland to incorporate work placements and sales modules that focus on the practical capabilities required by firms into third level marketing and sales programmes and the report itself be available to students of technical disciplines. There is only one Government supported sales management programme in Ireland. Very few undergraduate and MSc programmes have sales modules. This framework can help give sales a prominence in education by introducing it into education institutions. The framework can be a contribution to policy by organisations like Enterprise Ireland incorporating the framework and having academia roll it out as part of a module in sales and marketing for undergraduates and postgraduates.

"So, the two things missing from education in the Western World and may be all over the world is the ability to sell, and everybody sells. So, if you're a parent giving out to our child and trying to get them to do something, you're selling. If you're trying to get a wife in the first place you're selling. If you're working in a job, you're selling ideas. Everybody is selling. Yeah, you've no idea how to run a business when you start-up, you know, sales, finances and so on. That's when I discovered that I could sell, and the great thing about, I suppose when \_\_\_\_\_ closed I had a good reputation for getting things done. So, I discovered really early on that I loved selling, absolutely loved selling" (N1).

N1 is the CEO of a €32 million turnover SME in software sales and he highlighted the part of selling he likes, and he talked about engineers selling and felt they are better than salespeople as customers like them:

“It’s that just the ability to persuade and influence other people and of course, then when it’s your own business you then have to deliver, and then you can sort of see, your building. So, I think selling is one of the finest professions that you can be in. You know, can you take a painfully shy person and make them into a great salesman. I certainly have painfully shy people here that are brilliant engineers, and when they’re selling, when they’re with customers they sell more than anybody else because they’re authentic, and people will know that” (N1).

## **7.6 Limitations**

While the research made valuable contributions to theory, practice and policy there were limitations to the research that need to be taken into consideration and it is important to recognise these. That said the limitations could be interesting topics for future research and this is discussed in this chapter.

Only six case companies were studied, three in the UK and three in Ireland. Having a larger sample would have been good as more data would have been collected and with a wider sample it would have been interesting to see if the findings from the first set of six case companies would have been similar. This research focussed on the SME environment which has a maximum annual revenue turnover of €50 million employing 250 employees. Researching companies above this threshold would show if the findings from this study are similar in these larger organisations.

The research was carried out in some important industries, but the case companies do not cover all industries. It is difficult to conclude that the findings from this research applies to all industries. Despite the fact that many of the case companies had significant revenues most of the participants did not have a sales background and had no prior sales training. This included the MDs, sales directors and sales managers. Researching sales and marketing participants from companies with seasoned sales experience would have been beneficial as the data from the research would show how the front end of the sales process is managed and how it compares to the results of the six case companies.

Sales and marketing play key role in the success of an organisation at the front end of the sales process. While some of the case companies did have sales and marketing departments others were only just starting to hire a marketing person. Even though the results of the research in this area did present some interesting findings it would have been good to investigate companies that have stronger sales and marketing departments.

Meetings took place with senior management in all of the six case companies. The meetings were very productive with very good data collected. He did not meet with the salespeople that are on the ground dealing with customers daily and seeing what the issues are. Having the opportunity to meet with them and discuss in detail their role, challenges and inhibitors to developing sales at the front end of the sales process would have been beneficial.

## **7.7 Future research directions**

Despite the thesis having some limitations it also provides opportunities for future research. The front end of the sales process is key in any organisation as revenues/profits are critical to

keep the company operating. If the revenues are poor, it can be attributed to low prospecting and bad pipeline management. If there is no pipeline then this will eventually lead to the premature death of the organisation since without customers there is no company (Etherington, 2010). This research has brought many contributions both in theory and practice.

Testing the SPEP within an SME environment would be good and a longitudinal study could be carried out. This study could consist of four SMEs in different industries that have identified challenges in the front end of the sales process. The implementation plan described in this chapter to be used as the basis of the roll out. It would be an excellent opportunity for the salespeople to validate the results from the study and real time data would be collected daily. Over a period of six months observations could be made to see the results of the implementation of the SPEP. If successful, then it could be rolled out to numerous SMEs as part of the Governments initiative to develop sales within SMEs.

The SPEP could also be tested in larger organisations outside of SMEs as I have anecdotal evidence from speaking with mature graduates who are involved in sales education on executive programs. They have highlighted issues within their own organisation relating to the front end of the sales process. It would be good to introduce the SPEP framework in two large organisations that have issues and monitor the results over a six-month period.

This research study has focussed on the SME environment in Ireland and UK where Ireland have 250,000 SMEs employing 1.3 million people and the UK have 5.8 million SMEs employing 16.6 million people. The study could be expanded to other countries i.e. Germany & France with an SME environment to see if it could be applied to all countries. There are over

24.5 million SMEs in Europe (Statista, 2019). If successful, then it could be rolled out within these EU countries.

The SPEP framework could be introduced into academia as part of a sales programme delivered to companies looking for their employees to achieve an academic qualification. Since acquiring new customers is key to all organisations this would be an excellent opportunity to deliver a SPEP Module to allow the employees take back the SPEP to their respective companies. As part of the buy in the SPEP framework could be presented to senior management of companies to get their feedback. If they are onboard with the pilot, their salespeople could attend the module and on their return the results of the execution of the SPEP within each organisation could be monitored.

The research identified from observations various examples of conflict between sales and operations which was causing disruption in delivering a good customer experience. The internal conflict was causing friction among the various teams and this was not healthy for the organisations. The research also identified finance as a key department working with sales and in some cases driving the sales meetings. Carrying out a study on sales collaborating with other departments including operations and finance would be worth doing. Similar to sales and marketing, it is also critical that sales have very good collaboration between all key departments.

Some of the case company's success in winning new business was as a result of their technical people working in sales. It would be worth carrying out a study on this topic with a wider sample to evaluate how credible it is as a wider strategy outside of a key account management framework where it is more prevalent.

The role of technology in sales is ever changing. While this thesis makes a contribution to how SMEs use social media in the B2B environment, the question remains to be asked “Is sales still a contact sport?”. What is the real role of Artificial Intelligence in the sales process? Is it merely a data point for salespeople to use the information when developing sales relationships with customers or can it replace the salesperson? While the answer is likely to be nuanced depending on the industry, the increasing role of social media gives food for thought. Everyone is talking about social media and how effective it can be in sales. But is it being used efficiently in today’s sales world? It is also recognised that it can take up a lot of the salesperson’s time especially due to clickbait and is this valuable time lost by the salesperson. In a B2B environment what are the most effective social media platforms to use to develop and grow sales? This thesis considers the role of LinkedIn but there may be others that could be used effectively.

Anecdotal evidence suggests that many salespeople fall into sales and that they do not decide at the start of the career journey that they want to work in sales. This has led delays in companies achieving sales targets, sales processes not being introduced or followed and a very high turnover in sales employees which is an enormous expense to the company. A key research question in the sales domain are what are the real costs to the company and what mechanisms can be introduced to avoid this from happening?

## **7.8 Conclusion**

In conclusion this thesis contributes to sales pipeline management with specific focus on the front end of the sales process. The findings are pertinent to academics and practitioners. Start-up companies looking to exploit new markets need to find new customers since they don’t have any. Companies looking to achieve growth in their business look to add new customers. The



sales department is a “major force” in a company’s survival as it is the revenue generation mechanism of a firm (Harmon et al., 2002) . Existing companies selling into mature markets will eventually lose customers and they will need to replace these with new ones (Wilson, 2003). SMEs cannot afford to depend on one or two customers who make up 85% of their revenues. They need a wide range of customers ideally where no one customer contributes more than ten percent of the total revenue. Case company F almost went into liquidation as a result of a high dependency on one customer.

“We don’t want big customers, we want a bucket load of small customers, and never again do we want big customers. If you are getting orders of course you can’t refuse them. I am very happy to say that we have no customer today that is over 10% of our business. We structured this like that and if I see a customer getting too big I will say, hey hold off here a minute this customer is getting too big, let’s not grow it any further, no we don’t want it, we learned our lesson, we are not going to make the same mistake again”

Every company that sells products or services must have some means of developing customer interest in their offerings (Monat 2011). The framework created from the study may contribute towards helping these SMEs increase their revenues and find numerous customers reducing their exposure to having only a few key accounts. The framework helps close the literature gap by connecting all of the early stages of the front end of the sales process with special focus on early relationship building with the prospect. With the introduction of the framework to SMEs it will give management the necessary structure to monitor and measure the performance in relation to the sales pipeline.

Selling is one of the oldest professions in the world with supply and demand around since the dawn of time. It is key for any company to stay in business and to survive. This study has demonstrated the criticality of sales at the front end of the sales process namely sales pipeline management. It has presented a SPEP framework for academics and practitioners with the key stages that need to be executed in order to generate higher revenues and win new customers. This framework may help salespeople on their sales journey and management in their quest to manage the sales pipeline. Hopefully this framework will give them the opportunity and ability to sell which was identified as an issue by the CEO of one of the case study participants with an annual turnover of €32 million.

“So, missing from education in the Western World and may be all over the world is the ability to sell, and everybody sells. So, if you’re a parent giving out to our child and trying to get them to do something, you’re selling. If you’re working in a job, you’re selling ideas. Everybody is selling” N1

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## **Appendix 1 Interview Questions-Phase One.**

### **Background**

Can you tell me about yourself and your own work background?

Can you give me an overview of the company in terms of numbers of employees, channel you sell into, key customers & the organisational structure?

### **Sales Structure**

How does sales operate in your company, who deals with it?

What are the main challenges you have in relation to sales in your company?

Who would be your major competitors?

What is the biggest threat to your growth?

### **Marketing**

Do you do any marketing?

If No ... then probe further about activities that are marketing related

If Yes ... then probe further about these activities

If social media is not mentioned then bring it up

### **Sales Process**

Can you talk me through a typical sale your company made recently?

Where did they find the customer, how did they profile them, what sales efforts were made and by whom, timeline?

Are all sales like this or are there some different types? If they are different why?

How do you get new customers? Is this process followed by everyone and written down somewhere?

Do you have an ideal customer? Is this shared across the company?

Do you have sales meetings? If so, how do they work?

Do you use any technology specifically for sales?

Are salespeople on commission and if so, how does that work?

Do you forecast your sales and if so, how do you do this?

**Future for Sales in your company.**

Are you happy with the way sales and marketing work in this organisation?

What would you change and why?

In relation to sales what areas do you think you need to improve in?

Any other thoughts relative to sales in your business

## **Appendix 2 Case Study Company Questions-Phase Two**

### **Background**

Can you tell me about yourself and your own work background & what experience you have in sales?

Tell me about your company's products/services & who do you sell to?

Can you give me an overview of the company in terms of revenues, numbers of employees, channels you sell into & major customers?

Where does sales sit in your organisation and who does it report to?

Why do customers buy from you, what are the main reasons?

Can you share with me how important is offering value to your customers & how do you communicate this?

### **Marketing**

How does marketing work in your company, has it got its own department & if yes how do sales & marketing get on?

Can you discuss if there has been any impact to your business in the area of Social Media & what are your views going forward in the area of Social Media in relation to your Company/Sector & how are you responding to the changes?

How effective is your website in generating sales leads?

## **Sales**

Do you have an ideal customer & if yes can you describe this ideal customer? Is this shared across the company?

Do you have a sales process in your company & if yes can you please define it?

Are sales processes written down & does everyone work off the same process?

How do you generate leads in your company?

Do you qualify leads when you get them & what is the process?

What is your best source in getting sales leads for the business?

Before you contact a sales lead, do you carry out research on the company?

Can you give me an example of the new customer you won recently & what was the process?

Do any of your salespeople carry out Cold Calling?

When contacting a prospect what method do you use in terms of communication?

Do you have sales meetings? If so, how do they work?

How do you track & report what is happening with your competitors?

## **Technology**

Do you use any technology specifically for sales? If they query, then mention CRM/SFA

How do you track the activity in relation to sales opportunities?

Are the salespeople attending any sales training courses and is there anything in place for their personal development?

Are salespeople on commission and if so, how does that work? Do you have any other reward system in place for your sales team?

Do you have a sales pipeline?

Do you forecast your sales and if so, how do you do this?

How do you measure Sales Performance in the Company, do you set individual targets for each salesperson?

What does success look like to you in the Sales Organisation?

How do you manage customers who contribute towards a major portion of your revenues?

What is the biggest threat to your growth in your company?

## **Investment**

If you had a blank cheque from an investor what would you invest in to grow this organisation & what areas in sales would you develop?

Is there anything I have not asked regarding your experiences that you would like to tell me?