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Personal Selling: A Humanist Perspective

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ABSTRACT

Personal selling might be the least studied aspect of marketing strategy by academicians, yet it is arguably one of the most critical success factors to most companies. It is safe to say that the stereotypical image of a salesperson is not flattering. It portrays the salesperson as ambitious, extroverted, conspicuously greedy, and self-serving, a company representative who is driven by volume commissions, but one who pays little attention to buyers' needs. In his classic 1960 Harvard Business Review article, *Marketing Myopia*, Ted Levitt discusses differences between selling and marketing, noting that selling caters to the needs of the seller, marketing to the needs of the buyer.

This paper reviews the role of personal selling in the organization and examines how that role has changed as a result of technology and social media. In doing so, particular attention focuses on the human side of personal selling. Issues that are addressed and discussed in this paper include:

- Examination of the human qualities of personal selling and how these have changed with modern technology.
- Revisiting the "ABC's" of personal selling ("Always Be Closing") from a humanist perspective in light of today's technological environment.
- The role of personal selling in branding and customer relationship management as companies try to develop brand identity at the emotional benefit level.
- The professional development challenges for companies as marketing professionals embrace a humanistic approach to the art of personal selling.

Finally, this paper identifies implications for future academic research in this often under-studied field of personal selling.

Personal Selling: A Humanist Perspective

“From *caveat emptor* to *caveat venditor*...” ~ Daniel H. Pink

INTRODUCTION

Personal selling just might be the aspect of marketing strategy least studied by academicians, yet it is arguably one of the most critical marketing success factors to most organizations - product or service based, consumer or industrial, profit or non-profit. It is safe to say that the stereotypical image of a salesperson is not flattering. It portrays the salesperson as ambitious, extroverted, conspicuously greedy, and self-serving, a company representative who is driven by volume commissions, but one who pays little attention to buyers' needs. In his classic 1960 HBR piece, *Marketing Myopia*, Ted Levitt discusses differences between selling and marketing, implying that selling caters to the needs of the seller, marketing to the needs of the buyer.

The extraordinary changes in the ways people relate brought about in the last decade by ubiquitous technology invite a contemporary investigation of the role of personal selling in the modern age of texting, tweeting, Facebook and LinkedIn.

This paper reviews the role of personal selling in the organization, the selling process, and the evolution of personal selling in the context of changes in technology and social media. Special focus is given to the human side of personal selling, and suggests that for the selling function to be an integral and effective element in the firm's marketing mix strategy, personal selling needs to be thought about from a humanist perspective. As it applies to this paper, the salesperson as humanist is one who not only caters to the needs of the buyer, but also a person who understands, appreciates, and respects the buyer's (*human*) welfare, values, and dignity. Finally, as the salesperson transitions into a more humanistic role in the organization, the paper addresses the need for professional development beyond such traditional sales capabilities as possessing adequate product/service knowledge or delivering an eloquent pitch.

The Personal Selling Process

By its very nature, personal selling involves personal interaction between two or more people, and more often than not, that interaction traditionally has been face-to-face. More than 50 years ago David Riesman pointed out in *The Lonely Crowd* that modern technology was leading people to become less comfortable with face-to-face interaction and at the same time more vulnerable to decisions shaped by others than themselves. In his recent book *Hamlet's BlackBerry*, William Powers has expanded on Riesman's prescience with his observation that increasingly modern consumers now find themselves in what he calls the “omega,” or ultimate, state of overcrowded connectedness, but with too little time or inclination for personal reflection regarding their actions (Powers, page 98). Powers' point begs important questions: What is the role of personal selling in today's world? Has technology made it obsolete or made it more vital than ever? Whether buyers are current or prospective customers, a key role of personal selling is to move buyers from a state of company/product/brand awareness to preference, and ultimately to the purchase decision. How the sales call unfolds varies from company to company and from

one salesperson to another, but the basic process can be thought about as a series of six major steps, with the four intermediate steps representing the humanistic core of the process:

1. **Preparation.** An in-depth understanding of what is being sold, be it a product or a service, is essential before any face-to-face meetings. Of greater importance, perhaps, is as much knowledge as one can garner on the prospective customer. In this stage of the traditional sales call, technology has made a huge difference in both regards. On-line intranet learning has given companies the ability to train sales forces much more efficiently in their products and services. Likewise, access to public government data-bases, as well as industry and company private data-bases give a salesperson prior knowledge of the prospective customer than was unimaginable as recently as ten or twenty years ago.
2. **Face-to-Face Introduction.** Any experienced salesperson can predict success or failure of a call in the first ten minutes. Why? Because this is when the “human connection” is made initially or missed entirely. Success is often a function of the ability of the salesperson to “Schmooze” the prospect to get the person talking about his interests, not those of the salesperson. Of equal or greater importance, however, is that through speaking about the prospect’s interests (not necessarily the salesperson’s) the prospect has relaxed and likely will be more forthcoming in the next stage of the process.
3. **Determining Customer Needs.** Too often this step in the process is ignored or, if attempted, resembles an interrogation of sorts. Artful questioning, following a seamless transition from the introductory “Schmooze,” separates the great from the ordinary in successful selling.
4. **Matching Needs and Benefits.** Once those needs are identified, the product or service knowledge the salesperson gained in the first step in the process allows her to match her company’s benefit offering that best fills the needs of the prospect. And, if there is no match, the salesperson needs to acknowledge that and thereby convert a potentially failed prospect into a future client when offerings or needs change.
5. **Closing.** This should be a natural last step in the face-to-face meeting, if the prior steps have been successfully accomplished. If rejected in this step, an informed salesperson knows to revert two steps earlier to determine what he missed in the prospect’s needs that prevented success.
6. **Follow Up.** This final step in the selling process is a too often neglected essential step to determine client satisfaction post sale, to address any cognitive dissonance that the customer might be experiencing, and/or to look for valuable marketing feedback in the case of sales failures.

Humanizing the Personal Selling Process

Clearly, these steps in the selling process are transaction oriented and for the most part are geared towards accomplishing the short term goal of making the sale. But as Kotler and Armstrong point out, there is a longer term goal in personal selling:

“But in most cases, the company is not simply seeking a sale. Rather, it wants to serve the customer over the longer haul in a mutually profitable relationship. The sales force usually plays an important role in customer relationship building. Thus the selling process must be understood in the context of building and maintaining profitable customer relationships.” (Kotler and Armstrong, *Principles of Marketing*, 14th Ed., page 477.)

Similar to relationships across a broad spectrum of social contexts then, customer relationships are built upon face-to-face *human* connections over time, suggesting a need for a humanistic approach to personal selling.

In his recent book *To Sell Is Human*, Daniel H. Pink views selling as the process of “moving others,” and argues that we need to take a fresh and broader look at the art and science of personal selling because, “What we think we understand about selling is constructed atop a foundation of assumptions that has crumbled” (Pink, pages 4-5). In one of his more interesting perspectives, Pink takes the longstanding adage of the ABC’s of selling (“Always Be Closing”) in the context of the selling process, and presents a very different “ABC” paradigm, *Attunement, Buoyancy, and Clarity*. Pink is not suggesting that the latter replace the age old “Always Be Closing” maxim, acknowledging that the traditional ABC’s of selling can be useful and constructive in many sales situations. Rather, he argues that these three human qualities – attunement, buoyancy, and clarity - are particularly relevant if not essential today for the salesperson to “move others.” His argument has merit and is worth noting briefly here as a way of depicting the humanistic side of the salesperson.

Attunement of course has to do with bringing oneself into harmony with another’s point of view, situation, or perspective. Most of us at one time or another have used the cliché, “to walk in the other person’s shoes,” as a way of describing empathy for another person. Regardless of the relationship context with the other person, to attune is easier said than done. Yet in marketing, identifying and understanding a prospective customer’s needs, a basic principle of marketing, *requires* that the salesperson embrace the human quality of attunement in order to relate to the needs of a customer. Short of that, the salesperson risks falling into the marketing myopia trap of focusing on the needs of the seller, and not on the needs of the buyer. Successful “Schmoozing” is correlated with the ability of the salesperson to lead the prospect toward topics based on clues obtained in the Preparation Phase or via verbal or non-verbal clues noticed during the first minutes of a meeting with a prospect. Keen powers of observation enable a humanistic salesperson to notice photos, memorabilia, or other signals in an office that clearly, albeit non-verbally, identify the interests and priorities of a prospect. A humanist knows that people enjoy talking about their interests. Therefore, “Schmoozing” that leads to the prospect opening up to expound on her interest in tennis or whatever the topic might be creates a human bond that can lead to a connectivity otherwise absent in a purely “business “ relationship. Just as, *ceteris*

paribus, people vote for the candidate who they like, they also do business with people who they like.

Regardless of one's profession, no one likes rejection, yet salespeople face the real possibility of being rejected every day. In discussing this issue in his book, Pink proposes the need for *buoyancy*, the human quality in the salesperson, "to stay afloat amid the ocean of rejection" (Pink, page 99). An interesting and true story helps explain the challenging problem of rejection in selling. A premier financial services firm hired a "can't miss" recruit into its sales training program. Among his qualifications were intelligence (Ivy League graduate), knowledge of the business (MBA from a top Business School), affability (President of the student body) and toughness (varsity athlete who lost in the Olympic trials to a boxer named Mike Tyson). Not long after his formal training ended, however, this "can't miss salesperson" quit. His reason? The "ocean of rejection" was too much for him. Another example offers insight into overcoming the challenge posed by the rejection encountered in personal selling. One excellent sales organization found that by recruiting Mormons into entry level sales positions, it was able to address the "ocean of rejection" and improve the probability of new salespeople succeeding. In their earlier missions for their church, these recent college graduates had faced rejection when proselytizing for their religion and had developed coping mechanisms and support techniques to remain *buoyant*.

Lastly, the notion of *clarity*, the third human quality of Pink's paradigm, is usually tied to interpersonal communication in some form. Professional marketing researchers would agree that the most important step in carrying out an effective market research project is to define the problem with as much lucency and transparency as possible, in other words, clarity. Pink presents a compelling argument that sales people in today's technology-driven business environment need to be *less* skilled at *accessing* information, and *more* skilled at *curating* information – that is, sorting through massive amounts of information that is so readily available today, and then selectively disseminating information to prospective customers in relevant ways (Pink, page 132). Powers rightfully points out that "there's a difference between access to information and the experience of it" (Powers, page 135). Since traditionally the best way to "experience" the prospect's information has been through personal selling, this argues for the importance of personal selling growing, not shrinking even in the high tech age in which we live. As information becomes more readily accessible to the buyer, the onus of information management becomes the responsibility of the seller. A critical piece in becoming an effective curator is for the personal salesperson to deviate from the stereotypical sales image of a fast talking huckster, possessing superior oral skills. Today the great salesperson very well might have better *aural* skills than *oral* skills. Effectively listening to what the prospect is saying during the face to face meetings becomes indispensable in ascertaining the true customer needs. Interestingly, Pink suggests an irony about the buyer-seller dyad: that as this trend in information parity continues, the principle of *caveat emptor* (let the buyer beware) shifts towards the principle of *caveat venditor* (let the seller beware). Finally, Pink suggests that today's salesperson needs to excel more at *asking* questions than *answering* questions. Thousands of years ago Socrates pointed out that a well asked question was more effective than any didactic argument. Today this translates to salespeople asking indirect questions in assessing the needs of the prospect – "why" not "do?" As a result, prospective customers are moved to reflect on their

needs in conspicuously new ways, new buyer problems/needs are identified, and additional sales opportunities are created (Pink, pages 127-132).

Embracing a “let the seller beware” mindset, learning to ask the right questions of prospective buyers, and capitalizing on newly created opportunities in the selling situation by matching offerings with needs, impacts the behavior of the professional salesperson in ways that fundamentally will require a humanistic approach to selling. Implementing such an approach will have its implementation challenges, a topic addressed in the next section.

Challenges to Implementing a Humanistic Approach to Selling

Sir Bernard Arthur Owen Williams once observed that “humanity is a name not merely for a species but also for a quality” (*Wall Street Journal*, “Notable and Quotable,” May 29, 2013). The definition of that unique quality, however, is both timeless and evolving. Timeless in that an individualized, bespoke approach to matching customer needs with a provider’s offerings will always succeed more often than force-feeding. Evolving in that, the role of in person personal selling must be questioned in a world where “American teenagers sent and received an average of 2272 text messages each per month” (Powers, page 55). If tomorrow’s marketplace (as represented by today’s teenagers) resists Powers’ call to move from the Omega of maximum connectedness at least occasionally to the Alpha of inwardness, will a face to face conversation be necessary or at least helpful in marketing (even high end) products or services in the future?

Professor Scott Saul’s observation that the percentage of humanities majors in undergraduate programs has bottomed gives ground for optimism that personal selling still has a future. “Majors...hunger to understand the full dimensions of the world they’ve fallen into, not just to profit from one of its angles” (*The NY Times*, “The Humanities in Crisis? Not at Most Schools,” Scott Saul, July 3, 2103). If Saul is correct and face-to-face conversations will remain at least helpful in selling, introducing the new technologies into the second (introductory) phase of the personal selling process is only in its most nascent stage. Much work needs to be done on how best to integrate modern technology with this phase of the personal selling process. If Saul is not correct, and face-to-face meetings become unnecessary a Manhattan Project is necessary to re-conceive the sales process without face to face dialogue. In either case, salesperson selection and training must be sensitive to the world in which they will be selling.

Psychological testing as part of the selection process has taken on increased importance to test for factors such as Pink’s buoyancy and attunement versus stereotypical salesperson qualities of extroversion and public speaking. Once the best sales candidates are hired, firms need to progress from didactic training to one based on the experiential learning paradigm of Perform, Reflect, Design (*International Journal of Arts and Sciences*, “Teaching the Unteachable? Leadership Studies at Bucknell University”, William R. Gruver and John A. Miller, 2011). Experiential learning in the sales process is not necessarily the “deep end of the pool” approach. Effective administration of case studies, where trainees are asked to play the sales role are a cost efficient means of learning “in the shallow end of the pool” with no prospects lost in the learning process. Case studies, followed by or augmented with apprenticeships before being fully certified, also allow for the “reflect and design” components so necessary to improve skills in the selling process described earlier. Apprenticeships and case studies have successfully been combined in at least one very successful organization by senior executives conducting the role

plays and discussions of cases based on their own careers (*Physician Executive*, “Imparting Wisdom to Evolving Leaders...”, William R. Gruver and Robert C. Spahr, May-June 2006).

Summary and Conclusions

This paper has examined the art of personal selling from a humanist point of view, an especially important perspective given the technology-driven world within which salespeople find themselves working today. In summary, several concluding points can be made:

- The role of the personal salesperson in any organization is more vital today than ever before. Technology *supports* the personal selling function in many important ways, but social media, be it texting, tweeting or friending, will never *substitute* for the salesperson. Long term customer relationships are not built upon nor are they sustainable by periodically tweeting 140 character messages. A recent NY Times opinion piece cleverly makes the point that, “Once, popes wrote encyclicals; now they tweet” (*The NY Times*, “My Case Against Twitter”, Joe Nocera, July 15, 2013). Though the Pope is said to have a Twitter account, papal doctrine is not likely to be communicated in tweets. Similarly, deep long term client relationships are unsustainable if only using technology.
- If Powers is correct in his observation that when people are bored or disinterested, they often tend to retreat inward via technology to get to a world in which they are more interested, then what does that suggest for the salesperson as humanist? Pink might argue that in this world the burden falls on the salesperson to be customer sensitive and focus on customer needs.
- In order to cultivate long term customer relationships, the salesperson must embrace the human side of the personal selling process. The human qualities of attunement, buoyancy, and clarity discussed earlier in this paper can contribute immeasurably to a better understanding of customer needs, thereby insuring for the organization the life-time value of the customer.

At the end of his commencement address at Middlebury College this year, Jonathan Safran Foer noted, “Being attentive to the needs of others might not be the point of life, but it is the work of life” (*The NY Times*, “How Not to Be Alone”, Jonathan Safran Foer, June 9, 2013). And how truly applicable to today’s salesperson!

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