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The Emerging Role of the “Sales Technologist”

David J. Good and Roberta J. Schutlz

Marketers have long sought to craft marketplace opportunities to provide a differential advantage that is both significant and sustainable. Particularly important in the sales organization, creating and maintaining a marketplace advantage are often the keys to success or failure. In this pursuit, a host of strategies, mechanisms, and processes have evolved through marketing departments as managers constantly seek the “best” tools for rapidly changing marketplaces.

Employing considerable resources to obtain such marketplace advantages, management has sought to integrate many different

elements into the marketing domain. One contemporary effort that has received a great deal of attention has been the increased usage of sales force automation, coupled with the need to enhance the relationship management of clients through communications technology. This effort has resulted in an escalated need to determine where and how technology is being used in personal selling (Widmier, Jackson, & McCabe, 2002) to maximize technological integration within the sales organization.

Correspondingly, sellers have become increasingly aggressive in recent years as they seek and implement constructive assets that improve their positions and opportunities for success. For instance, training has become a key strategic organizational tool being visualized as an important vehicle for success (e.g., Leach & Liu, 2003). Spending in some situations more than \$100,000 and two years in the development of one salesperson (Johnston & Marshall, 2003) to cultivate a competitive advantage in a

single territory, marketers have demonstrated their interest and willingness in acquiring and deploying assets that can cultivate a significant, sustainable differential advantage under virtually any condition.

Actual applications of sales force automation indicate a range of failure that suggests technology cannot be automatically and easily intertwined within the sales force. One study used identity theory to better understand these failures and found salespeople have positive perceptions of the technology immediately after the training; however, six months after implementation, the technology had been widely rejected (Speier & Venkatesh, 2002). To make sales technology more functionally valuable, some European companies have discovered that technology that dictates how salespeople behave will fail while technology that respects how salespeople really behave has a better chance at success (Schrage, 2003). What this suggests is that, while technology may be

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a positive force in some situations, as with any tool, its usage must be balanced against the value it brings and the resources required for its implementation.

Similar advances in other areas such as hiring practices, market identification techniques, strategic development, and compensation systems are but a few of the elements considered for usage in contemporary marketplaces to gain a differential advantage by salespeople. The critical issue as it relates to the sales force, therefore, is that marketing managers are increasingly demonstrating a willingness to take risks in discovering tools and strategies that maximize field opportunities. In turn, the failure to maximize situations as they occur can result in mixed opportunities.

As the shift toward relational sales approaches and emerging technologies continues to drive the changing nature of selling, it is important for the sales organization to identify, explore, adjust to, and exploit the needs of the marketplace in highly competitive situations. For example, the critical role of marketing communications as part of relational strategies (Andersen, 2001) suggests B2B sellers are learning to craft relational selling strategies in an environment in which e-commerce is increasingly viewed as a critical marketplace tool. In this regard, most marketing tools,

whether implemented by upper management or by local field managers, are designed to satisfy the core needs of the seller (identify, explore, adjust, and exploit). It is reasonable to anticipate, therefore, that when new methods, processes, tools, and strategies are considered for future implementation, the criterion for acceptance will rest on this same ability to meet selling needs.

It is in this spirit of sellers constantly needing new tools and strategies that this research examines the emerging role of the sales organization becoming oriented toward the usage of technology. The next generation of B2B sellers may require a newer form of specialists to manage this focus on technology.

Why Combine Sales and Technology?

Selling is evolving to the point at which professionals will have two related, but quite separate skills. Specifically, successful contemporary B2B sellers will increasingly need technological abilities. For example, at the Aetna Insurance Company, educating sales professionals about customer-facing technology has become a high priority (O'Donnell, 2003). Facing the need to enhance customer connections, a new generation of sales strategies starting to evolve is of a move toward a "sales technologist"

(ST). As discussed in the following sections, these employees will assume a broader marketing orientation and will be less restricted to specific functional areas as they expand the role and connections of traditional salespeople.

What is a "sales technologist"? The sales technologist is, in most contexts, an employee who carries many of the traditional sales responsibilities (e.g., creating revenue), but utilizes technology as a critical sales tool for strategic and tactical purposes. The ST is primarily focused on selling and providing organizationally required performance output. As part of his/her performance guidelines, he/she incorporates contemporary technologies into the selling effort. For instance, STs seek methods in which e-commerce efforts are incorporated into relational and selling efforts. This could include fostering customer relationship systems driven through web order points, customer records and inventory management systems, and automatic reorder points derived from the buyer to the seller. The critical aspect of the sales technologist is that he/she utilizes contemporary technologies to gain and retain competitive advantages through technology. Hence, the ST is not tied to any particular technology but to technologies in general. As the technologies change, so does

the focus on the types of tools that the ST utilizes.

The sales technologist is more of an operational title than a functional title. These employees may be drawn from a variety of functional roles in and out of the traditional sales function. New to these positions may be skilled employees from finance, logistics, information technology, and other areas previously not included in the selling function. Possible titles may include customer data specialist, information technology analyst, technology solution advisor, customer solutions developer, contact center professional, or professional services engineer. These sales technologists will become more skilled and participative in a wider array of organizational levels than has previously existed for those who came strictly from the sales area of the business.

The inclination of many managers when faced with the challenge of hiring or developing a sales technologist would be to employ someone who is fundamentally technologically inclined (e.g., computer analyst) and, then, attempt to transform him/her into a salesperson who understands technology. A number of years ago, when selling was not considered to be a professional skill, sales organizations routinely found salespeople internally from a host of positions throughout the company (e.g., engineers). Employers found that simply knowing the product, under-

standing the employer, and being willing to hire a technologist is not the same as meeting the needs of the buyer in competitive markets.

In today's business climate, more of what were previously considered to be non-boundary spanning employees are now boundary-spanning at an increasingly fast pace. More of the organization is interfacing with customers. While these non-customer contact personnel may have been socialized in a non-client orientation, they may be likely candidates to move into these positions and receive the additional training to handle the customer development/maintenance and sales responsibilities. More individuals are being asked to wear multiple hats, and, just as salespeople are also being asked to provide return on investment and become finance-savvy employees, finance people are becoming increasingly sales- and marketing-oriented. It is a two-way street.

The wide range of integration will, in turn, allow B2B sellers to create more sustainable advantages in highly competitive markets. As a result, organizations that cultivate these STs will prosper over those organizations that reject their usage. Changing the very nature of the marketing organization, this research proposes that the usage of the ST will foster an advantageous atmosphere that will enrich

the competitive benefit of B2B marketers.

The Emerging Environment

The role of the salesperson has historically and consistently been defined in a reasonably confined context and structure. Producing revenue through sales activity, salespeople are expected in very basic terms to retain existing customers, find new accounts, sell accounts, and/or replace clients when they depart. While other general expectations of salespeople often exist (training new salespeople, servicing complaints and accounts, overseeing territories, etc.), the main managerial direction of the salesperson has been altered very little in recent decades. Salespeople are first and foremost expected to create and maintain revenue. Of course, the tactics underlying this performance may vary, as sellers utilize a variety of mechanisms (e.g., relational selling, major accounts, teamwork) to accomplish performance objectives. Therefore, while the specific content of how one engages most effectively in selling for particular markets may have varied in recent years, the focus has been on, and continues to remain on, revenue performance for the vast majority of salespeople.

Pursuing increased revenue as an outcome

measure has been evidenced by sales organizations seeking various methods to enhance their effectiveness in their operational environments. For example, while the ABC's of selling ("always be closing") were at one time considered an effective selling method, today's environment relies increasingly on creating and maintaining long-term relationships between clients and sellers. Efforts to improve B2B sales force productivity have suggested revisions in the way most sales divisions traditionally view salesperson time. Revenue per available salesperson hour is proposed to integrate the salesperson's time in calculations of sales potential and revenue generation (Siguaw, Kimes, & Gassenheimer, 2003). As part of this evolution, it will be important to examine the effects of technology-mediated tools upon the important relationship outcomes such as trust and future intentions (MacDonald & Smith, 2004).

The question for sales organizations, therefore, rests on the next major evolution in the sales force. In this vein, what strategic and operational adjustments should management make to prepare both salespeople and customers for the environment of the next decade? Further, given that the salesperson will continue to sell products, how will sellers be shaped to be able to meet changing environmental needs?

To respond to these concerns, it has been proposed

industry is on the verge of a third industrial revolution, in which issues such as technology are becoming the driving force of business commerce. The rapid and explosive growth of technology has cultivated an environment in which electronic commerce has been widely adopted to improve efficiencies in the marketing of products (Osmonbekov, Bello, & Gilliland, 2002). This environment needs visionaries who are able to incorporate increasingly rapid technological changes with the needs of the marketplace. This suggests that the possibility of recasting some of the sales force and employees from other functional areas as STs provides interesting strategic and operational opportunities for B2B sellers.

Technology as an Emerging Force

Sales organizations increasingly operate in an environment in which participating in risk and innovation is needed for a trade-off of gain that would not be otherwise possible. In other words, successful sales organizations are able to respond to changing conditions. Organizations that conduct stagnant operations and strategic actions in their markets will eventually be lead to declining performance results. Several aspects of salesperson attitudes (perceived usefulness, attitude

toward the new system, and compatibility) about sales force automation technology (Jones, Sundaram, & Chin, 2002) are worthy of examination as they affect the success of the business.

In an examination of market conditions, a number of changes have occurred over the last several decades, encouraging and demanding successful firms to adjust to environmental fluctuations. For instance, a growing diversity in the types, locations, and nature of purchases has reformulated how many sellers are now addressing their markets. Changing market conditions have forced sellers to alter their methods of business in order to survive. While other alterations have occurred during the past years, dramatic changes have been seen in the application, usage, and management of data and their transmission via electronic mail (Bean, Boles, & Rodriguez Cano, 2003) and online databases (Wilson, 2003).

Rapid advancements in computer and related technologies have changed how markets operate. For instance, the rapid exchange of information between customers and sellers now allows buyers to carry minimal inventory, reduce costs, and gain selective competitive advantages. Subsequent changes in e-commerce and other related types of technological progressions

have caused most organizations to adjust, at least to some degree, how they do business. These changes in sales approaches and emerging technologies require sales managers to examine factors important to the success of the salespeople they hire. Skills, content knowledge, attributes, and historical indicants of performance are such factors to consider (Marshall, Goebel, & Moncrief, 2003) for incorporating technology into the sales force.

A tidal wave of technological advancements has created a new and very unique differential advantage among those marketers able to capitalize on these advancements. Among the tools of the trade in the sales arsenal is the irreplaceable laptop. The ST would find it difficult to work without the ability to close sales in the field. Mobile communication allows instant contact with sales staff personnel. Even more important is the quick access to clients. A popular handheld device allows the ST to receive calls and e-mails simultaneously, enabling negotiations of contract specifications while communicating with customer employees. Increased coordination and productivity become the key component. Even wireless ear pieces made possible by Bluetooth allow the ST to press a button to talk even when the cell phone is not in reach. Navigation systems, powerful PDA's that quickly sync to office computers, lightweight projectors

that eliminate compatibility problems for presentations, and small storage devices that allow transfers of large data files while at the client's premise are all tools to differentiate a great marketing firm from a mediocre firm (Cummings, 2003).

Sales force automation systems are electronic software-based devices that enable field salespeople and companies to keep detailed records of their dealings with customers at all stages of the sales cycle, from initial contacts through closing contracts. Companies have found success with incorporating sales and automation systems. The 60 or so salespeople at Pegasus Airwave, which markets special air mattresses to medical facilities, willingly accepted a new online system that helped speed up payments. Completely Internet-based systems such as MyNetSales.com propose suitability for small businesses. These systems have the capability to streamline the sales processes in companies with several different offices since individual sites do not need their own servers (Riggs, 2000). Those sales organizations able to construct and utilize technology in a competitive sense within the sales field are likely to gain a sustainable advantage that will enhance existing and future buyer-seller connections. STs offer unique opportunities and challenges to the sales organi-

zations that utilize their skills and knowledge.

Incorporating the Sales Technologist

Sales organizations have historically gone through a number of positional changes as market conditions have demanded market adjustments. For instance, a few years ago many sales organizations determined that one method of creating greater connections to major clients was to create major accounts managers. These individuals were (and remain in many sales organizations today) chiefly responsible for crafting better relationships with significant accounts that generated large amounts of revenue. The idea behind the concept rested on the notion that better personal relationships allowed for a stronger understanding of the client, and, through this understanding, the potential for greater amounts of long-term revenue could be generated. As in most markets, the response of the sales organization has been to create connections with customers that enhance opportunities for the buyer and seller.

The specific type of technologies utilized by the ST is of little strategic importance from the standpoint of the organization. What is most important is that because technologies have, and always will, change, organizations

adopting STs as part of their sales structures will systematically ensure that these professionals remain current in the needed technologies of that time period. Much like the salesperson of the 70's who became more connected to telecommunications (e.g., programs like "Phone Power"), a similar type of role transformation will occur in the next decade.

The role of this seller will, in many cases, expand and be more inclusive and participative in current technologies. The move toward the ST is a more formal recognition that technologies need to be increasingly incorporated into the training and development of sales organizations. As such, technologies are not just idle tools, but, instead, they offer vibrant opportunities for sellers to advance their

competitive causes. It is critical in such environments that sellers are able to incorporate a variety of these changing technologies into their technological "tool boxes," as advancements rapidly outdate new innovations.

Of course, not all salespeople, or their organizations, will want or need their sellers to become STs; however, it appears that this role will increasingly become merged with the selling function, and eventually most salespeople will incorporate at least some of the ST skills and capabilities into their daily functional responsibilities. In the short-term, organizations desiring this type of strategic advantage will need to make distinct structural decisions that incorporate these skills and knowledge into the selling

function. As such, the ST is a unique professional offering an array of qualities and skills.

Implications for Usage of the Sales Technologist

A number of implications can be gathered from the utilization of an ST. These implications represent impacts at the organizational and managerial levels. These implications are provided in Table 1 and are discussed in more detail following the table.

As noted in Table 1, a number of organizational and managerial implications exist as they relate to the utilization of the ST. While these implications address a number of issues that are germane to the selling organization, they are also implications that impact top management and

Table 1
Implications of the Sales Technologist

Organizational Implications	
	Organizational support from upper management needed Challenges in measuring outcome performance Managerial blending of technologies with other organizational tactics and strategies
Managerial Implications	
	Must continuously educate and re-retrain employees of seller and buyer in technologies Impact on traditional monitoring (outcome versus behaviors based) Inter-departmental educational responsibilities Ability to move between positions and/or between companies Technology provides a common connection point and mechanism for communication within the selling organization and externally with the buying organization

ultimately customers. As a result, selling organizations need to closely consider these implications before determining if the utilization of a technologist is in the best interest of the firm.

For the principle of the ST to succeed, upper management organizational support of the concept is strongly needed. Because sales personnel have many conflicting responsibilities, it is easy for sales managers to minimize the technology aspect of salespeople. Upper management must commit to the concept of the ST, and this commitment must be expressed throughout the organization to clarify that its usage and continuance is a dominant beacon.

One of the chief problems of using STs remains in that its usage represents a "blended strategy" designed to incur long-term results through some sort of synergy. What this suggests is that the ST is not a stand-alone strategy or tool but is, instead, part of a bigger set of organizational issues designed to work in combination with other assets. Seldom is technology able to be a stand-alone tool in the marketing organization since it offers no immediate advantages to clients unless it is directly linked with advantages customers need. As a result, technologies utilized to advance selling strategies need to be aligned with these strategies, ensuring consistency in assignments,

principles, objectives, and resources. For example, if relational selling is the selected message a seller wishes to send buyers, the usage of technology must be crafted in such a manner to ensure clients continue to connect with the relationship message. The biggest concern in this regard is that it is easy to separate issues and not utilize technology as the supporting strategy, but instead make it the driving force around which all other issues revolve. Under such conditions, the advantage of technology to construct meaningful support mechanisms will lose its favor with the customer.

Foremost, firms deciding to utilize technology as part of their selling strategies and tools must accept the idea that, from an organizational perspective, such a decision can be costly if it is determined by upper management to position the sales organization at the forefront of technologies. A firm cannot take the risk of becoming committed to technologies as part of the connection process with customers and then, a short period later, change this decision. The decision to utilize technology as an integral aspect of internal strategies should be viewed as a long-term commitment. Alterations in this approach "mid-stream" will negatively impact buyer-seller relationships. Sellers can be seen as fickle if they change their positions on the usage of

key buyer interconnection tools. Similarly to being at the front of the product life cycle, the decision to utilize technology aggressively in the sales force suggests, from a firm perspective, that the seller is attempting to be a "leader" in technological advancements. Therefore, being placed in the leader category provides risk and costs as part of the potential returns to the firm.

Other more managerial implications exist with the use of the ST concept. As part of the internal costs of adoption of this strategy, and for sellers to utilize an ST, the selling organization encumbers significant development and related training responsibilities for field personnel. If the selling organization employs personnel who do not have current technological understanding and skills, the firm has to develop these skills to an acceptable level. Correspondingly, if the organization hires personnel with these skills, it still incurs the expensive responsibility of maintaining this knowledge as the requirements of technology change. Further, part of the advantage is in allowing customers to benefit from the usage of technology. This may include the client actually participating in the usage of the technology, suggesting that critical professional training, maintenance, and preparations for the utilization of the technology will often fall into the hands of the seller. Under these circumstances, it is

critical to provide the highest degree of professional education for clients, which is likely, at least in part, to fall into the responsibility domain of the seller.

The measurement of the STs' success is one of the factors that separates them from other organizational members. It is not likely, however, that the issues of quota and account productivity will become unimportant for these individuals. Instead, much like account managers have in many firms been directed toward longer term outcome measurement systems (less immediate sales results expected), it is possible that, if a limited number of sales personnel are designated as STs, a restructuring of outcome measurements may be necessary for firms. For instance, one of the responsibilities of the ST might be to work with other salespeople implementing new technologies into the sales force. As a major objective, the accomplishment of this task will need to be measured. The task should not be minimized if it is to be successful.

The ST is the key for linking sales and staff personnel in implementing new technologies in the field. The ST should be utilized to first determine the suitability and acceptability of new field technologies. Then, based on successful field experiences, he/she should be utilized as an opinion maker in the integration of technologies to

other sales professionals and inter-departmental colleagues. Again, such quasi-management activities suggest he/she needs to be on a separate or different control system.

Employees who represent STs are individuals who are at the introduction stage of the product life cycle in terms of application and usage of technologies. These salespeople will offer flexibility in moving between positions in and between business units. As with the PLC, early stages are more expensive to maintain, and replacement can be costly. Equally, competitive firms will seek more rapid remedies of perceived lost marketplace positioning by duplicating successful strategies through the least expensive manner possible such as hiring away successful STs; however, once a selling organization has made the decision to utilize STs, managers should be reminded that in many respects retention of current employees is less expensive than retraining and efforts to maintain these resources should be made.

Sales Technologists will have to assume much of the field training of internal and external personnel. Forms of e-learning modules are being successfully implemented to help salespeople understand products at Fifth Third Bank (Nelson, 2003). This type of learning tool may be expanded to assist participants of both sides of the exchange. The STs will be expected to enhance

knowledge in the selling organization as well as that of customers. As a result, they must be skilled communicators who are able to build the knowledge base of users in a very non-threatening atmosphere.

One of the real strengths of STs is that they allow the sales organization to cross over to a variety of other organizational and functional levels through the language of technology. Because technology is the language of the next decade, it provides a common connection point and mechanism for internal communications that seem to be becoming prevalent. Further, as customers become increasingly more technologically demanding, the technologist is able to reach more of the client's functional areas through this common language. In turn, STs are able to construct a stronger linkage with clients via a common thread of "language."

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