"REVISITING SALES AS A HUMAN CONNECTION AND A BUSINESS TRANSACTION"

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Abstract

This study focusses on identifying what skills are essential for salespeople from a human motivation, sales skills, and business perspective. It uses historical research as a backdrop and then looks at today's sales environment from a company perspective. The study identifies, compiles, organizes and validates core elements of sales skill requirements and factors that impact these requirements. The literature review helps study this complex issue by bringing disciplinary and non-disciplinary knowledges, perspectives, and insights to bear.

Methodology

A mixed methods methodology was employed starting with qualitative analysis followed by a quantitative analysis. The qualitative analysis was conducted by interviewing experienced personnel with varied backgrounds, with and without sales experience. The intent of the qualitative analysis phase was to identify a list of necessary skills to maximize sales performance that would be used in the quantitative portion of this mixed methodology research. The quantitative analysis phase involved testing the relative importance of these skills by surveying a live population of internal stakeholders. A comprehensive list of skills was ranked in terms of importance by company personnel. Differences between type of sales being conducted, role in the company of the person answering the survey, company size, primary communication channel to the customer, and gender were comprehended, and implications discussed.

Results

The study utilized one hundred and ten skills in the quantitative analysis process, representing twenty-eight themes. Management, sales management, sales support and sale personnel from the Canadian division of a multinational organization were asked to rate how important each skill was on a 5-point Likert scale ranging from not important to very important. All skills ranged from above ‘somewhat important’ to the ‘very important score’ with a mean of 4.27. All themes scored over four which puts the importance ranking ranging from important to very important. The mean computed by theme rather than skills was 4.24.

Group comparison analysis between management/sales management versus sales/sales support, solution sales versus mixed commodity and solution sales, salespeople dealing with companies over 100 employees versus under 100 employees, primary communication channel being live versus a combination of live and virtual, and female versus male respondents was conducted. Significant group differences ranged from four skills when comparing management/sales management results to sales/sales support up to twenty-six skills significantly different in the primary communication channel comparison. Eta squared values were employed to measure effect size when differences were significant. The resultant small eta scores indicate all differences were tendencies rather than overriding differences.

When analysing the themes as scales using Cronbach alpha some scales showing reliable thematic analysis emerged and these could be utilized not only for current research but also have broader applicability for future endeavours both in academia and the business community.

Unique Benefits

What was gained with this new comprehensive list of important skills results is a new list of skills that may be utilized to custom build training and provide a basis for future research. The group comparatives identify significant differences to help in designing tailored training continuums for each group.

Keywords: selling, scales, qualitative/quantitative analysis, group comparisons, skills

Table of Contents

Tables

Tables

Figures

Figures

Appendices

Appendices

Introduction to the Study

1.1 Introduction

Dissatisfaction with capabilities of sales personnel with respect to what is required in terms of sales skills has generated a need to review what is important to enable a successful salesperson. The senior manager of the multinational we used in the quantitative portion of this study was quite certain than his sales force lacked the complete set of skills to be as successful as they could be. The expanded list of skills drawn from a variety of companies during the interview process, and research within a variety disciplines and non-disciplines, helped identify important skill requirements for a successful sales force to measure its sales force against. He also felt that there were differences in requirements between those who sold to large companies versus those who sold to smaller companies. Without the optimum set of skills both the salesperson, and the company they are selling for, are not as successful as they could be relative to driving revenue. The reason for the gap in skills between what sales people have versus what they need can be attributed to a variety of factors. For example, creators of inventories of sales skill requirements have customarily surveyed sales personnel and/or sales management utilizing a more limited list of skills. As well, the world in which sales personnel work in today has manifested a need for new skills not identified historically. This mixed method study focusses on looking at skills essential for salespeople from a human motivation, sales skills, and business perspective.

Importance of the Research

In a consumption-oriented society such as North America, it is estimated that about 10% of workers make a living in sales, another 80% are in a sense selling as well, in that they influence others in a non-sales selling role (Pink, 2013). There is a workplace transformation revolving around entrepreneurship, elasticity and Ed-Med. There are more entrepreneurs as technology reduces barriers to entry. Job requirements are stretching and often include influencing others. Education and medical jobs are the largest job market and often those jobs are about influencing people (Pink, 2013).

Understanding the Problem

The journey to understand how to improve selling methodologies and the efficiency and effectiveness of salespeople must first start with understanding what skills are germane to optimizing sales success. Sales skills can be defined as the ability to carry out a task with established results that are clearly important to improve sales performance. This understanding can be accomplished by reviewing topics such as why people buy, what motivates people to action, how customer's perceptions influence sales, and how these perceptions can be managed. Sales lends themselves to much anecdotal research and, in the past, there sometimes has been limited scientific analysis or empirical evidence to support findings in the real-world was done. This has been changing and there has been some very good research conducted on the impact of various sales tactics like upselling or cross selling. It should be noted that obtaining a scientific setting with control groups, and specific measurable and observable behaviours, is a difficult thing in this complex milieu. This paper reviewed various research techniques. The subsequent selected methodology demonstrates how new knowledge through analytical research can be derived.

1.2 Statement of the Problem(s)

Canadian Professional Sales Association President Peter Irwin in a 2018 Globe and Mail article states Canada's commercial sales force has been weakened by lack of support and recognition, needs better national standards for sales professionals, identifies that the skills sought are both hard skills, and soft skills such as empathy, communication and agility, and referenced Peter Drucker who says “what gets measured gets improved”(Globe and Mail, 2018). What is needed is to understand what skills are important to the success of sales personnel.

This first step on the journey to uncover salient skill requirements was to develop a comprehensive view of the various components of a successful salesperson’s skills portfolio and identify factors that can impact these requirements. Such a task necessitated drawing from relevant knowledge in academic literature such as in the discipline of psychology, and non-disciplinary knowledge formations such as the study of sales. It also required inputs from stakeholders such as management, sales management, sales support and sales personnel who have knowledge in this arena. Qualitative analysis involving interviews followed to collect this information.

This approach draws from more than one discipline and uses knowledge from practitioners of sales and psychology to help understand this matter. Incorporating these perspectives furthers the goal of developing an enlarged and enriched understanding of the subject matter. This approach is useful for this kind of study because the subject matter is complicated and can more insightfully be understood by bringing different disciplinary and non-disciplinary knowledge, perspectives, and perceptions to bear.

1.3 Purpose of the Study

The purpose of the study was to identify important skills necessary for a successful salesperson utilizing inputs from a variety of disciplines and non-disciplines. It also was designed to facilitate group comparison analysis to help differentiate sub groups of sales personnel who may have differing skill requirements. The research combined a qualitative analysis derived from interviews from professionals who have a diversified background, with what has been found in a multi-discipline literature review. It used the results to survey stakeholders, within a multi-national, in order to achieve a better understanding of what skills are important to sales organizations. Group comparison and scale analysis were also conducted.

1.4 Research Question(s)

Research Question – There are five components that make up the research question relative to what skills are required for sales personnel to maximize sales effectiveness.

1 Identify the core elements of sales skill requirements.
2 Organize them into logical themes.
3 Understand how important these skills are when identifying the pertinent skills of a successful sales person's skill set.
4 Examine scales that evolved from the research.
5 Utilize identified skills, themes and scales to conduct group comparison analysis.

It is envisioned that results will set the foundation to create models for future research. They will also provide templates for organizations to develop training and hiring practices that are designed to deliver a successful sales force. Understanding how sales groups differ should help in decision making relative to which skills should be correspondingly prioritized for training.

1.5 Research Objectives

Stevens (1989) postulates that to build a productive sales force you must first ascertain the category of sales to be undertaken and decide what qualities the incumbents will need. He goes on to say that skills that are effective in one situation may not be effective in others. In his research he points out a limitation that there were no pre-existing scales to work with. The research here will provide some clarity relative to skills required and showcase some themes that may be utilized for future research. Since what is being developed is a new measurement tool the expectation is that when testing the qualitatively derived list of skills it tests well and has means that reflect that the items identified from research are deemed important. Subsequent interviews should rate the skills highly when tested against a corporate population. Group comparisons should reveal where skill requirements may differ amongst the respective groups being compared.

1.6 The Importance of the Research

The research is important for both the corporate world and for subsequent developmental research in academia. The reason it is imperative to research today's skill requirements for corporations is that many aspects of the sales world have changed. Internal factors are shifting and sometimes altering. Sales forces are morphing from boomers to millennials, technology has evolved, in many cases funding for learning has moved to return on investment justification, gaps in sales skill sets costs revenue, and the focus of selling in many cases is becoming more sophisticated such as moving from hardware sales to a hybrid of hardware and solution. External factors are also changing. Customers are more educated, buying behaviours have transformed, industries are more competitive, market share has become harder and harder to maintain, and minimizing costs has become a dominant success factor for corporations. Building on the successful research of others will provide a stable platform for future research. Understanding what is most relevant in terms of skills for sales personnel will benefit the sales organization, future researchers, and ultimately the customer. In terms of academia a listing of skills deemed important that is unique in its scope, accompanied by reliable scales, and the group comparisons, provides a useful base future research.

Impact of Research

The impact of the information being gathered and analysed revolves around the customer experience with corporate sales personnel. Information on which skills are most relevant influences not only the opportunity to drive the initial sale, it also effects customer expectations for their ongoing relationship with the company. Properly set expectations result in customers being satisfied with their product, service, and support. The post-sale experience is impacted by what happens to the customer during the sales cycle. Ensuring that sales personnel are performing to customer expectations improves customer satisfaction. There are of course other corporate advantages. Sales leaders will be able to invest training funds in the best possible manner, know which skills to emphasize and track, and recognise what knowledge gaps need to be filled. Sales representatives will be spending their training commitment time in the most effective and efficient manner. Learning and development people will have a clear roadmap to necessary training, and human resources will have a better idea of the types of skills required in a new hire. Overall costs of training should be optimized and returns high as the appropriate learning is being provided.

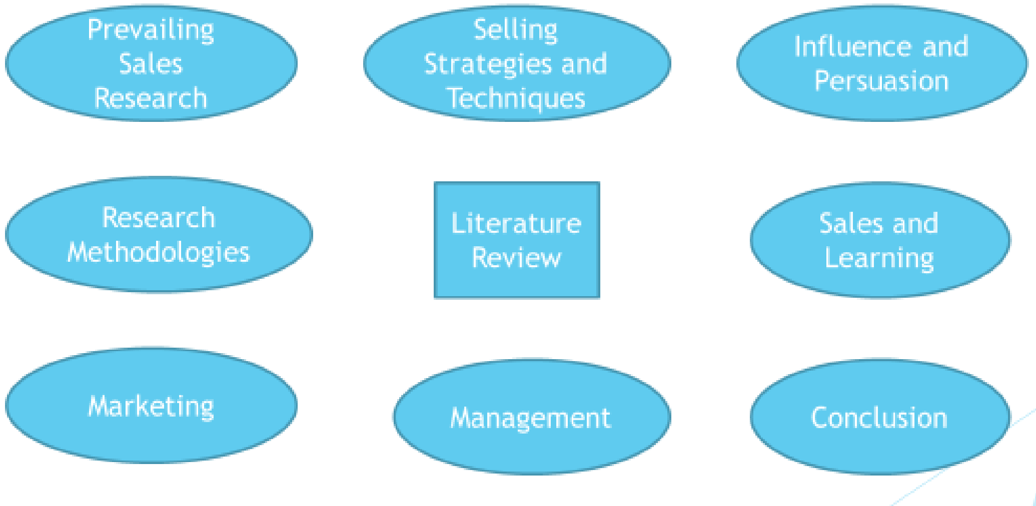
Literature Review

2.1 Introduction

The literature review was designed to help frame the area within which the qualitative and quantitative research was conducted. Different perspectives often generate insights that are beneficial when conducting research. Changing market dynamics, technology change including advancements such as the internet, and customer orientation has necessitated that updated knowledge be obtained to guide how best to navigate within the new paradigm. Pragmatic evidence is being demanded to understand the complexities of sales interactions internally and externally. Knowledge also helps in comprehending where issues lie in employee retention and which specific methodologies should be employed within what contexts.

The literature was reviewed not only within sales works but through the lens of other disciplines and non-disciplines. Figure one illustrates how the literature review was organized. Prevailing sales research reviews the historical sales materials sourced from some of the primary influencers of sales doctrine over the past four decades. Influence and persuasion topics are next, and they show how human behaviour studies can point out how to stimulate desired actions. Sales and learning studies analyse how learning orientation can impact sales and how training in sales can drive sale success. The marketing section discusses how market orientation can affect sales performance. The managerial section reviews how management actions can influence sales performance. Selling strategies and techniques looks at what makes a sales person effective in terms of overall strategies and techniques employed to achieve sales success. Research methodologies discusses the variety of methodologies available to conduct research and selects the best one to answer the research questions. The conclusion discusses what I have learned and the significance of the research. The purpose of reviewing these varied materials was to garner insights, identify relevant learning elements, and contribute to the foundation of skills being developed.

Figure 1 – Literature Overview



2.2 Prevailing Sales Research

No review of literature on sales skill components would be complete without first looking at some of the keystone books such as "SPIN selling", "Solution Selling", "Strategic Selling" and "Challenger Sales".

SPIN Selling

A change relative to sales research occurred when Rackham (1998) and his team developed their sales skills needs scope from existing models. Their four-stage sales call includes preliminaries, investigating, demonstrating capability, and obtaining commitment. "SPIN" is a questioning methodology and process that has continued to evolve. It centers around questions that relate to the customer's situation, problem, implication(s) of problem, and need payoff if problem is resolved (Rackham, 1988). The Miller Heiman Group (2016) validated that sales performers need to listen more than they speak and employ methodologies to encourage dialogue. They state that the emphasis for understanding, collaborating and partnering with the buyer, and asking questions while listening more and talking less, still makes “SPIN Selling” relevant. Huthwaite (2013) concurs and expresses that value must be created not just communicated. He clarifies that it is not enough to communicate the value of your product or service, salespeople need to have buyers recognize their needs, provide viable options, identify a resolution to their concerns, and ultimately demonstrate an implementation that minimizes risk and meets their requirements.

Strategic Selling

Heiman, Sanchez, and Tuleja (2005) developed a methodology of strategic selling that works well with programs such as “SPIN Selling”. Their methodology focuses on buying influences, action plans, red flags, leveraging from strength, response modes, win results, ideal customer profiles, and a sales funnel. They teach one how to position oneself within an account to enhance the chance of closing the sale. A recent review by Lawson (2015) found “The New Strategic Selling” to be a great macro selling book with a methodology that is generic enough to fit all organizations. Picker (1986) reviewed and supported the value of the information but did suggest that there was not a great deal of new information. He found their approach valuable because of the structured thinking on how to handle sales that it provides.

Solution Selling

Eades (2004) built upon this back drop and created a map, methodology, and sales management process to help salespeople define and diagnose customer problems, and create visions biased to the selling companies’ offerings and capabilities. This solution selling process includes performing an opportunity assessment, pre-call planning and research, stimulating interest, defining a critical customer issue, and diagnosing and creating a vision skewed towards your solution. It progresses further, and deals with negotiating access to power, competitive strategy, and reengineering the vision with the differentiators. The final steps are developing and managing an implementation plan, reaching final agreement, measuring success criteria, and leveraging that success for future business. A review of “Solution Selling” by Dayton (2017) supports the value of Eades’ work but suggests it does not necessarily provide new information. He does add that Eades has made the concept of solution selling more understandable by streamlining the entire process and providing time-tested insights into its guiding principles.

Challenger Sales

The “Challenger Selling” sales continuum is based upon the premise that buyers have changed, and this necessitates a different approach (Dixon & Adamson, 2011). They feel relationship selling is declining mainly due to customers’ better preparation and knowledge. There is an expectation from customers that salespeople teach them something that brings value to their organization. This has become mandatory for successful selling. The authors say that the optimum response to this new paradigm is the challenger sales strategy which involves teaching something new by providing a unique perspective, tailoring the message to ensure resonance, and finally to take control of the sale. The reviewers are not all positive on this new methodology. One example would be James (2013, p.1), who is blunt in calling the Challenger Sale a “fairly old school rehash of ideas that have been around since the days of the typewriter”.

2.3 Influence and Persuasion

Interpersonal communications, behavioural sciences, learning, and leadership research have produced relevant information about what sales personnel need to know. A range of variables that can impact sales performance was yielded when reviewing the research of authors that view how humans think and interact and then reflecting on how this can influence human behaviour.

Interpersonal and Communication Skills

Communication skills are goal-directed behaviors used in face-to-face interactions (Hayes, 2004). Such an approach involves diagnosing the social situation, identifying the action to bring about a desired result, and translating this prerequisite into an effective performance. He suggests that the focus should be on relevant interpersonal skills such as listening skills, verbal and non-verbal communication, interviewing skills, presentation skills, helping approaches, effective communication skills, asserting and influencing skills, negotiating, working in group techniques, and managing relationships. Pink speaks in terms of defining the quality of the problem that is found as it is the forerunner of the quality of the solution that is attained. He recommends that good salespeople be good at asking questions, listening, uncovering possibilities, surfacing latent issues, and finding unexpected problems (Pink, 2013).

Behavioral Sciences and Learning Skills

Behavioral sciences encompass a broad range of topics. McShane, Steen and Tasa (2009) discuss personality, self-concept, values in the workplace, and values across cultures and ethical behaviours. They conclude they all have an impact on interpersonal interaction and ultimately successful communication with a client. These concepts would include emotions in the work place, emotional intelligence, team dynamics, communication, leadership, power and influence in the workplace, how to deal with conflict and negotiation, and work-related stress. For Pink (2013), being able to handle rejection is important in the sales world. He suggests it is possible to influence this human tendency to be dejected, and techniques such as interrogative self-talk, positivity, and having an optimistic explanatory style, will help.

People have both conscious and unconscious attitudes and they are sometimes different (Gladwell, 2007). Sensation transference, non-verbal communication, and processes that understand that there needs to be a balance of deliberate and instinctive thinking, are all concepts that need to be comprehended when looking at influencing and persuading customers. He emphasises this is particularly important in the creation of first impressions. Understanding the cognitive process allows salespeople to better understand how to craft impactful messaging and strategies (Kahneman, 2011). Powell, Honey, and Symbaluk (2106) discuss in a broader sense how learning and behaviour mesh relative to influencing and persuading behaviours. Schedules and theories of reinforcement, observational learning, and rule-governed behaviour can all influence behaviours.

Leadership Skills

Effective leadership comes from enabling others to reach their potential (DePree, 2011). He postulates that leaders must take a role in developing, expressing and defending civility and values, and leaders should strive to make a meaningful difference in the lives of those they lead. Salespeople need to lead both internal teams and customer teams. Sometimes they have formal leadership and can direct activities but many times they only have informal leadership and must influence and persuade.

2.4 Sales and Learning

Understanding learning and performing testing on specific teaching methodologies is difficult with the myriad of variables inherent within a sales paradigm. This section examines the impact on sales performance by formal education, sales person entrepreneurial orientation, and sales departments entrepreneurial orientation. See below summaries of articles reviewed and a conclusion that comments on what to interpret from them.

2.4.1 Sales Education and Sales Success, and Sales Person Learning Orientation's Impact on Learning

A seminal study to look at sales education efficacy was conducted by examining the relationship between sales education and sales success. This study was developed to try to understand whether investments in learning sales pay off. The research starts by looking at the relationship between sales education from a college of business and sales performance. They assessed the relationship between what is learned in university sales programs and the actual selling behaviours of recent graduates from these programs. Their performance was compared to students who did not receive formal sales training education in their undergraduate degrees. The authors also investigated the relationship between sales education and extrinsic and intrinsic performance indicators (Bolander, Bonney, & Satornino, 2014).

The relationship between university formal education and increased selling behaviours was supported. Program graduates are likely to generate higher revenues and have lower retention costs. This improved result may be caused by better sales skills sales or just a better attitude on how they view their job.

2.4.2 Antecedents and Performance Implications of a Sales Department's Learning and Entrepreneurial Orientation in SMEs

Understanding how formal education impacts performance was discussed above but there is also the orientation of the sales departments and sales performers to consider. This study focussed on entrepreneurial orientation as it relates to sales departments entrepreneurial orientation (SDEO) and sales peoples learning orientation (SLO). The researchers study how these orientations reflect on sales performance (Spillecke & Brettel, 2014). Functional level analysis from this study related to three areas. The first area included is the sales departments entrepreneurial orientation relative to sales performance. The second was sales managements view on an individual's sales learning orientation on both salesperson performance and its impact on the sales department's entrepreneurial orientation. Lastly, the impact of the internal work environment by including informal sales controls on both the professional and cultural in the internal environment as well as the external work environment drivers of SDEO and SLO (Spillecke & Brettel, 2014).

While several hypotheses were proven the one most relative to learning is that sales department entrepreneurial orientation is a key sales performance lever. Sales learning orientation only indirectly fosters sales performance through driving the sales department's entrepreneurial orientation (Spillecke & Brettel, 2014). This study did not show that sales learning orientation by itself was significant in driving sales performance.

2.4.3 Conclusion Sales and Learning

Learning positively impacts sales performance. At the sales department level entrepreneurial orientation does as well. What cannot be stated are which aspects of sales training has the most impact without tightening up the criteria for analysis and conducting either experimentation, or statistical analysis on organizations who have instituted change. This could entail measuring and comparing results utilizing control groups. The relationship between university formal education and increased selling behaviours appears proven. Whether it is improved attitude toward their specific job or just better sales skills sales program graduates are likely to generate higher revenues and reduced retention costs.

2.5 Marketing

One aspect of marketing that plays a heavy role with respect to sales is the effects of sales market orientation. Sales force creativity and innovation can positively influence sales and is impacted by marketing philosophy and practise. See below summaries of articles reviewed and a conclusion that comments on what to interpret from them.

2.5.1 Effects of Sales Force Market Orientation on Creativity, Innovation, Implementation and Sales Performance

Market orientation is what guides organizations to success or failure and is the heart of marketing thinking and practise. Understanding how the dimensions of market orientation which are customer orientation, competitor orientation and inter-functional coordination, and impact innovation is the thrust of this article (Wang & Miao, 2015).

The authors found that:

- The positive relationship between competitor orientation and sales force creativity is stronger when outcome interdependence is higher.
- The positive relationship between creativity and implementation is stronger when the sales organization operates in a more innovative organizational culture (Wang & Miao, 2015).

Outcome interdependence has moderating effects on two of the three marketing orientation effects in the sales force innovation process. This analysis has provided additional insight to traditional studies by investigating marketing orientation at the dimensional level because typically aggregate constructs were studied. In an innovative organizational culture creative ideas will be more likely implemented which has a positive effect on sales performance. The study does highlight the critical role of sale force innovation in building competitive advantage and achieving higher sales performance (Wang & Miao, 2015).

2.5.2 Conclusion Marketing

Wang and Miao (2015) suggest sales force market orientation and outcome interdependence has moderating effects on two of the three marketing orientation effects in the sales force innovation process. In an innovative organizational culture, creative ideas will more likely be implemented. This has a positive effect on sales performance. The study emphasizes the critical role of the sales force in providing innovation to build competitive advantages and achieve higher sales performance.

2.6 Managerial Impact

Management has a strong impact on sales performance and turnover. Two primary areas of study in this area are described herein. Researchers endeavoured to discover the optimal methods and tools to drive higher revenues through sales behaviours. Reducing turnover by understanding how best to work effectively with salespeople is the other thrust of research within this arena. What follows is a review of some primary research and conclusions derived from individual studies.

2.6.1 The Influence of Formal and Informal Sales Controls on Customer-directed Selling Behaviours and Sales Unit Effectiveness.

The authors of this study look to “develop a comprehensive model that delineates the influences of formal and informal sales controls on adaptive selling and customer orientated selling and, through them, on sales unit effectiveness” (Guenzi, Baldauf, & Panagopoulos, 2014, p786).

A summary of findings shows that:

- Output and cultural controls improve sales unit effectiveness both directly and indirectly.
- Process and professional controls improve effectiveness only indirectly by stimulating adaptive selling behaviours.
- Adaptive selling behaviours fully mediate the effect of customer orientation selling behaviours on sales unit effectiveness (Guenzi et al., p.791, 2014).

The implications to a sales manager are that they must emphasize both formal and informal controls to optimize sales performance. To foster client orientated sales and adaptive selling the controls call for different types of control mechanisms. Client-orientated sales behaviours call for output and cultural controls and adaptive selling calls for more professional and process controls (Guenzi et al., 2014). The results suggest client-oriented selling by itself does not drive improved performance unless it impacts adaptive selling. “Companies need to install proper mechanisms that will foster adaptive selling behaviours such as training sessions or on-the-job training initiatives by sale supervisors” (Guenzi et al., p797).

2.6.2 An Assessment of Needed Sales Management Skills

A 2014 study serves to update the understanding of what skills are required by successful sales management as the sales world continues to evolve. Fifteen skills were identified as important with the interpersonal skill building trust with salespeople considered the most important factor. Management understanding of organizational strategy was perceived to be the second most important skill. Building effective teams and providing effective feedback were third and fourth respectively (Powers et al., 2014). Grouping the skills using factor analysis resulted in managers perceiving the knowledge skills and ability of managing sales as interpersonal, strategic, and technical. Interpersonal skills contained the most skills with 8 out of the 15 and was the highest rated. Four of the top five rated skills resided in this category as well. Strategic held second ranking and technical skills ranked last (Powers et al., 2014).

Other findings would include females placing more importance on interpersonal and strategic skills than did males. Level of management showed no significant differences between job titles on the three conceptual skills. The high sales group ranked the importance of new technology, company strategy, and sensitivity to cultural issues higher than the average performance group. The higher performance group also ranked the skill of making decisions consistent with company strategy higher than the average performing group. Lastly, they found no skill dimension differences based upon company size (Powers et al., p.218).

2.6.3 Salesperson Directive Modification Intention: A Conceptualization and Empirical Validation

McAmis and colleagues begin their study with respect to salespeople by identifying them as boundary spanners as they work with customers. The researchers try to understand why salespeople often ignore or modify organizational directives and hypothesize that a salesperson's motivations would include customer, organization, and self-focussed motivations (McAmis, Evans, & Arnold, 2015). Two theories guided their analysis. Agent theory is the first, which postulates that there exists information asymmetry between the principal and agent and that the behaviour of the agent is guided by self-interest. The second theory is that cognitive dissonance forms the core of directive modification intention. The inconsistent view of information from what they know versus new information causes employees to experience dissonance in reaction to organizational information and/or directive and intentions to resist the change manifest themselves (McAmis et al., p.206).

Concern for the possible impact of directives on the customer, organization or themselves, provide motivations to ignore directives. Agency theory suggests salespersons are risk averse and do not want to change the relationship with the customer as it may be detrimental to their relationship and or sale. Organization directives that boundary spanners perceive are not realistic or feasible will also cause resistance. The introduction of a directive that disrupts their sales process prompts feelings of dissonance that come with transformation. (McAmis et al., 2015).

The three hypotheses that were developed and subsequently proved were:

- Customer relationship importance will positively affect a) customer-focussed directive modification intentions and b) organization-focussed directive modification intentions.
- Organizational commitment will positively affect organization-focussed directive modification intentions.
- All forms of directive modification intentions will positively affect employee satisfaction (McAmis et al., p.214).

Understanding how the salesperson views directives through the lens of their motivations should help managers position new directives to encourage salesperson adoption. All deviations from directives are not inherently bad. Sometimes the sales representatives are making the right call. Managers should try to understand the motivations for not adopting directives before deciding on how to manage the deviation. Organizations may even consider creating frameworks rather than specific directives to take advantage of sales person experience and capabilities. Managers should carefully plan new initiatives to optimize adoption rates.

2.6.4 Are Good salespeople Born or Made? A New Perspective on an Age-old Question: Implicit Theories of Selling Ability

An interesting perspective was taken by this group of authors as they examined the innate versus can be taught debate from an objective viewpoint. Subjective beliefs impact the performance environment and are called implicit theories. These two-mind sets can influence how salespeople behave with respect to motivation and performance (Novell, Machleit, & Sojka, 2016). The social cognitive model developed by Dweck and Legget (1988) helps explain why people in similar performance situations act very differently. Implicit theories are the cognitive trigger for these differing response patterns (Novell et al., p.310).

The authors conducted two studies. Results of study 1 concluded that a sales person is born rather than made. Study 2 suggests "that an individual's mere belief about selling ability being born (entity ITSA) versus made (incremental ITSA) can influence a host of sales related outcomes, including the tendency to avoid feedback that is designed to improve performance". It also suggests that when hiring, it is important to hire those who have a high ITSA score as they will more likely to be successful, and thus, minimize hiring and replacement costs (Novell et al., p.316, 2016).

2.6.5 Influence of Job Fit, Perceived Support, and Organizational Identification in the Sales Force: An Analysis of Antecedents and Outcomes

The analysis on the level of support sales people see from their sales manager and the organization and how it relates to turnover is an important one. In addition to studying the aforementioned, the authors look at how the degree of salesperson's identification and fit with organizational goals impacts their intention to leave (DeConinck, DeConinck, & Lockwood, 2015).

Supervisor support is positively related to sensed organizational support which minimized turnover. Organizational identification influences employee attachment to their employer. Salespeople who associate with their company are psychologically tied to them and less likely to leave their position. Lastly, job fit influences turnover. Job fit is influenced by organizational identification (DeConinck et al., 2015). A good job fit minimizes turnover.

2.6.6 Better Together: Trait Competitiveness and Competitive Psychological Climate as Antecedents of Salesperson Organizational Commitment and Sales Performance.

This paper assesses the direct and interactive effects of trait competitiveness and competitive psychological climate on organizational commitment and sales performance. Trait competitiveness refers to personal characteristics such as salespeople competing amongst themselves for compensation, promotions, recognition, and status. The study also evaluates continuance commitment negative moderation of the affective commitment-sales performance relationship (Schrock, Hughes, Fu, Richards, & Jones, p.351, 2016).

Results showed trait competitiveness is positively related to affective commitment and normative commitment but has no significant relationship to continuance commitment. Competitive psychological climate is negatively related to continuance commitment (Schrock et al., p.353-,2016).

The research showed a positive direct relationship between competitive constructs and performance but only continuance commitment has a direct relationship with performance among the commitment variables (Schrock et al., 2016). The relationship between trait competitiveness and sales performance is positive when psychological climate is high. When competitive psychological climate is low the relationship with competitiveness and sales performance is negative but not significant. Affective commitment's effect on sales performance is positive when continuance commitment is low, but non-significant when continuance commitment is high (Schrock et al., p.354, 2016).

To ensure optimum effectiveness sales managers should "actively recruit salespeople with high trait competitiveness while fostering a competitive organization climate" (Schrock et al., p.359-360). An affective climate, emotional allegiance, and association with the organization also positively impacts sales performance. This occurs unless there are high levels of continuance commitment, which refers to an opportunity costs of departing the organization, and this manifest itself in doing the minimum to stay employed.

2.6.7 A Field Experiment on the Effects of Benchmarking and Goal Setting on Company Sales Performance

The authors of this study ran three experiments to compare three strategies. Internal benchmarking and goal setting, either big bang or small wins, were compared. Their aim was to create an experiment that contained benchmarking and then compare the effectiveness of the it with goal setting. They assumed that benchmarking was more likely to be more effective than goal setting. (Mann, Samson, & Dow, 1998).

Results showed benchmarking with the highest growth, then the control, "small wins" groups, and then "big bang" (Mann et al., p.84). Benchmarking had a larger effect on sales than the other two combined. The difference was mainly due to the dominance of benchmarking over the "big bang" group. The hypotheses that the three interventions showed significantly better performance than the control group was supported by benchmarking but not for "small wins" or "big bang" (Mann et al., p.87).

The findings were modest, but the authors did highlight that "benchmarking offers something more than goal evaluation and goal setting, namely the motivational and informational benefits of social comparison and knowledge of best practices" (Mann et al., p.94).

2.6.8 Conclusion Managerial

Maintaining a sales force and minimizing turnover results from a combination of how effective you make the salesperson and how they feel about management. Much analysis is predicated upon the various tools to manage staff to ascertain the optimum way to do so. Understanding what management skills work best, how best to influence salespeople, what drives sales people, and what factors influence sales people in terms of retaining them, provides powerful information.

Directed Selling Behaviours

In a study of the influence of formal and informal sales controls on directed selling behaviours and sales effectiveness Guenzi et al. (2014) illustrate that output and cultural controls enhance sales performance. Process and professional controls impact effectiveness indirectly by inspiring adaptive selling behaviours, which fully mediate the effect of customer orientation selling behaviours on sales unit effectiveness. Powers et al. (2014) say female managers value interpersonal and strategic skills more than men did. The higher performing managers ranked new technology, company strategy, and sensitivity to cultural issues, higher than the average performing group. They also felt the skill of making decisions consistent with company strategy was more valuable then men did.

Impact of Directives

McAmis et al. (2015) state understanding how the salesperson views directives through the lens of their motivations should help managers to position new directives to encourage salesperson adoption. It should be noted all deviations from directives are not inherently bad. Managers should try to understand the motivations for not adopting directives before deciding on how to manage the deviation. Organizations may even consider creating frameworks rather than specific directives to take advantage of sales person experience and capabilities. Managers should carefully plan new initiatives to optimize adoption rates.

Sales Personnel Born or Made and Impact of Manager Support

Novell et al. (2016) ask whether sales reps born or are they made and answering this question helps us understand how to plan training and manage salespeople. The current research suggests "that an individual's mere belief about selling ability being born versus made can influence a host of sales related outcomes, including the tendency to avoid feedback that is designed to improve performance "Novell et al., p 316). He also suggests that when hiring, it is important to hire those who have a high belief in that they have natural ability as they will more likely be successful thus minimizing hiring and replacement costs. Deconinck et al. (2015) stress that the level of support salespeople recognize from their sales manager and organization, and how it relates to turnover, is very important. Perceived supervisor support is positively related to perceived organizational support which minimizes turnover. Organizational identification influences employee attachment to their employer. Salespeople who connect with their company are tied to them and less likely to leave their position. Job fit influences turnover. Job fit is influenced by organizational identification as well. A good job fit minimizes turnover.

Trait Competitiveness and Competitive Climate

Trait competitiveness and competitive psychological climate impact salesperson's organizational commitment and sales performance. To ensure optimum effectiveness, sales managers should "actively recruit salespeople with high trait competitiveness while fostering a competitive organization climate" (Schrock et al., 2016, p.359-360). They declare an affective climate also positively impacts sales performance. This is unless the salesperson believes highly that leaving the organization would be costly. They would then do the minimum to stay employed.

Impact of Benchmarking

Benchmarking and goal setting have long been suggested to influence sales performance. "Benchmarking showed the highest sales growth and offers something more than goal evaluation and goal setting, namely the motivational and informational benefits of social comparison and knowledge of best practices" (Mann et al., 1998, p.94). Understanding how to motivate your personnel, what is important to them, what tools are most effective, what types of people should a manager be looking for to hire, and how best to support them, will minimize turnover and maximize sales.

2.7 Selling Strategies, Techniques, and What Makes a Salesperson Effective

Selling is made up of the person who sells, the customer, and the variables that interact to facilitate a sale. This area of study is made up of many components. Research has been extensive on human motivations and their impact on sales. There have been some researchers who looked at the tools such as a proposal or sales contest to see how to be more effective. The interface between the customer, the company, and the salesperson are important and has been studied. Specific techniques such as cross selling, influence tactics etc. garnered interest and have been studied. Interpersonal skills including items such as listening were evaluated. Samples of these articles are reviewed below to showcase the types of research completed to date and how it has identified important aspect of the sales continuum. These articles also discuss how these variables can be manipulated to drive greater sales and minimize turnover thus keeping replacement costs down. A conclusion follows that reflects how this research impacts sales effectiveness.

2.7.1 An Empirical Investigation of Critical Success Factors in the Personal Selling Process for Homogeneous Goods

The authors studied 51 selling techniques to evaluate which techniques were prevalent in the top performers and which were in the bottom salespeople who sell homogeneous products. Using critical success factors to study what selling techniques are important to sales success was how they approached this research (Dwyer, Hill, & Martin, 2000).

The significance of this study is that there are critical success factors that distinguish low performers from high performers (Dwyer et al., 2000). High performing salespeople were apt to use the 'Centers of Influence', examine records, and utilize public executions techniques. Low performers were more likely to use the cold call specialists, non-competing salespeople, and pre-notification to selling. Top performers used the help prospect visualize the offering presentations, while the low performers utilized the product benefit approach and used partially standardized sales presentations. Overcoming objections was handled by high performers utilizing silence while the low performers were typified by comparative methods and single obstacle close (Dwyer et al., 2000). A synopsis of the results shows that high performers used a customer orientation focus. Low achievers took a more sales orientated approach. (Dwyer et al., 2000).

2.7.2 Critical Success Factors in the Personal Selling Process (An Empirical Investigation of Ecuadorian Salespeople in the Banking Industry)

Building on Dwyer's work the authors examined the selling techniques that differentiated the top achievers in the Ecuadorian banking industry. They utilized a multi-rater approach with both self-ratings and supervisor ratings. They reviewed critical success factors (CSF's) which are tasks or attributes that most strongly drive performance. The question they addressed was "which are the selling techniques that differentiate top and bottom performing salespeople of banking products and services in a Hispanic setting" (Jaramillo & Marshall, 2004, p. 9-13)?

Five significant critical success factors were identified. Salespeople who are most successful engage in:

- Organizing or participating in public seminars or company trade shows.
- Approaching the prospect by opening with a statement about themselves, the name of their company, and the name of the person who referred them to the company.
- Talking the prospects language, using short and non-technical words in their sales presentation.
- Clarifying the product benefits via demonstrations, competitive comparisons or satisfied customer testimonials.
- Periodically checking with the customer to ensure that they continue to be satisfied with their purchase (Jaramillo & Marshall, p.22).

2.7.3 The Good, the Bad and the Effective: A Meta-analytic Examination of Selling Orientation and Customer Orientation on Sales Performance

This study synthesized research from 1982-2013 to provide understanding of the history and impact of both customer orientation (CO) and selling orientation (SO). Sales orientation and customer orientation are two contrasting orientations that typically decide how salespeople interact with customers. The authors wanted to compare but also review how adaptive selling impacts sales performance relative to these two orientations. They did postulate that caring about oneself and caring about customers can be accomplished at the same time (Goad & Jaramillo, 2014). They developed a theoretical model that relied on principles from goal orientation theory, interpersonal motive models, and adaptive selling (Goad & Jaramillo, 2014).

One of the results they found was customer orientation has a direct and positive consequence on salesperson performance. There is also a significant impact of CO through utilization of adaptive selling. Salespeople who care more about the customer will be willing to take the time to listen to them and respond to customer demands. They found that the impact on CO as a success factor was reduced if the salesperson could not adjust the selling points and their actions in response to customer circumstances. Adaptive selling was important to sales as it helps with CO. Adaptive selling negates the impact of SO on sales outcomes. Higher performance occurs when adaptive selling is utilized with either CO or SO (Goad & Jaramillo, 2014). Learning orientation precedes SO and adaptive selling. The wish to learn translates into efforts directed at meeting customer needs. Learning orientated people are less likely to negatively impact customer satisfaction. The authors surmise that over time learning orientated people will likely achieve higher performance. SO was positively impacted by performance orientation. Selling orientated routines are damaging only when the salesperson serves business customers. Selling orientated behaviours when dealing directly with the consumer are not harmful to sales performance (Goad & Jaramillo, 2014).

2.7.4 The Impact of Salesperson Customer Orientation on the Evaluation of a Salesperson's Ethical Treatment in the Salesperson, and Intentions to Purchase.

This study assessed whether a salesperson's relational customer orientation, compared to a functional orientation, could trigger improved evaluations of a salesperson's ethical treatment of a customer, increased trust in the salesperson, and stronger intentions to purchase (Bateman & Valentine, p. 125, 2015).

The following hypotheses were proven. A relational selling approach can influence customers as they believe that salespeople been honest. A relational approach can create trust in the salesperson and can increase the intent to buy of the consumer. Increased belief in the ethics of the salesperson leads to greater trust and thus increased sales. Finally, trust in salespeople drives an increase in customer's sales intents (Bateman & Valentine, 2015).

2.7.5 Salespersons Empathy as a Missing Link in the Customer Orientation Loyalty Chain: An Investigation of Drivers and Age Difference as a Contingency

This study distinguishes between customer orientation and customer behaviour. The authors shed light on customers' perceptions as related to salesperson empathy to show it as a missing link between customer orientation and customer related outcomes. This study also investigates whether to look at customer orientated attitude and customer related behaviours as independent hypotheses. The authors also examine age differences in salesperson-customer groupings on diminishing the customer orientated attitude and behaviour with customers. This study observes salespersons environment perceptions as precursors of their customer orientated attitudes (Gerlach, Rödiger, Stock, & Zacharias, 2016).

Results included an age inclusive climate positively affects customer perceptions of sales person's empathy. if a salesperson is customer orientated attitude it positively affects their customer orientated behaviour. Salesperson's customer orientated attitude positively affects customer perceptions of sales person's empathy which positively affect customer satisfaction. In turn, customer satisfaction positively affects customer loyalty. The authors have tied together a compelling chain to achieve to customer loyalty. They also demonstrated that the relationship of salesperson's empathy with their customer orientated attitude is stronger for salesperson-customer groupings with large age differences. (Gerlach et al., 2016).

2.7.6 Selling Behaviours and Sales Performance: The Moderating and Mediating Effects of Interpersonal Mentalizing

This study explored the relationships among learned behaviours such as adaptive selling and customer orientation, and personal dispositions such as interpersonal mentalizing to predict sales performance (Chakrabarty, Widing, & Brown, p.112, 2014). To be successful sales people need to have the ability to ascribe mental states to themselves and customers. Salespeople abilities to infer what a customer is contemplating is called interpersonal metalizing. The authors utilized a sales force-specific Theory of Mind (ToM) scale that encompassed rapport building, detecting nonverbal cues, taking a bird's-eye view, and shaping the interaction (Chakrabarty et al., 2014).

Salespeople's theory of mind tempered the effects of selling behaviours on sales performance. and toned down the effect of customer-orientated selling on sales performance. Positive ambience mediated the relationship between selling behaviours and sales performance. The sales people got more successful increasingly due to their ability to positively shape the customer/sales person interactions by creating a positive ambience (Chakrabarty et al., p. 118, 2014). The impact of noticing non-verbal cues has salespeople automatically using their intuition to consider thin slices of customer’s nonverbal cues to garner customer attitudes and this improved performance. The study showed that salespeople’s learned dispositions with respect to selling behaviours, and autonomous abilities relative to interpersonal mentalizing, complement each other in affecting sales productivity (Chakrabarty et al., p. 119, 2014).

2.7.7 The Double-edged Effects of Emotional Intelligence on the Adaptive Selling-Salesperson-Owned Loyalty Relationship

This study looks at how a salesperson’s emotional intelligence affects adaptive selling and customer outcomes. The relationship between EI (emotional intelligence), AS (adaptive selling), and salesperson loyalty are observed. They used salesperson-owned loyalty (SOL) as an outcome variable. It pertains to customer willingness to pay premium prices, selling effectiveness, and sales growth. Lastly, the study scrutinises how managing emotions may help salespeople achieve SOL (Chen & Jaramillo, 2014).

Emotion regulation is the tool by which individuals sustain positive psycho-physiological constructs that benefit performance. This requires salespeople to identify both emotions of the customer and their own. They use this knowledge to kelp formulate an adequate response (Chen & Jaramillo, 2014). Emotion regulation creates a high level of SOL when the salesperson can customize the business proposition to meet customer requirements and control their emotions. Salesperson emotion can have a negative impact on SOL if not controlled. Salespeople can engage in adaptive selling behaviours more effectively and efficiently if they perceive customer emotions accurately (Chen & Jaramillo, 2014). Salesperson-owned loyalty was significantly related to customer satisfaction and perceived value.

2.7.8 Contingent Cross Selling and Upselling Relationships with Performance and Job Satisfaction: A MOA-theoretic Examination (Motivation-Opportunity-Ability)

The authors look at capturing the behavioural tendencies of salespersons towards cross selling and upselling and embedding them within a motivation-opportunity-ability (MOA) theoretical framework. This is an interesting analysis as these sales approaches are often utilized and often fail. This analysis helps explain why and provides insights that may be useful in strategies going forward. Their approach helps to understand why failure can occur by capturing the traits and behaviours necessary to engage in cross selling and upselling. These would include measuring salesperson orientation and abilities and assessing salesperson success and what they are thinking as the salesperson cross sells and upsells (Johnson & Friend, 2015).

It appears cross selling and up selling are different strategies with different philosophical foundations. This reinforces the need to treat them differently when attempting to understand their differing dependent effects on sales person attitudes. An example is that higher levels of customer orientation mean that when cross selling there will be improved job satisfaction. The opposite is true with respect to upselling. The authors suggest this may be traced back to salespeople view upselling as being more sales orientated than customer orientated. This perspective may result in poorer levels of job satisfaction (Johnson & Friend, 2015).

2.7.9 Effect of Salespeople's Acquisition – Retention Trade-off on Performance

This study examines the impact of how much time is allocated towards gaining new customer versus dealing with the existing ones. They examined the proportion of time dedicated to getting customers rather than retaining customers on sales performance for a financial services firm. They extended the research by including many factors within the firm that are important to understanding the allocation decision (Carter, Henderson, Arroniz, & Palmatier, 2014).

The authors argue that there is no optimum time allocation model for sales people. They recommend that the amount of time and effort spent in acquisition versus retention orientated activities be tailored to the individual salesperson, his/her manager, and their prospect portfolio (Carter et al., 2014).

2.7.10 Which Influence Tactics Lead to Sales Performance? It is a Matter of Style

The authors analysed whether influence tactics affect a salesperson's performance. They extended this research by identifying which influence tactics can be used to predict sales performance and which ones are the most predictive. They demonstrate that the effect of the tactics on performance varies across sales people. They discuss which of these patterns of influence are most predictive. The writers looked to extend current research by analysing salespeople's use of influence tactics to sales performance. This helps determine if salespeople differ in how well they use various influence tactics. How the tactics were used they postulated is more important than the how much they are used (Plouffe, Bolander, & Cote, 2014).

The authors studied the effectiveness of the tactics, not degree of use. They found individual differences among salespeople. The differences were within the salesperson's ability to effectively use various tactics, what sales tactics were used, the product or selling situation, and customer differences. They found that simply employing a tactic does not guarantee an increase in performance. Knowing in what way and when to use a specific tactic may be the most important determinate of performance (Plouffe et al., 2014).

2.7.11 The Impact of Sales Contests on Customer Listening: An Empirical Study in a Telesales Context

This study is based on a natural field experiment. It examines the effects of a sales contest on customer listening. During this process four dimensions of listening were identified including passive, active, adaptive, and assertive listening. These are associated with the process of listening which involves hearing, processing, and responding. The study looks at the impact a sales contest has on these four dimensions of customer listening on telesales agents (Koehl, Poujol, & Tanner, 2016). Adapting to a customer is key to building strong relationships whether adapting a sales presentation to a customer's needs or adjusting the style of the presentation to a customer's social style or both. Customer listening is a fundamental to adaptation. A sales person cannot be customer orientated unless they listen. This study focusses on examining the effects of employing sales contests on customer listening (Koehl et al., 2016).

The influence of the contest is not uniform across all forms of listening. Listening is negatively influenced by a sales contest. The adverse impact of the sales contest on responding, adaptive listening, and assertive listening are not significant (Koehl et al., 2016).

2.7.12 The Impact of Salesperson Credibility-building Statements on Later Stages of a Sales Encounter

This study investigates customer reaction to two types of credibility building statements that reflect benevolence and expertise. Credibility statements that emphasise benevolence build customer trust in the salesperson while expertise credibility statements are utilized to exhibit competence. By studying the customer's credibility statement reaction (CSR) it provides an opportunity for salespeople to gauge the effectiveness of their selling style (Arndt, Evans, Landry, Mady, & Pongpatipat, 2014).

This research demonstrated the process by which credibility statements influence the tone of the sales encounter. The authors offered three primary insights.

- The match between customers buying style expectations and selling tactics is important in the early stages of a sales cycle but not in later stages (Supported).
- Tactics that elicit a positive customer reaction early in the sales encounter may not elicit a positive customer reaction later (Supported).
- Addressing customer objections well can directly influence customer satisfaction and relationship building (Arndt et al., p.22-24, 2014) (Supported).

The authors also postulated that customer objections are best addressed with benevolence tactics irrespective of the customers buying style (Arndt et al., 2014).

2.7.13 Conclusion Selling Strategies, Techniques and What Makes a Sales Person Effective

Maximizing sales and minimizing turnover is a common theme. This section endeavours to provide a sampling of the types of analysis that impacts how an individual sales person can be more successful. There are many mitigating factors that drive success and the broad spectrum of analysis ranges from the mechanics of a sales, through personal selling skills, selling orientation, and psychological thinking.

Selling Techniques

In the first study examined, selling techniques were reviewed to evaluate which techniques were prevalent in the top performers and which were in the bottom salespeople, who sell homogeneous products. A synopsis of the results shows that high performers met their client needs by taking a more customer orientated focus. Low performers took a more sales orientated approach (Dwyer et al., 2000). Building on Dwyer's work Jaramillo and Marshal (2004) examined the selling techniques that differentiated the top performers in the Ecuadorian banking industry. Salespeople who are most successful engaged in organizing or participating in public seminars or company trade shows. They also approached the prospect by opening with a statement about themselves, the name of their company, and the name of the person who referred them to the company. They talked the prospects language, using short and non-technical words in their sales presentation, clarified the product benefits via demonstrations, did competitive comparisons or satisfied customer testimonials, and periodically checked with the customer to ensure that they continued to be satisfied with their purchase.

Selling Orientation and Customer Orientation

An overall review of studies from 1982 through 2013 conducted by Goad and Jaramillo (2014) relative to selling orientation and customer orientation, and how they related to sales, yielded some valuable results. Customer orientation has a direct and positive effect on salesperson performance. There is also a significant impact of customer orientation through utilization of adaptive selling. Salespeople who care more about the customer will be willing to take the time to listen to them and respond to customer demands. They found that the impact on customer orientation as a success factor was reduced if the salesperson could not adjust the selling messages and behaviours in response to customer situations. Learning orientation precedes selling orientation and adaptive selling. Learning orientated people are less likely to engage in aggressive behaviour that compromise customer satisfaction.

Bateman and Valentine (2015) found a salesperson's selling orientation has a direct impact on sales. A relational selling approach can lead to consumers feeling that salespersons have treated them ethically during sales transactions. A relational approach can precipitate greater trust in the salesperson and can increase the intent to purchase of the consumer. Increased customer judgements about the ethics of the salesperson leads to greater trust in the salesperson and increased sales. Lastly, trust in salespersons has the capacity to increase customer's sales intentions. Gerlach et al. (2016) found that salesperson empathy builds on customer orientation being important. Salesperson's customer orientated attitude positively affects their customer orientated behaviour. Salesperson's customer orientated attitude positively affects customer perceptions of sales person's empathy. Customer perceptions of salesperson's empathy will positively affect customer satisfaction. Customer satisfaction positively affects customer loyalty. There is a convincing chain to customer loyalty. They also found that the relationship of salesperson's customer orientated attitudes is stronger for salesperson-customer dyads with large age differences.

Interpersonal Skills Impact on Customer and Sales Orientation

Chakrabarty et al. (2005) discuss the effect of not only customer and sales orientation but also the salesperson's ability to utilize interpersonal skills on sales performance. The direct effect of detecting non-verbal cues on performance has salespeople automatically using their intuition to look at thin slices of customer's nonverbal cues to collect customer attitudes and this improved performance. Salespeople's learned dispositions, as demonstrated by selling behaviours and autonomous abilities established by interpersonal mentalizing, complement each other in affecting sales productivity.

Job Satisfaction and Cross Selling and Upselling

Job satisfaction is directly related to turnover rates. Strategies of selling such as cross selling and upselling can influence not only sales performance but turnover. It appears cross selling and up selling are different strategies with seemingly different theoretical underpinnings. This emphasizes the need to review cross selling and upselling as independent behaviours and understand their differing related effects on sales person attitudes (Johnson & Friend, 2015). An example is that higher levels of customer orientation accentuate the impact of cross selling on job satisfaction, but the opposite is true with respect to upselling. This may be traced back to salespeople viewing upselling as a form of putting their sales goals ahead of their customer's goals. This perspective may have negative implications to job satisfaction (Johnson & Friend, 2015).

Sales Time Management and Tactics Impact

How a salesperson spends their time when selling is relevant to their success as a salesperson. Do they spend it trying to retain existing customers or do they spend their time identifying new customers, and in what ratio of time? There is optimum allocation model that would work best for all sales people in a company. Carter et al. (2014) recommend that the amount of time and effort applied to acquisition versus retention orientated activities be customized to characteristics of the individual salesperson, his/her manager, and their prospect portfolio. Plouffe et al. (2014) ask, when you are looking to acquire customers what tactics are best? Individual differences among salespeople was very relevant. Specifically, the differences were within the salesperson's ability to effectively use various tactics, what sales tactics were used, the product or selling situation, and customer differences. Simply employing a tactic does not guarantee an increase in performance. Knowing exactly how and when to use a specific tactic may be the most important determinate of performance.

Contests

Contests are often run in sales organizations. The impact is not always positive as it changes how salespeople listen and respond to customers. This has been commonly thought to be true and thus would negatively impact sales. While the influence of the contest is not uniform across all forms of listening, the impact on some forms of listening is surprisingly unimportant when considering short term outcomes. Listening is negatively influenced by a sales contest, though the negative impact of the sales contest on responding using adaptive and assertive listening is not significant (Koehl et al., 2016).

First Impressions

When a salesperson first visits a customer credibility statements are how they form the customer's initial opinion of themselves and their organization. Arndt et al. (2014) declare credibility statements effect the tone of the sales encounter. They further state that matching up the customer's buying style expectations and selling tactics is important in the early stages of a sales cycle but not so in later stages. They further postulate that tactics that elicit a positive customer reaction early in the sales encounter may not elicit a positive customer reaction later. It is important because addressing customer objections well can directly influence customer satisfaction and relationship building. They propose that customer objections are best dealt with by using with benevolence tactics regardless of the customers buying style.

2.8 Methodological Studies on Sales

2.8.1 Research Methodologies Introduction

When reviewing sales research, from the perspective of the business world within the sales industry, we see investigators are often are caught up in anecdotal discussions and perhaps case study analysis. The scientific community has a variety of effective analysis, study techniques, and experimentation methods beyond these. Qualitative methods based upon techniques such as grounded theory, experiments, naturalistic observation, and quantitative measures in sales research will be some of the methods discussed. It is important to showcase how scientific methods have been brought in to temper the traditional attitude of using historical precedent and procedures to decide how to best sell.

Prevalent research philosophy involves testing theory through observed research. Sales analysis often lacked evidence to explain sales related phenomena. Sales scholars need to utilize a theory generating methodological approach with respect to scientific research. The model within which sales are being conducted is changing for customers, sales personnel, and the environment they exist within. Older theories need to evolve, and past research needs to be updated and built upon. This section reviews some methodologies to ascertain how best to gather and analyse the data to answer the research questions. The power of all methodologies is evident and for future research the one, or many, of the others may be selected to add to the findings.

2.8.2 Qualitative Sales Research

One of the more relevant methodologies both in the social sciences and in qualitative sales research is grounded theory (Johnson, 2015b). Johnson goes on to say that qualitative research is more discovery oriented and can uncover themes and hypotheses that are entirely unknown. The increased researcher flexibility and interpretation is what the complexity of sales analysis often requires. Grounded theory is pervasive in social sciences and is a respected and widely used in qualitative sales research.

Johnson (2015b) discusses the general method of comparative analysis (GMCA) which compares facts across cases to assess similarities and differences to discover the generalizability and boundary conditions of a concept. The results are impacted by both the researcher and the participants as the theories being tested are influenced by the researcher. Data collection utilizes theoretical sampling involves selecting sources who know the field intimately both to figure out the research questions and ensure validity of the results. Grounded theory data analysis is essentially a series of coding steps. Strauss and Corbin (1994) utilize an open coding process to identify higher levels major categories, followed by axially coding, which was subsequently used to uncover core phenomena. There is a last coding step called selective coding which unifies all categories around a core category. Since 2003 grounded theory in sales research has continued to grow. Theory borrowing from other fields sometimes does not provide an optimum fit so grounded theory may be a good choice.

2.8.3 Case Study Research

Perhaps a misnomer in that "persuasion with case studies" really revolves around three important uses for case research: motivation, inspiration, and illustration. Some studies center around theories and having case studies to flesh out the story is beneficial. They help to explain conceptual arguments and make it viable for a reader to understand and care about the results (Siggelkow, 2007,p.23). The three Siggelkow (2007) identifies are as follows. The first use is motivation from a case which revolves around helping identify gaps in current research and motivates a research question. The second main use of cases is to inspire new ideas. The third use of cases is to use them as an illustration. Seeing actual examples of constructs can help readers understand how the conceptual argument can be applied to one or more practical settings.

2.8.4 Implicit Measures in Sales Research

Friend and Johnson (2005) suggest that typically research has been explicit in nature involving capturing attitudes and behaviours by directly asking participants pertinent to the constructs of interest. Implicit measures are different in that they employ methods to capture inputs in an indirect fashion. Attitudes can be assessed without direct questioning. Often attitudes and behaviours do not operate on the fully conscious level so utilizing only explicit measures is problematic. The use of implicit measures gathers information in a different manner than explicit, and therefore potentially occasions better results.

An implicit measure can be defined as “the outcome of a measurement procedure that is causally produced by physiological attributes in an automatic manner”. This means implicit measuring “offers the sales researcher the ability to capture implicit attitudes and assess their impact on non-conscious activation of behaviours” (Friend & Johnson, 2015,p.73). They say implicit measures can be split into three broad categories: accessibility based, interpretation based and association-based measures. Being able to access a target concept means the subject can recall the concept and more readily recognize and identify stimuli. Lexical decision tasks, word fragment completion tasks, and modified Stroop test are three sample measures.

Friend and Johnson (2015) define interpretation-based implicit measures with ambiguous stimuli or plausible item responses. These capture systemic response tendencies. Examples of this type of testing would include thematic apperception testing, minor sentence completion, and conditional reasoning test. Testing of this type has been used for salesperson’s assessments of their selling orientation as it studies implicit motivations and helps eliminate bias. The author's state association based implicit measures assess the automatic links between target concepts and memory. Three tests for this area would include IAT, Name-Letter Self-Esteem and Approach-Avoidance Simulation. Uses could include IAT for customer satisfaction, name-letter for self-esteem measurements on positive employee interactions and approach-avoidance for success selling products.

In most sales research, explicit attitudes are typically all that are studied. Implicit attitude studies are nearly non-existent and certainly understudied. Including implicit exploration could open new areas of study and add methodological completeness to research. Implicit measures can even be more valuable than explicit in some constructs. Friend and Johnson (2005) say self-evaluative research, such as the explicit research typically utilized in sales testing, is often biased by attitudes, an unwillingness to admit attitudes, and outright faking. This is not to suggest that implicit research replace explicit research. The "value of indirect measures may lie in enhancing explicit measures rather than replacing them"(Friend & Johnson, 2015,p.75).

2.8.5 Experimentation

A definition of experimentation would be the act, process, practice, or an instance, of making experiments. Experimentation is used to test existing theories or new hypotheses to support or disprove them. An experiment usually tests a hypothesis, which is an expectation about how a particular process or phenomenon works ("Dictionary.com | Meanings and Definitions of Words at Dictionary.com," n.d.). Anderson and Simester (2003) provide an example by manipulating certain variables and observing the results within three field studies in which price endings were changed was conducted. The data yielded information that a price ending in 9 increased demand in all three experiments. Second, the increase in demand was stronger for new items than for items the retailer had sold in previous years. There was also evidence that that prices ending in 9 are less effective when retailers use sale cues. Measuring real customers offers greater validity than laboratory experiments.

Pure experimental analysis is useful in contexts such as the study mentioned above. This example showcased a return on investment with minimal expenditure. Experiments by themselves sometimes find it difficult to handle the more complex realities of studying some of the more sophisticated sales relationships. Experiments are more often in the marketing end of the business where evaluations such as which advertisement was most effective are run. Pure experiments can be part of the analysis in some iteration, but the cost associated with running real time tests in real companies, with real sales forces, is usually prohibitive. This typically means that analysis of existing behaviours or extrapolating from existing databases is preferred. Proving causals and relationships between behaviours is often a case of statistical analysis. This approach can also be applied to experimental results.

2.8.6 Quantitative Sales Research

"Quantitative analysis refers to analysis that aims to understand or predict behavior or events using mathematical measurements and calculations, statistical modeling, and research. Quantitative analysts aim to represent a given reality in terms of a numerical value. Quantitative analysis is employed for several reasons, including measurement, performance evaluation or valuation of a sales technique, and predicting real-world events. In general terms, quantitative analysis can best be understood as simply a way of measuring or evaluating things through the examination of mathematical values of variables. The primary advantage of quantitative analysis is that it involves studying precise, definitive values that can easily be compared with each other" ("Investopedia - Sharper Insight. Smarter Investing", np, n.d.). Where quantitative analysis shines in the sales world is comparing different complex variables that may relate. For example, variables that might most effectively influence a sale or the factors that would mitigate a trend of sales people leaving an organization. Developing constructs to test and then employing quantitative analysis is the preferred methodology in sales analysis to date. Sometimes utilizing this type of research has limitations that utilizing experiments or qualitative methods might alleviate.

2.8.7 Mixed Methods in Sales Research

The two most prevalent methods of research are quantitative and qualitative research. Johnson (p.334, 2015a) says "quantitative methods are generally used to empirically test theory-based hypotheses in a deductive manner with various forms of statistical analysis, whereas qualitative methods are generally employed to generate greater insight and theory in an inductive manner through various non-statistical approaches". Mixed methods refer to "research in which the investigator collects and analyses data, integrates the findings, and draws inferences using both qualitative and quantitative approaches or methods in a single study"(Johnson, p.334, 2015a).

Mixed methods are useful when one approach is insufficient to provide a clear picture and the combination can lead to more knowledge than if just one approach was utilized. This approach is well suited to complex research. Johnson (2105a) used an example of exploring consumer's attachment to celebrities. This study leveraged both types of research to help the researcher "richly describe the focal variable while statistically establishing the linkages among variables" to understand the complex phenomena of human brands. The idea is that quantitative and qualitative approaches, in combination, provides a better understanding of research problems than either approach alone. Most sales research uses mixed methods as a sequential design with qualitative analysis followed by quantitative analysis (Johnson, 2015a,p.343). That is how mixed methods research will be utilized in this thesis.

2.8.8 Research Methodologies Conclusion

There are a variety of methods and methodologies that may be utilized to gather and analyse information. The nature of the analysis required to create a new list of skills and then test it against an organization indicates that both qualitative and quantitative analysis are required. The mixed methods methodology was selected to provide the answers for the research questions.

2.9 Literature Review Conclusion

The viewpoint from which analysis is being conducted has an impact on how results are interpreted. Research from a variety of perspectives may provide optimum results. If a better way is discovered, and proven empirically, the next step would be to go forward with the new strategy but continue to test its effectiveness relative to alternatives. It is important to not be locked in solely on sales strategies. Research should be open to other disciplines and non-disciplines to ensure that the problem is clearly understood.

The world where the seller had more information than the buyer is has passed with the advent of technology such as the internet which educates the consumer. Sales has evolved into a paradigm where honesty, fairness, and transparency are the only viable path. Finding the problem, not the solution, has become the key to success. Sales people must be better at framing the questions to drive to relevant problems (Pink, 2013,p.129). A blend of social sciences provides a meaningful way to understand how to motivate people in general and ultimately is that not what sales is? Some of the sales strategies and techniques from the past need updating.

Successful Sales People Considerations

What is needed to be a successful salesperson is focussing on serving the customer, listening more and speaking less, make interactions more purposeful and personal, recognize the person you are serving, and put yourself personally behind what you sell. To sell is human, understanding how humans interact today will make for a more effective sales strategy (Pink, 2013). Pink goes on to ask when was the last time a sales training asked, "if the person you are selling to agrees to buy, will his life improve"? If this question cannot be answered in the affirmative, salespeople are not going to be successful long term (Pink, 2013,p.220).

How best to motivate salespeople, sales managers, and customers, to maximize performance is an overarching question that pervades sales research. Its underpinnings start with how people's attitudes impact behavioural change. Research must be inclusive of a variety of disciplines and non-disciplines. It must be scientific in nature and provide empirical evidence that support its hypotheses. Only then can this information be used to make decisions on how to best move forward on sales related topics. It is important to continuously monitor strategies and learning techniques as the paradigm within which decisions are made is constantly evolving. Sales research methodologies are important to review as positive changes relative to methods and methodologies employed can impact the value of the results. Reviewing research findings around the relevant topics of sales and learning, marketing, managerial impact, selling strategies and techniques and what makes a salesperson successful, helps us understand how different disciplines and non-disciplines impact sales performance.

2.10 Gaps in the Literature

Gaps in the literature exist within three critical areas. The first is the failure to adequately comprehend the nuances of today's selling paradigm and this results in relevant skills such as social selling being missed. The second is a limited perspective of some researchers, perhaps because they are discipline concentric in their thinking, and thus results can be limited in scope. The third is that research has traditionally been conducted from a corporation's perspective and the voice of the customer needs to be heard. The customer component gap exists both during a sales cycle and the subsequent relationship over time.

Research Methodology

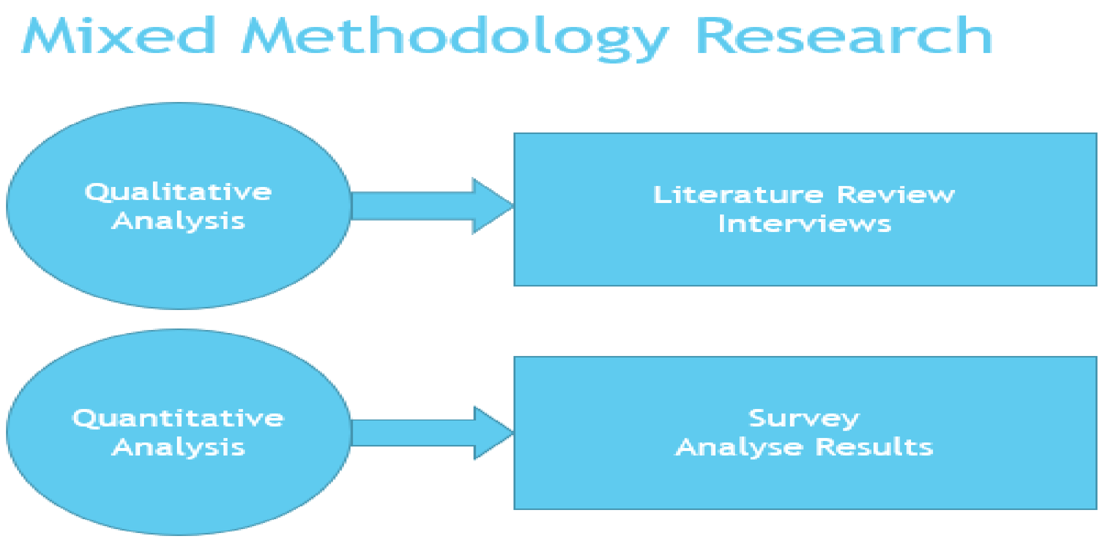
3.1 Introduction to Research Methodology

There are five components that make up the research question relative to what skills are optimum for sales personnel to maximize sales effectiveness: identify the core elements of sales skill requirements, organize them into logical themes, understand how important these skills are when identifying the pertinent skills of a successful sales person's skill set, examine scales that evolved from the research, and utilize identified skills, themes and scales to conduct group comparison analysis. A mixed method approach is the selected method to conduct this research. The qualitative analysis helps identify the skills and themes that successful sales personnel require. This list of skills is the basis for the subsequent quantitative analysis. The quantitative analysis provides generalizable results on the relative importance of the skills and inspects the resultant themes. Group comparison analysis is also conducted during the quantitative phase.

Recommended Methodology

Much previous research has typically been conducted from a single discipline or knowledge formation perspective, such as from a sales outlook or behavioural sciences point of view. Results are limited by the respective viewpoints. The information reviewed within the mix of disciplines and non-disciplines that influence this mixed methods research resulted in a much more comprehensive set of necessary skills that sales personnel could require. Conversations were held with a learning development professional and a consulting firm specializing in sales training, to discuss whether or not reviewing and analyzing pertinent information from a variety of disciplines and non disciplines would provide new insights with respect to factors necessary to excel in sales. The broader spectrum centered around influencing human behaviour and sales, combined with a 2017-2018 set of data was crucial! Figure 1 is a representation of mixed methodology research which is a combination of qualitative and quantitative research. Investigation began with identifying relevant elements of requisite skill requirements for sales personnel to test against using qualitative analysis and then a quantitative analysis to test against a real-world multinational organization was conducted.

Figure 2 Mixed Methods Research



3.2 Qualitative Methodology Introduction

The intent of the qualitative portion of the study was to allow selected experts to discuss their respective backgrounds, converse about skills they felt were important for sales personnel, and comment on the questions. Thirteen invitations to contribute were sent out to people that the author felt would be willing to participate, had a strong and relevant background, and would provide value. Nine respondents chose to take part. Contrasting viewpoints were possible and even likely due to the varied backgrounds and perspectives of the information providers. The contributors were selected from a pool of possible interviewees created from the author's list of contacts developed over a thirty-five-year career in sales, consulting, and academia. The selections were based upon experience in a variety of disciplines and non-disciplines, subject matter expertise, and intellect. A wide-ranging group of participants was used to attain as extensive a perspective as possible. Sales experience ranged from beginning sales up through to senior management including a director, vice president of sales, and a president. Different industries are represented as are different companies. An assortment of disciplines and non-disciplines derived from their educational backgrounds and work experience are represented. Table 1 shows information on respondents.

Table 1 Respondent Credentials and Description

Education	Work Experience	Tenure	Relevant Experience
H. B. Commerce Marketing Major University Degree	Sales Rep, Major Account Representative, Sales Manager, General Manager, Agency Owner	Over 20 years job experience, female, age 40-45 years	Experience with a multinational in and now owns a sales agency. Specialized in both hardware and software solutions. Currently needs to train sales staff, and source and provide requisite training.
Technical College Diploma	Service Rep, Printing Systems Analyst, Solutions Analyst, Solutions Engineer, Solutions Architect	30+ years job experience, male, age 55-60 years	Supported solutions selling within a major multinational in Canada and Internationally. Helps sales reps within sales cycles on an ongoing basis.
Degree Candidate Marketing Major	Inside Sales, Sales Rep, Solutions Sales Executive, Sales Manager and Partner Manager	10-15 years job experience, male, age 30-35 years	Sold solutions and hardware for two multinationals on both a provincial and National Level. Currently Partner Manager for U.S. in a small professional services and software company. Was part of training development team for solutions sales reps.
University Degree Marketing	Inside sales, Outside Sales, Sales Manager, Global Client Delivery Manager, General Manager Services, Transition Manager, VP Sales, and Director National Learning and Development Global Operations	30-35 years job experience, female, age 50-55 years	Sold for a Retail Multinational, did Pharmaceutical Industry sales, sold within 3 small sales organizations, two large multinationals and sold hardware, services and overall solutions. Scope has evolved from provincial to national to being part of a global team. Currently in Leaning and Development an integral part of identifying sales needs and learning development globally with large multinational.
University Degree Computer Science and Commerce Majors Focussing on Management Information Systems	Programming, Analyst work, Pre-Sales Analyst, Sales Rep, Implementation Analyst, Workflow Solutions Specialist, Solutions Architect, Manager of Solutions Architects, Director of Product Management and Professional Services	15-20 years work experience, female, age 40-45 years	Most of career spent working with sales, and seeing what works, and what is often missing. Had a national mandate to work with advanced sales reps and solutions and services sales reps. Currently has Global mandate to develop solutions that will sell. Help develop training to sell the more sophisticated solutions.
University Commerce Degree with Marketing Major	Sales Rep, Sales Specialist, Sales Manager, General Manager, Regional Marketing Manager, National Black Belt Lean Six Sigma Manager, Director of IT	35-40 years work experience, male age 60-65 years	Began in the metals industry and moved to an Industry Specific Team within a large multinational for many years. Involved in many problem-solving endeavours including implementing a major sales automation software solution.
University Degree in Philosophy	Account Manager, Major Account Rep, Sales Manager, National Work Flow Solutions Specialist (Software Solutions), Software Solutions Specialist Enterprise Software	10-15 years work experience, female, 30-35 years of age	Responsible for sales development and training of sales reps. Worked for large sales agency, large multinational selling hardware, software and solutions and large multinational selling Enterprise Software in U.S. and Canada.
PHD Psychology	Professor and Researcher	15-20 years work experience, male, 40-45 years of age	Teaches a variety of Psychology courses, including courses on learning and how to influence and persuade people.
University double diploma in International Business Relations and Marketing	International Cash Manager, Marketing Manager, Sales Rep, Sales Manager, General Manager, Client Delivery Manager, VP Sales Global, President Canadian Operations	15-20 years work experience, male, 40-45 years of age	Took extensive sales training courses both in and outside of work. Developed curriculum and trained sales personnel. Worked in multiple start-ups, a multinational selling Services, and currently is VP Sales for an international company, and President of their Canadian operations group.
AUTHOR: University Commerce degree, Economics degree, MBA and Doctoral Candidate in Human Studies	Sales Rep, Sales Specialist, Centralized Solutions Consultant, Pre-Sales Analyst, Provincial Major Account Executive, National Manager for Enterprise Content Management Software, Senior Manager Solutions Architects, Sessional University Professor (Interpersonal Skills)	35-40 years work experience, male, 55-60 years of age	Participated in training across the entire spectrum of sale positions at a major multinational. Coverage went from local to national and had some international aspects. Have built training continuums from scratch (identifying gaps and developing training programs)

3.2.1 Qualitative Questions

When conducting the information gathering of the qualitative portion of the analysis there was potential to have interviewer bias influence the questions and answers. An attempt to provide open ended non-biased questions that were vetted by two subject matter experts resulted in questions that should have had minimal bias. Appendix D contains the questions. The author used the literature review to develop a set of skills to query about originating from a variety of disciplines and non-disciplines. This provided a back drop for expanding on answers during the interviews and to offer context. The author attempted to not steer the conversation and only asked clarification questions if required. All participants were asked to do some pre-work to put some thoughts together around the topic in general, and the questions in specific. The individuals being interviewed were then asked to comment. From the interviewee responses a list of skills was identified.

3.2.2 Qualitative Research Methodology

Qualitative research was conducted utilizing the interview method that is described by Patton (2002). It involved utilizing open ended questions and probes which yielded in-depth responses about people's experiences, perceptions, opinions, feelings, and knowledge. Data consisted of verbatim quotations with enough context to be interpretable. Patton (2002) believes that qualitative inquiry is especially powerful in that it is inductively generated from field work.

Interviews

Interviews were scheduled over a two-week period. Each interview conducted was from thirty to thirty-five minutes in duration. The software utilized for analysis was Atlas.ti from Atlas.ti Qualitative Data Analysis. Skype was used for remote communications along with an attendant recording software called Amolto. This software recorded conversations so that subsequent typed transcripts could be transcribed accurately. Transcripts were typed verbatim employing Word. Atlas.ti software was used to import the Word files. Appendix C provides a sample of a portion of a transcript.

Software

Atlas.ti is an easy to use program that provides a clear roadmap on how to manage information and attain logical outputs. Coding and theme creation are intuitive, and reports are easily created. The only real limitation is that it limits the flexibility of the reports so outputting the raw data and reformatting is required in some cases. The Amolto recording software is easy to use and allows for easy transcript creation. It makes typing up the actual transcripts straight forward. The subsequent exporting the Word files into the Atlas.ti for coding worked well.

Transcripts, Coding, and Theme Generation

Each transcript was reviewed for relevant quotations and comments were added by author for clarification. Each quotation was aligned with defined codes or used to identify new codes. Open coding was used to label concepts, define and develop categories based on their properties and dimensions. These codes are skills that are pertinent for a successful sales representative. A review was then made of the codes and naming conventions for accuracy and redundancy. A peer appraisal was conducted to check if codes were relevant and understandable. Codes were reworded, and or detail added, for clarity. Comments were added to all codes to demystify jargon and explain meaning. Axial coding was used to create core themes during the qualitative data analysis phase relating the codes to each other, via a combination of rational and logical thinking. Comments were added to themes to ensure clarity. Feedback was utilized to improve the validity, credibility, and transferability of the identified codes and themes. Specifically, the codes were reviewed by a peer to ensure the information captured within the quotes was translated into appropriate codes. A further member check was completed at the theme creation stage. The subject matter experts involved in the initial interviews reviewed the codes and the subsequently created themes. A final examination of all information to ensure accuracy and eliminate any errors was conducted. A set of draft reports reflecting the codes, the code comments, quotations, themes, and theme comments was generated. These were peer reviewed and edited. The subsequent information was shared with a specialist experienced in the sales milieu, for commentary and editing. A final list was compiled displaying themes, related codes, and comments.

3.2.3 Reflexive Discussion

Qualitative research is often impacted by the researcher's background. Having spent thirty-five years in sales, and been extensively educated within this area, the author has preconceptions that may have influenced the results. For example, the angle of the investigation in terms of who was being asked to provide input and the types of disciplines and non-disciplines investigated may have been impacted by the author's perceptions of gaps in the existing research.

Qualitative Research Impact

The codes, themes, survey questions, and survey clarification notes per question were validated by peers and subject matter experts and the author tried to closely monitor himself to minimize influencing answers during the qualitative process. It should be noted that having one investigator can have an impact on results. Techniques like open ended questions that allow answers without prompting helps but even clarification questions can have some bias. When interpreting the quotes and building the codes and then developing the subsequent themes the author's background played a part in interpreting the results in the qualitative phase. An attempt was made to be unbiased during this process using self-reflection and correction.

Quantitative Research Impact

The findings that may have been influenced during the qualitative phase provide the list of skills for the quantitative phase. Therefore, overall results of the study may be influenced by what the author considers most important. Some bias may have occurred when generating the survey even though the survey development phase was conducted in conjunction with multinational personnel to minimize author bias. Interpreting the results may also be impacted to some degree by the author's perspective. Throughout this process self-reflection by the author should have mitigated bias to a large degree.

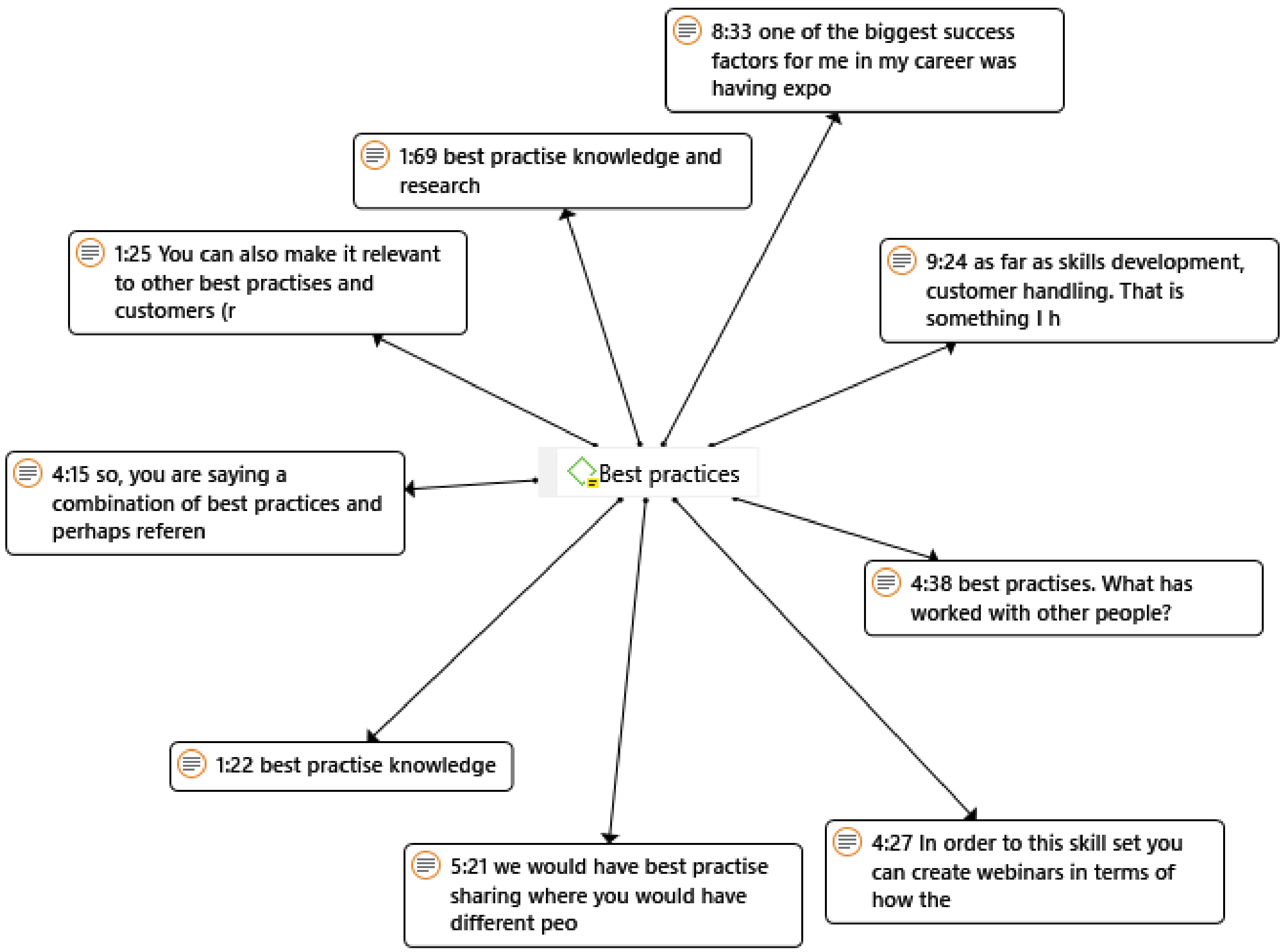
Conclusion

The framing and communication of conclusions may be influenced by what the author has experienced throughout his career, the courses he has taken, and research conducted. An additional researcher with no sales background may have provided perspectives beyond the narrower perspective of the author. There were different perspectives solicited during the qualitative phase, literature review, and quantitative phase but ultimately the whole project has been impacted to some degree by the authors' perspective. All efforts were made by the author to be introspective and reflective in order to keep the impact minimal. It should be noted that there is a benefit to the extensive sales background of the author throughout the process as communications is much clearer when both sides are familiar with the concepts. While having a neutral researcher could help eliminate some bias it would remove some beneficial aspects.

3.2.4 Example of how Quotes Create Skills

Figure 2 shows an example of how quotations evolve into a skill or code. Some of the quotes are truncated as they are longer phrases. The figure is provided as a visual example of how the process moves from the quotes to the identification of the relevant sales skills.

Figure 3 Sample Code with Supporting Quotes



3.2.5 Evolution from Individual Skills to Themes

Figure 3 shows a representative example of how a theme or scale stems from skills that relate to one another. Skills that correlate are bucketed into logical themes. The following table is pictorial representation of the process.

Figure 4 Sample Theme with Related Skills

A listing of the themes and codes was derived from the qualitative research. The information within was used as a basis for discussion with the multinational being utilized within the quantitative portion of the research. There were 206 codes identified, as seen in Appendix B, within the 28 themes.

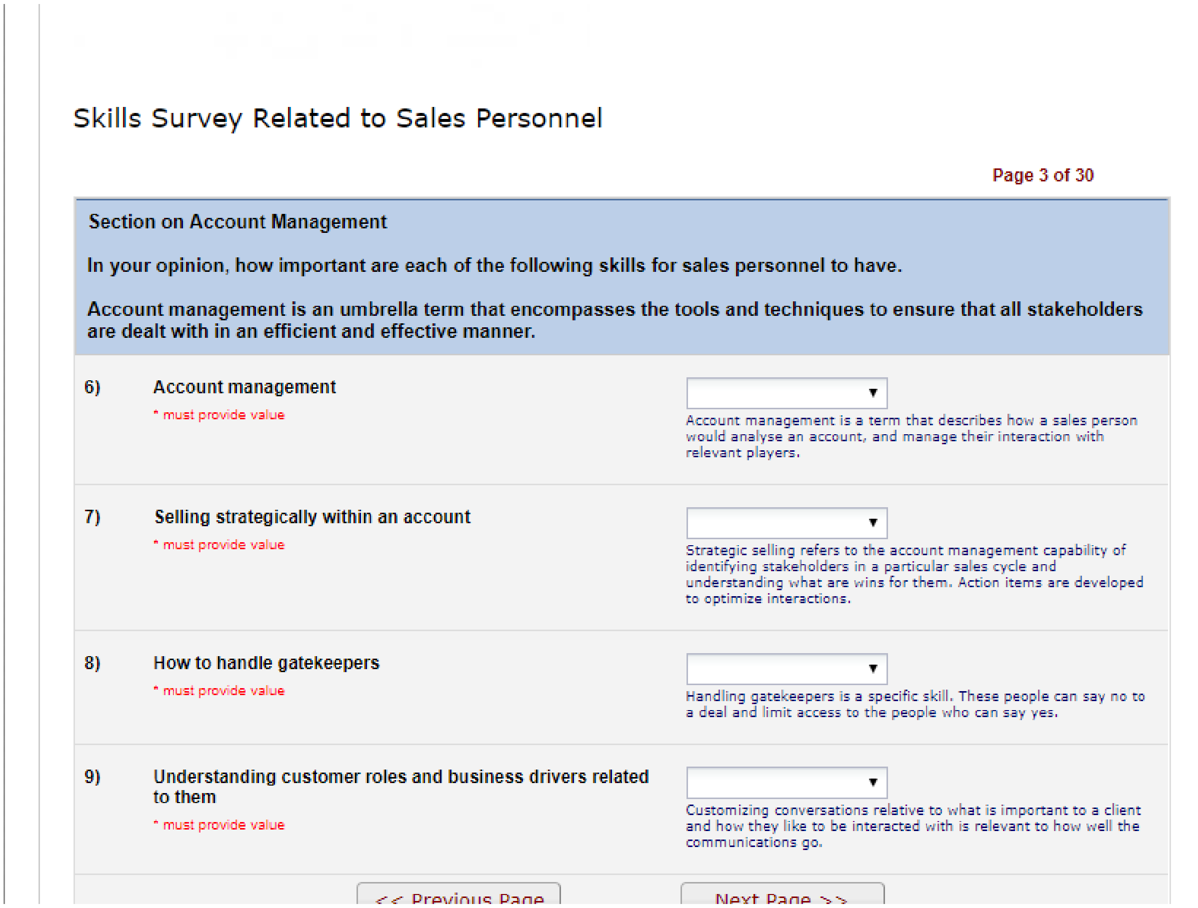
3.3 Quantitative Methodology Introduction

Direct sales are defined as business to business interactions. In the framework of this study what was examined was the Canadian direct sales component of a large multinational sales organization. The intent of expending time and attention here was to provide a demanding test that yielded valuable insights both from an academic and business perspective. The audience from the company was composed of management/sales management and sales/support. The companies represented were Canadian customers of the multinational. The company sells to businesses through direct sales personnel who interact directly with the customer. Commodities, tailored solutions, and combinations of both, are sold virtually and directly.

Survey

A survey was created in the software Redcap. The questions sprang from the skills identified in the qualitative analysis portion of this study. The survey was sent to 400 participants and 71 responded fully, and another 116 partially. Only fully completed surveys were analysed. The surveys began with a demographic section and then were broken into questions about the themes and their associated skills. Each skill was identified and clarified with a clear description. In collaboration with corporate personnel, surveys were reviewed and finalized. The survey included questions in each of the theme categories. Discussion with the company to shorten the survey resulted in a subset of 110 questions reflecting 110 individual codes or skills, and these represented all 28 themes. The survey essentially asked how important each of these skills are. A sample view of how the survey looked to the respondents is in Figure 4.

Figure 5 Sample of Survey


Skills Survey Related to Sales Personnel

Page 3 of 30

Section on Account Management

In your opinion, how important are each of the following skills for sales personnel to have.

Account management is an umbrella term that encompasses the tools and techniques to ensure that all stakeholders are dealt with in an efficient and effective manner.

6) **Account management**
* must provide value
Account management is a term that describes how a sales person would analyse an account, and manage their interaction with relevant players.

7) **Selling strategically within an account**
* must provide value
Strategic selling refers to the account management capability of identifying stakeholders in a particular sales cycle and understanding what are wins for them. Action items are developed to optimize interactions.

8) **How to handle gatekeepers**
* must provide value
Handling gatekeepers is a specific skill. These people can say no to a deal and limit access to the people who can say yes.

9) **Understanding customer roles and business drivers related to them**
* must provide value
Customizing conversations relative to what is important to a client and how they like to be interacted with is relevant to how well the communications go.

<< Previous Page   Next Page >>

3.3.1 Quantitative Methodology

Redcap has a powerful GUI interface that permits easy editing and survey creation. It allows for several iterations of the survey to be created and shared through the internet via emailing the URL of the survey. This was especially useful when working with the company supplying the respondents as they were involved in the creation phase, particularly the explanation component of each skill question. Publishing the survey to the population that was to fill it in was accomplished by emailing the URL of the survey to the company. They incorporated the URL within their document that introduced the study. Redcap gathered the information anonymously and compiled the data so that it could be exported into SPSS for analysis.

All company personnel were surveyed. Five demographic questions were asked dealing with gender, role in the company, company size, type of sales, and primary interaction channel. The questions on the survey were measured on a 5-point Likert scale from “most important” to “least important”. Likert-scale questionnaires are more likely to yield data that is reliable and thus leads to more valid interpretations (Nemoto & Beglar, 2013). Results were analysed relative to the research questions. A discussion of the results in a more general sense was developed and group comparisons were conducted. Limitations of the research are discussed, and overall conclusions derived. Figure 5 shows how the demographic questions would appear on the survey and Figure 6 shows sample questions with answers exposed.

Figure 6 Demographic Questions with Possible Answers

Demographic Information

1)	Gender	☐ Male ☐ Female ☐ Other
2)	Role in the Company	☐ Management/Sales Management ☐ Sales/Support
3)	Company Size	☐ 0-30 ☐ 30-100 ☐ 100-500 ☐ 500+ (Please select all that are applicable)
4)	Type of Sales	☐ Solution Sales ☐ Commodity Sales ☐ Mix of Both
5)	Primary Interaction Channel	☐ Virtual ☐ Live ☐ Mix of virtual and live

Figure 7 Sample of Survey Questions with Possible Answers

Page 2 of 37

Section on Account Management

In your opinion, how important are each of the following skills for sales personnel to have.

Account management is an umbrella term that encompasses the tools and techniques to ensure that all stakeholders are dealt with in an efficient and effective manner.

6) Account management

- ☐ Very Important
- ☐ Important
- ☐ Somewhat Important
- ☐ Not Very Important
- ☐ Not Important

(Account management is a term that describes how a sales person would analyse an account, and manage their interaction with relevant players.)

7) Selling strategically within an account

- ☐ Very Important
- ☐ Important
- ☐ Somewhat Important
- ☐ Not Very Important
- ☐ Not Important

(Strategic selling refers to the account management capability of identifying stakeholders in a particular sales cycle and understanding what are wins for them. Action items are developed to optimize interactions.)

8) How to handle gatekeepers

- ☐ Very Important
- ☐ Important
- ☐ Somewhat Important
- ☐ Not Very Important
- ☐ Not Important

3.4 Sampling Selection for Quantitative research

The internal population employed was made up of sales personnel and sales support staff in one grouping, and senior management and sales management in the other group. All stakeholders were surveyed so the sample was the population. There were 400 people invited to survey and 71 answered fully. There was an additional 116 partially filled in but these responses were not analysed.

3.5 Data Collection and Analysis Procedures for Quantitative Data

The survey was created in a software called Red Cap and an URL was created for the participants. The questionnaire was branded under the company's logo and the research surveys were distributed by the multinational. An email for their staff was generated that explained the background of the investigation and asked for the assistance of the survey respondent in answering the questions. The information in Appendix E was provided as content for the communication with employees. It was stressed that participation was voluntary. The employees had complete freedom to withdraw from this study if there was a feeling of discomfort or stress at any time. They were informed that their input was anonymous and that the survey did not contain information that would identify them, and that aggregate results of the survey would be used for company and academic purposes only. Once the respondents clicked on the URL, they were brought to the survey that they then completed. By clicking on "complete" the results were sent anonymously to the Laurentian University Red Cap server. Data was gathered at a macro level. SPSS was utilized for the actual analysis and a variety of statistical tools within it employed. Descriptive analysis, Cronbach alpha, t -test for 2 groups, and analysis of variance were employed. SPSS stands for Statistical Package for Social Sciences and it was selected due to its capability of analyzing a wide scope as well as a large amount of data.

Results

4.1 Introduction to Results

The study was designed to provide information relative to the research question(s). The research question, related to what skills are optimum for sales personnel to maximize sales effectiveness, has five components. They would include identifying the core elements of sales skill requirements, organizing skills into logical themes, obtaining an understanding on how important these skills are when identifying the pertinent skills of a successful sales person's skill set, examining the scales that evolved from the research, and utilizing the identified skills and themes to conduct group comparison analysis. The results are organized relative to each component.

While important to understand the relative importance of skills and themes it is also key to look at differences among groups within the survey population. Tools utilized to look at differences would include analysis of variance and t- test for 2 groups. In addition to these tests of group differences eta squared values were employed, to report effect size. Trends were identified and commonalities between groups studied. Consistency of differences are an indication of systemic differences between groups. The groups being compared included type of sales being conducted by sales personnel categories, role in the company of survey responders' categories, primary communication channel utilized when communicating with the customer categories, typical company size of customer the sales personnel are dealing with categories, and the gender of the responder categories. Skills are identified in the text using *italics* and themes will be highlighted with <u>underlining</u>. Appendix B shows the skills and themes with descriptions.

4.2 Skills and Themes Identification and Their Relative Importance

The findings validate that all the skills identified all skills are believed by those surveyed to be important to a sales person's success as all the skills and themes had averages above the 'somewhat important' score of 3. The Likert scale ranged from 'very important' being 5, 'important' 4, 'somewhat important 3, 'not very important' 2, and 'not important' as a 1. The overall average mean for skills was 4.27 out of 5. Table 4 shows skill rankings. Skill means ranged from a high importance rating of 4.83 down to a low importance rating of 3.30. The highest mean scores were 4.83 for both, *understanding customer roles and business drivers related to them,* and *listening skills*. There were 88 skills listed in the range of 'important' to 'very important' with the other 22 being in the 'somewhat important' to 'important range'. The skills next in importance were *webinar development* at 3.3 and *halo effect basics* with a mean of 3.46. Table 2 shows themes derived from the data with a description.

Table 2 – Themes Derived from Data

Number	Themes or Skill Groups	Description of Themes
1	Account Management/Strategic Selling	Account management is an umbrella term that encompasses the tools and techniques to ensure that all stakeholders are dealt with in an efficient and effective manner.
2	Basic sales skills training	While there are many intricacies within the whole sales skill continuum these are list of skills necessary to all sales.
3	Business case development	Business case development relates to the comparatives done between the current and proposed states. It encompasses financials, problem identification, impacts of implementing solution etc.
4	Challenging sales skills	Challenging sales skills refers to the capabilities that help a sales person influence a customer to look at existing issues in a different light.
5	Consultative sales skills	The sales person must operate more as a consultant and use skills associated with problem identification and recommendation generation.
6	Funnel Management	Funnel management refers to the process to manage suspects and prospects to ensure revenue targets are attained.
7	Implementation Planning	Customer's need to know the impact and timeline for the proposed solution meets their risk comfort level.
8	Industry research and value development	Customers are more informed in today's world. Salespeople need to have industry knowledge, specific account knowledge, and knowledge of the person they are dealing with.
9	Objection handling	Objection handling is a process and set of techniques to mitigate the impact of customer objections.
10	Solution Selling	Solution selling is a group of techniques, and a methodology, to effectively sell solutions.
11	Communication Skills	Communication skills encompasses everything from listening skills through influence and persuasion techniques.
12	First impression/initial impact	First impressions are critical to the success of a salesperson.
13	Interpersonal Skills	Interpersonal skills encompass a broad range of skills that range from listening skills, time management, meeting skills, through influencing and persuasion techniques and tools.
14	Leadership skill	Leadership, both formally and informally, is critical to the sales process both internally and externally.
15	Non-verbal communication	Non-verbal communication impacts how a sales person perceives the customer, and how the customer perceives them.
16	Personal Skills	Personal skills relate to individual capabilities that may or may not be inherent in a salesperson.
17	Personality identification and communication impact	Knowing the personality of both the sales person, and the person they are interacting with, provides insight into the most effective methods to optimize communication and facilitate influence and persuasion.
18	Presentation Skills	Presentation skills refers to the skills necessary to communicate to the customer in a manner that influences behaviour.
19	Problem Identification	Problem identification involves gathering information and uncovering opportunities by understanding where the customer has a problem they wish to resolve.
20	Stress Coping	How a sales person deals with stress, and the best methods to help them deal with it, results in more productive and long-term sales people.
21	Verbal Communication	Verbal communication involves verbiage, listening and then employing questioning skills, and influencing and persuading customers through effective verbal communication that relates relevant information to customer needs.
22	Business and financial acumen	The combination of business and financial acumen is the key to credibility and to truly understanding the impact of a decision by the customer to go with the solution.
23	Business Ethics	Business ethics relates to the ethics that the organization adheres to. It is internal and external facing.
24	Computer Literacy	Computer literacy refers to the capabilities to utilize the various tools and software utilized by the sales persons organization.
25	Internal Systems Literacy	Understanding internal tools and processes makes for a more productive sales person.
26	Product knowledge training	Product knowledge training involves understanding what the organization sells, how it pertains to customers needs, and positioning the product effectively to a customer.
27	Social Selling	Social selling is a term that describes using social media and social engineering to make a sales person more credible to a customer.
28	Writing skills and reading literacy	Being able to write in a manner that is consistent with the message, and professional in tone, is key to influencing customers. Being able to read and internalize a broad range of information is necessary for a sales rep to be able to research customers, product knowledge, technology and industries.

Skills Ranked by Mean

Figure 8 shows scoring groupings using the Likert scale from 1 to 5 relative to rated importance by survey respondents. It shows relative importance of groups of skills by mean scoring. With the heavy weighting towards the importance end of the scale it is evident that the skills identified were perceived as important. There were no skills rated below the mid-point of the Likert scale.

Figure 8 Distribution of Importance for 110 Skill Items

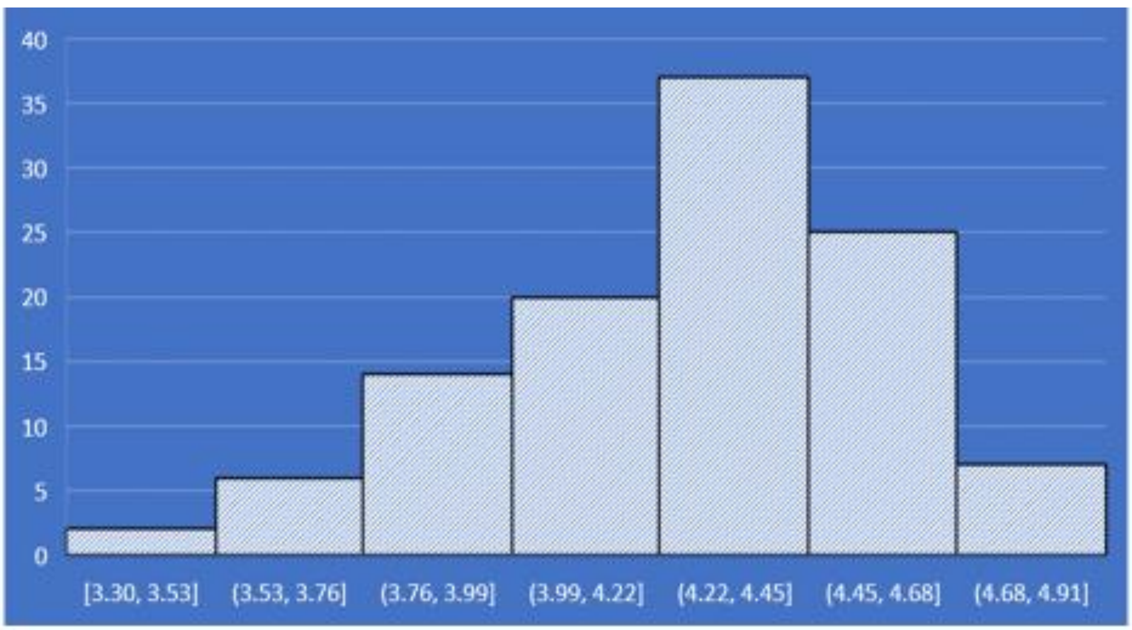


Table 3 shows skills ranked by mean. The first two column showcases all the skill rated as 4.32 or higher. While the third and fourth columns show a range of 3.3 to 4.31 on the Likert scale. This indicates they are rated as ‘somewhat important’ to ‘important’ across the entire spectrum. It is interesting that of the 110 skills only 22 are rated below 4.

Table 3 Skills Ranked by Mean

Skill	Mean	Skill	Mean
Understanding customer roles and business drivers related to them	4.83	Persuasion skills	4.31
Listening skills	4.83	Situation questions	4.30
Account management	4.79	Handling rejection	4.30
Understanding and delivering value to the customer	4.79	Observational skills	4.28
Selling strategically within an account	4.77	Research on a company	4.27
Objection handling	4.72	Computer literacy	4.27
Buying criteria	4.70	Understanding how features relate to advantages and benefits to the customer	4.25
Identifying your objectives	4.68	Meeting skills	4.25
Closing skills	4.66	Tactical sales	4.24
Questioning skills	4.65	Forecast	4.24
Communication skills	4.63	Alignment call	4.24
Interpersonal skills	4.63	Line of business concepts and value development	4.23
Open ended questions	4.62	Nonverbal communication	4.23
Verbal communication	4.62	Pregnant pause training	4.21
How to handle gatekeepers	4.61	Emotional intelligence	4.21
Gaps and opportunity identification	4.61	Best practices	4.20
Time management	4.61	Situational leadership	4.20
Managing relationships externally	4.59	Conflict management	4.20
Business case development	4.56	Customer orientation	4.17
Business ethics	4.56	Perceiver effects concept	4.15
Basic sales skills	4.55	Learning model	4.14
Negotiation skills	4.54	Sales management process	4.14
Solution development relative to customer needs	4.52	Creative leadership	4.14
Business development	4.52	Social cues principles	4.13
Implications to the customer questions	4.51	Industry specific value development for your solution	4.11
Executive calling	4.51	Systems literacy	4.08
Business acumen	4.49	Needs assessmen training	4.08
Pre call planning	4.48	Understanding the competition and how to deal with them	4.07
How to capture information while on a call	4.48	Assertiveness	4.07
Problem questions	4.46	Story telling	4.07
Consultative skills	4.46	Using intensity effectively	4.06
Product knowledge	4.46	Project planning	4.04
Prospecting	4.45	Workflow identification	4.04
Problem solving	4.45	Understanding customer baseline training	3.93
How do you open up a call	4.44	Understanding recency concepts	3.93
Presentation skills	4.42	Problem identification process	3.93
Relationship selling	4.41	Perspective coaching	3.92
Identifying strategic objectives	4.41	Reference training	3.90
Attracting customer attention at first contact	4.41	Verbiage training	3.90
Managing relationships internally	4.41	Understanding primacy concepts	3.89
Map out current environment	4.39	Stress coping	3.89
Provoking thought leadership	4.39	Categorization fundamentals	3.86
Organizational skills	4.39	Cognitive state identification	3.86
Writing literacy	4.39	Mentoring skills	3.85
ROI (return on investment) tools	4.37	Deception cue identification training	3.85
Develop ppp statement (purpose process payoff) statement	4.37	Demo skills	3.80
Selling solutions	4.37	Social selling (using today's tools like LinkIn and Twitter etc.)	3.79
Sales process	4.34	Customer processing traits (spontaneous or deep thinkers)	3.76
Proposal development	4.34	SOW (statement of work) creation and usage	3.75
Clarifying call	4.32	Personality interaction training	3.75
Need payoff questions	4.32	Using repetition effectively	3.68
Financial acumen	4.32	Interpersonal mentalizing	3.68
Current state identification	4.32	Memory training	3.63
Product positioning first impressions	4.32	Halo effect basics	3.46
Read the play and move with the customer (adaptive)	4.32	Webinar development	3.30

The skills inherent within the themes began as a list of 206 skills which occasioned multiple questions within each theme on the survey. Logistics tied to the length of the survey resulted in the trimming of the number of overall skills to 110 and this resulted in eight themes with only one question to represent them.

Themes Ranked by Mean

Table 4 showcases themes ranked by mean. The top five themes in terms of number of questions about specific skills were Sales Skills containing 31 questions, Personality Identification and Communication Impact 9, Interpersonal Skills 7, First impression During Initial Contact 7 and Business Case Development 5. Theme average means range from 4.75 down to 3.79 which suggests that all means identified were viewed as at least ‘somewhat important’ but leaning towards ‘important’. There were 23 themes with means above 4 which puts them clearly into the ‘important’ range. Personality Identification and Communication Impact with a mean of 3.97, Problem Identification with a mean of 3.93, and Implementation Planning with a mean of 3.90 all are closer to ‘important’ than ‘somewhat important’. Even the two lowest themes which were Presentation Skills at 3.87 and Social Selling at 3.79 were scored close to the threshold of ‘important’ scoring of 4 on the Likert scales used in this study. Themes with at least one skill with a mean ranging from 4.5-5.0 would include Account Management, Sales Skills, Business Case Development, Business Ethics, Communication, Funnel Management, Interpersonal Skills, Selling Solutions and Verbal Communications.

Table 4 Themes Ranked by Mean

Theme	Theme average
Account Management	4.75
Verbal Communication	4.62
Ethics related to business	4.56
Consultative sales skills	4.46
Objection handling	4.46
Product knowledge training	4.46
Sales Skills	4.39
Challenging sales skills	4.39
Writing skills and reading literacy	4.39
Funnel Management	4.38
Business and financial acumen	4.36
Communication	4.32
Business case development	4.30
Interpersonal Skills	4.28
Computer literacy	4.27
Selling solutions	4.26
Industry research and value development	4.17
Personal Skills	4.10
First impression during initial contact	4.10
Stress Coping	4.10
Internal Systems Literacy	4.08
Leadership skill	4.06
Non-verbal communication	4.04
Personality identification and communication impact	3.97
Problem Identification	3.93
Implementation Planning	3.90
Presentation Skills	3.87
Social Selling	3.79

Relative Importance

The skills identified and ranked by relative importance provide a roadmap to prioritize training. It may be that not all training can be funded by an organization and knowing which skills to focus more emphasis on is beneficial. Analysis by theme has its benefits as well when discussing in a macro sense what is important to sales personnel. Research to identify requisite skills and themes will be benefited by this more extensive list of skills and themes that have been scored as important. Additional group comparisons, and customer surveys may follow as subsequent research is designed. Testing the training against success in the field will further validate the findings.

4.3 Scale Analysis using Cronbach Alpha Results

During the qualitative analysis process a list of questions was developed with respect to skills identified as pertinent to the success of sales personnel. The list of skills used in the survey were used in a process to create common themes or scales. Questions related to these skills were created so that a ranking could be developed relative to the importance of the skills and themes. A Cronbach alpha was calculated for each of the themes that had more than one skill associated with it. When analysing the themes as scales using Cronbach alpha it became evident some solid scales showing reliable thematic analysis emerged. These scales could be utilized not only for current research but may have broader applicability for future endeavours both in academia and the business community. What follows is an overall dialogue relative to the Cronbach alpha scores (See Table 5) and then a deeper dive into some of the scales.

Table 5 Themes Cronbach Alpha Scoring

Theme	**# of skills within theme**	**Cronbach's alpha**
Sales Skills	31	0.94
Personality identification and communication impact	9	0.89
Industry research and development	2	0.84
Interpersonal skills	7	0.83
Leadership	3	0.75
Implementation planning	2	0.75
Business Case Development	5	0.75
Business and financial acumen	3	0.74
Selling solutions	7	0.74
First impression/initial impact	7	0.74
Stress coping	2	0.70
Non verbal communication	2	0.70
Personal skills	3	0.67
Communication	4	0.67
Verbal Communication	2	0.64
Presentation skills	3	0.58
Account Management	4	0.50
Objection handling	2	0.44
Funnel Management	2	0.22
All scales with alpha above .7 are rated as acceptable.		
Themes with only one skill are ethics related to business, challenging sales skills, computer literacy, consultative sales skills, internal systems literacy, problem identification, product knowledge training, social selling, and writing skills and reading literacy were omitted.		

Scale Alpha Scores Discussion

There are some powerful scales identified within this research that have proven to be reliable as shown in Table 6. The four examples discussed below showcase this reliability. The <u>Sales Skill</u> scale seems to personify a robust and reliable scale with an alpha score of .941. Reviewing the resultant Cronbach alpha scores for each question if it were deleted shows a remarkable pattern of scores that range from .938 to .941 over 31 questions. <u>Personality Identification and Communication Impact</u> with an alpha of .894 and a range of .873 up to .893 for each of the nine questions if item deleted, is a close second at the high end of the good reliability spectrum for alpha analysis. While the scale <u>Industry Research and Development</u> has a high alpha of .836 it only contains two questions, so it does not show results relative to removing a question. The scale of <u>Interpersonal Skills</u> is the remaining scale scoring better than .8 at .833. It contains 7 questions which when individually removed yield alpha scores ranging from .830 to .795. This means that answers are consistent.

At the other end of the scale reliability spectrum are scales that low alpha scores identify as not having consistent enough answers to the questions to suggest they are measuring the same concept on a reliable basis. The worst example of reliability is <u>Funnel Management</u> with a score of .215 over two questions. <u>Objection Handling</u> with an alpha score of .444, and <u>Account Management</u> at .498 are also low. These low alphas indicate items are responded to with less consistency. The scale related to <u>Personal Skills</u> is the only scale for which if you remove a question, in this case pertaining to *organizational skills*, the alpha score of the scale jumps over the .7 hurdle of acceptable reliability.

Table 6 Cronbach Alpha Analysis of Themes with Impact of Individual Skills if Item Deleted

Theme	Cronbach's alpha with all items included	Items within theme	Cronbach's Alpha if item deleted
Account Management	0.50	Account Management	0.45
		Selling strategically within an account	0.21
		How to handle gatekeepers	0.61
		Understanding customer roles and business drivers related to them	0.41
Sales Skills	0.94	Learning model	0.94
		Pre-call planning	0.94
		Identifying sales person objectives	0.94
		Relationship selling	0.94
		How do you open a call	0.94
		How to capture information while on a call	0.94
		Prospecting	0.94
		Understanding customer baseline training	0.94
		Identifying strategic objectives	0.94
		Buying criteria	0.94
		Map out current environment	0.94
		Gaps and opportunity identification	0.94
		Basic sales skills	0.94
		Tactical sales	0.94
		Questioning skills	0.94
		Pregnant pause training	0.94
		Clarifying call	0.94
		Situation questions	0.94
		Problem questions	0.94
		Implications to the customer questions	0.94
		Problem solving	0.94
		Understanding how features relate to advantages and benefits to the customer	0.94
		Need payoff questions	0.94
		Solution development relative to customer needs	0.94
		Understanding and delivering value to the customer	0.94
		Demo skills	0.94
		Understanding the competition and how to deal with them	0.94
		Best practices	0.94
		Closing skills	0.94
		Sales process	0.94
		Sales management process	0.94
		Time management	0.94
Business and financial acumen	0.74	Business acumen	0.54
		Financial acumen	0.61
		Research on a company	0.78
Business Case Development	0.75	Current state identification	0.67
		ROI training tools	0.71
		Proposal development	0.66

		Business case development	0.71
		Reference training	0.75
Communication	0.67	Communication skills	0.70
		Listening skills	0.66
		Understanding Primacy concepts	0.47
		Understanding Recency concepts	0.47
First impression/initial impact	0.74	Attracting customer attention at first contact	0.72
		Perceiver effects concept	0.69
		Categorization fundamentals	0.67
		Halo effect basics	0.71
		Product positioning (first impressions)	0.72
		Develop PPP statement (purpose, process, payoff)	0.71
		Social cues principles	0.71
Funnel Management	0.22	Business development	0.63
		Forecast	0.77
Implementation planning	0.75	Project planning	0.92
		SOW (statement of work) development	1.05
Industry research and development	0.84	Industry specific value development for the salesperson's solution	.
		Line of business concepts and value development	.
Interpersonal skills	0.83	Interpersonal skills	0.83
		Managing relationships externally	0.82
		Managing relationships internally	0.82
		Persuasion skills	0.81
		Using intensity effectively	0.80
		Using repetition effectively	0.81
		Meeting skills	0.80
Leadership	0.75	Creative leadership	0.76
		Mentoring skills training	0.82
		Situational leadership	0.75
Non-verbal communication	0.70	Deception cue identification training	.
		Non-verbal communication	.
Objection handling	0.44	Conflict management	.
		Objection handling	.
Personal skills	0.67	Memory training	0.60
		Observational skills	0.39
		Organizational skills	0.71
Personality identification and communication impact	0.89	Assertiveness	0.88
		Cognitive state identification	0.88
		Customer processing traits	0.89
		Customer orientation	0.88
		Interpersonal mentalizing	0.88
		Perspective coaching	0.87
		Emotional intelligence	0.89
		Personality interaction training	0.88
		Read the play and move with the customer (be adaptive)	0.89
Presentation skills	0.58	Presentation skills	0.61

		Webinar development	0.38
		Verbiage training	0.37
Selling solutions	0.74	Alignment call	0.67
		Executive calling	0.68
		Needs assessment training	0.71
		Negotiation skills	0.74
		Selling solutions	0.73
		Story telling	0.72
		Workflow identification in detail	0.69
Stress coping	0.70	Handling rejection	.
		Stress coping training	.
Verbal Communication	0.64	Open ended questions	.
		Verbal Communication	.
Alpha greater than 0.7 considered acceptable			
Themes with only one skill listed are not included here.			

Thematic Reliability

Reliable scales make for more valid research findings. The Cronbach alpha scoring results indicate thematic reliability in many of the scales being tested. This means that if the scales which scored in the acceptable range were used in subsequent sales research the results would more likely to be trusted. Having a list of questions already developed and tested would be a boon to academic and business researchers.

4.4 Group Comparison Analysis

4.4.1 Group Comparisons Introduction

Looking at differences between groups within the survey population helps us understand how to work best with each group. Tests for comparing two independent groups were utilized to look at these differences. In addition to these group differences measurements, eta squared values were employed, to measure effect size when differences were significant. Trends were identified and commonalities between groups studied. Consistency of differences are an indication of systemic differences between groups. The groups being compared included type of sales being conducted by sales personnel categories, role in the company of survey responders' categories, primary communication channel utilized when communicating with the customer categories, typical company size of customer the sales personnel are dealing with categories, and the gender of the responder categories.

The research questions asked within this component of the research were:

- Will sales personnel that handle accounts that have the number of employees in their organizations over 100 differ significantly in their skill requirements from those who handle smaller organizations?
- Will management/sales management differ significantly in terms of the skills they value most important versus sales/sales support personnel?
- Will there be significant differences between what skills females identify as important versus the responses of males?
- Will how the sales personnel interact with the client, either live or a mix of live and virtual, result in significant differences in rating of importance relative to skill requirements?
- Will sales personnel that sell only solutions differ significantly in their importance rating of skills from those who sell a mix of commodities and solutions?
- Will the differences be tendencies or over riding differences between the respective groups?

4.4.2 Type of Sales: Selling Solutions versus Selling both Commodities and Solutions

Research question - Will sales personnel that sell only solutions differ significantly in their importance rating of skills from those who sell a mix of commodities and solutions?

There are five skills where the analyses point to significantly different means between the selling solutions group versus the mixed sales group comprised of solutions and commodities. Results are reflected in Table 7. There is one more skill close enough to being significant to make note of with a p value of .055. Group differences as indicated by eta squared scores of less than .2 suggest that the differences are tendencies rather than overriding differences. The solution sales group has a higher mean relative to importance consistently across the skills identified as being significantly different between the groups.

Table 7 Solutions Sales versus Mixed Sales

Skill	P Value	Solution Sales Mean	Mixed Sales Mean	Within Theme
Selling strategically within an account	.038	4.93	4.68	Account Management
Buying Criteria	.046	4.85	4.61	Sales Skills
Understanding and delivering value to the customer	.041	4.93	4.70	Sales Skills
Sales management process (close just above .05)	.055	4.44	3.95	Sales Skills
Research on a company	.042	4.48	4.14	Business and financial acumen
Reference training	.040	4.15	3.75	Business case development model
Solution sales N = 27 and mixed sales N = 44				
ETA squared range from .052 through .061				

Commentary

Reviewing the skills and their affiliation with the respective themes provides some insight into which ones are significantly different between the groups. A discussion of why this occurs, and implications is useful in putting the results into perspective. *Selling strategically within an account* scores a significantly higher mean for the solution sales group and this makes sense in that often commodity sales do not require the more wide-ranging skill set that solution sales do. Knowing who the stakeholders in a sales cycle, what their wins are, and how best to influence them is more important in the more complex sales cycles that solutions sales typically require.

Understanding *buying criteria* and how to deliver value to the customer for each stakeholder resonates in a similar fashion. *The sales management process* to keep track of all the variables needs to be more rigorous and systemic and thus is more applicable to those who sell solutions. *Researching a company* and the references that might relate are critical when understanding how best to approach each player in the sales cycle and how to influence behaviour by providing references that will have the most impact on decision making. Solution sales are typically larger and more multifaceted transactions. The legitimacy reaped by showing a solid understanding of the customers company and their problems and then offering pertinent references is often necessary for this kind of sale. That the themes showing differences belonged to Account management, Business and Financial Acumen, and Business Case Development which are identified as more important in solution sales is logical, as solution sales have more sophisticated requisites.

4.4.3 Role in the Company of the Respondent: Management/Sales Management versus Sales/Sales Support

Research question - Will management/sales management differ significantly in terms of the skills they value most important versus sales/sales support personnel?

There are four primary skills that differ in terms of relative importance between the management/sales management group and the sales/sales support group. These are noted in Table 8. In terms of themes, the management/sales management group feels more strongly about the importance of Sales Skills than the sales/sales support group. Business Case Development relating to the skill *reference training* is something sales/sales support feels is more important. ETA squared scores range from .057 through .065 are indicating overlap is occurring and the relative differences are tendencies not overriding differences.

Table 8 Management/Sales Management versus Sales/Sales Support

Skill	P Value	Management/sales management Mean	Sales/support Mean	Within Theme
Gaps and opportunity identification	.045	4.76	4.47	Sales skills
Sales process	.039	4.55	4.16	Sales skills
Sales management process	.032	4.42	3.89	Sales skills
Reference training	.043	3.70	4.08	Business case development model
Management/sales management N = 33 and Sales/sales support N = 38				
ETA squared scores range from .057 through .065				

Commentary

Management/sales management feel that understanding where the *customers gaps and opportunities*, coupled with an understanding of how a *sales process* works, and a *sales management process*, is more important than the sales/sales support personnel do. This is due to management/sales management requiring a sales management process to see where their business is coming from and to provide insight into areas of opportunity to coach sales personnel. The *sales management process* is usually tied to how the *sales process* works so the consistent relative means makes sense. To input an opportunity into the sales management process, a sales person must understand the gaps and/or opportunity they are addressing for the customer. They then use the *sales process* managed by the *sales management process* to work towards closing the order. The sales management team keep track using the *sales management process*. They are all aligned, and it is sound reasoning that management who must have a view into the business would rate these skills as more important. *Reference training* is more important to the sales/sales support group as they are the ones who are working to convince the customers to move to the next step in a sales cycle and often a related reference is a positive contributing factor. They tend to need references to drive sales and thus feel the need more highly than their management team. Keeping in mind that both groups scored these areas highly and the eta squared being small the two groups are not that far apart on their views.

4.4.4 Primary Communication Channel: Live versus Mix of Live and Virtual Selling

Research Question – How will the sales personnel interact with the client, either live or a mix of live and virtual, result in significant differences in rating of importance relative to skill requirements?

There are 26 skills that are rated as more important to sales people who sell solutions that are comprised of a mix of live and virtual sales versus those who only sell live, as shown in Table 9. These skills are statistically significant but more as tendencies as the eta squared scores range from .065 through .174. The means for the identified skills are universally higher for the mix of virtual and live group versus the live only group. Themes impacted would include Sales Skills, Business and Financial Acumen, Business Case Development, Implementation Planning, Interpersonal Skills Training, Leadership and Personality Identification and Communication Impact.

Table 9 Live Sales Versus Mix of Live and Virtual Sales

Skill	P value	Live Mean	Mix of virtual and live Mean	Within Theme
Pre call planning	0.015	4.34	4.71	Sales skills
Identifying your objectives	0.022	4.57	4.83	Sales skills
Understanding customer baseline training	0.004	3.70	4.33	Sales skills
Identifying strategic objectives	0.000	4.18	4.75	Sales skills
Map out current environment	0.016	4.23	4.71	Sales skills
Gaps and opportunity identification	0.007	4.45	4.83	Sales skills
Implications to the customer questions	0.029	4.36	4.71	Sales skills
Understanding how features relate to advantages and benefits to the customer	0.045	4.07	4.54	Sales skills
Understanding and delivering value to the customer	0.050	4.73	4.92	Sales skills
Research on a company	0.011	4.11	4.54	Business and financial acumen
Current state identification	0.050	4.20	4.50	Business case development
ROI training tools	0.002	4.18	4.67	Business case development
Proposal development	0.006	4.18	4.63	Business case development
Project planning	0.019	3.86	4.33	Implementation planning
SOW creation and usage	0.009	3.52	4.13	Implementation planning
Meeting skills	0.009	4.07	4.54	Interpersonal skills training
Mentoring skills training	0.032	3.64	4.13	Leadership
Customer orientation	0.002	3.95	4.50	Personality identification and communication impact
Perspective coaching	0.016	3.70	4.25	Personality identification and communication impact
Emotional intelligence	0.002	3.98	4.58	Personality identification and communication impact
Personality interaction training	.024	3.52	4.08	Personality identification and communication impact
Read the play and move with the customer	.035	4.16	4.58	Personality identification and communication impact
Webinar development	.015	3.05	3.75	Presentation skills
Verbiage training	.018	3.70	4.21	Presentation skills
Needs assessment training	.002	3.86	4.42	Selling solutions
Workflow identification in detail	.009	3.86	4.38	Selling solutions
Stress coping training	.045	3.68	4.17	Stress coping
Live N = 44 and mix of virtual and live N = 24				
ETA squared scores range from .065 through .174				

Commentary

This data would seem to indicate the mixed group has greater need for the additional training, or perhaps more emphasis, in these 26 areas as they find them more important. This could be the result of having the needs from live interactions plus the additional requirements for the virtual world. It may be that the mixed group feels they need more skills to attain the same legitimacy in the customers mind as live sales personnel. Virtual sales personnel do not always have the benefit of being able to read the customer visually in their virtual interactions. Even though the low eta values indicate that the difference is small enough that the two groups could be said to have similar results there are many rated skill differences between the two groups and that indicates the groups should be treated differently. A close look at the respective groups to tailor training would be beneficial in minimizing training costs and maximizing revenue as the training would be personalised.

4.4.5 Size of the Company: Companies with Less than 100 Employees versus Companies with 100+ Employees

Research question - Will sales personnel that handle accounts that have the number of employees in their organizations over 100 differ significantly in their skill requirements from those who handle smaller organizations?

All eight skills identified as having differences between these two sizes of companies have higher means for the sales personnel that deal with the larger companies. These are reflected in Table 10. The macro aspects of account management, business and financial acumen, business case development, and selling solutions seem to coincide with the needs of handling the more intricate type of sales cycles in larger accounts. It is worth noting that *writing skills and reading literacy* also scored higher for those sales personnel that handle larger accounts. ETA scores ranging from .064 through .0135 indicate tendencies in these areas rather than dominant differences.

Table 10 Companies with Less than 100 Employees versus Companies with 100+ Employees

Skill	P value	Company population <100 mean	Company Population >100 Mean	Within Theme
Selling strategically within an account	.011	4.62	4.92	Account management
Research on a company	.014	4.06	4.46	Business and financial acumen
ROI training tools	.027	4.18	4.54	Business case development
Proposal Development	.033	4.15	4.51	Business case development
Executive calling	.048	4.29	4.70	Selling Solutions
Selling solutions	.007	4.12	4.59	Selling Solutions
Workflow identification in detail	.028	3.82	4.24	Selling Solutions
Writing skills and reading literacy	.039	4.24	4.54	Writing skills and reading literacy
Company population <100 N = 34 and company population >100 N = 37				
ETA squared scores range from .064 through .0135				

Commentary

Seven of the first eight skills identified as significantly different between the groups seem to relate to the sophistication of the sales cycle in a large account. Larger company sales require a more pervasive view of the company than smaller companies when trying to work a sales cycle. There are usually more stakeholders who all have their own needs so thinking about how to sell to larger accounts usually requires a more cohesive strategy. Research on a company is logically more important in a larger company in that there is more to research and knowing how a larger company works, as well as each department, is more relevant than looking at a small company with fewer players and departments. Larger companies characteristically are larger revenue transactions as well as having more components to weave into a ROI view of the transaction. *Proposal development* has a higher mean relative to importance in larger accounts because proposals need to be better the more complex and larger the revenue opportunity. Larger companies usually have more high-value deals. Small companies can use simpler proposals typically. *Executive calling* is more important to larger accounts as they characteristically have a more diverse set of C level personnel requiring the capability to call effectively on each type of C level person. It seems to rationally follow that selling more complex solutions such as solution sales is more often done in large accounts thus the relative importance difference in this metric. *Workflow identification* dove tails with the solution metrics as workflow is typically studied in solution sales. The *writing and reading literacy* set of skills is comprehensible in that larger accounts stereotypically are knowledgeable customers. They also require selling documents through the various sectors within the sales cycle. This would suggest a requirement for reading more materials and writing in a more professional manner. Larger accounts characteristically have many moving parts, the deal size is bigger and there are more players. Understanding how to most effectively develop a business case and deliver a professional document has more importance in larger accounts and this explains why there is a difference between these two groups.

4.4.6 Gender: Female Respondents versus Male Respondents

Research question - Will there be significant differences between what skills females identify as important versus the responses of males?

Six skills were identified as significantly different between males and females. All six skills were scored higher by the females and centered around Account Management and Sales Skills that focus on how to effectively manage accounts and understanding objectives of internal and external stakeholders (see Table 11). Understanding where the customer is in terms of their baseline and how best to capture information while on a call also seemed to resonate more strongly with the females. It should be noted that low eta squared scores ranging from .054 through .080 show these differences as tendencies and not overriding differences.

Table 11 Female Respondents versus Male Respondents

Skill	P Value	Female Mean	Male Mean	Within Theme
Account management	.032	5.00	4.71	Account Management
Selling strategically within an account	.017	5.00	4.69	Account Management
Identifying your objective(s)	.025	4.89	4.60	Sales Skills
How to capture information while on a call	.050	4.74	4.38	Sales Skills
Understanding customer baseline training	.019	4.37	3.77	Sales Skills
Identifying strategic objectives	.024	4.74	4.29	Sales Skills
Female N = 19 and male N = 52				
ETA squared scores range from .054 through .080				

Commentary

Account management and *selling strategically* within an account are both scored as very important by the females. The males do view it between 'important' and 'very important', but it may be that the females feel they are critical to their success and thus put more focus on this set of skills. The four other skills that differ significantly between these groups center around Sales Skills. Females seem to place more importance on starting at the right place with the customer and understanding what both they and the customer are looking for in terms of objectives. They also feel it is important to ensure they are capturing incremental new information correctly. Females seem to see more value in completing research and understanding the path the customers are travelling within the sales cycle. Understanding both how they plan to move toward the destination, along with the customers objectives and the starting point, may prove to be a more successful strategy. These differences may be due to the mix of respondents having more males in management, who rate these skills a bit lower. Because eta squared scores are low it may not be beneficial to put too much emphasis on differentiation training based upon gender.

4.4.7 Group Comparison Conclusion

In the case of all six questions there are significant differences between the groups. The differences are small, but they are there. The six group comparisons have enough differences that they could mold the emphasis of the training and it would be worthwhile to consider employing them in this manner. The research question centered around whether the differences are tendencies versus over riding differences between the respective groups is conclusively answered by the consistent low eta scores indicating tendencies. The overall high importance scores, coupled with the small effect size of the identified significantly different skills, suggest it would be beneficial to the company to train in the respective sections but to varying degrees.

4.5 Results Conclusion

In terms of the skills and themes identified all the skills and themes were identified as important. Training should be considered for all the skills listed in the study to some degree. Their Likert scoring was in the ‘somewhat important’ to ‘important’ range with an average mean of 4.27 for skills and 4.24 for means. Overall, 88 of the 110 skills ranked between ‘important’ and ‘very important’. Five of the themes were in the ‘somewhat important’ to ‘important range’ and 23 were in the ‘important’ to ‘very important’ range. Knowing that the survey respondents felt that the skills identified, and their subsequent organization to themes, were important allows us to make valid commentary on the subsequent group comparisons. The list of skills and themes also provides a solid list of skills for the future research and training.

Scale Evaluation

Scale evaluation using Cronbach alpha analysis illustrated scale reliability. This measure of internal consistency highlighted how closely related a set of skills questions are as a group.

While all scales did not exhibit scores that exhibited acceptable reliability, scales like sales skills certainly did. These scales that were in the acceptable range could be utilized for subsequent research.

Group Comparison

Looking at how the respective groups differ provides an idea of the gaps and opportunities for learning. This helps to optimize the effectiveness of training programs while minimizing expenditures and is a beneficial perspective. It is also useful to understand differences in how management views the relative importance of skills versus sales personnel so that the appropriate mix of skills to drive sales while maintaining employee satisfaction is arrived at. The analysis of large versus small companies, solution sales versus mixed sales, gender, and live versus a mix of live and virtual help, point out where differing emphasis in training is required. It is the mix and the emphasis of training that may be altered for better performance by sales personnel. It should be noted that with the consistently low eta squared scores, interpreting the results should consider that the differences between the respective groups in all cases as more tendencies than overriding.

Specifically, the following skills were rated as more important:

- The sales personnel who handle accounts with more than 100 employees felt it was more important to sell strategically within an account, conduct research on a company, utilize ROI training tools, focus on proposal development, focus on executive calling, train on selling solutions, understand workflow identification in detail and improve writing skills and reading literacy. Sales personnel that sell to smaller accounts need similar training, but these requirements are more important to the salespeople that sell to the larger accounts.

- Females felt there should be more weight upon account management, selling strategically within an account, identifying their own objective(s), how to capture information while on a call, understanding customer baseline training, and identifying strategic objectives. Males feel these are also important skills but just to a lesser degree.
- In terms of primary communication channel those sales personnel that handle a mix of both live and virtual communication placed more weight upon skills such as pre-call planning, identifying their own objectives, understanding customer baseline training, identifying strategic objectives, map out current environment, gaps and opportunity identification, implications to the customer questions, understanding how features relate to advantages and benefits to the customer, understanding and delivering value to the customer, research on a company, current state identification, ROI training tools, proposal development, project planning, SOW creation and usage, meeting skills, mentoring skills training, customer orientation, perspective coaching, emotional intelligence, personality interaction training, read the play and move with the customer (be adaptive), webinar development, verbiage training, needs assessment training, workflow identification in detail and stress coping training. Sales personnel who deal only live do fell these skills are required just not as strongly as the mix of live and virtual communicators group does.
- Solution selling personnel feel the following skills are more important than those who sell both commodities and solutions. The identified skills are selling strategically within

an account, buying criteria, understanding and delivering value to the customer, sales management process, research on a company, and reference training.

- Management/sales management versus sales support/sales personnel agree to a large degree. The areas of difference relative to importance are where management/sales management feel there should be a greater emphasis are gaps and opportunity identification, sales process, and sales management process. Sales/sales support feel reference training should have more emphasis than management/sales management do.

Overview

The combination of descriptive statistics, scale results, and analysis of variance provides a story line that should be relevant to both academics and business people alike. The extensive set of questions that range across knowledge boundaries has resulted in a comprehensive list of skill requirements for successful sales personnel that has been validated against the workforce of a multinational organization. The level of detail manifested in this study was required to provide a road map with enough elements to be useful. Contrasting group responses allows for differentiating the requirements of each group allowing for decisions to be made on optimizing training expenditures and training development. The multi discipline perspective of the study drove a more comprehensive list of skills during the literature review and qualitative phase to use when testing during the quantitative portion of the mixed method research employed herein.

Discussion

5.1 Discussion Introduction

Mixed methods research was necessary to provide the wide ranging perspectives essential to generate the initial list of skills utilized within the quantitative section to produce generalizable results. Real world concerns restricted utilization of the entire 206 skills identified but extensive discourse with the multinational personnel involved in the survey did yield a very characteristic list of 110 skills that still represented all 28 themes. Research findings that showed all skills being above the 'somewhat important' rating of 3 would indicate that the list of skills being drawn from for the quantitative survey are deemed germane. Having a survey of this length does limit participation but enough responders did participate to deliver generalizable results. The qualitative portion of the mixed method research yielded a wide range of skills. This was valuable when performing the quantitative research.

When planning for this research there were some preconceptions about what the results would be. The number of skills that were identified was much larger and diverse than anticipated. It was also surprising to have the skills and scales identified by the literature review and qualitative research all rated over the 'somewhat important' score of 3 with an overall average in the 'important' range of over 4. It was thought that the respondents would have focussed on an important few and scored many of the other skills as unimportant. To have none scored below 'somewhat important' was a pleasant revelation.

5.1.1 Discussion of Scale Development

The research was not an exercise in scale development, but the high scores do indicate reliable thematic analysis. If one were to answer a question with a high score the likelihood is that there would be similar high scores for the other questions pertaining to the same theme. The magnitude of the study with 110 questions makes it difficult to motivate stakeholders to spend the time to complete a survey. The scales with high scores suggest that if one were to wish to measure a specific scale that the results returned would be consistent.

Impact of Reliable Thematic Analysis

There are two main research areas of impact, academia and the business environment. Having consistent results mean informed decisions can be made as the research can be trusted to be reliable. For academics this means that building on previous research is possible. It also means that scales such as Sales Skills scoring high can be used to study specific subsets of the overall survey by looking at themes. With respect to the business world developing a fact-based understanding of learning requirements to support return on investment (ROI) budgeting for training is only possible if the results of the analysis can be relied upon. Reliable results from research will provide success factors each sales type variant would require. They would also supply information to support fact-based decisions related to ROI budget planning, generate a roadmap of required skills for the sourcing group, and help identify skill requirements for new hires. An example of future research could include using these scales to compare the differences between self rating and manager rating.

Reliability Results

Reliability of the scales was unexpectedly good. To have the scale sales skills have a rating of .943 on the Cronbach alpha spread over 31 questions was surprising. Although some questions had to be dropped in the quantitative phase due to survey length, and thus some of the scales have limited questions, it was excellent to see the reliability ratings for the scales utilized in this research. There were a couple of low scales but overall the Cronbach alpha scores were also an agreeable revelation.

5.1.2 Group Comparison Discussion

Group comparisons identified differences between the groups, but the most astonishing aspect was that all the eta squared scores were so low. In all cases the differences were tendencies and not overriding differences. It seems to indicate that while groups have differences, they all value the same skills and scales. There is just a slightly nuanced difference in emphasis on some skills being more important to one group versus another. An initial impression was that groups would have had more defined and larger differences in terms of what they evaluated as most important.

Limited Skill Differences

What is also thought-provoking, as illustrated in the charts within Appendix A, is that there is a very limited amount of skill differences between groups. The chart reflecting Group Comparison – Solutions versus Mixed Solution and Commodity Sales visually portrays a somewhat surprising lack of differences with only six out of 110 being significantly different. The Group Comparison – Selling to Companies with 100+ Employees versus Small Companies chart has 8 significantly different skills identified but once again the differences are small. The chart portraying Group Comparison – Role in the Company depicts a scenario where management and sales are almost in complete synch. The chart showing the Group Comparison – Gender showcases that there are limited differences between males and females. The Group Comparison Primary Interaction Channel chart shows the only group comparison with many differences. It displays a wide-ranging set of skills that are scored more important by the mix of live and virtual sale group. What follows is a brief discussion of the group differences.

Group Differences by Management Respondents

The group comparisons did show differences that lead to further discussion. Surveying management/sales management as a different group from the sales/sales support personnel provided an opportunity to see where they were gaps and opportunities. Management/sales management have different priorities than the sales/sales support staff, but it was interesting that the differences in ratings of importance were not large. Management rates *Sales process* and *sales management process* higher in terms of importance. This is logical as this is what they manage for success.

Group Differences Discussion Primary Communication Channel

In terms of the primary communication channel to the customer salespeople who use both live and virtual interaction feel that the skills surveyed were more important than the live only. There were 26 where the differences were significant, and this would indicate that a closer look at how training is developed for these two groups is necessary. The mix of live and virtual sales people may feel this way because they need to sometimes drive customer action without having seen the customer, thus not being able to read visual cues. Recovery from missteps may be easier when you can immediately read the customer.

Group Differences by Account Size

Salespeople who typically handle accounts with over one hundred employees feel that the skills identified as significant were universally more important than those who handle smaller accounts. There were eight skills that themes of higher importance ratings were significant but with smaller ETA scores it would indicate more emphasis for those that handle larger accounts, but these skills should still be addressed in a more limited fashion for those who handle smaller accounts. The handling of larger accounts drives a need to provide larger and more sophisticated business cases and this supports the survey results which indicate being able to develop and communicate a business cases is more important to those who handle larger accounts. It is still important for the smaller accounts just to a lesser degree.

Group Differences by Product Mix

Those salespeople who sell primarily solutions collectively felt that the skills evaluated generally were more important than those who sold a mix of commodities and solutions. This makes sense as selling commodities is usually more price concentric and requires less customer interaction and understanding of customer issues. The solution selling sales people, more so than the mixed sales personnel, felt that understanding the customer and their needs was important and a strategically planned sales process coupled with industry research would help drive sales.

Group Differences by Gender

Gender differences in terms of the importance of the identified significant skills had females rating the various skills higher than males. The areas of divergence were in six areas centered around account management and sales skills. Females felt that understanding both their objectives and the customers, coupled with selling strategically was very important. The males felt these were important as well, just not to the same degree. Females appear to want to establish legitimacy with their research and call activity to a greater degree and this certainly would increase sales success. Males seems to be more comfortable in a sales situation having a bit less knowledge about the customer and industry. Males do feel references, knowing objectives, and selling strategically are important just to a lesser gradation than the females.

5.2 Sales Management Impact

Sales management needs to be reading from a more wide-ranging playbook when considering learning requirements for sales personnel. There must be an alignment between sales automation software, sales processes, sales enablement, and the identified sales skills. The innovative aspects of this new playbook which includes items such as social selling skills, interpersonal skills, and leadership training, means training must be developed that is multi discipline in nature. Simply selecting a sales training course from a menu does not suffice.

Impact on Management Planning

In determining the best way to manage attaining the appropriate skill sets for their sales team management must consider the skills specific to their product, industry, and type of sales. What do their sales people need to learn? Then the sales enablement process and sales automation software must align. For example, if a team is selling solutions that require sophisticated sales cycles in larger more complex organizations, managing them on a 30,60, 90-day performance set of metrics as if they were selling commodities is not appropriate. Understanding what the salespeople must do allows a set of criteria that can be tracked and managed against. Tracking simply the numbers does not drive satisfactory performance. Training on the right skills, ensuring they are utilized, and then having measurable metrics to manage against is vital.

A hybrid learning continuum containing the specific sales skills aligned with the job requirements of the organization and solution being sold needs to be either developed or sourced. Training should consider aspects of disciplines and non-disciplines other than sales. A final consideration is that training is optimal if it can be consistent, ensures all stakeholders have similar skill sets, and that salespeople understand the sales management process. Since varying skill sets are inherent within a typical sales force it may be necessary to have training broken into subsets that can be customized to the learning requirements of a specific sales person. Person A may need all the modules. Person B may also need certain ones. The cost of developing a more flexible training continuum can be offset by more time in the field for experienced personnel, and less skilled personnel receiving what they need.

Conclusion and Recommendations

6.1 Conclusion

Overview of Study

The impetus for this study was the reality that sales personnel were often not competent to conduct their job as evidenced by the continuing drop in percentage of salespeople hitting plan! Only 53 percent of organizations achieved quota plan attainment last year, according to research from CSO Insights, the research division of Miller Heiman Group. That's down 10 percent from just five years ago Heiman Group Blog Post (2018). One reason may be that cost cutting has often been in HR and training. The result is a sales force ill equipped to meet the demands of today's sales environment. Optimizing expenditures for training starts with instruction on the correct topics to maximize sales performance. The question to be asked was, where should the money be spent?

To solve a problem, one must first identify it. What skills are missing from the current sales personnel's skillset? The research included herein was designed to take a broad spectrum look at the needs of the salespeople of today. It is understood that many of the past skills identified are still useful but there are new ones that need to be comprehended. As well, the nuances and emphasis on aspects of training can change predicated upon what the sales person sells and to what kinds of customers. Researchers have relied on the old standards and most new research has been on small aspects of sales and human behaviour. New research needed to not just rely on old scales. There was a necessity to build a new more diverse set of skills to work with. A new expanded list of skills was used to develop scales to use in creating a survey to rate their respective importance. Reviewing them against a multinational with varied market segment requirements allowed descriptive analysis and group comparisons to be completed. Decisions relative to incremental training and research could then be made. The new scales will provide opportunities for further research both for academic and business world applications.

Summary of Findings

What was identified initially was a very robust set of important core elements in terms of skill requirements for a successful sales person. Further testing to see how important each skill and theme was resulted in a comprehensive listing that could be used when conducting further research and developing training. After organizing them into themes and analysing the scales we saw thematic reliability in many of the scales. Group comparison analysis resulted in the identification of significant variables that were different in terms of importance. These differences could provide a basis for customized training and further research. Recommendations based upon the results provide further detail on how the results may be exploited.

Unique Contribution

The new list of skills is unique in its magnitude. A second contribution of this study relates to how the results were impacted by the utilization of a broader scope to discover the requisite skills necessary for successful sales personnel. Using multiple disciplines and non-disciplines during the literature review and qualitative portion of the analysis provided new perspectives and insights. For example, the study of human behaviour could look at motivating certain behaviours from customers differently then a sales perspective would. The subsequent quantitative analysis provided generalizable results that may be utilized for planning and future research both academically and in the business world. The new scales provide an opportunity to do subsequent research with a reliable foundation. Lastly, the group comparison results are unique in that they identify skills that are significantly different between the measured groups.

6.2 Recommendations

This section begins by considering the data which has provided an opportunity to make recommendations in terms of how future research should be conducted as well as suggestions to organizations based upon the results. Secondly, recommendations for hiring personnel, sales management, sales personnel, and customers are provided. Lastly, the group comparison analysis yielded recommendations by group.

6.2.1 Research

Research needs to:

- Continue looking at the big picture both in terms of expanding the disciplines and non-disciplines being comprehended within the spectrum of the inquiries.
- Expand to surveying customers as well. Comparing results between company personnel and customers responses would provide valuable information.
- Expand the analysis of the overall skills and scales required to be a successful salesperson.
- Look for and examine new specific skills as this may discover new salient skills for sales personnel.

- Consider how to test these expanded lists without having user weariness cause them to not complete surveys. Perhaps multiple surveys of shorter duration would work but this would need to be tested.
- Consider the goals of both academia and business groups when planning future studies.
- Consider that scientific tenants and research guidelines need to be focussed on when developing business fact finding and impact on real world scenarios should be understood when planning academic studies.

6.2.2 Organizations

Organizations should:

- Review the macro list of identified skills and contrast it to what they are currently training their sales personnel upon.
- Utilize subsets of the questions and perhaps scales to test for specific needs
- Consider implications of the group comparisons to tailor training courses and emphasises within the training
- Utilize the survey to do further group comparisons such as testing globally and in different national sectors
- Conduct industry testing to contrast results with their sales force

6.2.3 Hiring personnel

Hiring personnel can really benefit their organization if the personnel they recommend for hiring are suited to the position, have the requisite skill sets and are successful and wish to stay within the organization. Hiring personnel should:

- Review important skills and identify candidates with the skills sets most relevant to the sales position.
- Identify which skills are missing or underdeveloped and tailor a customized training curriculum.
- Customize curriculums utilizing group comparison results.

6.2.4 Sales Management

Sales management wants to ensure their sales personnel have the skills they need to perform their jobs and retain successful sales personnel. To help with this they should:

- Work with hiring managers to get their new hires with as close to the optimum skill set as they can.
- Review important sales skills capabilities and contrast them with the skills of their personnel
- Ensure training is available.
- Develop a plan to conduct the required training.
- Have a planning process that continues to look for gaps in knowledge and skills

6.2.5 Sales Personnel

Sales personnel must take ownership of their plan for success. They should:

- Review important skills.
- Discuss with sales management where their gaps and opportunities are.
- Develop an action plan with management to achieve goals.

- Periodically review what their current skill set is and if there are other new skill requirements they should be addressing.
- If they move to a different position that may have different skill requirements or emphasis on certain skills, ensure they get appropriate training planned and taken.

6.2.6 Customers

Customers are best served by competent sales representation. Considering that it is a benefit to them to have sales personnel that are skilled in what is important to them they should:

- Participate in analysis to discover what is important to their organization in terms of skills required by their sales representative.
- Work with sales and sales management in the selling company to see where the gaps and opportunities are to improve the required skills.
- Feedback both success and failures to the selling company so that there is a feedback process to ensure continuous improvement.

6.2.7 Recommendations by Group

The 110 skills identified for the quantitative analysis were all deemed important to very important and thus training should be conducted for all the groups identified within the study on these skills. What differs is the weight in some of the skills. Although the differences were small, they were significant and provide a roadmap for which skills to emphasize for which group. The following are some of the recommended skills to be emphasized by group.

- The sales personnel who handle accounts with more than 100 employees should place more focus on selling strategically within an account, research on a company, ROI training tools, proposal development, executive calling, selling solutions, workflow identification in detail and writing skills and reading literacy. Sales personnel that sell to smaller accounts need similar training, but these requirements are more important to the salespeople that sell to the larger accounts.

- When planning training of female sales personnel results indicated that sales training should place more weight upon account management, selling strategically within an account, identifying their own objective(s), how to capture information while on a call, understanding customer baseline training, and identifying strategic objectives. Because males feel these are also important skills, just to a slightly lesser degree, they should also receive training in these areas. Overall, it would seem differentiating training by sex may not be necessary.
- In terms of primary communication channel training for those sales personnel that handle a mix of both live and virtual communication should place more weight upon skills such as pre-call planning, identifying their own objectives, understanding customer baseline training, identifying strategic objectives, map out current environment, gaps and opportunity identification, implications to the customer questions, understanding how features relate to advantages and benefits to the customer, understanding and delivering value to the customer, research on a company, current state identification, ROI training tools, proposal development, project planning, SOW creation and usage, meeting skills, mentoring skills training, customer orientation, perspective coaching, emotional intelligence, personality interaction training, read the play and move with the customer (be adaptive), webinar development, verbiage training, needs assessment training, workflow identification in detail and stress coping training. Sales personnel who deal

only live do need some aspects of this training just not as strong an emphasis as the mix of live and virtual communicators.

- Solution selling personnel should receive a greater weighing of training on selling strategically within an account, buying criteria, understanding and delivering value to the customer, sales management process, research on a company, and reference training than those sales personnel who sell both commodities and solutions.
- Management/sales management versus sales support/sales personnel agree to a large degree. The areas of difference for training are where management/sales management feel there should be a greater emphasis are gaps and opportunity identification, sales process, and sales management process. Sales/sales support feel reference training should have more emphasis than management/sales management do. Perhaps emphasizing all four skills will give both groups what they need as successful as possible.

Limitations and Future Research

7.1 Limitations

General Limitations

A listing of general limitations to this research would include:

- there is the limitation that not all skills can be identified and necessarily tested for.
- more contributors and literature research on even more disciplines and non-disciplines may add more items to be evaluated.
- reliability and validity may have been improved if there had been more participants in the quantitative stage.

- Additional research into other global entities within their organization may provide a slightly different spectrum of skills in terms of importance that would have investment implications into the respective operating groups learning initiatives.
- Inputs from other companies and industries could have validated these findings and added perspectives and insights.

Methodology Limitations

Interviewer bias can impact results in many ways as the background of the author is extensively within the sale arena. While there is no way to eliminate this bias, all attempts were made to mitigate it as much as possible. Future research by other researchers may help in softening any effect.

The usage of a 5-point Likert scale during the qualitative analysis phase showed the skills clustered very close together and this makes it difficult to comment on differences between the rated importance of the skills. If a 7- or 10-point Likert scale was used, it may have provided perspective on the meaningfulness of the differentiations.

The difficulty with the necessarily longer survey was participants filling it out to the end. There were 116 survey respondents who only partially filled in the information. The trade off between length of survey, which provides an extended list of skills, and the willingness of participants to fill it in was lessened as much as possible by shortening the original survey by 94 questions. The possibility of surveying in smaller sub sections was raised but there are issues with surveying the same population multiple times. Generalized outcomes were attained but surveying more participants, within additional companies, inside of different industries, would provide extended results.

Validating Group Comparison Limitations

Even though the skills and themes have been identified and group comparisons completed, there is still a need to test the validity of the results with incremental testing. Targeted training for sales personnel based upon the research herein, and then subsequent review of their success in terms of actual sales versus a control group, would provide empirical evidence that the identifying the significant skills for each group helps drive success.

Explicit Research Limitations

It may be useful to add some dimension of implicit research as the results from the explicit research typically utilized in sales research are often biased by attitudes, an unwillingness to admit attitudes, and outright faking (Friend and Johnson, 2005). A combination of implicit and explicit research should further refine findings and perhaps discover new knowledge.

Scale Limitations

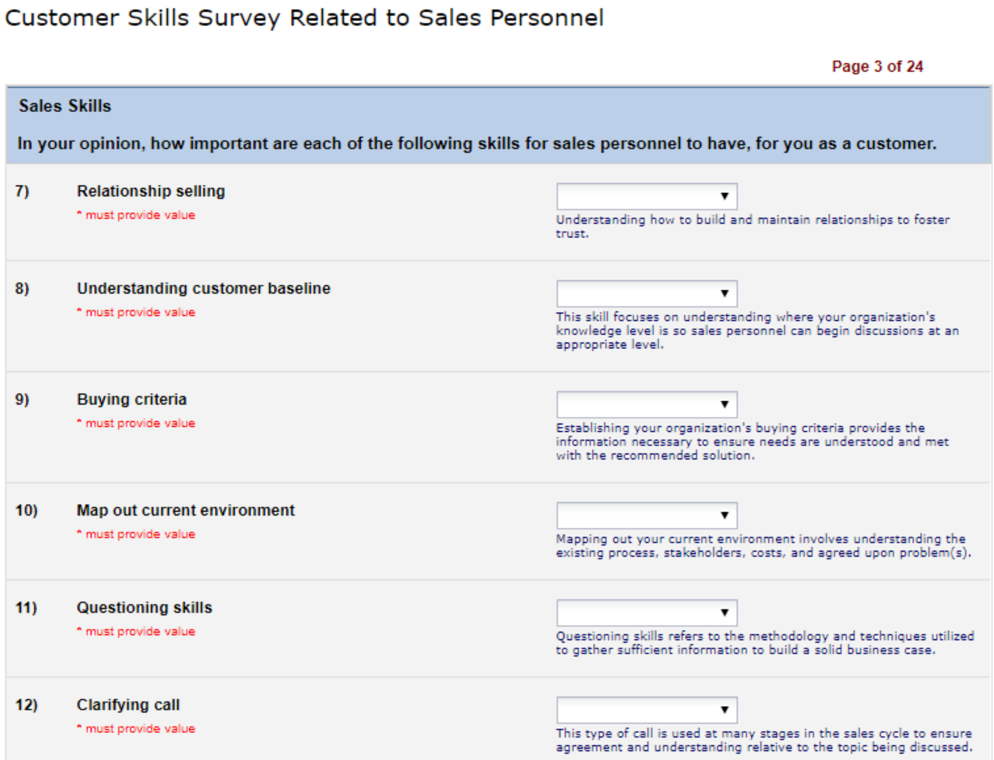
To complete scale research there needs to be some further stages of research completed. There are five steps (1) scale purification and initial validation, (2) exploration of the nomological network, (3) tests for the experimental and predictive validity, (4) replication within a field experiment, and (5) assessments of generalizability and boundary conditions (Böttger, Rudolph, Evanschitzky, & Pfrang, 2017). As this was not a study in scale development not all steps were completed fully. It would be recommended to follow the scale development process and complete the various steps to validate the scales identified within this analysis.

7.2 Future Research

Customer Perspective

One major area of future research should be asking the customer what they want. Sub sector stakeholders within the customers can also provide important group comparisons. With this type of investigation in mind three considerations are critical. The first would be cutting the survey size down as most corporations will not allow long customer surveys. It should be possible to have at least one question in each of the themes. For example, a survey was created for the customer audience of the multinational being worked with for the quantitative analysis and it shrunk to 48 questions and still would have provided pertinent information (see Figure 9 for a sample page of a customer survey). In this case the questions were kept the same so a comparison between internal and external answers could be done. There were fewer questions but the same number of scales. The second consideration is to modify the question explanations to reflect the customer viewpoint. The demographics need to be modified and, in this case, as illustrated in Figure 10 the role in the company question was changed to decision maker or influencer. The multinational who provided access to their personnel for the survey would use the results initially for developing their training continuums and the comparison to internal results would be particularly useful.

Figure 9 Sample Page of a Customer Facing Survey with Modified Explanations



Customer Skills Survey Related to Sales Personnel

Page 3 of 24

Sales Skills

In your opinion, how important are each of the following skills for sales personnel to have, for you as a customer.

7) **Relationship selling**
* must provide value
Understanding how to build and maintain relationships to foster trust.

8) **Understanding customer baseline**
* must provide value
This skill focuses on understanding where your organization's knowledge level is so sales personnel can begin discussions at an appropriate level.

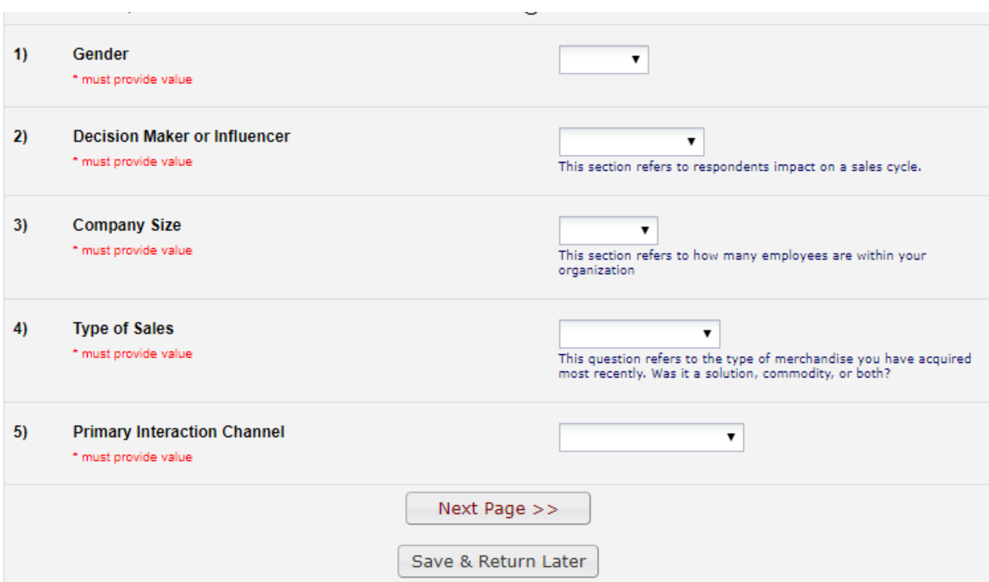
9) **Buying criteria**
* must provide value
Establishing your organization's buying criteria provides the information necessary to ensure needs are understood and met with the recommended solution.

10) **Map out current environment**
* must provide value
Mapping out your current environment involves understanding the existing process, stakeholders, costs, and agreed upon problem(s).

11) **Questioning skills**
* must provide value
Questioning skills refers to the methodology and techniques utilized to gather sufficient information to build a solid business case.

12) **Clarifying call**
* must provide value
This type of call is used at many stages in the sales cycle to ensure agreement and understanding relative to the topic being discussed.

Figure 10 Differing Demographic Page for Customers



1) **Gender**
* must provide value

2) **Decision Maker or Influencer**
* must provide value
This section refers to respondents impact on a sales cycle.

3) **Company Size**
* must provide value
This section refers to how many employees are within your organization

4) **Type of Sales**
* must provide value
This question refers to the type of merchandise you have acquired most recently. Was it a solution, commodity, or both?

5) **Primary Interaction Channel**
* must provide value

Next Page >>

Save & Return Later

Additional Future Analysis Recommendations

Future analysis should:

- Expand on the group comparisons and should necessarily include other organizations and industries.
- Develop group comparisons between contrasting groups within companies, organizations, and industries.
- Validate findings by providing training using the new list of identified important skills and then test the success of the sales personnel
- Validate group comparison findings by providing customized training for the identified skills that were significant and then reviewing sales person success to see if the identified skills training makes a difference.
- Conduct micro investigations in multiple disciplines, to identify new variables to include in scales, should continue.
- Utilize aspects of both explicit and implicit research where applicable
- Scale research should be completed to validate the scales identified.
- Research into the effectiveness of current teaching methodologies of the identified important skills could be conducted and possible new ways to train could be explored
- If there are no current training programs for an important skill identified herein then a teaching methodology could be developed and tested for effectiveness.

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+Strategic+Analysis.%E2%80%9D%2C+Miller+Heiman&aqs=chrome..69i57j69i60.3625j0j8&sourceid=chrome&ie=UTF-8

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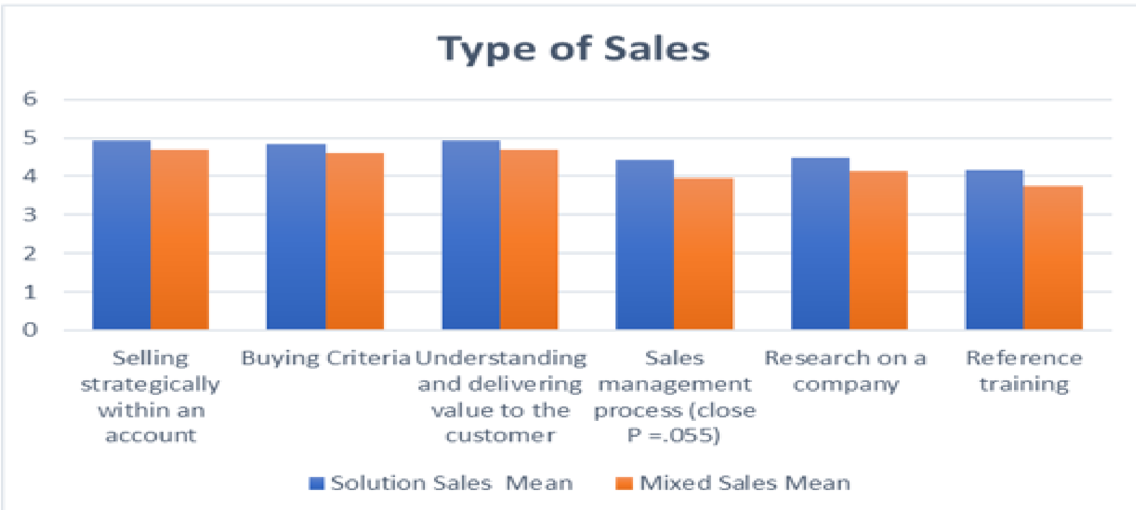
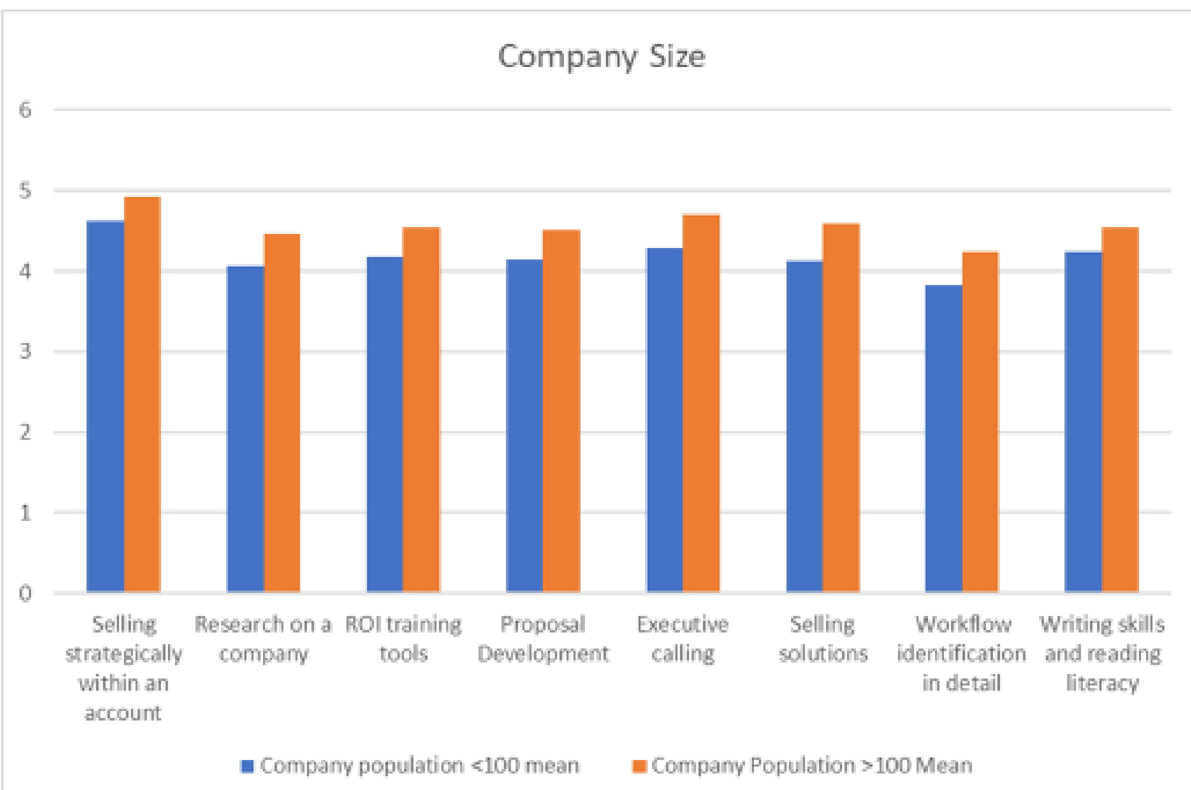
Section 9 -Appendices

1 Appendix A - Graphic Depiction of Group Differences

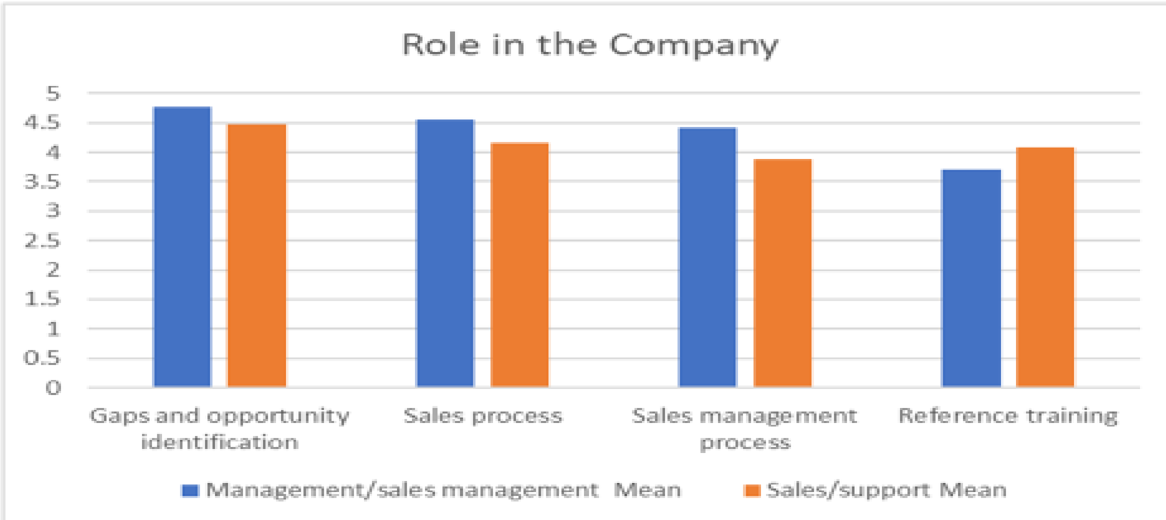
Group Comparison – Solutions versus Mixed Solution and Commodity Sales



Group Comparison – Selling to Companies with 100+ Employees versus Small Companies



Group Comparison – Role in the Company



Group Comparison - Gender

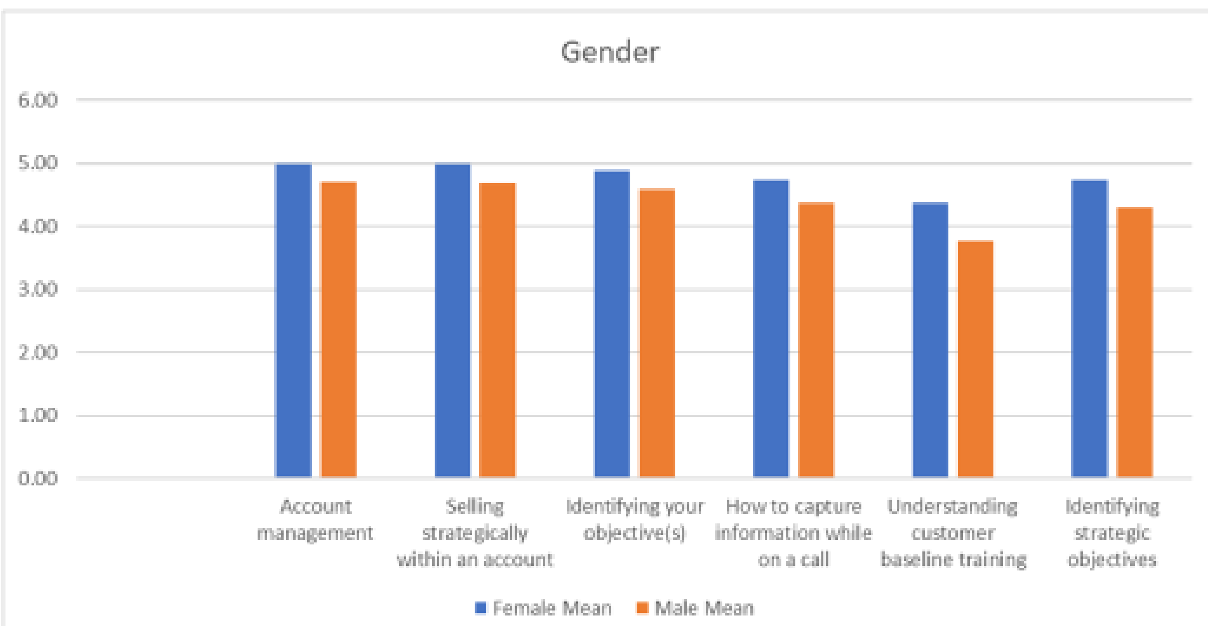
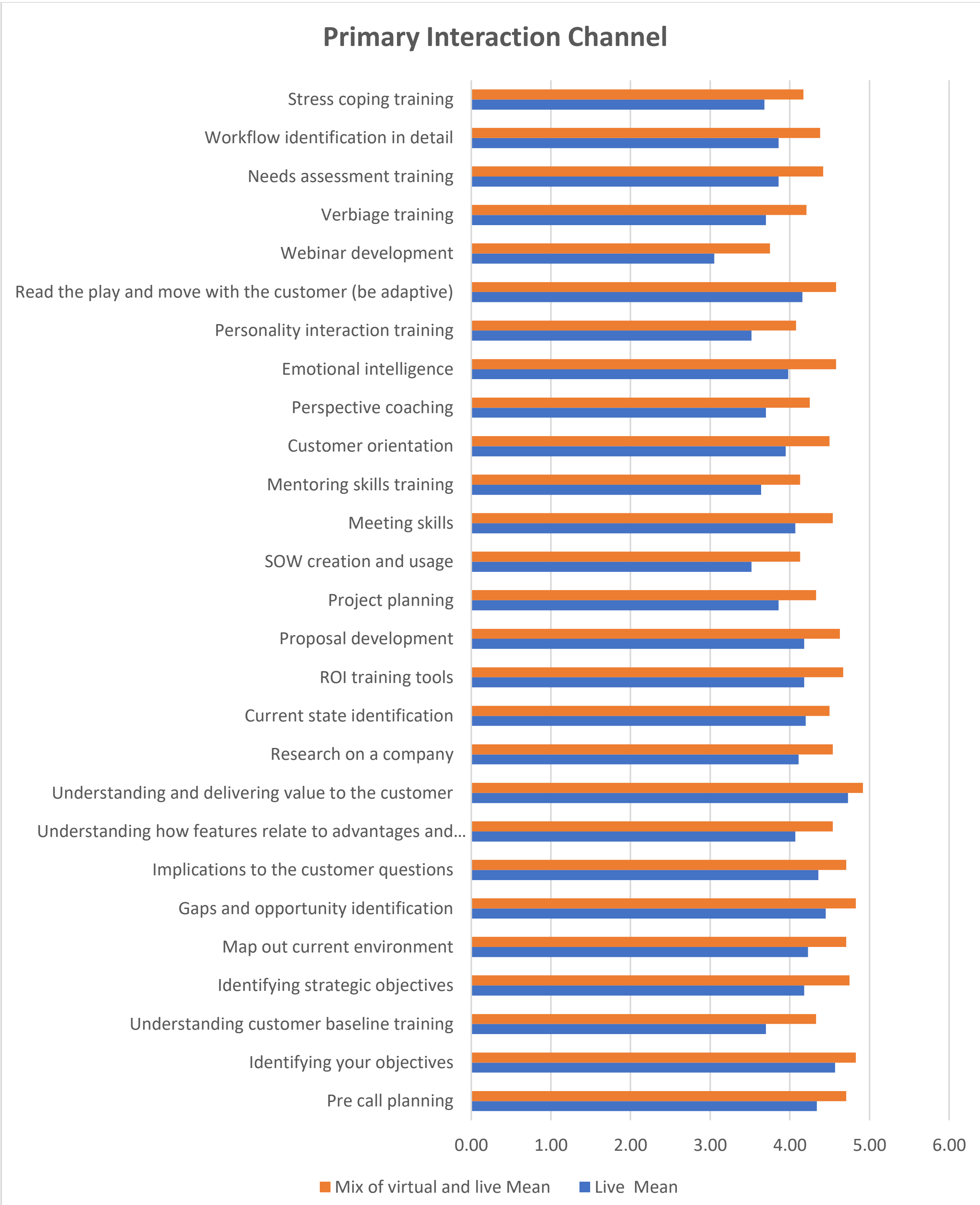


Figure 14 Group Comparison Primary Interaction Channel



2 Appendix B- Themes and skills with descriptions

Themes or Scales	Description of Themes	Codes or Skills Inherent in Themes or Scales	Description of Codes
Account Management/Strategic Selling	Account management is an umbrella term that encompasses the tools and techniques to ensure that all stakeholders are dealt with in an efficient and effective manner.	Account management	Account management is a term that describes how a sales person would analyse an account and manage their interaction with relevant players.
		Developing an influence map	An influence map is used to strategically plan on who you are going to influence in the account and how you are going to do so. Identifying the "wins" for each stakeholder and then developing a plan to provide this win is what an influence map is comprised of. In strategic selling they use a "blue sheet" which identifies all the stakeholders and relationships to each other as well as the wins and where you are in achieving the wins for each of them.
		Developing relationship tree	A relationship tree shows the various players and how their tasks and responsibilities relate to each other. This shows the players involved in a cycle. The initial contact may be at the purchasing level but IT, Finance and Human Resources may all have a stake in the final decision. Who reports to who, for this decision, and what their relationships are to the other stakeholders, is an example of a relationship tree?
		How to handle gatekeepers	Handling gatekeepers is a specific skill. These people can say no to a deal and limit access to the people who can say yes. Understanding how to deal with gatekeepers to gain access to the necessary contacts in the account is a skill that can be taught.
		Strategic selling	Strategic selling refers to the account management capability of identifying stakeholders in a sales cycle and understanding what are wins for them, and where they may be red flags (concerns that a stakeholder may not be on the salesperson's side). Action items are developed to influence the customer, and they are monitored. It is a systemic process that provides tools such as a "blue sheet" and instructions on how to use them. For any sales cycle that involves multiple people in the sales cycle on the customer side, this is a must learn.
		Training on customer roles and business drivers related to them	Customizing conversations relative to what is important to a client and how they wish to be spoking to is key to a sales person's success. Training on what typically interests a Chief Finance Officer and developing an appropriate talk track and verbiage is an example of this skill. This training would encompass listing roles relevant to their business and identifying a firm grounding in what matters to them and how they wish to be communicated with. There will be exceptions, but it is beneficial to have an idea how to formulate and deliver the message.
Basic sales skills training	While there are many intricacies within the whole sales skill continuum there are some skills necessary to all sales. This is a sampling of these skills.	Basic sales skills	Basic sales skills refer to the common denominator sales skills that all sales reps need. Even the more sophisticated solution sales still need the basics of how to influence a customer and attain the information necessary to build an effective business case. It is communication skills married to sales mechanics

		Best practices	In this instance, is being referred to is how to develop, position and communicate to the customer how the solution is best utilized by other customers, so that they can see how these best practises can apply to them.
		Budget Identification and confirmation	Attaining a customer's budget allows you to plan the size and scope of the solution. Often not understanding the budget means you either build a solution they cannot afford or build one that resolves a symptom and not the actual problem. Understanding how to effectively gather requisite information such as what the customer's budget is can be critical to a sales cycle.
		Buying criteria	Establishing the customer buying criteria provides the information necessary to build a solution that will meet their needs. It is not just monetary. It is a compilation of a variety of components that the solution will need to be able to deliver if you wish to do business with them. Skills in this are the basis for all sales training. Buying criteria identification, for each of the stakeholders in the project, is necessary for a successful salesperson.
		Call methodology	Call methodology refers to the steps within a sales cycle. It describes the various actions and outputs that a sales person needs to have completed at each stage.
		Clarifying call	A clarifying call is typically used to make sure that the salesperson understands what the customer issue/opportunity is. In more sophisticated sales opportunities, this type of call is used at many stages in the sales cycle to ensure agreement and understanding relative to the topic being discussed. It could be defining the problem, building the solution, or discussing the implementation plan. Clarifying is around understanding.
		Closing skills	A much maligned and heavily focussed upon skill. Closing skills training has evolved from what was basically asking for the order and handling objections, to a variety of methodologies to influence and persuade a client to acquire the product. A well-developed solution that matched up in a well-documented and believable manner to the defined buying criteria of the customer, is a much better closing tool than arguing that the customer's objection is not relevant.
		Cold calling	Cold calling refers to prospecting for new sales with customers you have never met and may not even know about your company or product. How you go about finding who to call on and the process to open the call, move past gatekeepers, and motivate the customer enough to agree to meet with you is the path to cold calling.
		Customer baseline training	In this age of customer sophistication, it must be understood where to start conversation. If the customer has done a lot of research and understands their industry well, understands your solution well, and knows your competitors, the dialogue is much different, and starts at a different level (place), then if the customer is uninformed. Understanding where the customer is starting from helps us more effectively communicate and influence and persuade.

		Customer goal identification	Understanding the goals and objectives of the customer you are dealing with, and the objectives of their organization, helps formulate the approach and recommendations you would be making. Objectives would be what they are interested in achieving. For example, one company may spend money to expand market share where another is focussed on short term profitability metrics.
		Demo skills	Demo skills are more than just showcasing the features of a sales person's product. The demo should show the solution/product considering how the advantages will benefit the customer and drive toward their objectives (meet their buying criteria). It involves technical capability, presentation skills, verbal and non-verbal communication, listening skills and much more.
		Establish timelines at each step in the sales cycle	Establishing an overall plan of action to move a sales cycle is contingent upon achieving the milestones. Part of the planning process is to understand the steps necessary, and when each step needs to be completed, so inertia does not kill the deal. Faster sales cycles are a benefit to establishing timelines.
		Feature, advantage benefit training	Feature, advantage, benefit (FAB) training is critical to the success of sales people. It is not enough to know the features of a product. It is necessary to know how these features manifest themselves into advantages to a client. The final and most important piece is understanding how those advantages impact the customer in a positive way (benefits).
		Fitting solution to customer needs	Developing the proposed solution that resolves the customer problem, and or provides an opportunity to hit customer objectives, is key to winning the business.
		Gaps and opportunity identification	Customers often have gaps (issues such as productivity gaps that have financial impact). The opportunity would be to bridge these gaps and either reduce costs or drive revenue. If accounts payable collections were delayed because of an operational issue you could resolve by improving their workflow, then that would be an example of a gap that would provide an opportunity. Faster collections have a positive dollar impact.
		Gather customer requirements	Understanding the customers current situation and gathering enough information to understand what their problem(s) are, provides an opportunity to understand their requirements (buying criteria identification). How to gather this requisite information is the skill that needs to be taught.
		How do you open a call	The scariest part of any sales cycle is opening the call. If you do it well, you earn the opportunity to move on with the sales cycle. If you do it poorly you do not. Learning what is necessary to most effectively open a sales call, and some tools you can develop and use, is the skill necessary.
		How to capture information while on a call	Information capture is important for future calls with the customer, and for internal calls as you work with resources within your firm to build a business case that will resonate with the customer. You need to develop a process to capture accurately information in a format that is useable. Techniques can be taught in this area.

		Identifying strategic objectives	Organizations will not make decisions that do not relate to corporate strategic objectives. Strategic objectives are the macro objectives that an organization must guide decisions. Growing market share would be an example, or all decisions must have an 18 month return on investment could be another.
		Implications to the customer questions	Once a problem has been identified it is necessary to see if it is relevant to the customer. Just because their accounts payable process is slow may not matter to them. Implication questions is where the "pain" is identified. What is the impact of the problem in terms of lost revenue, cost savings and or corporate objectives?
		Learning Model	A learning model is something that describes how the learning will happen, and explains things including corporate and industry verbiage, as well as the actual mechanics of learning the task at hand. Often this learning model has a range of options and individuals take advantage for the ones that will fill gaps and increase their success as sales people.
		Map out current environment	Mapping out the customers current environment involves understanding the existing process, stakeholders, agreed upon problem(s) and gaining a commitment from the customer that your understanding of their situation is accurate. It could involve a pictorial of the current process with the gaps and opportunities highlighted. It should include all costing and objectives of the customer.
		Need payoff questions	Need payoff questions are questions that elicit from the customer the win that will result from solving the identified problem. It takes the pain identified by implication questions and makes the customer understand how the proposed solution will ultimately benefit them.
		Pre-call planning	Pre-call planning is a systemic methodology combined with tools that include templates to properly organize the sales rep before the call. It would highlight things such as what are the objectives of the call, what are typical industry or client specific issues that they may have, what clues should be looked for to identify problems that can address with the salesperson’s solution etc. It is especially important now that customers are more informed. The sales person needs to be the subject matter expert and appear legitimate from the very first contact. All subsequent calls would also need to be pre-call planned and participants on the sales side aware of their roles.
		Pregnant pause training	Silence is golden is apt with respect to this skill. It may seem like a small thing but leaving a space for the customer to speak and provide information you can use to drive the sales cycle is important. Questioning techniques that utilize things such as open-ended questions are taught, and the critical piece is for the sales rep is to stop talking and listen. In its simplest form the sales reps need to shut their mouth and patiently wait for the customer response and not rush to fill any pauses.
		Problem questions	Problem questions are designed to solicit information that identifies the customers real problem, not a symptom.

		Problem solving	Problem solving can take many forms dependent upon what you are selling. If your problem was widgets rolling around the floor of your office the problem solver could be a widget catcher. It is usually not that easy though. As the sophistication of the problem rises, for example a complex work flow that is not flowing optimally, them a process to work through the best way to fix the problem is necessary. Learning the tools and techniques to most efficiently resolve problems is a learned skill.
		Prospecting	Prospecting is the combination of cold calling and qualifying whether the client is a prospect for what you sell. There are many ways to go about this dependent on what you are selling where and what the level of sophistication of the sales organization you are operating within. Suffice it to say, understanding the tools and techniques for a sales person's company to prospect, needs to be learned.
		Qualify leads	Qualifying leads refers to the techniques and tools that sales reps and their organizations utilize to understand if a customer is one that they may be able to do business with.
		Questioning skills	Questioning skills refers to the methodology and techniques utilized to solicit the requisite information to move a sales cycle to a successful conclusion. This is a top tier training requirement as obtaining the correct information efficiently results in the core information used to influence customers and build solid business cases.
		Relationship selling	Relationship selling can be viewed in a variety of ways. Historically, sales were often conducted using relationships. In smaller communities today and in situations where ongoing business is the expectation, understanding how to build and maintain relationships is still relevant. There are tracking tools and communication techniques to help, that can be taught. Even in what is now not a true relationship sale there is still a need to build enough trust and credibility to foster a decision in the sales rep favour. Customers may not have to love the sales rep, but they seldom will deal with one they do not trust.
		Sales management process	The sales management process is tied to call methodology and sales processes. SMP is the plan, methodology and tools used to manage the business. Sales reps need to understand the requirements of them in terms of what information do they need to provide, in what format and how. Since they are being managed this way employee satisfaction is impacted if they are not trained on expectations and actual tasks.
		Sales process	An example of a sales process would be introduction, gather requirements, demo, proposal, and close. It is call methodology and actual actions to be completed. It varies by organization and solutions being sold. Training needs to be done in all aspects.
		Situation questions	Situation questions in today's world have evolved. It is the expectation by clients that some research into the industry and the company you are calling on has been done. There are still instances where the sales rep needs to understand a more detailed idea of the situation for the customer. For example, corporate objectives would be different for a company that is in growth mode, then for their industry which may be in decline. Detail is important.

		Solution development relative to customer needs	Developing solutions that relate to the customer's specific needs is the cornerstone to gaining an order. The methodologies and tools in the sales rep's specific organization that help identify the optimum solution is what training is required.
		SPIN (situation, problem, implications and need payoff) selling	Perhaps the seminal training required for sales personnel. Situation, problem identification, implication and need payoff questions, and process is SPIN. It was heavily researched and developed into a methodology that stands the test of time. Modifications and adjustments by industry and type of selling is required at times, but the base sales skills are required.
		Tactical sales	Tactical sales refer to what tactics you may use in a situation to move around an issue or influence a customer. Specific tools can be employed. For example, some companies develop things such as general benefit statements, specific to the gatekeeper, to increase the chance to meet the decision maker.
		Time management	Time management is a combination of tactics, strategies and tools to increase productive time, and minimize non-revenue generating activities. Doing tasks in parallel and leveraging internal resources can be examples of how to put more time back in a sales person's day.
		Understanding and delivering value to customer	Being able to understand where the value is in your solution relative to a problem or opportunity and then being able to present it back in an articulate and impactful fashion is the skill. Tools and techniques are part of this skill that can be taught.
		Understanding customer concerns	Being able to listen, and question as appropriate, to better understand and qualify customer needs is the skill.
		Understanding existing customer environment	The skill is to listen and ask questions, as appropriate to better understand the customers environment. The idea is to communicate in a controlled and specific fashion to yield results the sales rep can use to drive a sales cycle.
		Understanding internal processes and infrastructure	Internal processes, and sales automation software needs to be understood and trained upon.
		Understanding the competition and how to deal with them	Knowing the strengths and weaknesses of the competition, and how their offering is being presented to the customer, helps position the sales reps offering. Competitive knowledge, and handling techniques, are sometimes married with technology that can be utilized to help.
		What is your objective	Objectives are what you are trying to achieve in a call, and they are also what a customer is trying to achieve in their job. Understanding how to plan for, and achieve, objectives for the sales rep, and for the sales rep to be able to obtain and reinforce objectives for the customer is the skill.
Business and financial acumen	The combination of business and financial acumen is the key to credibility and to truly understanding the impact of a decision by the customer to go with your solution.	Building credibility training	Building credibility is a skill that involves a variety of tasks and methods. Customers will not hand you sales that will impact their livelihood if they do not believe you can deliver. Learning how to utilize the materials provided by your own organization, references, and effectively showcasing your solution including implementation plans needs to be learned.

		Business acumen	Having business acumen, which is an understanding of how business works, within your area of opportunity, is necessary to build credibility. Sometimes it is necessary to even understand why a customer would care about your solution. C-level people want to have an intelligent business conversation, not discuss low level features and capabilities.
		Credibility building	Credibility building refers to interacting with a customer in a manner that makes you as a salesperson credible. It can be verbal or non-verbal communication. It can be the utilization of references and case studies within the customers industry. Effectively it is any way that you can influence the customer to see that you and or your organization is competent to do business with. In some case competent enough to even have a conversation and participate in a sales conversation.
		Financial acumen	Financial acumen relates to how finances work within an organization. This helps both internally and externally. Internally it facilitates the interaction with decision makers to provide things such as lower pricing, more creative packaging and customization of costing for customers. Externally understanding financially how a solution needs to fit into financial planning from the customers perspective can help close a deal. Maybe they cannot afford the solution today but if you amortise the costs over three years the business case work as the savings kick in with the new increased productivity.
		Research on a company	Knowing how to research a company, an industry and even a person is critical to building credibility and being able to begin and maintain a sales cycle. Items such as, what are typical problems in this industry or line of business that this customer manages, what are some success stories you can share that will resonate with this customer because there are commonalities they share, who is this person being dealt with (LinkedIn and other social media search). Companies have tools and methods they utilize and focuses they need to teach.
Business case development	Business case development relates to the comparative done between the current and proposed states. It encompasses financials, problem identification, impacts of implementing solution etc.	Business case development	Business case development goes far beyond simple return on investment discussions. It encompasses a clear understanding of the customer's existing environment, a problem statement, a proposed solution, implementation plans and many other details. If the solution has an impact on a customer's current workflows you need the detail to show why your solution increases value, solves an existing issue and or provides incremental opportunity. All while mitigating the risks of implementation of a new solution.
		Current state identification	To understand a customer issue and or understand the impact of possible solutions, the sales person must first start with the situation the customer is in. If they are dealing with a workflow, they need to know the existing workflow and where it has issues and opportunities that may be addressed.
		Proposal development	Proposal development can be as simple as filling in a tool that auto generates a generic proposal with generic wins for point solutions. For more complex sales cycles customizing the messaging relative to this customer's problem(s) and ultimate benefit(s) for maximum impact and keeping considerations such as primacy and regency in mind, is much more successful. Explaining current state, proposed state

			and financial implications in a succinct, impactful document, requires training.
		Reference training	The ability to generate and utilize references effectively is not an innate skill. Understanding how to develop references that will build credibility and move sales cycles needs to be learned. The usage of references to move a sales cycle also needs to be learned. Just providing the names of three customers that are positive toward your company is not going to achieve the deal. The references must resonate with the customer and be applicable to their situation. In some cases, you also need to consider the personalities of the respective players. The last thing you want is a pedantic, slow talking, detail orientated reference speaking to a C - level that wants a high-level discussion in a short period of time.
		ROI (return on investment) training (tools)	Return on investment has come to mean how do the financials look relative to the existing or current state. Training on the tools to show comparative financials to the proposed environment and how to explain them to the customer is relevant here.
Business Ethics	Business ethics relates to the ethics that your organization adheres to. It is internal and external. For example, no discrimination, no bribing, no bullying etc.	Business ethics	Business ethics refers to the rules and behaviours required by your organization relative to communicating and interacting with customers. It is more than "no bribing people" it refers to other components such as interacting even internally (no bullying or discrimination). All employees need to be trained on company expectations.
Challenging sales skills	Challenging sales skills refers to the capabilities that help a sales person motivate a customer to look at existing issues in a different light. A new way of thinking or viewing problems or opportunities is what is being suggested by the sales person.	Challenging customer training	Challenging the customer is the lynch pin to a new strategy of sales that revolve around Challenger Selling and the Challenger Customer. It refers to encourage the customer to look at their current situation in a new and or innovative way so that they can see other opportunities to improve their current situation. An example is a customer saying they do not need, or want, to buy a widget that you are selling. If you can showcase through references that others have employed your widget to resolve issues and provide opportunities that the customer would see as a positive, support with empirical data, and have them agree they should consider acquiring your widget, then you have successfully challenged them and now have a sales opportunity.
		Provoking thought leadership	Provoking thought leadership comes down to market relevance (proven with relevant references) and research. To challenge the customer to think in a different way the sales rep needs to illustrate that they have a credible story that challenges the old way of thinking about a problem or solution. It must be proven to relate to this customers industry, line of business, and or their company. Hopefully marketing provides some materials but even if they do sales reps must learn how to optimize usage and tailor the message.
Communication Skills	Communication skills encompasses everything from listening skills through influence and persuasion techniques.	Communication skills	Communication skills is a pervasive and large skill set. No matter how great your widget is, if you cannot interface with the customer in an effective manner to understand their needs, and showcase how you align to them, you will not be a sales person long. This topic encompasses skills such as listening and interpersonal skills as well as techniques and tools that optimize the salespersons capabilities to receive and understand accurate information.

		Listening skills	Listening skills is a broad and very important field in sales, with many aspects. Effective listening involves really hearing the customers message (both verbal and non-verbal), understanding their message, relating it to the overall conversation and your objectives in that call, and asking questions to clarify and extend your knowledge. It allows the sales rep to dig deeper. The magic is being able to listen, formulate your thoughts and communicate back. Sales people often think speaking is more important than listening. The opposite is true. This is a mandatory skill that needs to be trained.
		Pre-call planning	Pre-call planning is a systemic methodology combined with tools such as templates to properly organize the sales rep before the call. It would highlight items such as what are the objectives of the call, what are typical industry or client specific issues that they may have, what clues should be looked for to identify problems that can be addressed with the solution etc. It is especially important now that customers are more informed. The salesperson needs to be the subject matter expert and appear legitimate from the very first contact. All subsequent calls would also need to be pre-call planned and participants on the sales side aware of their roles.
		Primacy training	Primacy training revolves around the scientifically proven concept that people remember what is said first the most. Training means positioning your arguments at the beginning and in presentations do not lead with the traditional ten slides worth of corporate back slapping. Lead with the most pertinent influential information first such as the defined customer problem within their current state, the recommended solution and impact on the customer. Detail can follow, important information must come first.
		Questioning skills	Questioning skills refers to the methodology and techniques utilized to solicit the requisite information to move a sales cycle to a successful conclusion. This is a top tier training requirement as obtaining the correct information efficiently results in the core information used to influence customers and build solid business cases.
		Recency training	Recency training is another proven concept that tells us people remember what is said at the end of a communication more than during the middle. This means train sales people to properly summarize and close out a meeting with relevant influencing materials.
Computer Literacy	Computer literacy refers to the capabilities to utilize the various tools and software utilized by the sales persons organization. It could be social media, software including Word or PowerPoint, and custom software for proposal building.	Computer literacy	Computer literacy refers to the basic skills of computer and smart phone operation. It would encompass standard word processing and presentation software including Word and PowerPoint. It would also include social media software like LinkedIn and Twitter.
Consultative sales skills	In some markets, the sales person must operate more as a consultant and the skills associated with problem identification and recommendation generation are required. Being perceived as a value-add helper rather than a sales person helps drive credibility and trust.	Consultative skills	Consultative skills are about communication, building credibility, negotiation skills and a variety of other skills to provide for the customer information they need to make decisions. Consultants do not sell as much as they analyse and provide outputs for decisions to be made.

First impression/initial impact	First impressions are critical to the success of a salesperson. This group showcases the various methods and techniques to ensure a powerful and impactful first impression.	Attracting customer attention training	You only have one chance to make a first impression. Everything from appearance to a custom dialogue, or general benefit statement relative to your solution and the customers industry or company is included. An appropriate talk track relative to that customer, and their interests, needs to be developed and delivered in an effective manner.
		Categorization training	Categorization training is a psychological term. It can refer to how people perceive your solution, your company, or even yourself as the sales rep. For example, if you portray your company as an innovative, fast moving and highly skilled organization you will be perceived differently than if you portray your organization as a well-established multi-national with extensive resources. Dependent upon the customer and the situation, being in the innovative cutting-edge category can mean responsive and quickly evolving, but it can also mean risky and perhaps not having a proven track record or infrastructure to support the implementation, or the solution long term. You need to able to position yourself, in your verbal and nonverbal communication (includes verbiage), in a category that matches what the customer wants.
		Cognitive state identification	Cognitive state refers to the customer's mind set relative to how they make decisions and may change over time or situations. Understanding the cognitive state, the customer is in will suggest the best way to influence them and the timing as to when to try. For example, at the beginning of a call the primacy effect is in play and the customer will be paying more attention. In mid call do not bring up the most important point as they may not be really paying attention.
		Develop interest statements (general benefit statements)	When meeting a customer there needs to be something that triggers their interest enough that they are willing to commit time to speak with the sales person. A general benefit statement, or interest statement, is comprised of some advantage and benefit that will resonate with this customer, or that is specific enough to their industry to spark a conversation.
		Develop PPP statement (purpose, process, payoff)	A purpose, process, payoff statement is an interest statement. It has three specific parts, the purpose of the call, the process of how the call will progress to show them how they can move to the final stage, which is the payoff for them.
		Developing initial benefit statements	Like an interest statement but specifically leads with a benefit statement for this customer. Sometimes a customer coach (a person who you are working with within the account) can provide the intelligence to craft this statement as you move to making calls with various individuals within the client's organization.
		First impression training	First impressions in sales is the first step in the journey of a sales cycle. There are many components to creating this first impression of a credible, trustworthy sales consultant that has something of relevance to say. There are psychological aspects such as non-verbal communication, and actual techniques such as building general benefit statements, to ensure you come across as relevant and worth continuing the conversation with.

		Halo effect training	Halo effect refers to relating one item to another, which results in the second item taking on a reflection of the other. For example, having a world class sprinter endorse Bell high speed internet, would provide BELL with a halo effect of speed. This halo effect can be manifested through verbal communication, verbiage etc. so it is important to know how positioning your product can have it take on characteristics that are both positive and negative.
		Perceiver effects training	Perceiver effect refers to understanding what the perceiver's (the client) point of view, preferred communication style, and preferred negotiation style is. Taking a top level look at how the client operates tells the sales rep how to represent themselves to the client. If the client is superficial in nature, and not detail orientated, it would behoove the sales rep to focus on a higher level, and not deliver too much detail, as that would turn the client off for example.
		Primacy training	Primacy training revolves around the scientifically proven concept that people remember what is said first the most. Training means positioning your arguments at the beginning and in presentations do not lead with the traditional ten slides worth of corporate back slapping. Lead with the most pertinent influential information first such as the defined customer problem within their current state, the recommended solution and impact on the customer. Detail can follow, important information must come first.
		Product positioning (first impressions)	There are many facets to product positioning but at a macro level you need to be able to relate the solution you provide relative to the customer and their needs. If you cannot do this at first impression the call is over. If you cannot do this mid sales cycle the call is over. If you cannot do this at the end of the sales cycle you will not close the business. There are psychological implications, there are mechanics that need to be learned, and it all needs to work together.
		Social cues training	Social cues training relates to how to recognize social cues and then how to react. Non-verbal communication has many examples of social cues that can be read in body language for example. It is specific training on what social cues to use to drive what behaviours.
Funnel Management	Funnel management refers to the process to manage suspects and prospects to ensure revenue targets are attained.	Business development	In the sales continuum the management of the sales cycles to fruition starts with developing an overall strategy to build the business. All the processes inherent to manage the revenue opportunities would be reflected in an overall business development plan. This plan is comprehensive and is reflected from the top on down to the sales rep, and then back up the line. Management needs to train the sales team on the tools to manage the sales rep’s business and ensure the business is healthy and grows. Sales automation software, tools such as funnel management (refers to tracking and managing sales cycles form prospecting through to close), and various other components are necessary to ensure business development. The sales rep needs to understand how to use the tools to manage their business effectively.
		Forecast	Forecasting refers to providing an informed opinion on which deals will close in what timelines. If there were a forecast revenue of $50,000 for this month the salesperson would be saying here is how much money that will be driven in sales in this timeline. There is usually detail in terms of what deals will close, and how likely are they to close.

		Funnel management	Funnel management refers to the task of looking at all the suspects and prospects in your territory and identifying when they are likely to move to the next step in the sales cycle, and the action item (along with attendant timeline) to get there. Sales management tries to understand how much business is going to happen, and when, and this allows them to recommend appropriate actions. They may, for example, say to a sales person, you do not have enough revenue in your funnel, so you need to prospect more suspects, that when the cycles are worked will become prospects, and then ultimately be forecastable.
		Qualify leads	Qualifying leads refers to the techniques and tools that sales reps and their organizations utilize to understand if a customer is one that they may be able to do business with.
Implementation Planning	Customer's need to know the impact and timeline for the proposed solution meets their risk comfort level. Implementation planning builds legitimacy and a sort of partnership with the customer as the team evolves through the process.	Implementation planning	Implementation planning sometimes is ignored by sales as they view it as someone else's job. If you want credibility with a client you need to show them how the solution would be implemented, timelines, and impact on their organization. While the salesperson does not do this in a vacuum and needs the help of internal stakeholders and the customer, he must know how to work with implementation plans.
		Project planning	Project planning can refer to planning a sophisticated sales initiative, such as a need's assessment in a multi-site large organization, with your team. It can also refer to doing the planning necessary to implement your solution. You will need to show the customer you can deliver, in the requisite timelines, and what the implications are to their resources and their overall business.
		SOW (statement of work) creation and usage	A statement of work defines the tasks, timelines and responsibilities of stakeholders. Sales rep can use this tool to build credibility and often to close the business. They can be tasked to create a SOW but more often they will be a team member tasked with being the customer interface to gather pertinent information for his/her implementation team. They need to understand how the tools work, what are the objectives, what are realistic expectations for customers to have, and the methodologies to move to the end document.
Industry research and value development	Customers are more informed in todays world. Salespeople need to have industry knowledge, specific account knowledge, and knowledge of the person they are dealing with to begin their conversation at an acceptable baseline for the customer as this will improve their chances of success.	Industry research	The days are gone where you walk in and begin asking about a company from scratch. The new paradigm that salespeople live in is customers having an expectation that you know about their industry and that you know about their company. The questions you ask must begin from this new baseline. You may be able to research typical issues for the industry or specific problems this customer is experiencing so that you already know a problem your solution can help with. As an informed advisor you have the credibility to challenge the customer and have them view issues in a different light that provides opportunity.
		Industry specific value development for your solution	Different companies with an industry can have similar concerns. For example, printing companies may all have the issue of being able to produce an audience of one document in a timely fashion or it costs them revenue. If you know this and have a recommendation that can improve turnaround time of production of customized documents, you will garner interest and have an opportunity to start or continue a sales cycle.

		Line of business training (product relative to industry issues)	Line of business training can focus on understanding the industry, typical pain points, and the relevance of your solution to these customer concerns. It can also refer to an actual line of business that may be pervasive across many industries such as an accounts payable application (accounts payable is a line of business) issue for example. It can be both such as an industry specific line of business issue with accounts payable, peculiar to manufacturing companies.
		Market relevance	Market relevance refers to how the solutions that your organization sells resonates within that industry. What problem does your solution solve and or what opportunities does it open up?
		Research on a company	Knowing how to research a company, an industry and even a person is critical to building credibility and being able to begin and maintain a sales cycle. Samples would include, what are typical problems in this industry or line of business that this customer manages, what are some success stories you can share that will resonate with this customer because there are commonalities they share, who is this person that is being dealt with (LinkedIn and other social media search). Companies have tools and methods they utilize and focuses they need to teach.
		Verbiage training	The types of words used by a sales rep can impact their credibility. It may even cause them to not be able to move forward in a sales cycle. For example, the verbiage used in a locker room would surely not be appropriate for a CEO.
Internal Systems Literacy	Understanding the variety of tools and processes within an organization makes for a more productive sales person as they spend less time on internal tasks.	Systems literacy	Sales reps need to understand the software and technologies within their organization to run their business. It is also beneficial to understand how the various systems within a customer environment might interact.
		Understanding internal processes and infrastructure	Internal processes, and sales automation software needs to be understood and trained upon.
Interpersonal Skills	Interpersonal skills encompass a broad range of skills that range from listening skills, time management, meeting skills, through influencing and persuasion techniques and tools.	Interpersonal skills	Interpersonal skills refer to the interface between one individual and another. It is not a specific sales skill as much as it is a life skill. It is important for sales people as effective interpersonal skills provides the ability to influence and persuade others. It would include items such as building rapport, increasing effectiveness of meetings, listening skills, leadership, and managing relationships.
		Listening skills	Listening skills is a broad and very important field in sales, with many aspects. Effective listening involves really hearing the customers message (both verbal and non-verbal), understanding their message, relating it to the overall conversation and your objectives in that call, and asking questions to clarify and extend your knowledge. It allows the sales rep to dig deeper. The magic is being able to listen, formulate your thoughts and communicate back. Sales people often think speaking is more important than listening. The opposite is true. This is a mandatory skill that needs to be trained.
		Managing relationships externally	While there are many aspects that are important in a sales call, one of the most relevant is managing relationships. This term describes how a salesperson interacts with the customer and influences them in a manner that is positive and maintains a relationship that can result in a sale. Pushing someone too hard may achieve the salesperson winning that battle but the resultant poor relationship can kill the overall deal. Learning what styles exist and how best to

			interact with each type of customer personality is very helpful even if the sale is not a relationship only transaction.
		Managing relationships internally	Management of internal relationships refers to how a salesperson interacts with their internal team members and other stakeholders within their organization. In many cases the solution must be touched by many hands and if the management of these resources is not optimum than time is lost, and the best solution may not come forward.
		Meeting skills	A part of interpersonal skills this one needs to be highlighted. The capability to run an effective meeting that achieves objectives in an agreed upon timeline is something that all salespeople need to know how to do. They are in meetings literally everyday. There are hard tools, and soft skills including listening and leadership skills, that all come into play to run a meeting that generates desired results in a timely fashion
		Persuasion skills	Persuasion skills are much more than objection handling. The human species can be motivated in several scientifically proven ways. Learning the best way to influence and persuade internal and external clients increase the chances of success.
		Time management	Time management is a combination of tactics, strategies and tools to increase productive time, and minimize non-revenue generating activities. Doing tasks in parallel and leveraging internal resources can be examples of how to put more time back in a sales person’s day.
		Using intensity effectively	Using intensity to attract attention and keep the customer engaged is the skill.
		Using repetition effectively	Repetition may be used to reinforce ideas and help the customer remember salient points.
Leadership skill (formal and informal)	Leadership, both formally and informally, is critical to the sales process. It can entail how the sales management team manages the rep, but it also includes the sales reps managing and leading the internal and external teams they work within.	Creative leadership	Leadership takes many forms and today's world involves innovation and creativity in leading internal and external people. Leadership styles of the past such as authoritarian (9 1 leadership) only works in a limited fashion and in limited situations. Leadership must be more fluid and informal leadership techniques that influence and persuade are more useful now, in most situations.
		Leading without position	Informal leadership is learning and developing the capability to influence others to follow your lead. In sales, leading internal or external meetings, without formal authority, is very important.
		Management style	Management style refers to how you manage your internal and external resources. If you have formal authority, theoretically, you could just tell people what to do and this is an actual management style. Training would involve understanding what your default management style is, and how it impacts your interactions. Learning other styles, and understanding when to use them, would also be part of a curriculum in this area.
		Mentoring skills training	Sales people deal with a broad range of internal support people. Often the team will have new members and or some that lack certain skills or capabilities. If a sales person can mentor the other assets/team members, the overall team becomes more effective

		Sales management courses	As a sales manager, how do you most effectively manage your team, how do you set quotas, how do you use the software and tools to manage the call methodology and funnel, and how to mentor and motivate, are all examples of sales management courses. Sales reps need to understand the other side of the discussion and how the management tools, methodologies, and sales automation software are to be used by them.
		Situational leadership	As a sales manager you need to understand how to modify leadership, coaching and mentoring based upon the situation you are in and who you are dealing with. A stressed out, high strung employee having just lost a deal will be different to deal with than a high energy, motivated, A type personality who just lost a deal. The tools and methodologies to coach need to be influenced by factors that can be trained upon such as personalities of the participants, influence and persuasion skills etc. Sales people should also be trained on how the various tools are used and expectations set as to what is good and bad.
Non-verbal communication	Non-verbal communication impacts how a sales person perceives the customer, and how the customer perceives them, during an interaction. Social cues and body language can impact the message being sent and delivered.	Body language	Body language is a powerful tool. Your body language tells a story, but so does the body language of the customer. You need to be able to both give off non-verbal communication via body language that supports what you are saying and, be able to see from the customer's body language how they are reacting.
		Deception cue Identification Training	Deception cue training works two ways. Understanding the cues (non-verbal communication and body language for example) will help you identify when a customer is being deceptive so that you can deal with it. It also teaches a salesperson what cues make them seem to be deceptive. Building credibility is hard if the customer thinks you are being deceptive by the cues you are show casing.
		Non-verbal communication	Non-verbal communication is based upon many variables such as facial cues, body language and even items such as intensity and volume or speed of speaking. It encompasses the whole gamut of understanding of people's non-verbal cues.
		Psychological perspective on non-verbal communication	The whole concept of nonverbal communication both from understanding what the customer is saying, as well as what your non-verbal communication is saying, needs to be understood. It is much easier to negotiate with a client when you truly understand, for example, that they feel uncomfortable every time you begin to discuss the topic of layoffs within your business case. You should not ignore this and instead put together a plan that addresses this discomfort (you could take on these employees as part of the services deal). Another important example would be if you are putting off deception cues, that make you as a sales rep look untrustworthy, you need to alter that behaviour before it costs you business. Psychological studies have proven this type communication is valid, sales people need to be trained to listen to it.
		Social cues training	Social cues training relates to how to recognize social cues and then how to react. Non-verbal communication has many examples of social cues that can be read in body language for example. It is specific training on what social cues to use to drive what behaviours.

Objection handling	Objection handling is a process and set of techniques to mitigate the impact of customer objections and persuade them to move on with the next step in the sales cycle.	Conflict management	Conflict management is both from an internal and external perspective. Being able to manage conflicts to attain your specific goals, without having an adverse effect on future dialogues is the key.
		How to handle gatekeepers	Handling gatekeepers is a specific skill. These people can say no to a deal and limit access to the people who can say yes. Understanding how to deal with gatekeepers to gain access to the necessary contacts in the account is a skill that can be taught.
		Objection handling	Once the cornerstone of sales calls it is still a valuable skill to learn. Learning how to properly respond to customer objections in a manner that achieves your objectives involves many techniques including pre-call planning creation of anticipated responses to customer objections.
Personal Skills	Personal skills relate to individual capabilities that may or may not be inherent in a salesperson. If a sales person does not know how to multi task they can be taught techniques to improve this behaviour, is one example.	Attention to detail (training on how to be systemic)	This is a critical skill for all types of sales. Training in this area typically revolves around the various methods and tools that can be utilized within the sales persons day, to ensure that necessary detail to do things such as build a solid business plan is completed in a timely manner (in terms of tasks, planning, or information gathering).
		Memory training	Memory training may seem to be an odd skill required for a sales rep but imagine a two-hour call with multiple players speaking and relevant information needs to be captured, listened to, expanded upon, questions need to be asked and some information relates to other information discussed earlier. A systemic process to ensure relevant information is captured/remembered so it can be utilized late or even remembered when going into the meeting in the first place is very helpful. There are tools and methodologies that can help as required.
		Multi-tasking training	Multi-tasking is an advanced form of time management. There are literally an infinite number of tasks a salesperson can be doing. Learning methods to help organize and prioritize the many tasks required to be completed is a critical skill for a salesperson. Often doing tasks in parallel is the only way to achieve them done in a timely fashion. It is not necessarily intuitive, training can help.
		Observational skills	Observational skills are related to simply learning to see what is in front of you and interpret what you are seeing. For example, there were lots of filing cabinets it would be possible to extrapolate that this company had a lot of paper. If selling scanning or electronic content management, the sales person would be able to ascertain that this may be a prospective customer based upon the quantity of paper they have in their office. Seeing equipment waiting to be shipped could indicate that shipping materials are taking too long to generate. These skills can be taught relative to the solution you sell.
		Organizational skills	Organizational skills refer to the tools and techniques to ensure a sales person is optimizing their time in revenue generating activities. These skills help with respect to time management and all sales people should be trained on how best to organize their activities. Even organizing customer meetings, or their own schedule, are relevant to be trained on.

Personality identification and communication impact	Knowing the personality of both the sales person, and the person they are interacting with, provides insight into the most effective methods to optimize communication and facilitate influence and persuasion.	Ability profile	Measuring abilities relative to pertinent personality traits that would reflect on sales skill capability
		Assertiveness	Assertiveness refers to a personality trait that needs to be adjusted according to the customers personality and the situation the sales person is in. By nature, some people are more assertive than others (what is meant is assertive, not aggressive, which is not typically good) and so are customers. As a sales rep you will have to dial up or down your assertiveness posture dependent upon the customer. Assertiveness is manifested with verbal and non-verbal communication and through written communications and presentations.
		Cognitive state identification	Cognitive state refers to the customer's mind set relative to how they make decisions and may change over time or situations. Understanding the cognitive state, the customer is in will suggest the best way to influence them and the timing as to when to try. For example, at the beginning of a call the primacy effect is in play and the customer will be paying more attention. In mid call do not bring up the most important point as they may not be really paying attention.
		Curiosity	Curiosity is a personality trait. What can be taught are mechanisms to dig out information and expand knowledge. This is necessary to understand customer issues and build solid business cases.
		Customer baseline training	In this age of customer sophistication, salespeople must understand where to start conversation. If the customer has done a lot of research and understands their industry well, understands your solution well, and knows your competitors, the dialogue is much different, and starts at a different level (place), then if the customer is uninformed. Understanding where the customer is starting from helps us more effectively communicate and influence and persuade.
		Customer orientation	Customer orientation relates to how the sales professional orients there thinking. If you are customer orientated, then you are looking to provide help that will benefit the customer. The more customer orientated you are typically the more trusted you are and the more credibility you have. Short term sales goals that provide a win for the sales rep but not for the customer result in poor long-term results.
		Customer processing traits (spontaneous or deep thinkers)	Customer processing refers to how a customer processes information. Are they the type that needs all the detail on a solution, so they can actively think about it, or are they the type that wants just an overview, so they can make the decision and start moving?
		Emotional intelligence	Emotional intelligence relates to what your emotions are, and how you control them, so that you have productive relationships with customers. If you understand the emotions of your customer, you will also be able to more effectively influence and persuade them.

		Interpersonal mentalizing	Interpersonal mentalizing is taking a bird's eye view of the interaction with whoever you are talking to, so you can create a positive ambience. For example, you can look at their non-verbal cues, interpret them, and make it a comfortable place for someone to decide.
		Managing relationships externally	While there are many aspects that are important in a sales call, one of the most relevant is managing relationships. This term describes how a salesperson interacts with the customer and influences them in a manner that is positive and maintains a relationship that can result in a sale. Pushing someone too hard may result in the salesperson winning that battle but the resultant poor relationship can kill the overall deal. Learning what styles exist and how best to interact with each type of customer personality is very helpful even if the sale is not a relationship only transaction.
		Managing relationships internally	Management of internal relationships refers to how a salesperson interacts with their internal team members and other stakeholders within their organization. In many cases the solution must be touched by many hands and if the management of these resources is not optimum than time is lost, and the best solution may not come forward.
		Personality Interaction training	Personality interaction training refers to learning how you interact in a variety of settings and then understanding the optimum communication style to influence the customers personality. If you are aggressive typically, and the customer is more of a slower deeper thinker, you may have to alter your style to slow down and provide more detail while patiently waiting for the customer to respond. If you rush them, you turn them off and could alienate them. At best, you lose their input as they do not have time to process your question, so they do not answer
		Personality profile	Personality profiling is often used with personality interaction training in that it identifies how the sales person typically interacts with others in a variety of settings such as social, business etc. It certainly lends itself to understanding and providing a set of skills upon which to base your selling style. If you are typically prone to be very quiet, both at work and home, you may have to learn to dial it up (techniques and tools to help do this are available) at work.
		Perspective coaching	Perspective coaching is part of leadership. To be able to coach internal and external partners in an effective manner increases the chances of a sale. If you have a customer who is helping you inside the account with presenting your ideas up the food chain coaching perspective coaching really helps to propagate your point across to other stakeholders within the account. If you are a sales manager who does calls with the sales rep, and then properly coaches warranted behaviour change to increase the hit rate on sales, this is powerful and results in increased revenue.
		Read the play and move with the customer (be adaptive)	As the customer reacts to the sales person the sales person must be able to adapt their approach to optimize their chances of success. For example, if the customer is a slow-moving detail orientated thinker and the sales rep pushes to hard so that the customer is induced to be frustrated, the sales rep needs to read the verbal and non-verbal cues and modify their approach. They could, in this instance, go back to the detailed information and patiently review with the client. They can spend more time listening and

			probing for customer responses than trying to talk loud enough and long enough to push to a decision.
		Relationship selling	Relationship selling can be viewed in a variety of ways. Historically, sales were often conducted using relationships. In smaller communities today and in situations where ongoing business is the expectation, understanding how to build and maintain relationships is still relevant. There are tracking tools and communication techniques to help that can be taught. Even in what is now not a true relationship sale there is still a need to build enough trust and credibility to foster a decision in the sales rep favour. Customers may not have to love the sales rep, but they seldom will deal with one they do not trust.
		Sociability	Sociability is a term used in a form of training that refers to personality traits. Understanding your personality and how prone you are to be sociable, and how prone the customer is to be a sociable person, you can dial up or down your sociability. Training in this are revolves around understanding various personalities and how to adapt as required.
		Social cues training	Social cues training relates to how to recognize social cues and then how to react. Non-verbal communication has many examples of social cues that can be read in body language for example. It is specific training on what social cues to use to drive what behaviours.
Presentation Skills	Presentation skills refers to the broad range of skills necessary to communicate the requisite message to the customer in a manner that influences behaviour.	Presentation skills	Creation of presentations, and actual presentation skills, to effectively communicate the concepts to the customer and influence them to an action you want them to take is the skill requirement. It would include knowing software similar to or including PowerPoint, to the soft skills of interpersonal persuasion, and non-verbal communication.
		Using intensity effectively	Using intensity to attract attention and keep the customer engaged is the skill.
		Using repetition effectively	Repetition may be used to reinforce ideas and help the customer remember salient points.
		Verbiage training	The types of words used by a sales rep can impact their credibility. It may even cause them to not be able to move forward in a sales cycle. For example, the verbiage used in a locker room would surely not be appropriate for a CEO.
		Webinar development	Webinar's are integral to extending the reach of sales professionals. Webinars are virtual meetings typically with a specific theme.
Problem Identification	Problem identification involves gathering information and uncovering opportunities within a customer site by understanding where they have a problem they wish to resolve.	Lean six sigma	Lean six sigma refers to a methodology to effectively diagnose problem(s). It is detailed and systemic. Larger, more complex opportunities would benefit from this kind of analysis. The sales person could learn the process but would more likely learn a subset such as a yellow belt, and or work with an expert (called black belt).

		Problem questions	Problem questions are designed to solicit information that identifies the customers real problem, not a symptom.
		Problem solving	Problem solving can take many forms dependent upon what you are selling. If your problem was widgets rolling around the floor of your office the problem solver could be a widget catcher. It is usually not that easy though. As the sophistication of the problem rises, for example a complex work flow that is not flowing optimally, them a process to work through the best way to fix the problem is necessary. Learning the tools and techniques to most efficiently resolve problems is a learned skill.
		Understanding customer concerns	Being able to listen, and question as appropriate, to better understand and qualify customer needs is the skill.
		Understanding existing customer environment	The skill is to listen and ask questions, as appropriate to better understand the customers environment. The idea is to communicate in a controlled and specific fashion to yield results the sales rep can use to drive a sales cycle.
Product knowledge training	Product knowledge training involves understanding what the organization sells, how it pertains to a customer's needs, and positioning the product effectively to a customer.	Product knowledge	Product knowledge is important as the sales rep needs to understand what their solution does (features), how it works, the implications of implementing for the customer (advantages) and overall benefits (benefits) that can be derived from the product. In sales vernacular this is called FAB (feature, advantage, benefit).
		Product positioning (first impressions)	There are many facets to product positioning but at a macro level you need to be able to relate the solution you provide relative to the customer and their needs. If you cannot do this at first impression the call is over. If you cannot do this mid sales cycle the call is over. If you cannot do this at the end of the sales cycle you will not close the business. There are psychological implications, there are mechanics that need to be learned, and it all needs to work jointly.
Social Selling	Social selling is a term that describes using social media and social engineering to make a sales person more credible to a customer and more effective in their dealings with them.	Build marketing campaigns	The paradigm has shifted. Generic marketing campaigns are not enough. A sales professional must customize campaigns to reflect specific industries, customers and themselves. Attaining the correct information out on the right medium is critical.
		Building and maintaining social selling network.	Building a social selling network refers to the utilization of today's social communication tools such as Twitter and LinkedIn. The arena within which sales is being conducted has evolved and customers require being communicated to in a different fashion. The customer in today's world has much more information available to them and their expectation is that you bring value add beyond what they can look up themselves. Using social media to build a brand that showcases you have something to offer means sales.
		Building your brand	Building your personal brand is how you showcase to the customer that you can bring value add. There are various methods and communication strategies that need to be employed to build your personal brand. People buy from people, and while your company may have a good brand, your own personal brand will also have an impact and can enhance or kill a sale.

		Halo effect training	Halo effect refers to relating one item to another, which results in the second item taking on a reflection of the other. For example, having a world class sprinter endorse Bell high speed internet, would provide BELL with a halo effect of speed. This halo effect can be manifested through verbal communication, verbiage etc. so it is important to know how positioning your product can have it take on characteristics that are both positive and negative.
		How to build sales campaigns	Whether you are in a large organization that provides marketing materials, or in a small organization that provides little in terms of marketing support, you must be able to understand and optimize the marketing resources you have. In some cases, you may have to add on to the collaterals you have, but in all cases, you need to learn how to use the marketing tools.
		Managing relationships externally	While there are many aspects that are important in a sales call, one of the most relevant is managing relationships. This term describes how a salesperson interacts with the customer and influences them in a manner that is positive and maintains a relationship that can result in a sale. Learning what styles exist and how best to interact with each type of customer personality is very helpful even if the sale is not a relationship only transaction.
		Managing relationships internally	Management of internal relationships refers to how a salesperson interacts with their internal team members and other stakeholders within their organization. In many cases the solution must be touched by many hands and if the management of these resources is not optimum than time is lost, and the best solution may not come forward.
		Research on a company	Knowing how to research a company, an industry and even a person is critical to building credibility and being able to begin and maintain a sales cycle. Items such as, what are typical problems in this industry or line of business that this customer manages, what are some success stories you can share that will resonate with this customer because there are commonalities they share, who is this person being dealt with (LinkedIn and other social media search). Companies have tools and methods they utilize and focuses they need to teach.
		Social selling (using today's tools such as LinkedIn and Twitter etc.)	Social selling is made up of many parts, but the essence is to use social platforms to brand yourself in a manner that has customers wishing to do business with you. You can prospect and identify opportunities as well as have the customers reach out to you if it is done correctly. You can also do research to better understand your client and their objectives prior to a call.
		Webinar development	Webinar's are integral to extending the reach of sales professionals. Webinars are virtual meetings typically with a specific theme.
Solution Selling	Solution selling is a group of techniques, and a methodology, to effectively sell solutions. This type of selling is most often utilized in situations that are typically more sophisticated sales cycles and require more diligence.	Alignment call (sharing best practises relevant to this specific customer and their industry)	An alignment call is used to align the customers needs with the capabilities of your solution. Often best practises and references are used to provide credibility during this call.

		Customer reference handling, development and usage	References are the key to credibility building, which is the key to solution sales cycles. It is not enough to say you do business with a glass manufacturer and their accounting issues, when you are dealing with a manufacturer who has a work flow issue. Developing lists of references that will provide the message to your clients that you wish them to have relative to specific solutions, problems, industry etc. that resonates is an important skill. How to present these references in a manner to optimize their impact and improve your chances to sell something needs to be learned if it is not inherent. Different organizations handle this in different ways and use different tracking mechanisms. How to manage this process relative to references is important.
		Demo skills	Demo skills are more than just showcasing the features of a sales person's product. The demo should show the solution/product considering how the advantages will benefit the customer and drive toward their objectives (meet their buying criteria). It involves technical capability, presentation skills, verbal and non-verbal communication, listening skills and much more.
		Executive calling	How to plan and execute a call on an executive.
		Fitting solution to customer needs	Developing the proposed solution that resolves the customer problem, and or provides an opportunity to hit customer objectives, is key to winning the business.
		Gaps and opportunity identification	Customers often have gaps (an example would be productivity gaps that have financial impact). The opportunity would be to bridge these gaps and either reduce costs or drive revenue. If accounts payable collections were delayed because of an operational issue you could resolve by improving their workflow, then that would be an example of a gap that would provide an opportunity. Faster collections have a positive dollar impact.
		Gather customer requirements	Understanding the customers current situation and gathering enough information to understand what their problem(s) are, provides an opportunity to understand their requirements (buying criteria identification). How to gather this requisite information is the skill that needs to be taught.
		How do you open a call	The scariest part of any sales cycle is opening the call. If you do it well, you earn the opportunity to move on with the sales cycle. If you do it poorly you do not. Learning what is necessary to most effectively open a sales call, and some tools you can develop and use, is the skill necessary.
		How to capture information while on a call	Information capture is important for future calls with the customer, and for internal calls as you work with resources within your firm to build a business case that will resonate with the customer. You need to develop a process to capture accurately information in a format that is useable. Techniques can be taught in this area.
		Identifying strategic objectives	Organizations will not make decisions that do not relate to corporate strategic objectives. Strategic objectives are the macro objectives that an organization must guide decisions. Growing market share would be an example, or all decisions must have an 18 month return on investment could be another.

		Map out current environment	Mapping out the customers current environment involves understanding the existing process, stakeholders, agreed upon problem(s) and gaining a commitment from the customer that your understanding of their situation is accurate. It could involve a pictorial of the current process with the gaps and opportunities highlighted. It should include all costing and objectives of the customer.
		Needs assessment training	Needs assessment training refers to the tools and methodology required to gather requisite information to identify the current environment. It helps spot gaps, and with understanding possible opportunities for improvement in the process, and highlights revenue or profit implications. In larger opportunities sometimes, a business analyst or solutions architect are part of this process but ultimately the salesperson must understand what is happening and what information is relevant and why. They are tasked to dig out the missing pieces.
		Negotiation skills	Negotiation skills are a combination of communication skills, listening, understanding how to influence others, styles and techniques of effective negotiation, and interpersonal skills.
		Pre-call planning	Pre-call planning is a systemic methodology combined with tools that include templates to properly organize the sales rep before the call. It would highlight what are the objectives of the call, what are typical industry or client specific issues that they may have, what clues should be looked for to identify problems that can be addressed with the solution etc. It is especially important now that customers are more informed. What is needed is to be the subject matter expert and appear legitimate from the very first contact. All subsequent calls would also need to be pre-call planned and participants on the sales side aware of their roles.
		Questioning skills	Questioning skills refers to the methodology and techniques utilized to solicit the requisite information to move a sales cycle to a successful conclusion. This is a top tier training requirement as obtaining the correct information efficiently results in the core information used to influence customers and build solid business cases.
		Reference training	The ability to generate and utilize references effectively is not an innate skill. Understanding how to develop references that will build credibility and move sales cycles needs to be learned. The usage of references to move a sales cycle also needs to be learned. Just providing the names of three customers that know you is not going to close the deal. The references must resonate with the customer and be applicable to their situation. In some cases, you also need to consider the personalities of the respective players. The last thing you want is a pedantic, slow talking, detail orientated reference speaking to a C - level that wants a high-level discussion in a short period of time.

		Relationship selling	Relationship selling can be viewed in a variety of ways. Historically, sales were often conducted using relationships. In smaller communities today and in situations where ongoing business is the expectation, understanding how to build and maintain relationships is still relevant. There are tracking tools and communication techniques to help that can be taught. Even in what is now not a true relationship sale there is still a need to build enough trust and credibility to foster a decision in the sales rep favour. Customers may not have to love the sales rep, but they seldom will deal with one they do not trust.
		Sales management process	The sales management process is tied to call methodology and sales processes. SMP is the plan, methodology and tools used to manage the business. Sales reps need to understand the requirements of them in terms of what information do they need to provide, in what format and how. Since they are being managed this way employee satisfaction is impacted if they do not receive training on expectations and actual tasks.
		Sales process	An example of a sales process would be introduction, gather requirements, demo, proposal, and close. It is call methodology and actual actions to be completed. It varies by organization and solutions being sold. Training needs to be done in all aspects.
		Sales skills	Sales skills refers to sales training that all types of sales people would require. It is as simple as how-to cold call, qualify, questioning skills, listening skills etc. It would include a call methodology and the tools used to conduct sales calls and build proposals within the sales rep's organization. This is included as it became apparent that not all sales reps have these capabilities, and often companies are no longer equipped to teach them, and or assume that the people they hire have these skills sets.
		Solution development relative to customer needs	Developing solutions that relate to the customer's specific needs is the cornerstone to gaining an order. The methodologies and tools in the sales rep's specific organization that help identify the optimum solution is what training is required.
		Solutions selling course	Solution selling is one of the benchmark selling programs with a pedigree and scientifically proven track record. It utilizes a broad range of tools to identify customer issues and opportunities and then develop an appropriate solution.
		Story telling	Story telling is the capability to take several concepts that may be complex and weave them into a cohesive and easily understood narrative. Tools and techniques have evolved within this area.
		Time management	Time management is a combination of tactics, strategies and tools to increase productive time, and minimize non-revenue generating activities. Doing tasks in parallel and leveraging internal resources can be examples of how to put more time back in a sales person's day.
		Training on customer roles and business drivers related to them	Customizing conversations relative to what is important to a client and how they wish to be spoken to is key to a sales person's success. Training on what typically interests a Chief Finance Officer and developing an appropriate talk track and verbiage is an example of this skill. This training would encompass listing roles relevant to their business and identifying a firm grounding in what matters to them and how they need to be communicated with. There

			will be exceptions, but it is beneficial to have an idea how to formulate and deliver your message.
		Understanding and delivering value to customer	Being able to understand where the value is in your solution relative to a problem or opportunity and then being able to present it back in an articulate and impactful fashion is the skill. Tools and techniques are part of this skill that can be taught.
		Understanding customer concerns	Being able to listen, and question as appropriate, to better understand and qualify customer needs is the skill.
		Understanding existing customer environment	The skill is to listen and ask questions, as appropriate to better understand the customers environment. The idea is to communicate in a controlled and specific fashion to yield results the sales rep can use to drive a sales cycle.
		Understanding internal processes and infrastructure	Internal processes, and sales automation software needs to be understood and trained upon.
		Understanding the competition and how to deal with them	Knowing the strengths and weaknesses of the competition, and how their offering is being presented to the customer, helps position the sales reps offering. Competitive knowledge, and handling techniques, are sometimes married with technology that can be utilized to help.
		What is your objective	Objectives are what you are trying to achieve in a call, and they are also what a customer is trying to achieve in their job. Understanding how to plan for, and achieve, objectives for the sales rep, and for the sales rep to be able to obtain and reinforce objectives for the customer is the skill.
		Workflow identification in detail	Workflows need to be understood to an extensive degree, and any changes that have impacts need to be understood. Learning how to clearly identify a workflow and all its components requires training on tools and tactics.
Stress Coping	Stress coping is something that can be learned. Understanding how a sales person deals with stress and employing the best methods to help them deal with it, results in more productive and long-term sales people.	Handling rejection	Handling rejection, especially the quantity of it that a sales rep sees is important. If the sales person becomes depressed and unmotivated, they will fail. If they use the rejection as a learning opportunity, so that they will not be rejected the next time, that is a positive handling of rejection.
		Stress coping	Stress coping techniques, to combat the often-intense rejection and pressure inherent in a sales position, helps sales people become more successful and stay in the job longer.
Verbal Communication	Verbal communication involves verbiage, listening and then employing questioning skills, and influencing and persuading customers through effective verbal communication that relates relevant information to customer needs.	Open ended questions	There are many styles of questions, but open-ended questions are best for eliciting a broader response from the customer as they cannot answer with just a one-word answer. "How would this problem impact your business" is an open-ended question. This contrasts with "would this impact your business" which is a closed ended question that allows the customer to say just yes or no. You need open ended questions to discover content and to increase your

			knowledge of the customer issue, account, or decision maker/customer.
		Persuasion skills	Persuasion skills are much more than objection handling. The human species can be motivated in a few scientifically proven ways. Learning the best way to influence and persuade internal and external clients increase the chances of success.
		Questioning skills	Questioning skills refers to the methodology and techniques utilized to solicit the requisite information to move a sales cycle to a successful conclusion. This is a top tier training requirement as obtaining the correct information efficiently results in the core information used to influence customers and build solid business cases.
		Verbal communication	Verbal communication skills refer to how you verbally communicate your message. There are a variety of things to consider to be a more effective communicator that ranges from verbiage through sentence structure and even how loudly or fast you speak.
		Verbiage training	The types of words used by a sales rep can impact their credibility. It may even cause them to not be able to move forward in a sales cycle. For example, the verbiage used in a locker room would surely not be appropriate for a CEO.
Writing skills and reading literacy	Being able to write in a manner that is consistent with your message, and professional in tone, is key to influencing customers. Being able to read and internalize a broad range of information is necessary for a sales rep to be able to research customers, product knowledge, technology and industries.	Writing skills and reading literacy	There is a need to communicate clearly via the written word and to able to quickly and accurately read and internalize information.

3 Appendix C Sample of transcripts

Joe: intro and greeting. Alright, let's get you working. You see in your current job all types of sales reps and would have an opinion on what they need to learn. Could we start with a recap of your career and schooling and then we can carry on from there.

xxxx: I went to University of Alberta and have a double major comprised of Computer science and Bachelor of Commerce focussing on MIS (Management Information Services). Went on to do programming and analyst work more focussed on the technical and development side of the house. Liked to talk to people so switched over to pre-sale analyst. I did a stint as a salesperson. Switched back over to leverage my technical side as an analyst doing implementations. Bounced back to the sales side as a workflow solutions specialist. Form there moved to Electronic Content Management Solutions Architect role. Evolved to lead architect role and now the Manager of Solutions Architect role.

Joe: If you think about the jobs that you had, and currently have, each of those have touched sales in a different way and you got training. What kinds of things did you learn that you think is relevant today?

xxxx: What I really learned from the sales stuff is how to engage the customer and how to read the customer. Ironically a lot of my retail skills came from my mom's retail store on things like how to engage in friendly conversation with a customer without being awkward. Things like establishing rapport. That became really helpful early on in the sales side. I realized that that was not necessarily a skill that a lot of people had. From there, during the pre-sales analyst side what I found really useful was a solution selling course. So, learning how to dig deeper, hearing what the customer is saying, trying to go beyond what they said. Understanding that I need to get from point a to point b but getting enough details in between so I can correctly identify something that makes sense to the customer.

Joe: How do you do that?

xxxx: Just picking up on cues and asking second level, third level, fourth level questions. I think that was part of the solutions selling where you don't stay at level one you have to go down to, I can't remember how much, but it was at least level 3 (3 levels deep) where, how, why just digging deeper there. In some cases, going all the way down to 5th level questions. That was very helpful just clarifying. The example she used (the trainer) was "I need to get to Toronto". What are the questions you need to develop from there? Some of the easy questions are: where are you currently? That was a simple question but now you need to know how quickly do you need to get there, how much money you have, is there anybody else travelling with you? So, adding all those other elements to ensure that you have correctly identified it versus answering on the first go around with a just drive there, comment. Without asking the second, third, fourth level questions you could be completely wrong in your recommendation. That was a little bit of an eye opener where the questioning went beyond the rapport piece. How do you make it conversational and yet get more details?

Joe: So, clarification questioning skill, those are the kind of things you are describing that salespeople need to know? Perhaps listening skills?

xxxx: Yes, definitely the listening skills. You need to listen in order to dig deeper and ask next level questions. Do I need to expand on the level of questions I am on now or do I have enough? Knowing when to stop, knowing when you have gotten to the end of that line of questioning. Here is another second level question to start another line of inquiry.

4 Appendix D – Sample read me document for qualitative analysis

READ ME

Research Question

Research Question: The purpose of the analysis is to identify the critical success factors necessary to flourish in sales. Investigation will utilize an interdisciplinary perspective including interpersonal skills, psychological influence and persuasion factors, and sales tactics and strategies. The question to be answered is what is the best blend of capabilities required for each target sales segment (direct sales for both small and large accounts, sales specialists, sales technical specialists, sales managers) to optimize their success in selling? **What should they learn?**

Study Methodology

This study will identify critical success factors pertinent to sales performance. **The portion that pertains to you is a half hour live session on Skype.** The ask is that you review the target sales segments (excel spreadsheet attached) through the lens of:

1. What are your thoughts re the types of topics that need to be addressed when looking at required sales learning?
2. By sales target segment, do you have specific suggestions?
3. Any suggestions on non-sales training required (like interpersonal skills or influence and persuasion techniques, for example)
4. Think of training you have seen in the past, does any of it really resonate as being particularly useful.
5. What capabilities are missing when you hire, or move people into different positions? Include moving from sales to sales specialists and Analysts into Technical sales specialists.
6. Changing market dynamics are forcing change within the sales paradigm, what impact does that have on gaps in salespeople learning?
7. Any thoughts on the provided spreadsheet (interdisciplinary list of learning requirements)?

The interview will be open format with the aforementioned as thought starters but **should not limit in any way commentary or suggestions.**

I will be recording on Skype using Amolto Call Recorder, so could you please download Skype, if you do not already have it, from https://www.skype.com/en/download-skype/skype-for-computer/ (my address on Skype is my email address joe.pitzel@gmail.com). If you are amenable, I can email you and we can arrange a time that is convenient for you. **Please send me your Skype address** so I can add to my contacts and then just have Skype ready (open Skype) on your device at the appointed time, and I will contact you.

For any questions, I may be reached at 705 207 5428 or email at joe.pitzel@gmail.com .

5 Appendix E – Information to insert in corporate invitation to participate in survey

A recent article by Canadian Professional Sales Association President Peter Irwin highlighted some subjects "Company Name" is also interested in. He goes on to say Canada's commercial sales force has been weakened by lack of support and recognition, Canada wants better national standards for sales professionals, and finally that the skills sought are both hard skills, and soft skills such as empathy, communication and agility. To resolve any issue, we need to understand it. Mr. Irwin references a world-renowned author Peter Drucker who says "what gets measured gets improved"

"Company Name" invites you to participate in a survey designed to identify the necessary proficiencies for successful sales personnel in the Canadian market space. The main purpose of this study is to explore the competencies necessary from the perspective of "Company Name".

Your participation is voluntary. You have a complete freedom to withdraw from this study if there is a feeling of discomfort or stress at any time. If you decide to fill out the survey, you will be asked to answer questions related to skills necessary for sales, and to rate your response relative to the importance of these skills. The survey should take approximately 15 minutes to complete.

Your input is anonymous; this survey will not contain information that will identify you and the aggregate results of this survey will be used for internal "insert company name" and academic purposes only. If you have any questions or concerns about the research, please feel free to contact "insert company contact and email address".