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Why Are You Really Winning and Losing Deals:
A Customer Perspective on Determinants of Sales Failure

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WHY ARE YOU REALLY WILLING AND LOSING DEALS:
A CUSTOMER PERSPECTIVE ON DETERMINANTS OF SALES FAILURE

BY

SCOTT BERTRAM FRIEND

A Dissertation Submitted in Partial Fulfillment of the Requirements for the Degree
of
Doctor of Philosophy
in the Robinson College of Business
of
Georgia State University

GEORGIA STATE UNIVERSITY
ROBINSON COLLEGE OF BUSINESS
2010

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ACCEPTANCE

This dissertation was prepared under the direction of the candidate's Dissertation Committee. It has been approved and accepted by all members of that committee, and it has been accepted in partial fulfillment of the requirements for the degree of Doctor in Philosophy in Business Administration in the Robinson College of Business of Georgia State University.

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ABSTRACT

WHY ARE YOU REALLY WINNING AND LOSING DEALS:
A CUSTOMER PERSPECTIVE ON DETERMINANTS OF SALES FAILURE

By

SCOTT BERTRAM FRIEND

MAY 13, 2010

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Understanding the determinants of sales success and sales failure has organization wide implications, ranging from an improved salesforce to improved corporate performance. However, a paucity of research on sales failure has resulted in an under-conceptualized field largely built on assumptions. This research proposes to overcome salesforce failure attribution biases by collecting data from the industrial buyer's perspective. Thirty five post-mortem interviews with procurement decision makers from buying organizations were collected following a failed sales proposal. The context of these failed sales proposals was for multi-year industrial service key account contracts (>$5 Million). The result of this naturalistic inquiry is a model which outlines the determinant attributes of sales failure: price, adaptability and relationship-potential. An experimental design was conducted following this exploratory research in order to test the derived drivers of sales failure and success, as well as provide a trade-off analysis of the three emergent sales proposal themes. Results indicate that a lack of adaptability has the strongest impact on the sales failure outcome variable, as well as buyer characteristics have a potentially moderating impact on the relative trade-off weights between price/adaptability and price/relationship-potential.

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1. INTRODUCTION

"Sales is a profession fraught with failures" (Dixon and Schertzer 2005). Sales & Marketing Management (2007) reports that 43% of sellers fail to meet their quota, a drop in performance from 2006 when 41% of the nation's sellers failed to hit their mark. Understanding the drivers of sales success and sales failure can have organizational wide implications, ranging from an improved salesforce to improved overall corporate performance. The benefits of understanding these performance drivers have managerial significance outside of the immediate company-wide consequences and extend into constructing a strong foundation for future corporate success and improving sustainable competitive advantages within the company's business environments. This effort will focus on identifying the drivers of failure and success within a sales proposal. It is important to understand if we are correct in assuming that the characteristics of a salesperson, sales organization or sales environment that are advantageous to sales performance also account for sales failure. As stated by Morris, LaForge & Allen (1994, p.2),

> Failure is not only poorly understood, but little consensus exists regarding a number of fundamental failure-related issues. For example, given that success occurs in varying degrees, does failure represent a low degree of success, rather than its opposite? If success is approached as a high standard of achievement, does a middle ground exist where many salespeople may operate? That is, can salespeople be productive without being successful? Does the failure construct include different dimensions than the success construct? Are the factors that correlate with sales failure the same as those related to success?

Due to the limited nature of research specific to sales failure, a combination of qualitative interviews and quantitative experimental data will be utilized to build a comprehensive conceptual model and empirically test the emergent constructs. In order to better understand the causes of sales failure, information on this phenomenon will be captured from the organizational buyer's perspective to overcome potential attribution biases which might be present if studied from the salesperson or sales organization viewpoint.

1.1. Importance of Sales Failures

Attention has consistently been focused on sales performance as business managers and academe alike strive to better understand how to improve the efficiency and effectiveness of the selling process (Roberts, Lapidus and Chonko 1994). This emphasis is due to the critical role salespeople play in contributing to sales volume, profits and customer satisfaction (Baldauf and Cravens 2002). The study of sales failure remains under-researched and largely built on assumptions of an implied relationship with performance, as opposed to an understanding built on empirical support. Although there has been a paucity of research attention directed toward the issue of salesperson failure (Morris et al. 1994), the topic is gaining considerable interest in sales (Silver, Dwyer and Alford 2006), particularly during the current economic downturn (Lay, Hewlin and Moore 2009). Specific implications regarding sales failure research includes extending the knowledge pertaining to salesperson evaluations, training, corporate strategy, and customer retention and relationships.

1.1.1. Evaluation and Training

One of the major outcomes of failure analysis is assisting organizations in identifying areas of improvement, such as the development of training materials aimed at preventing future failures (Gonzalez, Hoffman and Ingram 2005; Jolson 1999). Loss drives attributions (Mallin and Mayo 2006), and inaccurate explanations of sales loss will increase the likelihood of subsequent ineffective sales efforts (Dixon, Spiro and Jamil 2001; Weiner 1985) and may also result in additional sales development expenses. This process is in-line with Total Quality Management (TQM) strategies which note that improvement starts with identifying the source(s) of failure (Hill 1992; Jolson 1999).

Dealing with these sources of failure results in significant evaluation and training costs within the organization. Replacements may need to be selected and trained, non-performance based salary and benefits changed, and supervisory time spent coaching and retraining reallocated (Johnston et al. 1989; Johnston et al. 1987; Lipshitz 1989; Miller 1986; Morris et al. 1994). The analysis of lost sales opportunities can add value to the company’s evaluation and training programs, improve recruitment, and point to streamlined selling procedures (Clifford, Kim and McDonald 1989; Driscoll 1989; Morris et al. 1994; Pinchot 1985).

1.1.2. Corporate Strategy

Failure analysis can allow organizations to make more informed decisions about investing in failure deterrence (Morris et al. 1994). Investment in reducing sales failures is critical not only for the immediate needs of the sales force or customer base, but also in long-term corporate success (Dubinsky 1999). Gonzalez et al. (2005) state that tracking failures and attributions over a period of time can indicate areas of weakness in the firm’s sales process. Corporate strategies often emphasize failure analysis and recovery efforts because of the potential for the organization to gain a strategic competitive advantage (Gonzalez et al. 2005).

1.1.3. Customer Retention and Relationships

Page, Pitt, Berthon and Money (1996) remind us that most firms are not built on the basis of once-only customers, but rather on the lifetime value of customers. The result of effective failure analysis and recovery efforts should be more satisfied customers and concurrently increased revenue growth and profit opportunities for the sales organization (Gonzalez et al. 2005). It is not just the sales organization which benefits from failure analysis, but customers would clearly benefit as well (Gonzalez et al. 2005; Tax, Brown and Chandrashekaran 1998). Gonzalez and colleagues note that customers directly benefit from an improved sales process, resulting in an increased likelihood that the exchange process will result in a positive outcome. Sales failure analysis indirectly impacts the sales firm’s customers by reducing sales employee stress and conflict, meaning more satisfied employees who are retained longer, are more productive and exhibit positive behaviors, all of which are visible to customers and positively impact the customer’s satisfaction with the sales organization (Gonzalez et al. 2005; Heskett et al. 1994).

1.2. Gap Analysis

“…Although managers can identify factors which they believe enhance the probability of being successful, they do not appear to have an understanding of what characteristics lead to failure” (Johnston et al. 1989, p.53). A review of the current literature suggests that this lack of understanding is still relevant and appears to be derived from two significant gaps. First, the concept of sales failure, as opposed to sales performance, has not been fully developed or conceptualized. Second, much of the research which does exist on sales failure is concerned with understanding salesperson or sales manager attributions following a failed sales attempt. Almost no research has been conducted to assess the industrial buyer’s perspective regarding what characteristics of the sales interface lead to the failed proposal. Both of these gaps will be addressed in the current research.

1.2.1. Conceptualization

Morris et al. (1994, p.94) called for more research on the area of sales failure, “Overall, it can be concluded that failure is not a well-conceptualized or well-understood phenomenon, especially when compared to the phenomenon of success (Churchill et al. 1985; Dubinsky and Hartley 1986; Walker, Churchill and Ford 1979).” However, this stream of research has still lagged relatively far behind research examining success of sales performance. Morris et al. (1994) continue to maintain their call to action by addressing specific areas of development in which future researchers should focus due to the distinct nature of sales failure when compared to sales success (Morris et al. 1994, p.12):

- Failure is more difficult to define and identify than success, and is more situational. Degrees of success are possible, while failure captures an entire range of performance below some minimum standard.
- The findings of this study not only suggest that the selling profession has a strong "success" orientation, but that such an orientation affects the way managers approach failure. Thus, respondents tended to over-simplify failure and were fairly intolerant when it occurred. A possible causal explanation is that managers are not especially confident in their abilities to predict, recognize, or address failure.

These points have not been fully addressed in recent research, thus a conceptual model specific to attributes of failure is needed.

The definition of failure utilized for this study is a failed individual sales attempt as opposed to repeated failure of a salesperson over time. This is an important distinction because the potential results of the proposed research apply to the likelihood of winning or losing a specific proposal. If the probability of winning can be enhanced, it will result in better performance.

1.2.2. A Buyer's Perspective

The primary focus of research on sales failure deals with the attributions sales personnel place on failed sales proposals. Dwyer, Hill and Martin (2000) state that future research should examine customer preferences. Customer-based research would be beneficial because it would help alleviate the attribution biases which may exist in current findings. Morris et al. (1994) state, "With regard to causal attributions, managers were more apt to link failure to causes controllable by the salesperson himself or herself, rather than to environmental or company factors. Company factors were emphasized the least, suggesting managers take little personal responsibility for failure."

Gonzalez et al. (2005) argue for an emphasis to be placed on future research pertaining to sales failure analysis. Gonzalez et al. (2005, p.63) summarize the needs of this specific research field to move forward by proposing seven calls to action, including the following:

> Who do customers believe is responsible for the failure? Do customers believe we have control over the specific cause of the failure? How can we, as a sales organization, effectively manage customer attributions?

1.3. Research Proposal

Based on the importance of the topic and the identified gaps in the current literature, the following research design was developed. The goal of the research was to build and test a conceptual model of the factors which lead to sales failure. In order to best accomplish the overall goal of this research project, a number of research objectives were critical to the incremental design of the proposal:

- Review the literature on sales failure
- Collect data from the buyer side of the dyadic transaction in order to: (1) minimize potential sales organization attribution biases pertaining to failed sales efforts, and (2) understand failed sales efforts from the party which determines the value of the sales proposition and is the determinant of whether the sales offering is accepted or rejected.
- Build a conceptual model of sales failure through relevant literature and a naturalistic inquiry of themes expressed by organizational buyers in failed sales transactions.
- Empirically test the emergent conceptual drivers through quantitative research in order to provide a greater degree of generalization to the research findings.
- Assess the relative importance and trade-offs between the drivers of sales failure.
- Determine the comparative strength of the variables which contribute to sales performance versus sales failure.

1.3.1. Qualitative Data and Methodology

Two empirical data collection procedures were employed. First, a qualitative based analysis of the organizational buyer's verbal responses was utilized in order to assist in developing a conceptual model of sales failure. Specifically, post-mortem interviews with decision makers from the buying organizations were conducted following a failed sales proposal from one of our reference supplier companies. These in-depth interviews addressed the reasons in which the buying organization decided not to select the reference company's sales proposal. Collectively the interviews offer a comprehensive take on the decision maker's attributions of the sales failure decision based on their needs, attributes of the unsuccessful sales organization, competitive offerings, and attributes at the individual level (e.g., salesperson) and organizational level (e.g., sales firm).

The context of this research was sales proposals between business-to-business organizations. Two service-based sales organizations, each with numerous sets of unique buying organizations, were utilized as reference companies. Each of these reference company's failed sales proposals were for key accounts, defined here as $5 million and above and multi-year agreements. While multiple contacts within a buying organization were interviewed for the naturalistic inquiries, each buying organization/sales proposal counted only as a single data-point.

Over $233 million worth of lost sales potential was captured within the 35 sales failure case interviews. The following quotations provided by organizational buying firm decision makers clearly show the importance of capturing this expressive and complex form of data from the buyer's perspective:

> The interactions between our hospital and [ServiceStat] could be described as sporadic and very sales oriented. I personally feel the relationship with [ServiceStat] was mainly concentrated on marketing and promotional items. Hardly any relationship building or attempts to understand our hospital's specific needs were in the mix. I may be wrong, but I

> think that our hospital was a rather small customer amongst all of their accounts. The reason, why I think this was the case, is that we had a hard time getting return phone calls and we were usually given standard programs versus custom solutions. Also, there were hardly any interactions between their executive team and our hospital. This made us feel like second-grade customers (Chief Operating Office – Case 23).

> [TransArgo] has done a good job. Even though I decided on [CraftLine], [TransArgo] was on the ball answering questions and communicating with us. I got the feeling they could have been more aggressive in the sales process. By aggressive I mean learning about a business and build a relationship. Not the price, they were very strong on that point, but that’s only part of the picture as we are looking for a reliable solution, not the cheapest (Vice President, Logistics – Case 31).

1.3.2. Quantitative Data and Methodology

A quantitative test of the drivers in the developed sales model was utilized to statistically test the causal drivers of the proposed model, determine the relative strengths of the identified variables, and strengthen the generalizability of the proposed model. Additionally, a trade-off analysis was conducted to determine the relative importance of the sales proposal elements in explaining the buyer’s purchasing decision. Together, the unique attributes of such a comprehensive data set which captures data from the decision-maker’s perspective, combines qualitative and quantitative inquiries and is specific to key account sales proposals was highly valuable in serving the distinct demands of this research proposal.

2. LITERATURE REVIEW

"Empirical investigation of how and where failure analysis and recovery efforts fit within the relationship-selling approach has the potential to create an entirely new stream of academic research and produce meaningful implications for progressive sales organizations" (Gonzalez et al. 2005, p.63). This *Call to Action* provided by Gonzalez et al. (2005) serves as the conceptual motivation for this research project. We present literature pertaining to sales force performance, as well as pertaining to the limited existing domain of sales failure analysis research, in order to ground our qualitative and quantitative research in current knowledge.

2.1. Sales Failure Attributions

A majority of the existing research on sales failure relates to how sales managers and sales personnel respond to their failures, as well as a limited number of studies examine the potential causal factors of sales failure from the sales organization's perspective. Both of these streams of sales failure literature either directly or indirectly discuss the limitations of sales failure attributions. Attribution theory provides a framework for understanding how individuals, in this case sales personnel, make sense of unexpected events, such as failed sales proposals (Ajzen and Fishbein 1983; Dixon and Schertzer 2005). The focus of this research attempts to minimize these attribution effects by studying the causes of the failure from the buyer's perspective.

As a review, attribution is the process used by individuals to explain why some particular outcome has occurred (Weiner 1985). As stated by Mallin and Mayo (2006, p.346), "The type of attribution made by salespeople is important because it can affect subsequent sales effort (e.g., working smarter or harder, Sujan 1986) as well as how they alter their strategy and approach to match the selling environment (Sujan, Sujan and Bettman 1988; Sujan, Weitz and Sujan 1988). In terms of antecedents, it appears that attributions are made, in part, by reviewing past performances to determine whether one’s present efforts or some environmental factor caused a given outcome (Kelley 1973).” In sum, attribution theory is a framework for understanding an individual’s reactions and behaviors based on their causal inferences (Folkes 1984).

Specific to failed sales proposals, the current literature uniformly asserts that a failed sales attempt drives failure attributions and that sales managers or salespeople will attempt to preserve their tangible and intangible resources in light of the loss (Mallin and Mayo 2006). Attribution theory implies that while sales managers will tend to attribute poor performance to the salesperson, the salesperson will attribute the poor performance to factors beyond their control, both of whom are making external causal attributions (Churchill et al. 1985; Ingram and Bellenger 1983; Ingram, Schwepker and Hutson 1992; Teas and McElroy 1986). As summarized by Dubinsky (1999), sales managers tend to fall victim to the fundamental attribution errors (Ross 1977), in which they tend to overemphasize personal factors, such as salesperson ability and effort, and de-emphasize external factors, such as economic conditions and competition, when they are determining the underlying causes for a salesperson’s performance. This explains why sales executives tend to ascribe failure primarily to the salesperson and less so to the organization (Dubinsky 1999).

The primary detriment of these potentially skewed attributions following a failed sales attempt is the impact on the salesperson or managers recovery expectations. If the sales manager or salesperson is not attributing the correct cause to the failed sales attempt, then recovery efforts will be misdirected. Further, if the individual believes that he or she has no control over the outcome, then learned helplessness theory (Seligman 1975) would suggest that there could be psychological consequences. Schulman (1999, p.32) suggests the following three potential results of incorrect attributions: (1) loss of motivation, (2) feelings of anxiety and lower selfconscious, and (3) difficulty learning that he or she has control, even when there is evidence that an objective is achievable.

Sales failure research with organizational buyers, as opposed to members of the sales organization will offer two important insights. First, while current research has looked at the causal attributions provided by the salesperson and by the sales manager, we do not know whether the attributions provided by purchasing decision makers’ unique perspective. Secondly, data from the organizational buyer’s perspective may not have the attribution bias commonly attributed to the information provided by salespeople and sales managers, because organizational buyers have less of an incentive or personal risk at stake when evaluating the determinants of the failed sales proposal compared to respondents within the sales organization.

2.2. Sales Failure Classification

In regard to the specific context of this research, a classification of sales failures was developed in order to provide perspective on the potential in this research field. As a means of classifying the type of potential failed sales attempts, the following questions are important in regard to the post-mortem analysis of the needs and evaluative criteria of the supplier’s proposal:

- Is the product or service of interest a new need within the organization or a renewal of an existing product or service currently purchased by the organization?
- Was the losing sales firm a current supplier to the buying organization?
    - If yes, and if the context is a renewal purchase, was the losing sales firm the incumbent supplier of the product or service sales proposal of interest?
- Was the winning sales firm a current supplier to the buying organization?
    - If yes, and if the context is a renewal purchase, was the winning sales firm the incumbent supplier of the product or service sales proposal of interest?

Based on the identifying questions outlined, 12 categories of sales failures are proposed:

1. ***Sales Proposal Failure***: A failed sales offering for a *new* customer need in which neither the focal sales organizations, nor any of the competing sales organizations, possessed an existing supplier relationship with the buying organization.
2. ***Sales Take-Over Failure***: A failed sales offering for a *new* customer need in which the focal sales organization was not a supplier of another product or service and lost the potential sale to an organization concurrently acting as a supplier for a separate product or service to the buying organization.
3. ***Sales Extension Failure***: A failed sales offering for a *new* customer need in which the focal sales organization lost the potential sale while concurrently acting as a supplier for a separate product or service to the buying organization.
    a. *Contested:* The winning sales organization was also a supplier of a separate product or service provided to the buying organization.
    b. *Uncontested:* The winning sales organization did not have an existing supplier relationship with the buying organization.
4. ***Sales Entrant Failure***: A failed sales offering for a *renewal* purchase in which the focal sales organization lost the potential sale to a new supplier of the specified product or service of interest.
    a. *Inside:* The losing sales organization was a supplier of a separate product or service provided to the buying organization.
    b. *Outside:* The losing sales organization did not have an existing supplier relationship with the buying organization.

5. ***Sales Development Failure:*** A failed sales offering for a *renewal* purchase in which the focal sales organization lost the potential sale to an incumbent supplier of a separate product or service:
    a. *Inside:* The losing sales organization was a supplier of a separate product or service provided to the buying organization.
    b. *Outside:* The losing sales organization did not have an existing supplier relationship with the buying organization.
6. ***Sales Capture Failure:*** A failed sales offering for a *renewal* purchase in which the focal sales organization lost the potential sale to the incumbent supplier of the specified product or service of interest.
    a. *Inside:* The losing sales organization was a supplier of a separate product or service provided to the buying organization.
    b. *Outside:* The losing sales organization did not have an existing supplier relationship with the buying organization.
7. ***Sales Renewal Failure***: A failed sales offering for a *renewal* purchase in which the focal sales organization was the incumbent supplier for the specified product or service of interest.
    a. *Contested:* The winning sales organization was also a supplier of a separate product or service provided to the buying organization.
    b. *Uncontested:* The winning sales organization did not have an existing supplier relationship with the buying organization.

For a summary of the sales failure classifications based on our identifying questions, refer to Table 1:

Table 1
Sales Failure Classification

	Sales Proposal Failure	Sales Take-Over Failure	Sales Extension Failure (C)	Sales Extension Failure (U)	Sales Entrant Failure (I)	Sales Entrant Failure (O)	Sales Development Failure (I)	Sales Development Failure (O)	Sales Capture Failure (I)	Sales Capture Failure (O)	Sales Renewal Failure (C)	Sales Renewal Failure (U)	
(1) Was this purchase a new need within the organization?	Yes	Yes	Yes	Yes	No	No	No	No	No	No	No	No	**--**
(2a) Was the losing sales firm a supplier to the buying organization?	No	No	Yes	Yes	Yes	No	Yes	No	Yes	No	Yes	Yes	**Inside**
(2b) If yes, was the losing sales firm the supplier for the proposal of interest (renewals)?	n/a*	n/a*	n/a*	n/a*	No	n/a**	No	n/a**	n/a***	n/a**	Yes	Yes	**Outside**
(3a) Was the winning sales firm a supplier to the buying organization?	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	No	**Contested**
(3b) If yes, was the winning sales firm the supplier for the proposal of interest (renewals)?	n/a*	n/a*	n/a*	n/a*	n/a**	n/a**	No	No	Yes	Yes	n/a***	n/a**	**Uncontested**

(C) = Contested; (U) = Uncontested; (I) = Inside; (O) = Outside; n/a = Not Applicable; * Indicates n/a to be incumbent because new buying task situation; **Indicates n/a to be incumbent because firm was not an existing supplier to the buying organization; ***Indicated n/a/ to be incumbent because competing supplier is existing incumbent

Much like the *Buyclass Framework* developed by Robinson, Farris & Wind (1967) and the *Sales Contingency Model* developed by Weitz (1981), the needs of the buying organization may vary depending on the specifics of the failure situation identified. In this case, the buyer's experience (or lack thereof) with the sales organizations, as well as their internal experiences in terms of identifying important criteria of the specified product or service based novelty (or lack thereof) of the purchase, may alter a buyer's comparative judgment of the value of the sales proposals. The *Sales Failure Classification* provided will serve a similar purpose of identifying the possible variation in reasons for sales proposal failures for this and future sales failure research.

Ideally, in the coming years as this research field grows and becomes further tested, comparisons and distinctions between the 12 sales failure situations identified in Table 1 will be made. For the time being it is important to focus in on specific sales situations in order to understand how the resulting conceptual model was developed and tested. In this research, we will predominately focus on Sales Proposal Failures, Sales Capture Failures, and Sales Renewal Failures. In addition to defining and taking note of the specifics of the sales situation when coding the interpretive interviews, it is also important to review existing literature on the drivers of both sales performance and sales failure.

2.3. Sales Performance & Sales Failure

Personal selling is the process by which a salesperson attempts to influence a customer to purchase his or her product or service (Filley, House and Kerr 1976; Weitz 1981). As a dichotomy used for initial classification, performance is the purchase whereas failure is the lack of a purchase. Performance is typically conceptualized as a summation of success and failure over a number of buyers over a period of time. Further, Walker et al. (1979) distinguish salesperson performance and organizational effectiveness as two distinct elements of evaluating sales outcomes. Sales performance is “salesperson behavior evaluated relative to organizational goals and objectives,” while sales organization effectiveness is “a summary evaluation of overall organizational outcomes” (Morris et al. 1994; Walker et al. 1979). Situational variables which capture the environmental conditions of the sales situation have been shown to affect sales performance (e.g., Roberts et al. 1994; Ryans and Weinberg 1979; Walker, Churchill and Ford 1977). Characteristics which impact performance fall in to three broad categories: (1) salesperson characteristics, (2) sales organization and job characteristics and (3) sales environment characteristics. These three categories are consistent with previous classifications, such as that provided by Walker et al. (1979).

Sales failure has been defined in two distinct ways. First, Ingram et al. (1992) define sales failure as “the inability of the salesperson to consistently meet minimum job standards” (p.226). Second, Johnston et al. (1989) provide a broader definition, which includes losing a sale, missing a quota and the inability to get an account to renegotiate a contract (Mallin and Mayo 2006). Based on the context of this study, in which we discuss determinants of sales failure with organizational buyers as opposed to the sales organization, we elect to follow more closely to Johnston, Hair and Boles’ (1989) sales failure definition. Specifically, we identify sales failures as the inability to win a contract in a sales proposal. In addition to being able to identify failure from the buyer’s perspective, Johnston, Hair and Boles’ (1989) failure attributions also fit many of the *Sales Failure Classifications* outlined in Table 2. For example, a *Sales Proposal Failure* can be identified by losing a sale, whereas a *Sales Renewal Failure* could be identified by failing to renew a contract.

A key question facing sales organizations concerns whether the ultimate responsibility of the failure is attributable to the salesperson, the sales company or the selling environment (Dubinsky 1999). Are the attributes which are responsible for sales failure within the control of the salesperson or the sales organization? This notion of controllable and uncontrollable elements is incorporated from the Ingram et al.'s (1992) definition (Dubinsky 1999). Morris et al. (1994) identify three categories of determinants and causes of failure: (1) external factors, (2) company factors and (3) personal factors. These three categories are consistent with the three determinants of sales performance identified and thus will be included in the literature search and exploratory qualitative analysis.

In order to comprehensively develop the exploratory study, it is important to identify independent variables which may have previously been recognized to impact sales performance or sales failure within the bounds of characteristics which are observable from the buyer's perspective. The sales performance and sales failure literature search will be reviewed with this predisposition in mind. Certain company characteristics (i.e., salesforce recruitment procedures) and personal characteristics (i.e., poor planning/organization skills) which have been shown to be related to sales failure (Morris et al. 1994) may be difficult to be evaluated by the buying organization, and thus may be excluded from this review.

2.3.1. Salesperson Characteristics

Individual salesperson characteristics have been shown to possess a relationship with salesperson performance (Churchill et al. 1985) and salesperson failure (Morris et al. 1994). The seminal meta analysis conducted by Churchill et al. (1985) concludes that among the 116 articles addressing salesperson performance, individual determinants possess a weak relationship, while sales failure analysis conducted by Morris et al. (1994) showed that based on the grand mean, personal characteristics had a stronger determinant relationship than external or company factors (see Table 3).

Additional research shows that there are specific characteristics, such as selling techniques, goal orientations and presentation techniques, which distinguish between high and low performing salespeople (Dwyer et al. 2000; Silver et al. 2006). Further research on salesperson behaviors, such as adaptive selling, show significant positive relationships with effectiveness, while also indicating that salespeople who do not adapt their selling behaviors and deliver canned presentations to all customers may fail to reap the benefits of personal selling (Chakrabarty, Oubre and Brown 2008; Predmore and Bonnice 1994; Weitz 1981).

Based on the literature search, a number of personal characteristics, which can be observed by the buying organization, will be specifically included in the coding scheme developed for the exploratory analysis, including: effort (Churchill, Ford and Walker 1979), experience (Roberts et al. 1994), communication (Dwyer et al. 2000), customer-orientation (Dwyer et al. 2000), adaptive selling (Weitz 1981), effective listening (Castleberry, Shepherd and Ridnour 1999; Roman, Ruiz and Munuera 2005; Shepherd, Castleberry and Ridnour 1997), age (Roberts et al. 1994), enthusiasm, persuasiveness, ability to follow instructions, and sociability (Moss 1978).

Despite the differentiation in which Johnston et al. (1989) and Ingram et al. (1992) define sales failure, Jolson (1999) recognized that these two major studies both attribute failure to salespersons personal characteristics and behavior. A third study conducted by Morris et al. (1994), which defines sales failure inline with Ingram and colleagues', also includes personal characteristics as a determinant of sales failure. For reference purposes, the tables below summarize the salesperson characteristics variables used by the Johnston, Hair and Boles (Table 2) and Morris, LaForge and Allen (Table 3)

Table 2
Factors Contributing to Failure of a Salesperson –
Johnston, Hair & Boles (1989)

Factor	Sales Manager		Salesperson		Student	
	Mean	Rank	Mean	Rank	Mean	Rank
Lacks initiative	1.70 (b)	(1)	1.60	(1)	1.89 (a)	(5)
Poor planning and organization	1.88	(2)	1.99	(4)	1.98	(7)
Lacks enthusiasm	1.98 (b)	(3)	1.70 (c)	(2)	1.78	(2)
Lacks customer orientation	2.06 (b)	(4)	2.17	(8)	1.78 (a)	(3)
Lacks personal goals	2.18 (b)	(5)	2.01	(6)	2.48 (a)	(8)
Inadequate product knowledge	2.23 (b)	(6)	1.81 (c)	(3)	1.56 (a)	(1)
Lacks proper training	2.32 (b)	(7)	2.00 (c)	(5)	1.91	(6)
Unable to get along with buyers	2.37 (b)	(8)	2.11	(7)	1.80 (a)	(4)

1 = very significant factor, 5 = not a significant factor
(a) significant at the .05 level between students and salespeople
(b) significant at the .05 level between sales managers and students
(c) significant at the .05 level between salespeople and sales managers

Table 3
Determinants & Causes of Failure* -
Morris, LaForge & Allen (1994)

		mean	s.d.
Personal factors			
	Lack of ambition	3.74	.531
	Poor planning/organization skills	3.61	.513
	Poor time management	3.63	.529
	Lack of enthusiasm	3.77	.520
	Not persistent enough	3.34	.621
	Insufficient product knowledge	3.26	.815
	Poor people skills	3.43	.671
	Lack of experience	2.68	.732

* Items were measured on four-point scale, with lower scores indicating the factor has little to no impact on failure, and higher scores indicating a moderate to high impact

While the salesperson variables identified in Table 2 and Table 3 provide a majority of the salesperson variables which will be coded a priori, the tables also exemplify the notion that the existing scales and studies take the sales organization perspective in defining salesperson performance and failure. Johnston et al. (1989) – see Table 2 - shows that differences exist between the means in which sales managers and salespeople attribute cause to sales failure.

Based on these findings, it is appropriate to propose that further differences may exist based on customer based attributions. While this study does recognize certain limitations with collecting data on salesperson characteristics from the organizational buyer's perspective (e.g., buyers may be more likely to attribute their purchase decision to characteristics of the product, organization or environment, as opposed to salesperson characteristics, such as sales techniques), it is nonetheless important to understand the sources of failure from this new perspective.

In addition to the list of personal characteristics identified in the literature review, our exploratory analysis also intends to look for new variables associated with the salesperson which have not been previously identified in sales failure publications. While some of the determinants listed in Table 2 and Table 3 would be highly difficult to evaluate from a buyer's perspective (e.g., lacks personal goals, lack of ambition), the majority of these salesperson characteristics will be included. Additional personal attributes, skills, and behaviors identified in the sales failure literature complete our list of personal characteristics that we will code in the exploratory analysis. Together, the salesperson failure determinants are as follows: unable to get along with buyer (Johnston et al. 1989), lacks customer-orientation (Johnston et al. 1989), lacks initiative (Johnston et al. 1989), not persistent enough (Morris et al. 1994), poor people skills (Morris et al. 1994), lack of experience (Morris et al. 1994), lack of enthusiasm (Johnston et al. 1989; Morris et al. 1994), inadequate product knowledge (Johnston et al. 1989; Morris et al. 1994), poor planning and organization (Johnston et al. 1989; Morris et al. 1994), lacks sufficient effort (Jolson 1999), lacks ability to plan sales presentation (Jolson 1999), lacks listening skills (Jolson 1999; Roman et al. 2005), and sales-orientation (Dwyer et al. 2000).

Table 4 represents characteristics of the salesperson identified in the sales performance and sales failure literature streams which will be coded for in the exploratory analysis:

Table 4
Personal Characteristics to Include in Exploratory Coding

Personal Characteristics		Source	Relationship
Ability to Follow Instructions		Moss (1978)	Performance
Adaptive Selling		Weitz (1981)	Performance
Age		Roberts, Lapidus & Chonko (1994)	Performance
Communication		Dwyer, Hill & Martin (2000)	Performance
Customer-Orientation	Possess	Dwyer, Hill & Martin (2000)	Performance
	Lack	Johnston, Hair & Boles (1989)	Failure
Effort	Possess	Churchill, Ford & Walker (1978)	Performance
	Lack	Jolson (1999)	Failure
Enthusiasm	Possess	Moss (1978)	Performance
	Lack	Johnston, Hair & Boles (1989); Morris, LaForge & Allen (1994)	Failure
Experience	Possess	Roberts, Lapidus & Chonko (1994)	Performance
	Lack	Morris, LaForge & Allen (1994)	Failure
Inadequate Product Knowledge		Johnston, Hair & Boles (1989); Morris, LaForge & Allen (1994)	Failure
Lacks Ability to Plan Sales Presentation		Jolson (1999)	Failure
Lacks Initiative		Johnston, Hair & Boles (1989)	Failure
Listening Skills	Possess	Sheperd, Castleberry & Ridnour (1997); Castleberry, Shepherd & Ridnour (1999)	Performance
	Lack	Jolson (1999); Roman, Ruiz and Munera (2005)	Failure
Not Persistent Enough		Morris, LaForge & Allen (1994)	Failure
Persuasiveness		Moss (1978)	Performance
Poor People Skills		Morris, LaForge & Allen (1994)	Failure
Poor Planning and Organization		Johnston, Hair & Boles (1989); Morris, LaForge & Allen (1994)	Failure
Sales-Orientation		Dwyer, Hill & Martin (2000)	Failure
Socialability		Moss (1978)	Performance
Unable to Get Along with Buyer		Johnston, Hair & Boles (1989)	Failure

2.3.2. Organizational Characteristics

“’When a salesperson fails, it is almost always management’s fault’” (Jolson 1999, p.19). The emphasized fault placed on sales managers when a salesperson fails is due to the fact that the managers and the sales organization possess control over the hiring of sales personnel and management (e.g., compensation, training, supervision, motivation, evaluation) of sales personnel. The sales organization is responsible for anticipating and/or adapting to external conditions (e.g., competition, marketplace dynamics, technology), as well as internal conditions (e.g., territorial design, organizational reputation/image, financial support, quality leads, company objectives) (Jolson 1999). To summarize, Dubinsky (1999, p.15) states:

> The major purpose of this article was to provide support (using both extant literature and concomitant dialectic) for the presupposition that the reasons for a salesperson's failure ultimately reside with sales management. No matter what excuses the sales management team might offer for the subpar performer (e.g., dismal economic conditions, intense competition, inadequate selling skills, little initiative or drive), the simple fact of the matter is that the rationale offered can be dispatched with by clearly assigning responsibility to the sales management team.

Similar implications regarding the impact of management and the sales organization exist within the performance literature. Jaramillo and Prakash (2008, p.44) point out that a perennial question that sales force managers face is: "How can I inspire salespeople to achieve higher performance?" and Ingram, LaForge, Locander, MacKensie and Podsakoff (2005) note that managers play a fundamental role in influencing salespeople to become successful in selling. In addition to the roles identified by Roberts et al. (1994) that the sales organization plays in positively enhancing sales performance (e.g., training, work overload and setting quotas), eight organizational variables which adversely affect performance were also identified: (1) job-related information, (2) tools and equipment, (3) materials and supply, (4) budgetary support, (5) required services and help from others, (6) task-orientation, (7) time availability, and (8) work environment. These variables were derived from the original taxonomy of situational variables to performance outcomes developed by Peters, O'Connor and Rudolf (1980) – see Table 6.

While the study of the impact of the sales organization on performance and failure has been conducted in the past, extension is needed because the majority of the organizational variables may be difficult for buyers to perceive during their decision process. This is not to say that these organizational variables are not important determinants of success or failure, but their impact on the performance or failure of a sale is currently documented, while the perceived customer value of similar organizational variables is not. This tendency to measure outcomes from the sales organizations' perspective can be observed in Tables 5 and 6, which represent summarizations of two prominent studies, one showing the impact of organizational factors' on sales failure (Table 5 - Morris et al. 1994) and one regarding the organizational variables which impact sales performance (Table 6 - Peters et al. 1980). Table 7 represents the sales organization determinants found in the literature which impact performance or failure and could realistically be observed from the buying organization's perspective and thus will be included in the a priori coding sheet for the exploratory analysis. Organizational characteristics included in this literature review consist of managerial actions and organizational attributes.

Table 5
Determinants & Causes of Failure* - Morris, LaForge & Allen (1994)

		mean	s.d.
Company factors			
	Salesforce recruitment procedures	2.47	.943
	Salesforce training programs	2.97	.832
	Way salespeople are assigned to territory	2.02	.866
	Methods used to motivate salespeople	2.82	.936
	Ways salespeople are evaluated	2.18	.847

* Items were measured on four-point scale, with lower scores indicating the factor has little to no impact on failure, and higher scores indicating a moderate to high impact

Table 6
Situational Resource Variables Relevant to Performance – Peters, O'Connor & Rudolf (1980)

1. *Job-related information.* Refers to the information (from supervisors, peers subordinates, customers, company rules, policies, and procedures, and so forth) needed to do the job assigned.
2. *Tools and equipment.* Refers to those specific tools, equipment, and machinery needed to do the job assigned.
3. *Materials and supplies.* Refers to those materials and supplies needed to the job assigned.
4. *Budgetary support.* Refers to the financial resources and budgetary support needed to do the job assigned – the monetary resources needed to accomplish aspects of the job to include such things as long distance calls, travel, job-related entertainment, hiring new and maintaining/retraining existing personnel, hiring emergency help, and so forth. This category does not refer to an incumbent's own salary, but rather, to the monetary support necessary to accomplish tasks which are a part of the job they have been assigned.
5. *Required services and help from others.* Refers to the services and help from others needed to do the job assigned.
6. *Task preparation.* Refers to the previous personal preparation, through previous education, formal company training, and relevant job experience, needed to do the job assigned.
7. *Time availability.* Refers to the availability of the time taking into consideration both the time limits imposed and the interruptions, unnecessary meetings, non-job-related distractions, and so forth, needed to do the job assigned.
8. *Work environment.* Refers to the physical aspects of the immediate work environment which are needed to do the job assigned – characteristics which facilitate, rather than interfere with doing the job assigned. For example, a helpful work environment is one that is not too noisy, too cold, or too hot; that provides an appropriate work area; that is well lighted; that is safe; and so forth.

Table 7
Organizational Characteristics to Include in Exploratory Coding

Organizational Characteristics		Source	Relationship
Budgetary Support		Roberts, Lapidus & Chonko (1994)	Failure
Company Experience		Dubinsky (1999)	Performance
Company Objectives	Strong	Jolson (1999)	Failure
	Weak	Dubinsky (1999)	Performance
Company Reputation/Image	Strong	Dubinsky (1999)	Performance
	Weak	Jolson (1999)	Failure
Corporate Philosophy & Culture		Dubinsky (1999)	Performance
Financial Support	Strong	Dubinsky (1999)	Performance
	Weak	Jolson (1999)	Failure
Human Capital		Dubinsky (1999)	Performance
Managerial Adaptations	Strong	Chakrabarty, Oubre & Brown (2008)	Performance
	Weak	Jolson (1999)	Failure
Managerial Supervision/Leadership		Dubinsky (1999)	Performance
Materials & Equipment		Peters, O'Connor & Rudolf (1980); Roberts, Lapidus & Chonko (1994)	Performance
Time Availability		Roberts, Lapidus & Chonko (1994)	Failure

2.3.3. Environmental Characteristics

Environmental characteristics are important to take into consideration because they may impact the likelihood of success of a salesperson or organization. As Roberts et al. (1994) points out, environmental characteristics could potentially trump alternative drivers of performance, such as effort and ability, and inhibit salespeople from accomplishing their tasks. It is often the case in the performance literature that environmental characteristics are modeled as moderators to the relationships between personal characteristics or organizational characteristics and performance. Attribution bias may cause individuals inside the sales organization to attribute success to internal attributes of the organization or sales personnel and failure to environmental factors. Environmental characteristics are sometimes not included in the performance models because researchers assume that salespeople perceived these variables in the same way and that they impact individual salespeople in the same way (Roberts et al. 1994).

Of the literature which makes up the sales failure research stream, Jolson (1999), Morris et al. (1994) and Dubinsky (1999) each recognize the unique effects of environmental characteristics on sales failure. For example, Dubinsky (1999, p.11) states, "*Caeteris paribus*, salespeople are likely to be less successful in territories where competition is heavily entrenched than in territories where competition is not so keen." Morris et al. (1994) provided empirical results for the impact of external factors on sales failure (Table 8).

Table 8
Determinants & Causes of Failure* -
Morris, LaForge & Allen (1994)

		mean	s.d.
External factors			
	Economic conditions	2.91	.877
	Competitors aggressiveness	2.94	.889
	Customer loyalty	2.78	.928

* Items were measured on four-point scale, with lower scores indicating the factor has little to no impact on failure, and higher scores indicating a moderate to high impact

Environmental characteristics may be particularly susceptible to attribution errors within the sales failure literature because, when a sales organization is unsuccessful, they will tend to attribute their lack of success to external attributes of the sales environment, such as the economy, as opposed to organizational-based characteristics. One benefit of the environmental characteristic variable group is that many of the determinants which have been studied from the sales organization's perspective in the performance and failure literature streams, transition well to a buyer's perspective due to the fact that these environmental variables are externally observable to both the selling and buying organizations. Table 9 shows the environmental characteristics found in the sales performance and sales failure literature which will be included in the exploratory analysis coding sheet:

Table 9
Environmental Characteristics to Include in Exploratory Coding

Environmental Characteristics		Source	Relationship
Competitive Intensity	Favorable	Ryans & Weinberg (1979)	Performance
	Unfavorable	Jolson (1999); Dubinsky (1999); Morris, LaForge & Allen (1994)	Failure
Cultural Changes		Dubinsky (1999)	Failure
Customer Loyalty		Morris, LaForge & Allen	Failure
Economic Conditions	Favorable	Walker, Churchill & Ford (1977)	Performance
	Unfavorable	Jolson (1999); Morris, LaForge & Allen (1994)	Failure
Ethical Climate		Dubinsky (1999)	Failure
Natural Resources		Dubinsky (1999)	Failure
Political Issues		Dubinsky (1999)	Failure
Regulatory Forces		Dubinsky (1999)	Failure
Social Trends		Dubinsky (1999)	Failure
Technological Innovation		Dubinsky (1999)	Failure

2.4. Theoretical Implications

While the potential overlap of contributing factors between the dependent variables of sales performance and sales failure are noted, theoretical reasoning regarding potential divergent effects does exist. Theories, such as Herzberg’s motivation-hygiene theory (Herzberg 1959) and Tversky’s theory of perception of similarity and dissimilarity (Tversky 1977), suggest that subjects may attend to decidedly different features when assessing what appear to be polar dichotomies. In the context of this study, motivation-hygiene theory lends particularly useful insights regarding the variables which determine sales performance versus sales failure.

Motivation-hygiene theory, often referred to as the two-factor theory of job attitudes or satisfier-dissatisfier theory, suggests that job satisfaction and job dissatisfaction are produced by different work factors (Herzberg 1974). Findings suggest that job satisfaction and job dissatisfaction are not the obverse of each other, but rather are best viewed as two separate and parallel continua. The opposite of job dissatisfaction is not job satisfaction; and the opposite of job dissatisfaction is not job satisfaction (Herzberg 1965). What makes people satisfied at work are factors related to the content of their jobs, bringing about work motivation (motivation). What makes people unhappy is how well (or poorly) they are treated, symbolizing the fact that they represent preventative and environmental conditions at work (hygiene) (Herzberg 1974). The motivation-hygiene theory has been replicated over 200 times (Herzberg 1974) and extended (e.g., Maddox 1981; Saleh 1964), providing validation of the theory for a wide range of occupations at many levels and for diverse organizations. This theory has not yet been applied to the study of factors which produce sales performance and sales failure.

As a conceptual extension, the motivation-hygiene theory suggests that it is possible that organizational buyers do not perceive the same factors which lead to their selection of one organization's proposal (performance) are the same as the factors which lead to their decision not to select another organization's proposal (failure). For example, while a high ethical perception of the salesperson may not play a large contributing role in a buyer's decision to select a sales proposal, a perceived lack of salesperson ethics may play a large contributing role in the same individual's decision not to select an alternative proposal. If such results are found in this study, then the weight of these contributing variables may indicate that sales performance and sales failure may also best be viewed as two separate and parallel continua, not necessarily the obverse of one another. This proposal may thus be able to make a theoretical contribution in the extension of Herzberg's motivation-hygiene theory into sales success and failure.

Extending into the forthcoming section, customer-perceived value, we seek to compare the customer-perceived value models derived from the organizational buyer's valuation of the offering provided by the successful sales organization versus that of the unsuccessful sales organization. To fully test the motivation-hygiene theory, we will measure these two outcome value models distinctly, as opposed to simultaneously. This is in accordance to Maddox (1981, p.102), who specifically notes the complications of understanding and influencing consumer satisfaction using a two-factor view:

> The two-factor view complicates the understanding and influencing of consumer satisfaction. The often stated goal of "maximizing consumer satisfaction" would be replaced by two goals, "maximizing satisfaction and minimizing dissatisfaction," which must be pursued simultaneously (Stokes 1974).
>
> Take, for example, the concept of value that involves an implicit benefit-cost ratio. Suppose that for a particular product only two dimensions are important: appearance (an expressive outcome) and price. Common sense and the traditional view support the notion that either an improvement in appearance or a price reduction would result in more satisfied consumers. One action may be more potent than the other, but neither would be inappropriate.
>
> If a two-factor view prevails, "value" has little relevance. Appearance would affect satisfaction and price would act on dissatisfaction. Improved appearance would never reduce dissatisfaction; a quantum increase in appearance accompanies by a small increase in price (a much better value in conventional terms) would increase dissatisfaction. Similarly, a price cut, no matter how deep, could not increase satisfaction, which should only be affected by design improvements.

2.5. Customer-Perceived Value

Gonzalez et al. (2005, p.57) define failure analysis as "…the systematic documentation of performance flaws in the sales process from the customer's perspective," while recovery efforts are defined as "…actions taken to mitigate and/or repair the damage to a customer that results from the failure to deliver the sales process as designed" (Johnston and Hewa 1997). While much of the efforts in sales failure research have been focused on the outcomes of a failed sales attempt, determining where to attribute fault from a customer's perspective remains to be evaluated. While sales organizations improve the sales experience for the customer, efforts in this direction should be derived from the customer's definition of what is really important (Gonzalez et al. 2005).

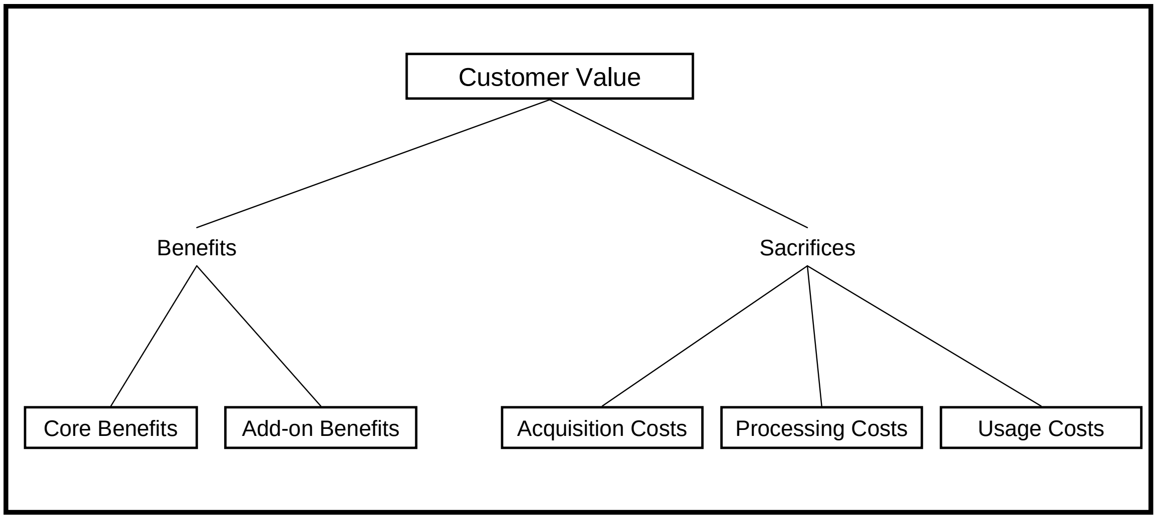
The concept of customer-perceived value has been empirically documented in research areas outside of sales failure analysis. In a study regarding buyer reactions to supplier stockouts, the following quotation provided by Tucker (1983) summarizes the value of customer perceptions: "'It doesn't matter what a supplier does in the area of customer service; it only matters what customers think a supplier does'" (Dion and Banting 1995, p.342). Further, a classic anecdote provided by Gonzalez et al. (2005, p.59) provides an industry exemplar of the value of understanding what is important to customers as opposed to meeting internally derived objectives:

> In one classic example, FedEx's original definition of performance was based on whether packages were delivered to customers the day after they were mailed. However, after categorizing customer complaints, a list of performance criteria emerged, which became known as FedEx's 'Hierarchy of Horrors' (AMA 1991). FedEx's much touted success is now rooted in a full understanding of its past failure as perceived by its customer base.

In the dyadic interplay between the buying organization and the selling organization lie the key drivers of success and failure. We know that value is determined in the eyes and minds of customers (Cravens 1998). Customer value is an extremely important domain of research which leads to customer satisfaction and has been referred to as the cornerstone of business marketing (Menon, Homburg and Beutin 2005).

In addition to the broader characteristics of the salesperson, the sales organization and selling environment, customer-perceived value completes this conceptual review by addressing specific elements of the sales interaction. While the decision process is impacted by the salesperson, sales organization and selling environment, the ultimate accept or reject decision is a function of customer value. The *Customer Value in Business Markets* model by Menon et al. (2005 - Figure 1) provides a framework for the customer's decision to accept or reject a sales proposal.

Figure 1
Customer Value in Business Markets –
Menon, Homburg & Beutin (2005)



The accept or reject buyer decision is determined based on the customer-perceived benefits, customer-perceived sacrifices and customer-perceived competitive offerings of the sales proposal (Ulaga 2003). This indicates that characteristics of the salesperson, sales organization and selling environment each potentially contribute to this value function.

2.5.1. Benefits

In industrial marketing, two of the most widely cited benefits which add to customer value are adaptive offerings and customer relationships. Both forms of benefits aid the sales organization and the buying organization. A question to be addressed in this research is does a lack of adaptive selling and/or a relationship orientation lead to failed sales proposals? If the customer does perceive the supplier or salesperson to possess these characteristics, what potential sacrifices outweigh these benefits and cause a failed sales proposal?

2.5.1.1. Adaptive Selling

The benefits of adaptive selling can be provided by both the sales organization (Menon et al. 2005) and the salesperson (Weitz 1981). Organization-based adaptations are synonymous with the marketing concept, which requires an organization to determine the needs of a customer and adapt itself to satisfying the needs better than their competitors (Saxe and Weitz 1982). The adaptability of the sales organization refers to the extent to which the company is both willing and able to accommodate the customer's changing needs (Menon et al. 2005; Noordewier, John and Nevin 1990).

In terms of specific benefits provided based on supplier adaptations, flexible suppliers afford the customers the opportunity to reduce inventory costs, reduce operations costs, as well as allow sales managers to match their marketing decisions (e.g., pricing decisions) with their strategy for specific market segments (Menon et al. 2005; Noordewier et al. 1990; Yim, Anderson and Swaminathan 2004). A supplier that is adaptive to a customers' unique business needs makes "life easier" for the customer to differentiate between vendors and do business with the supplier (Menon et al. 2005). While we understand that the adaptability demonstrated by the supplier positively influences customer-perceived benefits and is a winning element in the buyer's decision criteria (Menon et al. 2005), we also desire to understand the impact of a lack of organizational adaptability in the customer's accept or reject decision.

In addition to organization based adaptations, salespeople possess the ability to adapt to the customer's unique needs by matching their sales behavior to a specific customer and situation (Weitz 1981). Spiro and Weitz (1990) conceptualize adaptive selling as the process a salesperson goes through to gather information about the selling situation and use this information to develop unique sales offerings to meet the needs of the customer (Grewal and Sharma 1991). This process is operationalized by Spiro and Weitz (1990) based on five facets of adaptive selling: (1) recognition that different sales approaches are needed for different customers, (2) confidence in ability to use a variety of approaches, (3) confidence in ability to alter approach during an interaction, (4) collection of information to facilitate adaptation, and (5) actual use of different approaches.

As summarized by Thompson (1973) and Weitz (1981), there is no one sales situation and no one way to sell, thus adaptive sales behaviors are hypothesized to positively relate to sales performance when the benefits outweigh the costs of adapting. Adaptive selling behaviors are effective because customers gain benefits from these specific sales techniques (Weitz 1981). Among the dimensions in which customer's perceive that salespeople need to specifically adapt their sales message, Grewal and Sharma (1991) suggest the following: (1) the initial product-performance expectations of the customer, (2) customer expectations of the salesperson's presentation (message expectations), (3) customer perceptions of salesperson credibility, (4) customer's prior effort, and (5) customer perceptions of salesperson's effort.

2.5.1.2. Relationship-Orientation

Similar to the benefits offered from supplier and salesperson adaptations, adopting a relational perspective, rather than a transactional perspective, to industrial markets can help both the sellers and buyers create superior value that can be mutually beneficial (Han, Wilson and Dant 1993; Leonidou 2004; Sheth and Sharma 1997). When studying customer relationships, it is vital to not overlook the customer's perspective and level of satisfaction and to understand the customer is actually a co-producer of value (Hunt, Arnett and Madhavaram 2006; Vargo and Lusch 2004; Yim et al. 2004). Customer Relationship Management (CRM) is intended to reflect the way customers want to be served and offers a more efficient and effective way of doing business (Yim et al. 2004). Kotler and Armstrong (2004, p.16) define CRM as "the overall process of building and maintaining profitable customer relationships by delivering superior customer value and satisfaction."

Relationships are formed on the basis of benefits which provide each partner with skills or resources the other partner lacks or reducing uncertainties of environmental turbulence. Strategic relationships enhance value by combining the unique competencies of the buyer and seller (Cravens 1998). The decision process of whether or not to enter into relationships with a sales organization is similar to the framework which represents customer value. Consumers enter into relational exchanges with selling firms when they believe the benefits derived from such relational exchanges exceed the costs (Hunt et al. 2006).

A number of relational benefits have been cited in the literature. From the customer's perspective, relational exchanges offer greater efficiency in their decision making, reduce the information processing task, offer more cognitive consistency in their decisions, and reduce the perceived risks associated with future choices (Hunt et al. 2006; Sheth and Sharma 1997). Additionally, economic advantages from relationships exist for business customers, who may receive special pricing considerations (Bitner, Gwinner and Gremler 1998). Dwyer, Schurr and Oh (1987) indicate that buyers also perceived personal relationships as an important aspect of purchasing. Hunt et al. (2006, p.76) summarize the customer-based benefits dimension of their relationship marketing theory with the following six elements which help determine whether or not a customer should enter a relationship: (a) the belief that a particular partner can be trusted to reliably, competently, and non-opportunistically provide quality marketing offerings; (b) the partnering firm shares values with the consumer; (c) the customer experiences decreases in search costs; (d) the customer perceives that the risk associated with the market offering is lessened; (e) the exchange is consistent with moral obligation; and (f) the exchange allows for customization that results in better satisfying the customer's needs, wants, tastes, and preferences.

2.5.1.3. Benefits Summary

This exploratory research effort will code for elements of adaptability and relationships offered by the salesperson and sales organization as major elements of the benefits dimension of customer-perceived value. The desire is to understand the potential relationship or interactions between the overarching drivers of sales performance and sales failure and the elements of specific sales interactions which provide the basis for determining the customer-perceived value (i.e., adaptive selling, relational selling vs. sacrifices).

2.5.2. Sacrifices

Research measuring customer value often evaluates sacrifices separately from the benefits (cf., Anderson and Narus 1999; Grewal et al. 1998; Menon et al. 2005; Sinha, DeSarbo and May 1998). As noted by Ravald and Gronroos (1996), adding value can be done in distinct ways, one of which is reducing customer-perceived sacrifices by minimizing the costs for the customer. The sacrifices construct is multi-dimensional and reaches far beyond just price. As a general framework, sacrifices refer to the purchasing price, acquisition costs and operating costs for the buyer (cf., Claycomb and Frankwick 1997; Dahlstrom and Nygaard 1999; Gronroos 1997; Menon et al. 2005; Ravald and Gronroos 1996). This research takes a total cost of ownership (TCO) perspective to portray the sacrifices dimension of customer-perceived value.

2.5.2.1. Total Cost of Ownership

As a summary of the benefits documented by adopting the philosophy and tools associated with TCO, Ellram (1995, p.7-8) provides the following seven buyer-based benefits:

1. Provides a consistent supplier evaluation tool, improving the value of the supplier performance comparisons among suppliers and over time
2. Helps clarify and define supplier performance expectations both in the firm and for the supplier

3. Provides a focus and sets priorities regarding the areas in which supplier performance would be most beneficial – supports continuous improvement – creating major opportunities for cost savings
4. Improves the purchaser's understanding of supplier performance issues and cost structure
5. Provides excellent data for negotiations
6. Provides an opportunity to justify higher initial prices based on better quality/lower total cost in the long run
7. Provides a long-term purchasing orientation by emphasizing the total cost of ownership rather than just price

Incorporation of total cost of ownership is a response to growing concern among managers and scholars to account for the total life cycle cost incurred in a relationship, or costs of running the system. TCO is a broader view of costs and views sacrifices as the purchase price along with the costs associated with the entire relationship between the buyer and seller (Menon et al. 2005). The pioneering researchers in TCO, Ellram and Siferd (1993), suggest six cost categories exist: quality, management, delivery, space, communications, and price. In addition to identifying the relevant cost categories, Ellram (1995) suggests that buyers take TCO a step further by determining which costs it considers most important or significant in the acquisition, possession, use and disposition of a good or service. In the exploratory phase of this analysis of the total perceived sacrifices made by the buyer in the decision process various types of costs and any indication of the importance of each of the cost elements will be examined.

2.5.3. Competitive Offerings

In addition to customer benefits and customer sacrifices, Ulaga (2003) identifies the recurring characteristic in the marketing literature of value perceptions as relative to competition. Value is relative to competition (Lindgreen and Wynstra 2005; Ulaga and Chacour 2001). The total customer value function and decision is summarized by Anderson and Narus (1998, p.54-55) , who stated, "The difference between value and price equals the customer's incentive to purchase. The equation conveys that the customer's incentive to purchase a supplier's offering must exceed its incentive to pursue the next best alternative." This means that the benefits and sacrifices of the customer value framework only capture the buyer's incentive to purchase, while the competitive offerings must be factored in to determine the actual purchase accept or reject decision.

In today's competitive industrial markets, it is becoming increasingly difficult for suppliers to differentiate their offerings from their competition (Ulaga 2003). Suppliers need to not only operate under a market-concept in order to understand what the customer values, but also to produce a sales offering that meets these customer's needs more effectively or efficiently than their competitors (Hunt and Morgan 1995). Hunt and Morgan (1995, p.8) define competition as "the constant struggle among firms for a comparative advantage in resources that will yield a marketplace position of competitive advantage and, thereby, superior financial performance." Ultimately, supplier organizations that are able to deliver a better combination of customer-value offerings relative to the competition will help create a sustainable competitive advantage (Ulaga and Chacour 2001).

Consistent with this literature stream and our data collection, capturing customer-perceived value information from the customer's perspective is ideal. The customer is truly the party which defines value, is exposed to various competitive offerings, and assesses their decision based on the relative offerings of benefits received versus sacrifices made. This study is one of the first to combine the elements of customer-perceived value with drivers of sales performance and sales failure.

3. QUALITATIVE RESEARCH

The methodology for this study was a multi-method design utilizing qualitative exploratory inquiry and quantitative experimental research. The methodology followed the Goodwin, Mayo and Hill (1997) suggested research sequence for under-researched areas. First, the qualitative interviews were utilized to develop themes and conceptualize the phenomenon from those business actors who experienced it firsthand. Second, the quantitative data, generated through large random samples, was utilized to report generalizability, reliability and validity. The following section will discuss the research design for the qualitative research which was used to study the sales failure phenomenon from the organizational buyer's perspective.

3.1. Qualitative Design

There is value in using interpretive research because of the importance of the social context and processes which create meaning specific to a buyer. A comparison between buyers across multiple organizations for a given set of sales firms can provide insights into the value-based decision outcomes. It is through the social interaction and engagement in the buying environment that the purchasing agents are co-creating meaning and constructing their social reality, a notion adopted from Howcroft and Trauth (2005).

3.1.1. Qualitative Research

The aim of the exploratory aspect of this multi-method approach is in line with the goals of naturalistic inquiry, as explained by Belk, Sherry and Wallendorf (1988), which is to explore emergent themes. The goal of this qualitative methodology is to discover generic elements of the sales failure process in order to generate substantive theory. Additionally, the a priori development of categories to be used in this research was consistent with the work of Miles and Huberman (1984).

Belk et al. (1988) present a list not only of the advantages of qualitative research, but also the potential disadvantages. Both are important dimensions to understand during the research design in attempts to capitalize on the offered strengths, as well as attempt to compensate for the weaknesses. Table 10 is representative of the advantages and disadvantages of naturalistic inquiry as proposed by Belk and colleagues. While this comparison between naturalistic and positive research is directly pertaining to consumer behavior research, the concepts are transferable to the context of this research project.

Table 10
Advantages & Disadvantages of Naturalistic Methods versus Positivist Methods - Belk, Sherry & Wallendorf (1988)

Advantages	Disadvantages
(1) Richer description of consumer behavior phenomena	(1) Greater time is required for data collection
(2) Better opportunity for generating original theoretical insights grounded in naturally occurring behavioral content	
(3) Constructive recognition of the impossibility of value-free inquiry	(2) The presence of a team of researchers is essential
(4) Lesser disruption of naturally occurring consumer behaviors and greater freedom from artificial and contrived behavioral tasks	
(5) Greater openness to the insights of consumers themselves	(3) Data analysis is more time consuming and does not commonly offer the familiar refuge of stats with their illusion of correspondence to a singular, verifiable, external, objective reality
(6) Greater access to consumers as they become interested and involved in multiple phases of the research process	
(7) Firmer researcher certainty that the findings correspond to the consumption reality experienced by consumers	(4) Greater sensitivity is needed in obtaining informed consent and in safeguarding informant anonymity
(8) Findings that explicitly take into account the complexity of people's lives and experiences rather than attempting to isolate elements of those experiences "holding all else constant"	
(9) Greater use of multiple methods of data collection and data analysis within one project	(5) Such methods have not yet received substantial use or scrutiny in consumer research
(10) A more intrinsically enjoyable research process	

Depth interviews were the specific technique used in this research. Depth interviews have been used in the marketing literature in order to understand the beliefs and outcomes of marketing managers (e.g., Frankwick et al. 1994; Kohli and Jaworski 1990), to develop an understanding and create themes within an under-researched marketing phenomena (Price, Arnould and Curasi 2000), and to obtain experimental perspectives that might not emerge from surveys or briefer field interviews (e.g., Goodwin et al. 1997). As stated by Patton (1990, p.279), depth interviews "make it possible for the person being interviewed to bring the interviewer into his or her world."

3.1.2. Sample

In order to assess the drivers of a failed sales proposal from the decision maker's perspective, post-mortem interviews were conducted with organizational buyers following the decision not to purchase a service from a focal supplier. Two large industrial service firms are the focal suppliers for the study. These companies provided a list of buying organizations, along with key decision makers within these organizations, following the decision not to select their sales proposal. Every qualitative case represents a set of interviews following the lost sales opportunity, in which the decision makers reflect on their reasoning for not selecting the focal sales organization.

These sales organizations were invited to make a sales proposal or respond to a RFP. This indicates that the buying organization likely believed all bidding firms met a minimum level of requirements to be considered. Further, following the decision to not select the focal organization's sales proposal, a competing proposal was selected. This indicates none of the decisions were based on the resolution to not pursue the desired services. Thus, this makes the findings specific to sales efforts which extend beyond the core offering and are perceived as the most important add-on attributes in the sales proposal selection process.

Buying organizations were purposively sampled, as proposed by Belk et al. (1988) in naturalistic inquiries, based on the size of the failed sales proposal and the type of product or service being purchased. All of the respondents interviewed were individuals within their respective organization which played an influential role in the ultimate purchase decision (e.g., Assistant Administrator, Vice President of Corporate Facilities, Director of Office Services and Chief Operating Officer). A total of 35 industrial purchasing organizations were selected based on attributes of the firm and the sales proposal. Together, these interviews represent over $233 million worth of lost sales potential. All respondents had the following in common:

- Similarity of Offerings: Large scale ($5 million and above) accounts and multi-year agreements. This potentially amplifies the risk involved, and thus buyer's attention to detail in the buying process.
- Similarity of Good: The two focal sales firms were industrial service providers. The service context of the sales proposal potentially amplifies buyer's attention to intangibles of the selling firm, such as the sales offering and relational position, and typically allows for a higher degree of adaptability on behalf of the sales organization.
- Similarity of Focal Sales Organization & Competitor Companies: Focal suppliers and competitor companies were all among the leading companies in their given industry. Thus potentially leveling the effects of purchasing based solely on company image (brand name, size, financials, etc.)

Table 11 provides abbreviated statistics to summarize the characteristics of the sales proposals.

Table 11
Sample Sales Proposal Statistics

Sales Proposal Range		**Frequency**
$5.1 Million - $10 Million		6
$10.1 Million - $15 Million		8
> $15 Million		21
Contract Details		**Approximate Average**
Sales Size per Year		$6.85 Million*
Number of Years per Proposal		4.4 Years
Sales Failure Classification**		**Frequency**
(1) Sales Proposal Failure		10
(2) Sales Take-Over Failure		0
(3) Sales Extension Failure	(a) Contested	0
	(b) Uncontested	0
(4) Sales Entrant Failure	(a) Inside	1
	(b) Outside	1
(5) Sales Development Failure	(a) Inside	2
	(b) Outside	0
(6) Sales Capture Failure	(a) Inside	6
	(b) Outside	4
(7) Sales Renewal Failure	(a) Contested	0
	(b) Uncontested	10

* Contract Details excludes Case 2 ($1.3 Billion/5 Years); Including Case 2 Approx. Sales Size/Year = $14.76M
** Sales Failure Classification excludes Case 23 – contract taken over by in-house operations

3.1.3. Data Collection

The aim of the interviews was to understand why strategic sales opportunities were won and lost. This was accomplished through semi-structured executive interviews with individuals who played a decision making role within the buying organization. The questions were divided into seven broad categories: (1) Sales Team Effectiveness – interaction with decision makers; (2) Needs and Expectations – prospect's requirements, seller's identification of prospect's needs, and seller's perceived capabilities; (3) Value Proposition – solution, fee and ROI; (4) Communication Tools – proposal and presentation; (5) Competitive Analysis – how the seller compares; (6) Strategic Planning – opportunities and goal setting; and (7) Additional Comments.

The 35 executive interviews were utilized for coding, integrating into themes, and comparing and contrasting these themes across buying organizations or sales offerings. Within each organization the sampling plan was flexible and was specific to the decision process and buying center contributing to the decision outcome. Respondents were selected based on their role in the buying decision, as identified by the specified selling organization. From this initial identification and discussion, additional respondents were further selected and interviewed in select cases based on respondent recommendations.

3.1.4. Analysis

As a means of analysis, each interview was read multiple times in order to classify sentences, phrases or sections under its corresponding theme (Goodwin et al. 1997). Emerging themes were generated inductively as the analysis progressed, meaning that an elicitation of new themes and confirmation of a priori categories were created (Goodwin et al. 1997; Patton 1990). The summary procedure of the interviews followed common procedures which iterate between parts of the data and the whole, meaning between portions of an interview and the whole interview, as well as between one interview and another (Goodwin et al. 1997). These aspects of the interview analysis procedure are consistent with the previous qualitative effort analyzing sales failure provided by Goodwin et al. (1997).

As a further description of the iterative process conducted in analyzing the interview transcripts, we followed the two level procedure of interpretation utilized by Fournier (1998): (1) impressionistic reading of transcripts and identification of recurrent manifest behavioral and psychological tendencies (i.e., themes), and (2) across-person (proposal) analysis to discover patterns across episodes and individuals that could help structure an understanding of the phenomena. This process of interpretation was simultaneously conducted while deductively (e.g., locating passages that represent a priori constructs, themes or ideas) and inductively (e.g., identifying emergent categories from the data) categorizing the interview transcripts (Spiggle 1994). This process of comparing each incident in the data with other incidents appearing to belong to the same category, thus exploring similarities and differences, is referred to as the constant comparison method and was pioneered by Glaser and Straus (1967) (Spiggle 1994).

3.1.5. Coding

Based on the review of the literature on sales failures, sales performance and customer-value, an a priori code book on factors leading to sales outcomes was developed to perform the deductive categorization. The literature review further serves as the definitional basis and is indicative of what elements are expected to be classified within each category. All executive summaries were coded inductively based on a scheme derived from the interview data. This process consisted of several iterations of reading, coding, modifying, and creating rules for assigning text to a segment using the qualitative data analysis software QSR NUD*IST 6 (N6).

The outcome of this inductive approach was a coding scheme representative of the data, as well as an in-depth report and conceptual model capturing the themes and potential causal variables related to failed sales proposals. Figure 2 represents the ‘Tree Node’ output provided by QSR N6. A tree node is a depiction of the structure used to code the qualitative data. After deriving the themes represented in the tree node, interviews were then re-read and quotations which embodied the categories were grouped together under their respective headings. The table can be interpreted as the final structure of the qualitative data set.

Figure 2
QSR N6 Tree Node

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Licensee: -----.

PROJECT: Node Tree, User Friend, 12:08 pm, Apr 1, 2010.


REPORT ON NODES FROM Tree Nodes '~/'
Depth: ALL
Restriction on coding data: NONE

(1)          /Customer-Perceived Benefits
(1 1)         /Customer-Perceived Benefits/Non-Adaptive Offerings
(1 1 1)        /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Understanding
(1 1 1 1)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Understanding/Not Understanding Needs
(1 1 1 2)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Understanding/Not Hearing Requests
(1 1 2)        /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Flexibility
(1 1 2 1)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Flexibility/Non-Tailored Message or Offering
(1 1 2 2)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Flexibility/Unwilling or Unable to Create New Solutions
(1 1 3)        /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Perceived Future Adaptability
(1 1 3 1)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Perceived Future Adaptability/Too Focused on the Past
(1 1 3 2)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Perceived Future Adaptability/No Future-Oriented Adaptability
(1 1 4)        /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Adaptive Attitude
(1 1 4 1)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Adaptive Attitude/Telling vs. Selling
(1 1 4 2)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Adaptive Attitude/Seller Arrogance Spillover
(1 1 4 4)       /Customer-Perceived Benefits/Non-Adaptive Offerings/A Lack of Adaptive Attitude/Unresponsive
(1 2)         /Customer-Perceived Benefits/Non-Relational Offerings
(1 2 1)        /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of a Partnership Approach
(1 2 1 1)       /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of a Partnership Approach/Failed to Develop Trustworthiness
(1 2 1 2)       /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of a Partnership Approach/A Lack of Perceived Seller Commitment
(1 2 1 3)       /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of a Partnership Approach/Underdeveloped Buyer-Seller Communication
(1 2 2)        /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of an Existing Relationship-Orientation
(1 2 2 1)       /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of an Existing Relationship-Orientation/Broken Trust
(1 2 2 2)       /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of an Existing Relationship-Orientation/Unmet Performance Expectations
(1 2 2 3)       /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of Existing Relationship-Orientation/Inability Portray Future Relationship Potential
(1 2 3)        /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of an Existing Relationship
(1 2 3 1)       /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of an Existing Relationship/Switching Risks
(1 2 3 2)       /Customer-Perceived Benefits/Non-Relational Offerings/A Lack of an Existing Relationship/Satisfaction with Incumbent
(2)          /Customer-Perceived Sacrifices
(2 1)         /Customer-Perceived Sacrifices/Greater Costs
(2 1 1)        /Customer-Perceived Sacrifices/Greater Costs/Higher Priced
(2 1 2)        /Customer-Perceived Sacrifices/Greater Costs/Higher Supplemental Costs
(2 1 3)        /Customer-Perceived Sacrifices/Greater Costs/Lower Cost Savings
(2 2)         /Customer-Perceived Sacrifices/A Lack of Cost Justification
(2 2 1)        /Customer-Perceived Sacrifices/A Lack of Cost Justification/Unfavorable Cost-Benefit Ratio
(2 2 2)        /Customer-Perceived Sacrifices/A Lack of Cost Justification/Unjustified Downstream Costs
(2 3)         /Customer-Perceived Sacrifices/An Inferior Cost Comparison
(2 3 1)        /Customer-Perceived Sacrifices/An Inferior Cost Comparison/Unfavorable Competitor-Cost Comparison
(2 3 2)        /Customer-Perceived Sacrifices/An Inferior Cost Comparison/Unfavorable Expectation-Cost Comparison
(2 4)         /Customer-Perceived Sacrifices/Negative Cost Associations
(2 4 1)        /Customer-Perceived Sacrifices/Negative Cost Associations/Non-Adaptive Cost Structure
(2 4 2)        /Customer-Perceived Sacrifices/Negative Cost Associations/Negative Cost Attributions
(3)          /Competitor's Value Proposition
(3 1)         /Competitor's Value Proposition/Competitor's Adaptive Offering
(3 2)         /Competitor's Value Proposition/Competitor's Relational Offering
(3 3)         /Competitor's Value Proposition/Customer-Perceived Sacrifices - Competitor's Offering
```

3.1.6. Ethical Issues

As recommended by Mason (2002), we were mindful of ethical issues facing the respondent. These ethical issues include both informed consent and confidentiality. Interviewers received verbal consent at the time of conducting each interview and each respondent voluntarily agreed to participate under his or her own will. The names of the respondents, the respondent’s employer, and the target sales companies will all remain anonymous for protection of potential proprietary information.

3.2. Qualitative Findings

The findings from the qualitative analysis were representative of factors, as perceived by the organizational purchasing decision makers, which lead to the specified sales organization being unsuccessful in their proposal. The iterative procedures conducted in the qualitative analysis provide a sales outcome framework related to customer-perceived value. The lack of customer-perceived value was attributed to both the sales team presenting the proposal, as well as the sales organization's proposed solution.

All quotes represented in the qualitative section were from the perspective of decision makers within the purchasing organization. The nature of the interviews was regarding the decision makers' reason for not selecting the sales organization's proposal. The losing sales organization in cases 1-27 is represented in the quotations as *ServiceStat*, while the organizations which won these sales proposals were represented as *ProServ*. The losing sales organization in cases 28-35 is represented in the quotations as *TransArgo*, while the organizations which won these sales opportunities were represented as *CraftLine*.

3.2.1. Customer-Perceived Value

Customer-perceived value was represented as the interrelated function of benefits offered versus proposed sacrifices. The value of the proposal was not necessarily determined based on the trade-off between proposed benefits, proposed sacrifices and the competitor's offering. Specifically, in the context of failed sales proposals, the seller or the selling firm typically did not demonstrate an adequate benefit to sacrifice ratio, did not effectively communicate the higher ratio of benefits, or did not tailor the benefits offering to the specific buyer’s needs in order to justify the sacrifices.

The comparison of the overall value between the losing sales proposal and the winning sales proposal was regularly the reason for the buyer’s purchase decision. This comparison was represented at the organizational level (e.g., which organization offered the most or least value), as well as at the attribute level (e.g., which specific benefit was or was not adequately provided). Starting at the broader level of comparison, buyers used the value of the winning sales proposal in order to provide a reference point in which the losing proposal fell short.

The attribute-level decision frame provided by purchasing decision makers was a value proposition relative to the company’s expectations. As indicated by the respondents, a pre-specified level of expectations in terms of what benefits the buyer would receive and what sacrifices the buyer would incur in order to receive those benefits was used to make their purchase decision. The unsuccessful firm failed to meet these specific expectations.

The final element of the value framework which appeared to be missing in the losing bids was the buyer’s perception of a lack of future-oriented value. This shortcoming was expressed in terms of the seller’s inability to convert their service offering into end-user value or a positive return on investment. Proposals which did not offer future returns to the buyers also were not selected.

Together, under-represented value was due to deficiencies compared to the competitor, the firms’ existing expectations, or the lack of future end-user value. These relationships provided a preliminary structure of the buyer’s decision process during failed sales proposals which acted as a broad lens for the analysis. A further understanding of the specific means in which the buyer defined perceived benefits, perceived sacrifices and the perceived competitor value within this value function was developed in the remaining qualitative analysis.

3.2.2. Customer-Perceived Benefits

One component of the value function expressed by the purchasing decision makers was their perception that the potential supplier organization failed due to a lack of demonstrated benefits. While the buyer's specific needs and wants did vary to a degree from organization to organization, the notion of not meeting these criteria through the benefits offering was consistently related to the decision to not select the specified supplier. A COO of a hospital explains the importance of understanding their hospital's needs and constraints in order to offer the needed benefits:

> In an environment in which a company pretends to sell not a commodity but a solution and fails to fully understand the dynamics inside of their client, competitive pressures are never identified. Therefore, [ServiceStat] never identified, understood and solved the items we needed them to sell for most (Chief Operating Officer – Case 23).

Two themes of unmet benefits which were related to the sales failure were: (1) Non-Adaptive Sales Proposal and (2) Non-Relational Sales Proposal. The combination of the non-adaptive and non-relational elements was representative of the majority of the variance which was expressed as leading to the industrial buying organization perceiving a lower degree of benefits from the sales proposal.

3.2.2.1. Non-Adaptive Sales Proposal

'Non-Adaptive Sales Proposal' is conceptualized as the perceived lack of willingness or ability to understand the essential elements of the prospect's needs. This deficiency is the failure of the sales proposal to present a customized solution or to communicate an offering which is tailored to the prospect's relative expectations and objectives. A generalized perception of unresponsiveness and a selling-orientation, as opposed to a customer-orientation, contributes to a demonstrated lack of flexibility.

The lack of an adaptive offering was commonly discussed as contributing to a lack of customer-perceived benefits. Buyers' interpreted the lack of adaptive offerings as the seller not understanding the needs of their firm, or not adapting their service or proposal to fit the specific needs of their organization. The implications of not understanding the prospect, and thus not correctly adapting, were commonly discussed:

> I certainly did not think they understood what we wanted. Then that led me to lose my confidence with [ServiceStat] about the future (Director, Engineering & Building Services – Case 12).

Non-adaptive selling was typically blamed on the individual salesperson (e.g., canned sales presentation), whereas the theme of non-adaptive service offerings (e.g., canned solutions) was typically attributed to the sales organizational. Taking into consideration the context of the sales situation, a pattern of blame for the sales failure was commonly assigned to the salesperson at the individual level when the buying organization did not have experience dealing with the specified sales firm (e.g., the specified sales firm was not the incumbent supplier). The following quotes illustrate the salesperson's presentations or sales meetings that were generally perceived as non-adaptive, thus consistent with blaming the individual in cases with no organizational working history.

> In the presentation itself there was not a sense [ServiceStat] really understood the requirements of [Financial Service Co.], and even the products they brought in were disappointing. This is in comparison to the other two companies (Vice President, Strategic Sourcing – Case 26).

In contrast, when the context of the failed sales proposal did involve previous working experience between the buyer and sales organizations (e.g., incumbent supplier), respondents more often referenced a lack of adaptability at the organizational level. The comments below further illustrate this pattern and were consistent with the organization-based attributions, as well as the existence of a working history between the two firms.

> Our sales rep and his boss – the Area Director – knew very well what was important to us – and they ignored it. I guess it was not of their doing – it was their Senior Management's strategy. They just didn't respond to what was important to us…It's these – they're just inflexible. These are show-stoppers that we just can't get over (Vice President – Case 33).
>
> [ServiceStat] should have taken a little more time to cater. I just get the impression that they didn't care. I find it hard to believe that they would let that kind of contract slip through their hands without putting a little more effort into it (Assistant Deputy Superintendent – Case 5).

In addition to non-adaptive thematic components, the purchasing decision was also reflective of the relative degree to which the non-adaptive components compared to alternative offerings. In specific instances, even if the sales organization's offer was perceived to be adaptive, if this proposal was comparatively less adaptive than the alternative competitor's offering then the result was ultimately a failed sales attempt. As vocalized below, the sales outcome was not always a consequence of the focal firm *losing* the proposal, but alternatively an outcome of the competitor *winning* the proposal:

> You've got two companies essentially offering the same services. What was most impressive about [ProServ] was their willing to adjust their model (Case 27).
>
> The difference between our current provider and [TransArgo] are mainly around customization. Our current provider is more skilled at adapting to our specific needs…[TransArgo] seems to address needs with specific programs they have developed throughout the years trying to address a broader market (Senior Manager, Warranty Services – Case 32).
>
> [ServiceStat's] competition was definitely stronger in coming back to what the customer wanted (Director, Engineering & Building Services – Case 12).

While the buyer-seller working history and comparative references offered key insight into potential moderating effect of the attributions of the failed sales proposal, it was also essential to understand the thematic dimensions of the non-adaptive offerings construct. Four primary themes, each with multiple subcomponents, emerged within the interview transcripts. These dimensions of non-adaptive sales offerings include: (1) A Lack of Understanding, (2) A Lack of Flexible Capabilities, (3) A Lack of Future-Oriented Adaptive Benefits, and (4) A Lack of a Willing Adaptive Attitude.

3.2.2.1.1. A Lack of Understanding

When describing the conditions which lead to the sales organization's proposal not being selected, the buying decision makers were especially vocal in terms of the potential supplier not understanding their firm's needs. Salespeople or sales organizations who did not understand the buyer's needs could not in-turn adapt and align their offering or message. As voiced by repeated respondents, unsuccessful sales proposals' failed to demonstrate an understanding through a number of means, such as a lack of time investment, lack of desire to learn, lack of involvement and proposals inconsistent with expectations:

> I would say that [ServiceStat] did not show a thorough understanding of our most critical needs. First, they never invested much time to find our most critical issues…They displayed no desire to learn about the hospital and never showed any interest to be involved, to educate us or to provide new suggestions (Chief Operating Officer – Case 23).
>
> I think the numbers we saw from [ServiceStat's] proposal suggested that they didn't completely understand what we were expecting of them in terms of a response (Manager, Procurement – Case 13).
>
> I think their proposal was terrible. We've spent so much time with [ServiceStat] trying to guide them through the process and then we see the proposal and we were shocked. This was totally off from what we talked about all along (Assistant Deputy Superintendent – Case 5).

Within the seller's lack of understanding the buyer's specific organizational needs was the common reference to not fully listening to the requests made by the buying organization. This lack of active listening occurred within verbal communications (i.e., not responding to discussion points), as well as within written communications (i.e., not responding to points specified in the RFP). Respondents below illustrated that this lack of listening led to a perceived lack of understanding, thus an inability to respond and adapt to the customer's needs:

> I think they didn't really hear us. I concluded this based on how they kept pitching facilities, never asked a lot of questions for more information. They also did not hit on most of the points we outlined. The proposal was very canned (Business Manager – Case 18).
>
> There were a few key points that [ServiceStat] missed that were quite telling and lacking in the presentation. We didn't feel that they were responding to the needs as stated in the RFP as we would have liked…I don't know if it was a corporate document and they just turned happy to glad and Detroit to St. Louis or whatever the case may be. It just didn't seem to be tailored to meet the needs that were requested in the RFP (Executive Director, Business Operations – Case 1).
>
> They missed by proposing something completely different from what we talked about. This is why they scored the lowest (Executive Director, Business Operations – Case 1).
>
> Seriously, they didn't pay attention. They were totally and completely insensitive to the interests and desires of the University (Associate Vice President, Financial Affairs – Case 14).

Interrelated to the skills necessary to adapt to the customer's needs was the seller's level of understanding the buyer. A lack of adaptability was not altogether a result of the willingness of the salesperson or organization to customize their offering, but also dependent on the seller's ability to understand the buyer's needs. From the buyer's perspective, when the seller did not listen and/or understand the specific needs of the buyer, the sales proposal was perceived as lacking adaptive benefits.

3.2.2.1.2. A Lack of Flexible Capabilities

Another component of the non-adaptive sales offering centered on an inability to be flexible. In referring to a lack of ability to be flexible, the purchasing decision makers referred to components of both the salesperson not tailoring their message to the specific purchasing scenario, as well as the sales organization not tailoring their service offering to the customer's needs. The first excerpt below focuses on the attributions of a failed sales proposal due to the firm's lack of flexible offerings:

> I really feel that because of their position in the industry they have not had to be flexible. I think the world is changing and you need to kind of change with it. Otherwise they'll be in

> some trouble because there are viable competitors. This may not have been true 10 years ago but it is now. They really haven't woken up to this. You can tell them this is my personal view. This is my and the team's view that this is the case. We would like nothing more than for them to make that adjustment. Quite frankly, we would be thrilled to do business with [TransArgo] (Director, Strategic Outsourcing – Case 33).

> They failed to answer the question. Instead they showed me a marketing brochure listing case studies of other hospitals using the proposed solution. I knew some of the facilities mentioned and know that these facilities not only have a significant difference in size, but also some of them did not use [ServiceStat] anymore. It was kind of funny to be pitched with a solution that is designed for a larger size hospital that is not using the solution anymore (Vice President, Support Services – Case 23).

The following excerpt describes a salesperson's canned proposal:

> But this meeting can be best characterized as [ServiceStat]-focused, non-enthusiastic, almost top-down. The students commented that they were treated with arrogance, that the presentation was so canned and focused on [ServiceStat] instead on [University] and that the company just did not peak interest with them (Business Manager – Case 18).

In relation to not tailoring the message or service offering to the buying organization, respondents also attributed the perceived inflexibility to the seller's inability or unwillingness to create a customized new solution. Specifically thematic in these responses was an inability of the sales proposal to create new, complete and/or creative solutions to match the buyer's needs, as the following vignettes illustrate:

> Something that surprised me most was that [ServiceStat] didn't give us solutions that were new (Director, Engineering & Building Services – Case 12).

> If [TransArgo] would have been more responsive, more flexible, more creative in their solutions, it would have made a huge difference. Let me give you a stupid example. In order to improve the quality of retrieving the test sheets and materials to improve scoring time, we identified a business need of having them picked up on Saturday for Monday delivery. The [TransArgo] account person was adamant that this could not be done (Executive Director, Products & Logistics – Case 35).

> Our business is changing rapidly – just as it is growing rapidly. So we need solution management – solutions that can change as we do. [TransArgo] only offered us one non-competitive solution (Vice President, Logistics – Case 31).

Together, a lack of customized sales communications (e.g., sales presentation) and/or service offerings (e.g., sales solutions) contributed to the buyer's perception that the sales proposal did not provide an adaptive benefit. The responses regarding a lack of flexibility centered on the message not being tailored to the buyer, as well as the seller's unwillingness to create a customized new solution.

3.2.2.1.3. A Lack of Perceived Future Adaptability

Among the intriguing insights uncovered were the implications of predicted future adaptability of the seller. The buyer's perception of the lack of future adaptability was constructed based on the seller's sales-orientation, as well as a focus on past service offerings as opposed to future needs. Responses below stress the focus on past behaviors or agreements which were believed to indicate a lack of a future adaptability:

> [ServiceStat] tried to really work with what they already do instead of modifying to meet our needs (Case 27).
>
> When we asked them specific questions about the new contract all they did was reference the old contract and offered to agree to the old contract (Director, Engineering & Building Services – Case 12).

This perceived lack of future adaptive benefits was also discussed based on the seller's past behaviors, present proposal and future promises, each of which contributed to the buyer's impression of a lack of adaptability beyond the exchange proposal. A seller should ensure that the indicators of their previous adaptability, current willingness to adapt, and future adaptive orientation were portrayed positively in order to avoid an undesirable sales outcome.

3.2.2.1.4. A Lack of a Willing Adaptive Attitude

The final elements derived from the interview transcripts relating to the adaptability, or lack thereof, of the failed sales proposals were related to the seller's attitude. Specific dimensions of this factor, which differentiate this dimension from previously discussed adaptive capabilities, fell into general categories described by respondents as: telling vs. suggesting, seller arrogance, sales driven, and a lack of responsiveness.

Under the label, ‘telling vs. suggesting,’ respondents indicated that the salesperson’s approach was more aligned with telling the potential buyer what he or she needed, as opposed to listening to their needs and subsequently adapting their proposal. The comments below were specific in their description of a ‘telling’ attitude, as well as provide an industry example to further extend this concept.

> Well, there are two kinds of proactive ways, telling people what to do and proposing people what to do. [ServiceStat] was a little more to the telling side…But I felt that they were a little too much “This is how we do it” and “This is how it needs to be done,” instead of “We’d love to have your business; we’d love to stand with you side-by-side and find ways to customize the solution to embrace all aspects of the [Sports Team]” (Consultant – Case 15).
>
> Our organizational vision is very specific on the support side. It’s about “Who we want to be.” [ProServ] said, “How can we help you get there?” [ServiceStat] said, “This is what we do” (Case 27).
>
> “At what point,” I said to Tony, “did [TransArgo] stop thinking of us as a customer?” We’d say this is how we have to do it and they would say no, this is not how you have to do it. For example, in the RFP let’s say I specified that I wanted to use “Zone skipping” for a certain part of my business. They would come back and say “Zone skipping doesn’t work for you.” And we would return to them and say, well, we have the data that says Zone skipping would work for this part of the business and they would just ignore that and hold that Zone skipping would not work (Consultant – Case 35).

Another concept represented under the adaptive attitude construct was a demeanor of non-responsiveness, and even arrogance, by the salesperson or sales organization. These characteristics were viewed negatively and contributed to the decision not to select the specified sales organizations’ proposal. The comments below illustrate the issue of non-responsiveness, specifically discussing the possible halo effects (e.g., arrogance, credibility), as well as unfavorable outcomes (e.g., termination):

> But their response was, no that’s not your business need. He just arrogantly told us, we can’t meet your need, so you must have a different need (Executive Director, Products & Logistics – Case 35).

> We had issues with him returning phone calls and addressing changes. Overall, he was very unresponsive. As an example, we were with [TransArgo] for several years when the market place changed dramatically for us and in the parcel industry. So, we felt it was time to renegotiate rates and accessorial fees etc. it took him weeks to touch base with us and he never helped us to customize a new contract, for which we made some very specific requests. After about two months, we finally heard back from him. [TransArgo] took the position that the prices are as they are right now and if we don’t like the current conditions, leave. So we did just that, leave (Director, Procurement – Case 29).

> Also, because of the lack of response in the past, [ServiceStat] had no credibility. We had no reason to believe that they would execute the plan they proposed (Associate Vice President, Financial Affairs – Case 14).

These elements of a lack of an adaptive attitude demonstrated not only a lack of flexibility, but also a negatively perceived demeanor toward the prospect. This demeanor was interpreted as the seller being centered on making a sale as opposed to the customizing a solution to the customer’s needs. Together, the concepts captured in the ‘Lack of a Willing Adaptive Attitude’ theme portrayed a perception that the salesperson or sales organization were not willing to, as opposed to unable to, adapt their proposal.

Table 12
Non-Adaptive Sales Proposal Themes

Customer Perceived Benefits – A Lack of an Adaptive Offering			
(1) A Lack of Understanding	**(2) A Lack of Flexible Capabilities**	**(3) A Lack of Perceived Future Adaptability**	**(4) A Lack of a Willing Adaptive Attitude**
• Not Understanding Needs • Not Hearing Requests	• Non-Tailored Message or Offering • Unwilling or Unable to Create New Solutions	• Too Focused on the Past • No Future-Oriented Adaptability	• Telling vs. Suggesting • Unresponsive • Seller Arrogance Spillover

3.2.2.2. Non-Relational Sales Proposal

The second component of the lack of customer-perceived benefits which was thematic in the depth interviews was the failed sales proposal not demonstrating a sufficient degree of relational characteristics. ‘Non-Relational Sales Proposal’ is conceptualized as a perceived lack of communicated or demonstrated trust and commitment. This lack of confidence is a product of unmet expectations relative to past experiences, present incumbent barriers and/or inferred future relationship potential. Further, insufficient hard and soft investments, a lack of a displayed interest in the prospect and inadequate knowledge sharing lowered perceived relationship-potential. A generalized perception of risk and dissatisfaction contribute to the perceived lack of collaborative partnership benefits. The following quotes indicate the importance of a relationship-orientation between the buyer and seller:

> We value a strong relationship above all (Director, Procurement – Case 29).
>
> We’ve always referred to our food service provider as a partner and they have typically become an extended part of the [Financial Services Co.] family. A partnership where it’s a win-win for both parties. We work very closely with the service provider. Impacts our people on a daily basis. Relationship is important (Vice President, Dining & Hospitality Services – Case 26).

Responses representative of a deficiency of relational offerings were attributed similarly to the lack of adaptability. Respondents tended to attribute responsibility for a lack of relationship benefits based on whether or not the buying organization had a working history with the potential supplier. A lack of a relational-orientated sales proposal was typically attributed to the salesperson in situations in which the buying organization did not have previous experience working with the sales organization of interest. Below, the VP of Operations for a Major League Baseball team discusses the lack of a partnership approach from a salesperson with a firm they have not worked with before.

> Well, we were looking for a collaborative partner that rolls up the sleeves and is enthusiastic for the business (President – Case 15)…But beyond that, especially soft factors, I did not get the feeling that they were going to be the partner on our side we wanted (Vice President, Operations – Case 15).

Comparatively, the following was an excerpt from the VP of Support Services from a hospital pertaining to a lack of relational offerings from a proposal in which the buying organization did have experience working with the supplier, thus attributing failure to the sales organization.

> We would have been most impressed with [ServiceStat] if we had the feeling they wanted to be a partner on our side and learn about our business. To get the sense that [ServiceStat] cares and has the heart in the project vs. selling canned solutions to us (Vice President, Support Services – Case 23).

The perceived lack of relational benefits was again relative to the degree to which the failed sales proposal compared to alternative offerings. If this proposal was comparatively less relational than the alternative competitor's offering then the result was often a failed sales attempt. The quotes indicate that the relational components of the failed proposal were evaluated based on the buyer's alternative offerings:

> [ServiceStat] was in a two horse race with [ProServ]. [ProServ] looked at this as building a relationship among future parties. [ServiceStat] made people feel uncomfortable. They looked over people's shoulders. It was a very focused business effort as opposed to "we're here to learn and add value." (Case 27).

> Our company and the current provider are in such a unique situation, that I would say [TransArgo] would have the business if it were not for the relationship (Senior Manager, Warranty Services – Case 32).
>
> In addition to pricing, [CraftLine] was more responsive, more collaborative in their solution. We have been very positively impressed with them – they are 150% better. They listen and they come up with creative solutions that give us the results we need with a better approach. It's not perfect, but they have come up to speed much more quickly than we expected they would and they have been very good to work with. They really have a partnership approach (Executive Director, Products & Logistics – Case 35).

The specific dimensions of the non-relational theme which emerged from the buyer's representation of sales offerings include: (1) A Lack of a Partnership Approach, (2) An Unsatisfactory Relationship, and (3) No Existing Relationship.

3.2.2.2.1. A Lack of a Partnership Approach

The first element expressed regarding a lack of relational benefits within the service offering was representative of an inadequate partnership approach. The lack of a partnership-orientation led to a diminished perception of relationship benefits and was represented by a lack of trust, a lack of perceived seller commitment, and lack of information sharing. By not demonstrating a relational-orientation to the potential buyer, respondents indicated that these missing variables had an impact on their purchase selection:

> [ServiceStat] made a good presentation, it was financially the strongest, but they didn't strike the same chord of values and partnership. Those kinds of things are the difference between a satisfactory business relationship and having superb partnership (Associate Vice President, Financial Affairs – Case 14).
>
> The things that would have likely resulted in them winning, at least from my perspective, would be to be curious and ask the right questions and be enthusiastic. Convince me that you like this business and you are going to be a real partner on the university's side (Business Manager – Case 18).

Trust was commonly cited for its' role in impacting the development of the buyer-seller relationship. This lack of trust in the seller impacted the respondents' decision not to select the specified sales offering. Commonly accepted elements of the trust construct, including a lack of credibility, competence and benevolence, were all documented below in the buyer's voice as leading to a lack of relational trust:

> If I can point to a single issue that stood out most, I would say it was the relationship and the trust that they are going to be a good partner on our side that was missing (Senior Manager, Warranty Services – Case 32).
>
> I'd say trust. We had a good deal on the table, but we were looking for a good partner, not a one-off transaction, so trust mattered more to us in this case (Vice President, Operations – Case 15).
>
> The issue was more about who we felt comfortable with and who we believed in. It was more an issue about credibility in respect to execution than the actual value from a black and white financial analysis (Assistant Vice President, Materials – Case 7).

In relation to the theoretical importance of trust within buyer-seller relationships, perceived seller commitment was also noted as a missing attribute of some sales offerings. In many of the cases, the buyer's lack of perceived seller commitment impacted their decision not to select the specified sales offering. As described by the following quotes, the purchasing decision makers perceived a lack of supplier commitment through insufficient relationship specific investments, as well as a lack of confidence that the seller viewed their company as an important customer.

> We were looking for a long-term agreement and we wanted that to be with somebody who's investing and showing they are staying in the forefront of that. Unfortunately, [ServiceStat] didn't score high for the plants that we looked at (Global Commodity Manager – Case 4).
>
> Hardly any relationship building or attempts to understand our hospital's specific needs were in the mix. I may be wrong, but I think that our hospital was a rather small customer amongst all of their accounts...This made us feel like second grade customers (Chief Operating Officer – Case 23).

Respondents also expressed a lack of relational benefits due to the seller's inability to communicate their partnering orientation, or unwillingness to fully share information with the potential partner. These insufficient communication dimensions led to the attribution of a non-relational supplier prospect and ultimately contributed to the purchasing organization selecting an alternative offering. The following respondent expressed an unmet expectation of information sharing benefits:

> We expect our vendors to be working with us in a partnership and letting us know what is out there in the market. What things might work or what might not work (Vice President, Real Estate – Case 12).

Together, the perceived lack of trust, commitment and/or information sharing contributed to the proposal's limited relationship-orientation. This presents a unique concept in the relationship literature, which involves a need to demonstrate relationship potential. Previous focus on buyer-seller relationships tend to concentrate on existing relationships, yet the qualitative responses indicated that decision makers were also influenced by how well the salesperson or sales organization demonstrated that they could form a partnership in the future.

3.2.2.2.2. An Unsatisfactory Relationship

When the buyer and seller had a previous or existing exchange relationship (e.g., incumbent supplier), the purchasing decision makers often reflected on the performance based attributes of their previous interactions when characterizing the lack of the seller's relationship-orientation. Through these existing interactions, the respondents were able to reflect on how the conflict developed through broken trust within the relationship, unmet performance expectations, as well as through the buyer's inability to portray future relationship potential. The following were representative of deficiencies with the focal sales organization, which ultimately contributed to the dissolution of the relationship:

> I think [ServiceStat's] performance influenced our decision by at least half. We had seen the trend of the last few years of how the program had been running. We wouldn't have been in this position if we thought things were overly effective to begin with. We wouldn't have necessarily gone out to bid if we would have felt completely comfortable with how the things had been running with [ServiceStat] (Food Service Liaison – Case 12).
>
> Additionally, the relationship worsened when our VP has a serious falling out with our service representative. We tried to escalate the issues to the Regional Vice President and

> never received a call back. We were not sure of whether he sided with the service representative or simply was not interested (Chief Operating Officer – Case 23).

Unsatisfactory performance in the seller's previous relationship negatively impacted the outcome of the current sales proposal. While we will see in the next section that a positive working history can create entry barriers which can lead to sales failure for the outside sales firm, conversely a negative relationship history was demonstrated to motivate change and often resulted in the loss of a sales proposal. Together these two components focused on constructs present within existing buyer-seller relationships.

3.2.2.2.3. No Existing Relationship

When the buyer and focal sales organization did not have a previous or existing exchange relationship, the buyer often reflected on the performance of the incumbent supplier. In these contexts an existing satisfactory relationship presented an entry barrier and ultimately contributed to the failed sales opportunity. Common elements within this theme included the risks associated with switching suppliers and satisfaction with the incumbent supplier.

Failed offerings were unable to provide sufficient benefits to surmount the risks associated ending an existing relationship. This risk was independent from monetary costs. As indicated below, the respondents specifically attributed the failed sales proposals to risk of delivery and inability to overcome the incumbent's existing experience.

> I think the fact that we didn't have a relationship with [ServiceStat] and no previous history. That would have positioned them better up to the decision. In an organization that doesn't like change and is very conservative, the fact that [ServiceStat] was a new vendor to the bank created stress in the bank (Vice President, Dining & Hospitality Services – Case 26).
>
> All things being equal, two proposals that both focus on service and the costs are fairly consistent, it comes down to risk of delivery. Because of the track record we have had through this process with the on-site team I could not get past the risk of delivery (Vice President, Supply Chain – Case 3).

> I wouldn’t say that we have had good experience with [ProServ] in the past but we know what their capabilities are and what their capabilities are not. I think we can manage it better and at the end of the day it comes down to risk and how much we are willing to tolerate (Strategic Sourcing Lead – Case 2).

An existing satisfactory incumbent relationship can raise the benefits needed from a new supplier’s proposal, which if not met can contribute to the failed sales outcome. As cited below, proposals failed to overcome an existing satisfactory relationship. All else being equal, the sales proposals failed due to the incumbent’s existing position:

> Beyond that, we’ve been doing business with [CraftLine] for years and we’re not that eager to change. We are pretty satisfied with them (Product Development & Office Manager – Case 28).
>
> Again, the relationship with our current provider was very strong and we just did not quite gain the confidence (Senior Manager, Warranty Services – Case 32).
>
> We had been with [CraftLine] for 5 to 6 years and the rest of the decision – the services, solutions, the monetary issues – were all very comparable (Director, Logistics – Case 34).
>
> Overall, they have comparable offerings and abilities. I think any organization would be well served by either company. It comes down to the people and past experience with organizations (Vice President, Facilities – Case 10).

While the risks associated with switching suppliers and the satisfaction with the incumbent provider certainly overlapped, respondents were distinctively vocal about these two dimensions during the interviews. Satisfaction can act as a large contributor to a competing firm losing the sales proposal, even preventing the contract from going out to bid.

Table 13
Non-Relational Sales Proposal Themes

Customer Perceived Benefits – A Lack of a Relational Offering		
(1) A Lack of a Partnership Approach	**(2) An Unsatisfactory Relationship**	**(3) No Existing Relationship**
• Failed to Develop Trustworthiness • A Lack of Perceived Seller Commitment • Underdeveloped Buyer-Seller Communication	• Broken Trust • Unmet Performance Expectations • Inability to Portray Future Relationship Potential	• Switching Risks • Satisfaction with Incumbent

3.2.3. Customer-Perceived Sacrifices

3.2.3.1. Excessive Customer-Perceived Total Cost of Ownership

Customer-perceived value was not only determined by the perceived benefits, but also the perceived sacrifices incurred by the buying organization. ‘Excessive Total Cost of Ownership Sales Proposal’ is conceptualized as a perceived disproportionate total cost of ownership across elements of the sales proposal. The overall level of the prospect’s sacrifice is insufficiently justified relative to the communicated benefits or savings. A generalized perception of an inapt cost proposal accompanies the organization or salesperson and carries along a connotation of a lack of interest and value.

The trade-off between benefits and sacrifices was represented in many forms and fashions, ranging from proposals in which the potential sales organization failed to demonstrate the value of a larger cost structure, to buyers who made their decision based solely on price. The following quotes were representative of these two points on the continua:

> Price was a factor to a certain extent and we were willing to pay a premium for what we saw in [ServiceStat]. But the premium, in this case, was a little too high (Director, Facility Support – Case 10).
>
> We conducted a lowest bidder type of bid. As long as the company met qualifications; the contract would be awarded to the lowest bidder (Director – Case 16).

The available alternatives were again used as a benchmark, specifically providing a reference point in which the buyer evaluated the relative excessiveness of the failed sales proposal. Respondents specifically discussed the winning sales organization in select cases to illustrate where the losing organization fell in relation:

> [ServiceStat's] solution didn't compare financially to the other two larger bidders. There was a smaller group and the other two larger ones were so close that we wondered how they hit so close together and [ServiceStat] was quite a bit off the mark when it came to financial arrangements…The final proposal from [ServiceStat] was well behind the other two finalists. The financial guarantees, potential investment dollars into the program, and what we considered the strength of the local management team were all behind (Director, Engineering & Building Services – Case 12).
>
> As you can see, it came down to price. [ServiceStat] lost because their bids down the road were higher than the others. Bottom line, their prices were higher than the competition (Assistant Director – Case 25).
>
> The financial differences between the proposals was one of the key factors that led to a different selection, I would say it was significant (Vice President, Facilities – Case 10).

The comments made by the purchasing decision makers were representative of the Total Cost of Ownership (TCO) perspective, in which the perceived sacrifices were based on the entirety of the cost elements. While, price was a focal component of the TCO construct used to describe the sacrifice theme, the four constructs identified within this theme included: (1) Greater Costs, (2) A Lack of Cost Justification, (3) An Inferior Cost Comparison, and (4) Negative Cost Associations.

3.2.3.1.1. Greater Costs

The cost component represents financial sacrifices which would be incurred by the potential customer in order to receive the proposed service offering benefits. The most common element of the cost component portrayed within the interviews was price. Respondents indicated the direct impact of price and cost components in the ultimate decision not to select the referenced sales proposal:

> We were charged to find the lowest cost for the highest quality provider. All companies were all quality. We checked their references. Therefore it boiled down to price. We awarded to the lowest price bidder (Assistant Director – Case 25).

> Overall I would say that it was a positive experience but the largest driver that resulted in our not selecting [ServiceStat] was that they were also the highest cost of all proposals received (Vice President, Facilities – Case 10).

> I think it is important to relay back to [ServiceStat]. They could have been our successful vendor but they weren't cost competitive (Chief Financial Officer–Case 6).

> They were way too expensive (Product Development & Office Manager – Case 28).

While price was the most frequently portrayed component of the buyer's sacrifices, a number of additional cost components were discussed to represent a TCO perspective. When these costs were excessive, they became a factor in the ultimate decision to not accept the proposal. The TCO elements include switching costs, opportunity costs, and operating costs:

> [TransArgo's] overall proposal was not strong enough for us to justify a transition. This is keeping all the hard and soft costs in mind (Director, Procurement – Case 29)…But, I do recall that our big concern was the cost of transition. If it was [TransArgo] that was cheaper, the difference of 3 percent in conjunction with losing a trusted partnership with [CraftLine] and the slightly worse timeliness factors was not enough to justify a change. We generally don't like to change over a smaller price difference (Director, Facilities – Case 29).

> [ServiceStat's] management fee was better by a small percentage but the upfront investment and money for operating costs were not in the ballpark (Director, Engineering & Building Services – Case 12).

> The difference was not significant, but it was still higher than [CraftLine] without having features that exceeded [CraftLine] and there had to be a good enough reason for us to change the status quo with [CraftLine]. It's a lot of work to change. It can cost you serious money in productivity (President – Case 30).

The final component of the cost theme was the calculated savings from the proposal. In specific instances, purchasing decision makers discussed the inability of the failed proposal to provide their company with a subsidized cost savings. Within this component, respondents were vocal about the minimum requirement for the organization to break-even on the proposed service through the cost outflows combined with the projected end-user inflows. Specifically, respondents below note the outcome of a non-self-sustaining offering, as well as the undesirable outcome of an expected loss on a project targeted to break-even.

> Given that all the other competitors' financial proposals were close and allowed [Commercial Co.] to reach break-even, [ServiceStat's] proposal stood out as being unacceptably high. This project was supposed to be self-sustaining. The other bidders offered a method of doing that (Director, Engineering & Building Services – Case 12).

> Our objective was to breakeven. That was not achieved. Instead there was a loss of about 1.3 to 1.4 million dollars (Director, Employee Services – Case 13).

The 'Greater Costs' component of the sacrifice theme was representative of the total costs, proposed price and lack of customer savings included in the sales offering. The proposal's excess costs or lack of demonstrated cost savings added to the buyer's perceptions of excessive ownership sacrifices.

3.2.3.1.2. A Lack of Cost Justification

Another dimension of the sacrifices theme was the organization's inability to justify the costs. A number of sub-components of the lack of cost justification were discussed, including the price-benefit trade-off and a lack of a cost justification via better benefits.

The costs associated with the service proposal needed to be justified in terms of the benefits which would subsequently be provided. Decision makers reiterated this point, specifically noting that while pricing was important, these prices needed to simultaneously be accompanied by an appropriate balance of benefits provided. The following informants illustrate:

> We are always looking for cost savings so cost is very big, but we are not going to accept the bid from a company from who we think there may have backorder concerns or quality concerns (Manager, Procurement – Case 11).

> Well, clearly pricing is always a major factor in these decisions. I think that's important but it's not the only thing. We looked at other components. Pricing is definitely important as well as the ability to maintain existing service levels (Director, Strategic Outsourcing – Case 33).

> We did not value all of the components a hospital that derives a benefit from being on the cutting edge would. Not saying we are not striving for excellence here, but we don't need to

> be a case study or a picture book example at all cost. The value is key. How can we accomplish the most within a certain budget (Assistant Administrator – Case 9)?

> I used the analogy of buying a Mercedes and a Volkswagen. A Mercedes is nice to have, but a Volkswagen has all the amenities as well, it is just not as expensive. I think that [ServiceStat] offered value for the money but it wasn't what we needed as a client (Director, Facility Support – Case 10).

Another component identified within the lack of cost justification was the seller's inability to demonstrate a downstream competitive advantage based on the proposed cost structure. Informants discussed that this lack of benefits included the inability to provide a strategic competitive advantage, inability to lower financial returns and a limited ability to provide end-user value.

> To attract the business of our associates we need to present them with a competitively priced product and I don't think we felt that [ServiceStat's] offering would give us the results that we would need (Manager, Procurement – Case 13).

> [TransArgo's] split shipment ratio is 16% and [CraftLine's] split shipment ratio is 5.5% - and this is something you don't know until you do business with them. But this is a huge cost advantage for our customers – it would mean more customers getting complete shipments and therefore higher satisfaction (Vice President, Logistics – Case 31).

The lack of cost justification builds on the previous cost component by indicating that failure can be a consequence of not only the proposed pricing structure, but also the justification of the given price levels. Unsuccessful sales opportunities failed to recognize this interconnection between the proposed benefits and the associated sacrifices.

3.2.3.1.3. An Inferior Cost Comparison

In addition to the proposed overall sacrifices incurred for the specified sales proposal, organizational decision makers noted the cost components in a comparative nature. These costs comparisons were portrayed in light of alternative sales proposals, cost expectations and organizational goals. Even in instances in which sellers' were potentially able to demonstrate high benefits and justify the associated costs, levels of cost above some benchmark could result in a lost sale

The first component of the sacrifice assessment was the cost comparison between competing sales organizations. The competing companies' prices offer a reference point, indicating that the bid financially missed the mark. The following comments illustrate this point:

> If they had a lower bid than the competition they would have been here (Assistant Director – Case 25).
>
> I really can't say anything during the RFP, they tried to compete on price, they did lower their pricing but they never became the lowest cost supplier. If they could have done that it may have helped (Manager, Procurement – Case 11).
>
> [ServiceStat] was off in pricing against the competitors. I am not allowed to state that. It would be fair to say between 200% and 250%. We did alert them of that fact because [Restaurant Co.] has a very good working relationship with them from the Design Projects…The next proposal [ServiceStat] submitted was drastically lower, but still a little higher than the competitors by about 15% (Director, Supply Chain Services – Case 22).

Another basis for cost comparison was the proposals' relative proximity to the buyer's expectations or organizational goals. Expectations and goals was another benchmark that decision makes used to evaluate the proposed cost structure. Misaligned or excessive costs, compared to the purchasing organization's expectations, were expressed as contributing to the proposal failure. The following comments provided by purchasing decision makers represent a rich basis of knowledge which can only be provided by those who know exactly what their own a priori expectations were in a given purchasing situation.

> The financials were very visibly out of line with what we wanted (Director, Engineering & Building Services – Case 12).
>
> We were looking for a monetary reduction, although we didn't set an exact number – and without going into confidential matters – I would say it was a sizable reduction we expected (Director, Logistics – Case 34).

The buyer's perspective showed that the failed sales proposal can be excessive in its' cost components compared not only to the competitor's offering, but also to the preconceived expectations established by the purchasing firm. This concept established the notion that unsuccessful proposals may partially be due to the seller's lack of understanding their competition and/or the buyer's expectations relative to cost.

3.2.3.1.4. Negative Cost Associations

The final dimension of the sacrifices theme was negative associations based on the cost. Through the proposed cost structure, organizational buyer's perceived a halo effect related to the seller's adaptability, negotiability and objectives. The implied associations based on the proposed costs unveiled an exceptional perspective into how the purchasing decision makers interpreted the intentions of the potential supplier.

Not being flexible in the proposed cost structure contributed to the proposal's negative cost associations. In this case, non-adaptive pricing appeared to add to the buyer's perceived sacrifices and portrayed an image of being inflexible and potentially over-valuing the proposed sale. As illustrated below, the sales organization's inability to be flexible on cost contributed to the negative outcome of the given proposal.

> They have a great program. It just had too many features. Maybe if we had a choice to do an a la carte program, we could have opted to skip on some things and hopefully the price would have come down (Assistant Administrator – Case 9).
>
> Well, [TransArgo's] pricing did not accommodate the type of shipment we ship frequently. We usually ship ground. Since we predominately ship boots we usually exceed the dimensional measure of [TransArgo's] lowest price. [TransArgo] has surcharges for anything over three cubic feet. Our shipments are larger than that and that would almost double the shipping price. [CraftLine] is more generous about the dimensional allowance without the surcharge and was therefore able to beat [TransArgo's] pricing (Product Development & Office Manager – Case 28).

The negative attributions perceived by the purchasing decision makers appeared to spill-over onto the perceptions of supplementary organizational qualities. Specific attributions resulting from the negatively perceived cost component provided by the respondents include, implications regarding the firm's lack of desire to earn the business, a negative seller attitude, as well as excessive corporate structure.

> And when it came to cost, I almost fell off my chair. They were completely out of line – not single percentage points, we're talking double digits. They were 30% more than the other carriers – not even in the ballpark. Maybe they underestimated how badly the other carriers wanted the business, but when I told them how high their prices were, they didn't come back with much lower prices. Their attitude seemed to be "We're high-priced and that's that" (Consultant – Case 35).

> Why they missed the boat on their pricing is beyond me, other than they wanted to make more profit…I understand that they also have to make a decision based upon shareholders. They have to prove that 'I'm not coming in at a non-profitable price point.' All I know is that the competition came in at a considerably lower price. Maybe they have too much corporate structure. Maybe they should shave off some management (Assistant Director – Case 25).

The negative attributions associated with the proposed price had a multiplier effect on the negative sacrifices perceived by the purchasing organization.

Table 14
Excessive Total Cost of Ownership Themes

Customer Perceived Sacrifices – Total Cost of Ownership (TCO) of the Offering			
(1) Greater Costs	**(2) A Lack of Cost Justification**	**(3) An Inferior Cost Comparison**	**(4) Negative Cost Associations**
• Higher Priced • Higher Supplemental Costs • Lower Cost Savings	• Unfavorable Cost-Benefit Ratio • Unjustified Downstream Costs	• Unfavorable Competitor-Cost Comparison • Unfavorable Expectation-Cost Comparison	• Non-Adaptive Cost Structure • Negative Cost Attributions

3.2.4. Summary

The findings provided by the qualitative analysis represent a foundational look at the buyer's post-mortem perspective as to why sales proposals fail. The breadth of causality, reasoning and emotions of the buyer’s voice captured through the in-depth interviews was portrayed in this section to represent the determinants of lost sales opportunities.

While many questions were established following this qualitative analysis, such as the significance and comparative strength of the potential antecedent variables, the research technique was successful in the contexts of discovery and development. Based on the exhaustive information provided by the procurement decision makers in this business-to-business environment, Figure 3 was derived to represent the conceptualized model for failed sales proposals. Figure 4 extends this conceptual model by including the sub-dimensions identified in the qualitative analysis.

Figure 3
Conceptual Sales Outcome Model

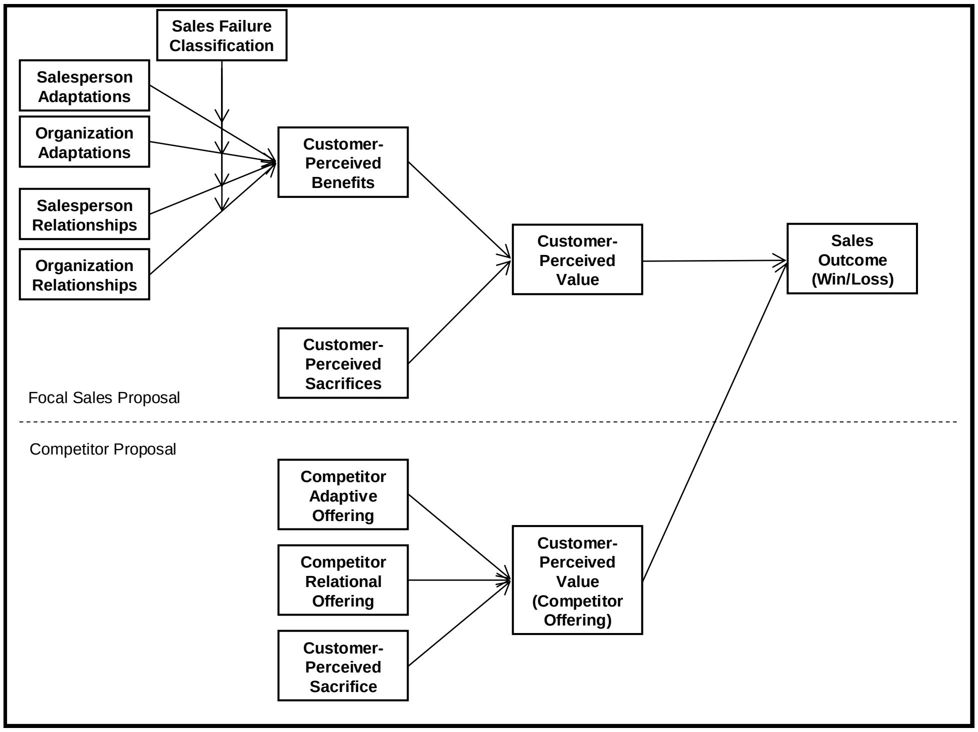
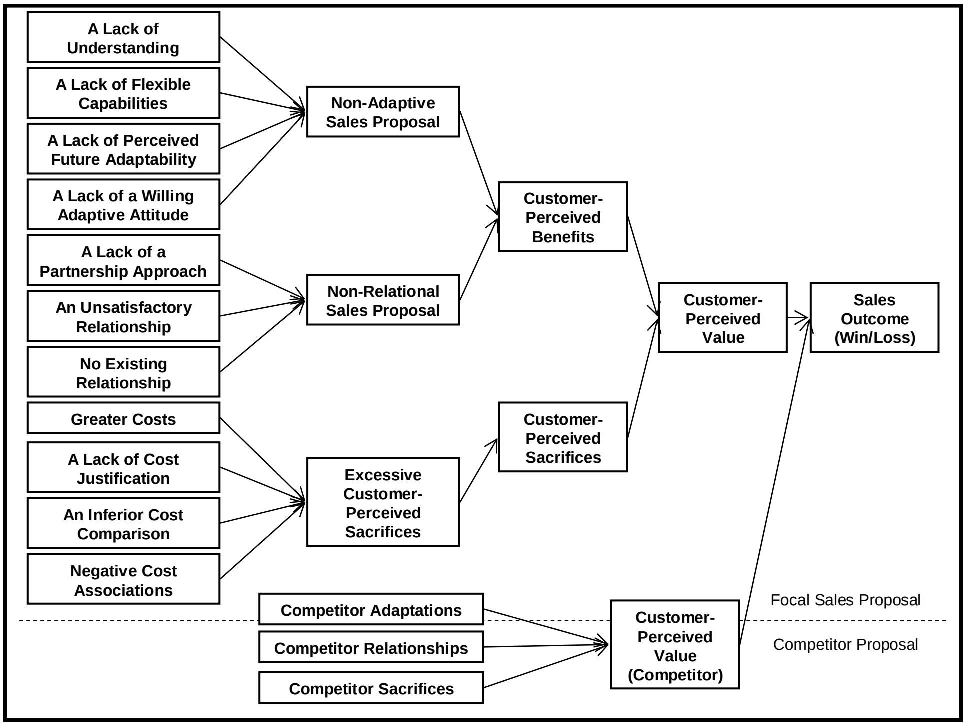

Sales Failure Classification
Salesperson Adaptations
Organization Adaptations
Salesperson Relationships
Organization Relationships
Customer-Perceived Benefits
Customer-Perceived Value
Sales Outcome (Win/Loss)
Customer-Perceived Sacrifices
Focal Sales Proposal
Competitor Proposal
Competitor Adaptive Offering
Competitor Relational Offering
Customer-Perceived Sacrifice
Customer-Perceived Value (Competitor Offering)

Figure 4
Sales Failure Thematic Dimensions Model


A Lack of Understanding
A Lack of Flexible Capabilities
A Lack of Perceived Future Adaptability
A Lack of a Willing Adaptive Attitude
A Lack of a Partnership Approach
An Unsatisfactory Relationship
No Existing Relationship
Greater Costs
A Lack of Cost Justification
An Inferior Cost Comparison
Negative Cost Associations
Non-Adaptive Sales Proposal
Non-Relational Sales Proposal
Excessive Customer-Perceived Sacrifices
Customer-Perceived Benefits
Customer-Perceived Sacrifices
Customer-Perceived Value
Sales Outcome (Win/Loss)
Competitor Adaptations
Competitor Relationships
Competitor Sacrifices
Customer-Perceived Value (Competitor)
Focal Sales Proposal
Competitor Proposal

4. QUANTITATIVE RESEARCH

Based on the qualitative findings, four primary research questions (RQ) regarding sales failure remained to be tested empirically:

- RQ1: Are the derived sales outcome drivers statistically significant?
- RQ2: Which driver has the strongest effect on the sales proposal selection?
- RQ3: What is the trade-off relationship between adaptability, relational offering and sacrifices in the buyer's decision choice?
- RQ4: Are there significant differences among the importance of price, adaptability and relationship-potential when comparing the buyer's decision to select versus not select a sales proposal?

Using the qualitative findings, hypotheses derived out of RQ1 regarding the three thematic dimensions were also developed (H1-H3). Using Herzberg's motivation-hygiene theory, a hypothesis derived out of RQ4 regarding the potential differences between the drivers of sales success and sales failure was also developed (H4). Hypotheses regarding the strength and potential trade-off effects of price, adaptability and relationship-potential were not developed per the exploratory nature of the qualitative analysis. Each research question and hypothesis will be answered in the proposed research design.

Hypothesis 1: The sales proposals' total cost of ownership is significantly related to the sales proposal selection.

Hypothesis 2: The sales proposals' adaptability is significantly related to the sales proposal selection.

Hypothesis 3: The sales proposals' relationship-potential is significantly related to the sales proposal selection.

Hypothesis 4: Significant differences exist between the buyer's perceived importance of (a) cost, (b) adaptability and (c) relationship-potential when evaluating failed sales proposals versus successful sales proposals.

4.1. Methodology

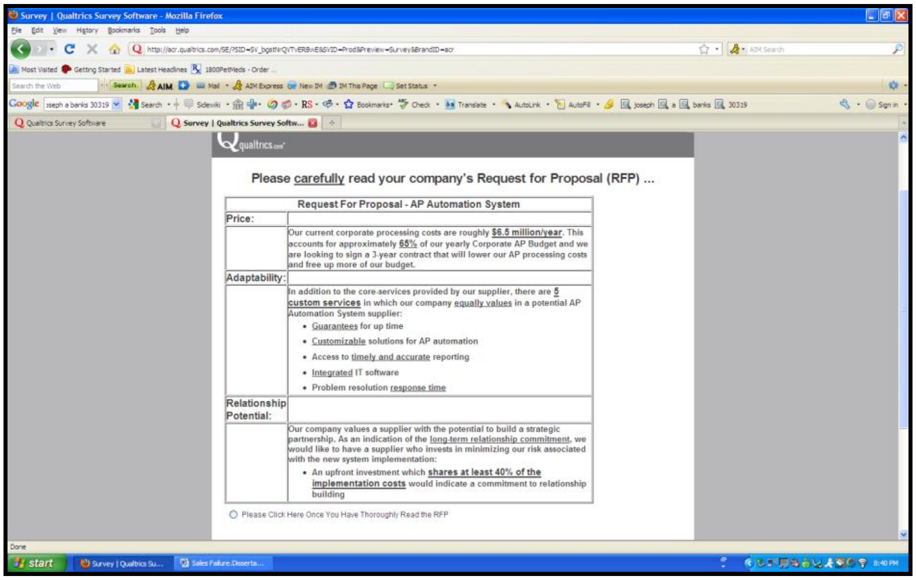
4.1.1. Data Collection Instrument

The four research questions and four hypotheses were addressed via an experiment where price (a proxy for TCO), adaptation and relationship-potential were manipulated. The experiment presented a scenario in which respondents assumed the responsibilities of an organizational buyer and selected a sales proposal among two competing suppliers. The criteria the respondent used to select between the two sales offerings were provided in the mock Request for Proposal (RFP), which outlined the buying organization's price preferences, specified needs in which the potential supplier was to address, and the desire to form a strategic partnership with the supplier. The specifics of the manipulated supplier offering was developed based on the expert advice of the Chief Executive Office and the Vice President & Managing Editor of an accounts payable (AP) organization. This organization had intimate knowledge of the AP Automation System proposal scenario presented. This includes the pricing levels of key account AP proposals, explicit adaptive needs sought by decision makers, and proxies for relationship-potential (see Figure 5).

Following the presented RFP scenario, each respondent received a decision set in which the proposals from two competing firms were provided. A total of eight distinct proposals were developed based on a 2 (Price: High, Low) x 2 (Adaptability: High, Low) x 2 (Relationship-Potential: High, Low) research design. Of the two firms, one firm (Supplier 2) was consistently set at moderate levels of all three attributes (i.e., Moderate Price, Moderate Adaptability, and Moderate Relational Offering), while the remaining firm (Supplier 1) was subject to random variation based on the eight research designs. The manipulated supplier offering levels were as follows:

- **Price**
    - High: $8.55 Million, 86% of Budget
    - Moderate (Supplier 2): $6.46 Million , 65% of Budget
    - Low: $4.37 Million, 44% of Budget
- **Adaptability**
    - High: Offering meets 5 of buyer’s specified needs
    - Moderate (Supplier 2): Offering meets 3 of buyer’s specified needs
    - Low: Offering meets 1 of buyer’s specified needs
- **Relationship-Potential**
    - High: Supplier is willing to cover 90% of implementation costs
    - Moderate (Supplier 2): Supplier is willing to cover 45% of implementation costs
    - Low: Supplier is willing to cover 10% of implementation costs

Figure 5
Experimental Request for Proposal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Done
start

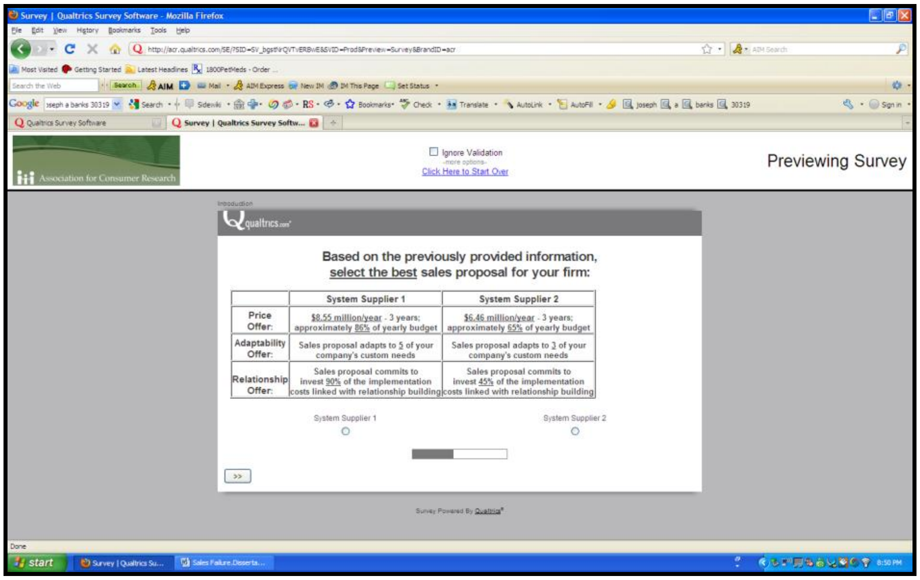
Please carefully read your company’s Request for Proposal (RFP) ...

Request For Proposal - AP Automation System	
Price:	
	Our current corporate processing costs are roughly **$6.5 million/year**. This accounts for approximately **65%** of our yearly Corporate AP Budget and we are looking to sign a 3-year contract that will lower our AP processing costs and free up more of our budget.
Adaptability:	
	In addition to the core-services provided by our supplier, there are **5 custom services** in which our company equally values in a potential AP Automation System supplier: • Guarantees for up time • Customizable solutions for AP automation • Access to timely and accurate reporting • Integrated IT software • Problem resolution response time
Relationship Potential:	
	Our company values a supplier with the potential to build a strategic partnership. As an indication of the long-term relationship commitment, we would like to have a supplier who invests in minimizing our risk associated with the new system implementation: • An upfront investment which **shares at least 40% of the implementation costs** would indicate a commitment to relationship building

○ Please Click Here Once You Have Thoroughly Read the RFP

In sum, the levels of this Supplier 1’s sales proposal attributes were manipulated and set against the constant moderate level of Supplier 2’s sales proposal. The respondent then made his or her decision to select between the two offerings (dichotomous dependent variable). The results of the respondent’s decision choice across all respondents provided the ability to run binary logistic regression, as well as calculate indifference scores representing the relative trade-off value of the three dimensions of the sales proposal. Figure 6 represents an example of the High Price, High Adaptability, High Relationship-Potential manipulated proposal.

Figure 6
Experimental Supplier Choice Set -
High Price, High Adapt & High Relation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Association for Consumer Research
☐ Ignore Validation
-more options-
Click Here to Start Over
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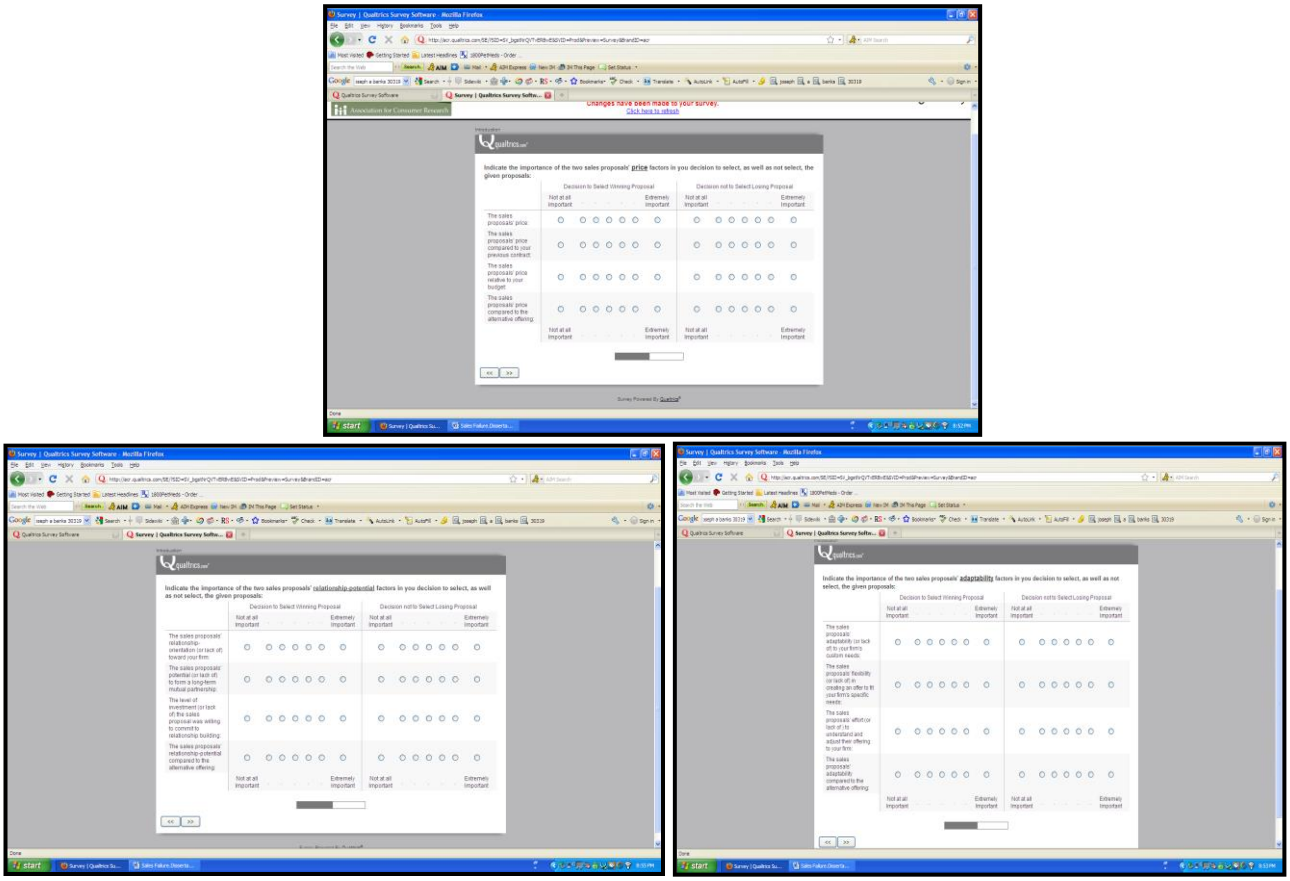
Based on the previously provided information, select the best sales proposal for your firm:

	System Supplier 1	System Supplier 2
Price Offer:	$8.55 million/year - 3 years; approximately 86% of yearly budget	$6.46 million/year - 3 years; approximately 65% of yearly budget
Adaptability Offer:	Sales proposal adapts to 5 of your company's custom needs	Sales proposal adapts to 3 of your company's custom needs
Relationship Offer:	Sales proposal commits to invest 90% of the implementation costs linked with relationship building	Sales proposal commits to invest 45% of the implementation costs linked with relationship building

System Supplier 1 ○ System Supplier 2 ○

Following the respondent's decision, the questionnaire then assessed the degree of importance each respondent placed on the dimensions of price, adaptability, relationship-potential and competitor's offering when selecting between the potential suppliers. The importance was measured using three 7-item Likert-type scaled questions per attribute. The results of the respondent's importance ratings enabled mean difference tests, in which the overall importance of the construct was assessed. Further, the questions assessed both the importance to *select* and *not select* the referenced proposals, thus the responses were split into two groups and means were compared across responses. The results provided insight into RQ4, whether or not there is a significant difference between the attributes in which buyer's perceive to influence sales success versus sales failure. Figure 7 provides an example of the questionnaire assessing the importance of the proposal adaptability, relationship-potential, cost and competitive attributes of the sales offerings:

Figure 7
Experimental Questionnaire on Importance of Sales Proposal Attributes


Changes have been made to your survey.
Click here to refresh

Indicate the importance of the two sales proposals' price factors in you decision to select, as well as not select, the given proposals:

	Decision to Select Winning Proposal							Decision not to Select Losing Proposal						
	Not at all Important						Extremely Important	Not at all Important						Extremely Important
The sales proposals' price	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' price compared to your previous contract	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' price relative to your budget	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' price compared to the alternative offering	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	Not at all Important						Extremely Important	Not at all Important						Extremely Important

Indicate the importance of the two sales proposals' relationship-potential factors in you decision to select, as well as not select, the given proposals:

	Decision to Select Winning Proposal							Decision not to Select Losing Proposal						
	Not at all Important						Extremely Important	Not at all Important						Extremely Important
The sales proposals' relationship-orientation (or lack of) toward your firm:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' potential (or lack of) to form a long-term mutual partnership:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The level of investment (or lack of) the sales proposal was willing to commit to relationship building:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' relationship-potential compared to the alternative offering:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	Not at all Important						Extremely Important	Not at all Important						Extremely Important

Indicate the importance of the two sales proposals' adaptability factors in you decision to select, as well as not select, the given proposals:

	Decision to Select Winning Proposal							Decision not to Select Losing Proposal						
	Not at all Important						Extremely Important	Not at all Important						Extremely Important
The sales proposals' adaptability (or lack of) to your firm's custom needs:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' flexibility (or lack of) in creating an offer to fit your firm's specific needs:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' effort (or lack of) to understand and adjust their offering to your firm:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' adaptability compared to the alternative offering:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	Not at all Important						Extremely Important	Not at all Important						Extremely Important

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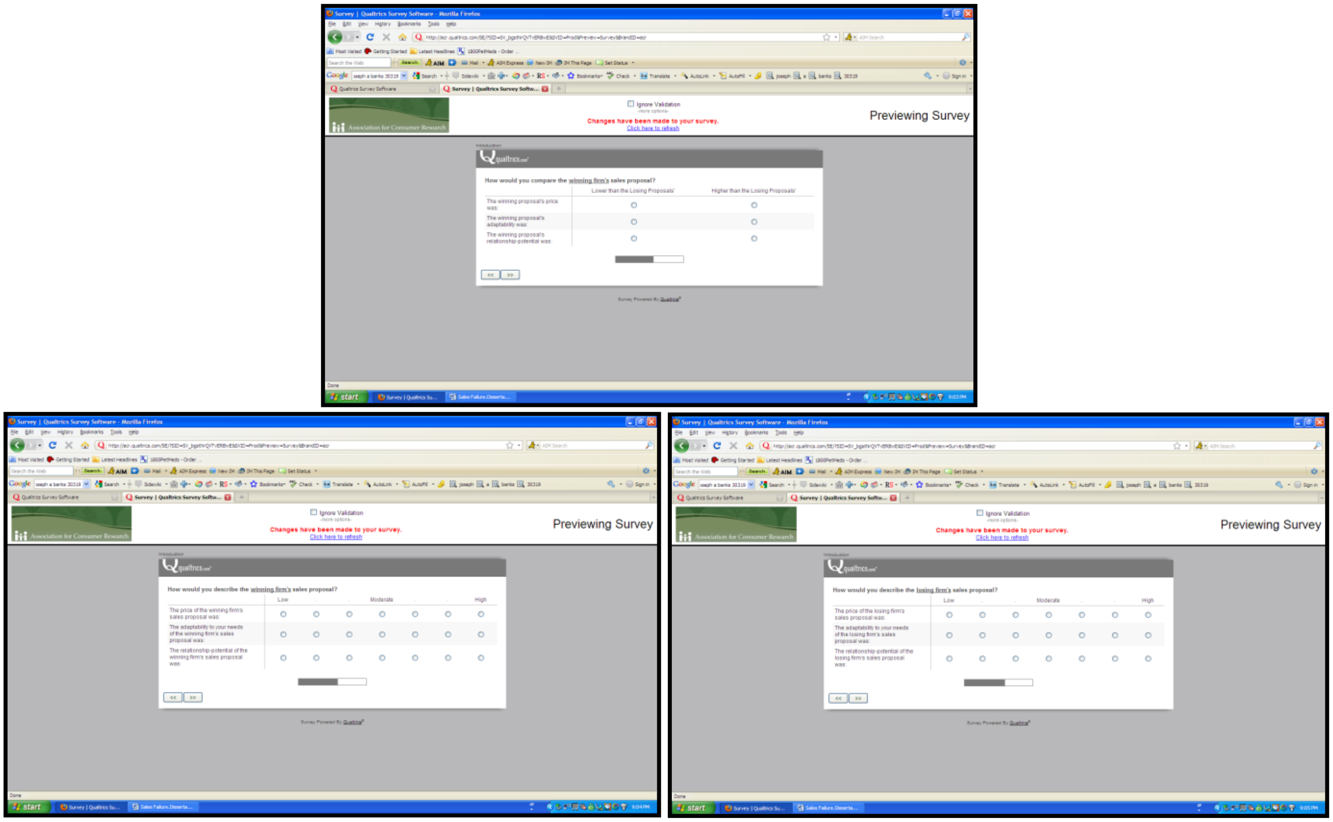
The final assessments of the questionnaire included a manipulation check and respondent information. The manipulation check assessed whether or not the manipulations were accurately perceived by the respondents. Specifically, it was important to determine whether the respondents correctly perceived the differences in price, adaptability and relationship-potential between the two potential suppliers presented in the proposal. Figure 8 represents the manipulation check which was presented at the conclusion of the experimental questionnaire. For a full reference of the data collection instrument, please see Appendix 7.4.

Figure 8
Experimental Manipulation Check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Association for Consumer Research
☐ Ignore Validation
-more options-
Changes have been made to your survey.
Click here to refresh
Previewing Survey
Introduction
qualtrics.com
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start

How would you compare the winning firm's sales proposal?

	Lower than the Losing Proposals'	Higher than the Losing Proposals'
The winning proposal's price was:	○	○
The winning proposal's adaptability was:	○	○
The winning proposal's relationship-potential was:	○	○

How would you describe the winning firm's sales proposal?

	Low	.	.	Moderate	.	.	High
The price of the winning firm's sales proposal was:	○	○	○	○	○	○	○
The adaptability to your needs of the winning firm's sales proposal was:	○	○	○	○	○	○	○
The relationship-potential of the winning firm's sales proposal was:	○	○	○	○	○	○	○

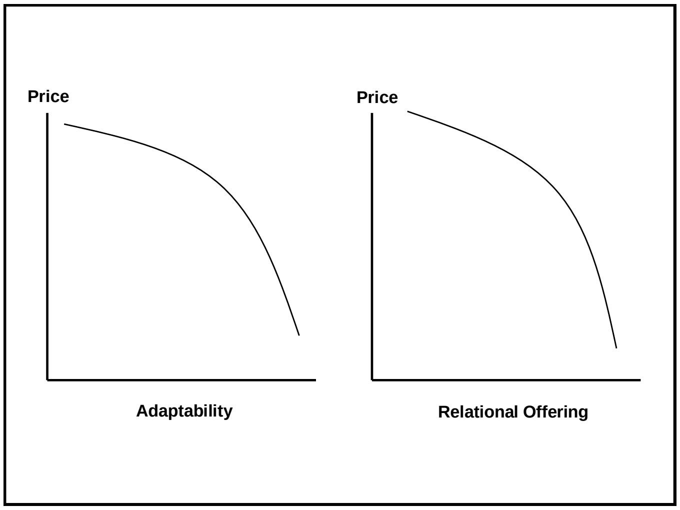
How would you describe the losing firm's sales proposal?

	Low	.	.	Moderate	.	.	High
The price of the losing firm's sales proposal was:	○	○	○	○	○	○	○
The adaptability to your needs of the losing firm's sales proposal was:	○	○	○	○	○	○	○
The relationship-potential of the losing firm's sales proposal was:	○	○	○	○	○	○	○

4.1.2. Data Analysis

In order to assess the various aspects of the experimental design, multiple data analysis techniques were utilized. Binary logistic regression was used in order to assess the probability of occurrence of selecting a given supplier based on the attributes of the competing proposals. The output also provided a goodness of fit measure. This technique was best suited to this research design because we were dealing with a dichotomous dependent variable (i.e., Supplier 1 or Supplier 2), as well as provided the ability to demonstrate the relative weight of the buyer's decision (i.e., dependent variable) explained by price, adaptability and relationship-potential (i.e., independent variables). This enabled the interpretation of the relative importance of price, adaptability, relationship-potential and competitive offerings, as it relates to the buyer's decision. Finally, the trade-off between price versus adaptation and price versus relationship-potential was also assessed to estimate the price elasticity (i.e., slope) of adaptation and relationships. This was done by running separate binary logistic regression equations with the two variables of interest (e.g., price/adaptability, price/relationship-potential) and graphing the data points within the decision frame. From this, the relative trade-off effects were determined and differences in slopes could be visually represented to demonstrate which variables had a stronger effect on the organizational buyer's willingness to pay higher costs in order to obtain such benefits. Results in the format shown in Figure 9 will be produced:

Figure 9
The Price Elasticity of Adaptation and Relationships



4.1.3. Data Collection Procedures and Sample

Twenty-five respondents were required for each of the eight cells in the 2x2x2 research design. To prevent unequal effects on the mean importance weights and regression coefficients based on the manipulation set received, equal cell sizes were required across the eight cells. This equates to a minimum sample size of 200 respondents.

Respondents for the experimental study were sampled from a local Business-to-Business organization's customer list. This organization's client represents multiple levels of purchasing decision makers across business organizations. Members of this customer list are responsible for making purchasing decisions with regard to the organization’s financial products and services. The context of this experiment is the procurement of an AP Automation System.

A pre-test was conducted to validate the manipulations. Of the eight possible manipulations, only three were necessary to include in the pre-test in order to assess the significance of all the high and low attributes of the 2x2x2 design. The following three scenarios were used to fully the manipulations: (1) High Price, Low Adaptability, Low Relationship-Potential; (2) Low Price, High Adaptability, High Relationship-Potential; and (3) Low Price, High Adaptability, High Relationship-Potential. In order to test for statistical significance, a minimum of 15 individuals per manipulation set was required (n=45).

4.2. Data Analysis & Results

4.2.1. Pre-Test Results & Sample

The purpose of the pre-test survey was to perform manipulation checks on the three experimentally influenced variables: price, adaptability and relationship-potential. Data was collected using a sample of 53 Masters in Business Administration (MBA) students at a large Southeastern state university were sampled for manipulation check purposes. The average years of work experience among the MBA sample was 9.29 years. Further, 26 respondents indicated they had organizational purchasing experience, with a mean of 3.64 years. The variables analyzed in the manipulation check were corresponding with the manipulation questions utilizing a Likert-type scale (1=low, 5=moderate, 7= high) regarding the perceived levels of price, adaptability and relationship-potential within the received sales proposals. Overall, results indicated significant differences for all intended manipulations, while maintaining no spill-over manipulation effects on unintended variables. For example, the high/low price manipulation significantly impacted the respondent’s price perceptions, however resulted in non-significant differences on adaptability and relationship-potential perceptions. Table 15 provides a summary of the manipulation check results, while Table 16 provides a summary of the pre-test sample characteristics.

Table 15
Pre-Test Manipulation Check Results

Variable	Means		t-Test
	High Manipulation	Low Manipulation	Sig. Difference
Price	5.72	2.56	.000
Adaptability	6.11	2.00	.000
Relationship-Potential	6.50	2.39	.000

Table 16
Pre-Test Sample Characteristics

Variable	Categories	Frequency	Percentage
Gender	Male	33	62.3%
	Female	20	37.7%
Age	18-24	5	9.4%
	25-34	34	64.2%
	35-44	7	13.2%
	45-54	6	11.3%
Average Purchase Size*	< $1,000	5	9.6%
	$1,000 - $9,999	3	5.8%
	$10,000 - $99,999	7	13.5%
	$100,000 - $999,999	6	11.5%
	$1mm - $5mm	4	7.7%
	$5.1mm - $10mm	0	0.0%
	$10.1mm - $15mm	0	0.0%
	> $15mm	1	1.9%
Buying Center Role**	Initiator	11	20.8%
	Influencer	13	24.5%
	Decider	7	13.2%
	User	9	17.0%
	Gatekeeper	4	7.5%

* Applies to only those respondents with organizational buying experience (n=26); ** Non-mutually exclusive responses (n=26)

4.2.2. Primary Sample Characteristics

For the primary data collection, individuals with a role in the organizational procurement decision were sampled. Per the goals of this research project, collecting data from the organizational buyer's side of the dyadic exchange allowed the opportunity to understand the importance of the elements of the sales proposal from the decision maker's perspective. Research subjects were contacted though an industry member list of financial purchasing decision makers. The sample consisted of individuals who played an executive role in the procurement process across numerous organization purchases.

Employees that worked in purchasing were asked to participate in the study. Respondents were recruited for this study using the corporate member list. In total, 416 potential respondents agreed to participate in the online survey and visited the website where the questionnaire was posted. A total of 326 respondents started the questionnaire, of which 227 completed it. After deletion of the respondents which were not usable (e.g., patterned responses, failed manipulation check, minimal time spent reading experimental conditions), followed by a small scaled randomized deletion to create equal cell sizes, a total of 200 respondents remained. The effective response rate of distributed surveys sent to organizational purchasing decision makers which agreed to take the survey was 48.08% (200/416).

The average years of work experience among the organizational buyer sample was 21.42 years. Approximately 98% of the respondents were currently working full-time at the point of the data collection, while 1% was working part-time and 1% was not currently working. Table 17 provides a summary of the sample characteristics.

Table 17
Respondent Profiles

Variable	Categories	Frequency	Percentage
Gender	Male	53	26.5%
	Female	140	70.0%
Age	18-24	3	1.5%
	25-34	46	23.0%
	35-44	55	27.5%
	45-54	59	29.5%
	55-64	28	14.0%
	65-74	1	0.5%
	75+	0	0.0%
Level of Typical Purchasing Dollar Responsibility*	< $1,000	24	18.6%
	$1,000 - $9,999	27	20.9%
	$10,000 - $99,999	33	25.6%
	$100,000 - $999,999	23	17.8%
	$1mm - $5mm	11	8.5%
	$5.1mm - $10mm	6	4.7%
	$10.1mm - $15mm	2	1.6%
	> $15mm	3	2.3%
Buying Center Role**	Initiator	54	20.5%
	Influencer	73	27.7%
	Decider	25	9.5%
	User	86	32.5%
	Gatekeeper	26	9.8%
Company's Industry	Manufacturing	52	26.0%
	Services	63	31.5%
	Distribution	12	6.0%
	Other	69	34.5%
Company Size	1-9 employees	1	0.5%
	10-19 employees	3	1.5%
	20-99 employees	14	7.0%
	100-249 employees	22	11.0%
	250-999 employees	42	21.0%
	1,000 – 4,999 employees	46	23.0%
	5,000 or more employees	68	34.0%
Company's Dollar Sales	Less than $1mm	10	5.0%
	$1 million - $20 million	37	18.5%
	$20.1 million - $100 million	39	19.5%
	$100.1 million - $200 million	18	9.0%
	$200.1 million - $1 billion	39	19.5%
	Greater than $1 billion	52	26.0%

* Skip patterns made this question available only to individuals with certain organizational buying experience (n=129); ** Skip pattern conditions remain, as well as non-mutually exclusive response option (n=129)

4.2.3. Manipulation Checks

In order to assess the experimental manipulations, respondents were aggregated across the eight manipulations based on the conditions of the proposal in which they selected (winning sales proposal) and based on the conditions of the proposal in which they did not select (losing sales proposal). Regardless of whether the participant selected the manipulated sales proposal or the fixed sales proposal, the manipulation was still measured for each individual. Respondents were asked to indicate their perceptions of the attributes of both the winning and the losing sales proposals using a 7-point Likert-type scale (1=Low, 4=Moderate, 7=High). Independent samples t-tests were used to compare the mean scores across the manipulation groups.

Results indicate that measurement of manipulations across both winning proposals (e.g., respondent selected manipulated proposal) and losing proposals (e.g., respondent did not select manipulated proposal) demonstrated significant differences between the high and low levels of price, adaptability and relationship-potential. The results were in the intended direction and therefore the manipulations were successful. While the fixed proposal remained at moderate price, adaptability and relationship-potential levels throughout the data collection instruments, and is thus not directly considered as a part of the manipulations, mean difference tests were run at the high vs. moderate and moderate vs. low levels within each cell and also demonstrated significant differences in all contexts. There were minimal significant spillover effects which carried into the alternative manipulation cells. All together, the manipulations were effective in creating the intended perceived sales proposal dimensions. Table 18 summarizes the results of respondents who selected the manipulated sales proposal, while Table 19 provides the results of the respondents who did not select the manipulated sales proposal.

Table 18
Manipulation Checks – Winning Proposal

	Manipulation Level of Selected Proposal	Manipulation Measured	n	Mean	Mean Difference	t	Sig.
Price Manipulation Check	High Price	Price	22	5.59	1.69	5.08	.000*
	Low Price	Price	62	3.90			
	High Price	Adaptability	22	5.68	0.81	2.04	.044*
	Low Price	Adaptability	62	4.87			
	High Price	Relationship-Potential	22	5.50	0.84	2.07	.041*
	Low Price	Relationship Potential	62	4.66			
Adaptability Manipulation Check	High Adaptability	Price	65	4.45	0.45	1.12	.264
	Low Adaptability	Price	19	4.00			
	High Adaptability	Adaptability	65	5.55	2.08	5.77	.000*
	Low Adaptability	Adaptability	19	3.47			
	High Adaptability	Relationship-Potential	65	4.91	0.12	0.27	.787
	Low Adaptability	Relationship Potential	19	4.79			
Relationship Manipulation Check	High Relationship-Potential	Price	52	4.42	0.20	0.59	.554
	Low Relationship-Potential	Price	32	4.22			
	High Relationship-Potential	Adaptability	52	5.08	-0.01	-0.05	.964
	Low Relationship-Potential	Adaptability	32	5.09			
	High Relationship-Potential	Relationship-Potential	52	5.63	1.97	6.48	.000*
	Low Relationship-Potential	Relationship Potential	32	3.66			

* Significant at .05-level

Table 19
Manipulation Checks – Losing Proposal

	Manipulation Level of Proposal Not Selected	Manipulation Measured	n	Mean	Mean Difference	t	Sig.
Price Manipulation Check	High Price	Price	78	6.24	2.93	12.32	.000*
	Low Price	Price	38	3.31			
	High Price	Adaptability	78	3.72	1.14	2.88	.005*
	Low Price	Adaptability	38	2.58			
	High Price	Relationship-Potential	78	3.84	1.05	2.92	.004*
	Low Price	Relationship Potential	38	2.79			
Adaptability Manipulation Check	High Adaptability	Price	35	5.94	0.94	2.62	.010*
	Low Adaptability	Price	81	5.00			
	High Adaptability	Adaptability	35	5.49	3.07	10.07	.000*
	Low Adaptability	Adaptability	81	2.42			
	High Adaptability	Relationship-Potential	35	4.17	0.96	2.57	.011*
	Low Adaptability	Relationship Potential	81	3.21			
Relationship Manipulation Check	High Relationship-Potential	Price	48	5.54	0.44	1.28	.204
	Low Relationship-Potential	Price	68	5.10			
	High Relationship-Potential	Adaptability	48	3.48	0.23	0.59	.557
	Low Relationship-Potential	Adaptability	68	3.25			
	High Relationship-Potential	Relationship-Potential	48	4.69	2.03	6.67	.000*
	Low Relationship-Potential	Relationship Potential	68	2.66			

* Significant at .05-level

4.2.4. Winning vs. Losing Sales Proposals

Following the decision to select between the two provided sales proposals, respondents were asked to evaluate the importance of the various aspects of the pricing dimensions, adaptability dimensions and relationship-potential dimensions of the winning sales proposal and the losing sales proposal. Within each respective construct, the mean score across the three-item measures was calculated to provide the given importance rating. This perceived level of importance in the respondent's decision to select, as well as not select, a given proposal was measured on a 7-point Likert-type scale (1=Not Important at All, 7-Extremely Important).

Using paired-samples t-tests, the mean importance ratings for each of the three constructs were compared between winning and losing proposals. Significant differences amongst the means were found in all three comparisons: price winning-price losing, adaptability winning-adaptability losing, relationship winning-relationship losing. These significant differences indicate that respondents did not perceive the levels of price, adaptability and relationship-potential as simple inverses of one another when reflecting on sales failure versus sales performance. This statement is a reflection of the findings which indicate the sales proposal elements had significantly different degrees of importance in the two proposal decisions: (1) Decision to Select and (2) Decision to not select. Table 20 provides a summation of these results.

Table 20
Paired Samples T-Test: Winning vs. Losing Sales Proposals

	Mean Importance – Winning Proposal	Mean Importance – Losing Proposal	n	Mean Difference	t	Sig.
Price	5.58	5.12	200	0.46	6.34	.000
Adaptability	5.88	5.43	200	0.45	5.77	.000
Relationship-Potential	5.60	5.10	200	0.50	6.35	.000

4.2.5. Importance of Price, Adaptability and Relationship-Potential

Following the determination that significant differences exist when evaluating the importance of the winning versus losing proposal dimensions, the relative importance of price, adaptability and relationship-potential were assessed within the winning and losing contexts independently. Using paired-samples t-tests, the mean importance evaluations for the three proposal constructs were evaluated in order to determine the order of perceived importance in an organizational buyer's decision to select, as well as not select, a sales proposal. Results indicated that adaptability (5.88) was the most important construct in the organizational buyer's decision to select a sales proposal, followed by non-significant differences between relationship-potential (5.60) and price (5.58). Results also indicated that a lack of adaptability (5.43) was again the most important construct in the organizational buyer's decision to not select a sales proposal, followed by non-significant differences between price (5.12) and relationship-potential (5.10). Table 21 provides the statistical results of these paired-samples t-tests for the winning proposal ratings, while Table 22 provides the results of the losing proposal ratings.

Mean difference tests were also run on the importance evaluations across a variety of demographic groups. Groups were developed via the high/low split (above and below mean response), as well as at the high/moderate/low split (above and below 1 standard deviation from the mean) and no significant differences were found between the high and low groups within any of these descriptive groups. This set of groupings included the following respondent characteristics: purchasing decision involvement, years work experience, level of dollar responsibility, company size, company sales, brand sensitivity and propensity to trust. Group differences resulting in non-significant differences were also tested using ANOVA across the following categorical descriptives: buying center role and company industry.

Table 21
Paired Samples T-Test: Winning Sales Proposal

Paired Samples		Mean	Mean Difference	n	Correlation (Sig.)	t	Sig.
Pair 1	Price	5.58	-0.30	200	.236 (.001)	-3.16	.002*
	Adaptability	5.88					
Pair 2	Adaptability	5.88	0.28	200	.499 (.000)	3.71	.000*
	Relationship	5.60					
Pair 3	Price	5.58	-0.18	200	.237 (.001)	-0.19	.853
	Relationship	5.60					

* Significant at .05-level

Table 22
Paired Samples T-Test: Losing Sales Proposal

Paired Samples		Mean	Mean Difference	n	Correlation (Sig.)	t	Sig.
Pair 1	Price	5.12	-0.31	200	.363 (.000)	-2.65	.009*
	Adaptability	5.43					
Pair 2	Adaptability	5.43	0.33	200	.672 (.000)	4.07	.000*
	Relationship	5.10					
Pair 3	Price	5.12	0.02	200	.329 (.000)	0.15	.879
	Relationship	5.10					

* Significant at .05-level

4.2.6. Binary Logistic Regression

Binary logistic regression was utilized in order to develop a predictive equation regarding the selection of the sales proposal explained by the categorical independent variables of high/low price (1/0), high/low adaptability (0/1) and high/low relationship-potential (0/1). Binary logistic regression allowed the opportunity to rank the relative importance of the manipulated variables and assess the probability of selecting the manipulated proposal. Interaction effects between price, adaptability and relationship-potential were assessed, however no significant interaction effects existed. While MANOVA is often used within experimental designs to compare groups formed by categorical independent variables, it was not appropriate for this analysis because the main and interaction effects were tested on multiple dependent interval variables. Because we had a single categorical dependent variable, no DV means existed to properly use this technique.

$$Y = 3.067 - 2.788(\text{price}) - 3.077(\text{adaptability}) - 1.437(\text{relationship-potential})$$

All variables in the regression equation were significant (.000), the pseudo R^2 (Nagelkerke R Square) was 0.551, and the Hosmer and Lemeshow Test for overall fit of the binary logistic regression demonstrated adequate fit with the data (.866). Results confirm the significance of price, adaptability and relationship-potential in the proposal selection, thus confirming H1-H3. Further, the predictability of the selected sales proposal improved from 58.0% in the baseline model to 78.5% in the model with all variables entered. Table 23 represents the probability of selecting a proposal based on the given set of manipulated sales proposal conditions.

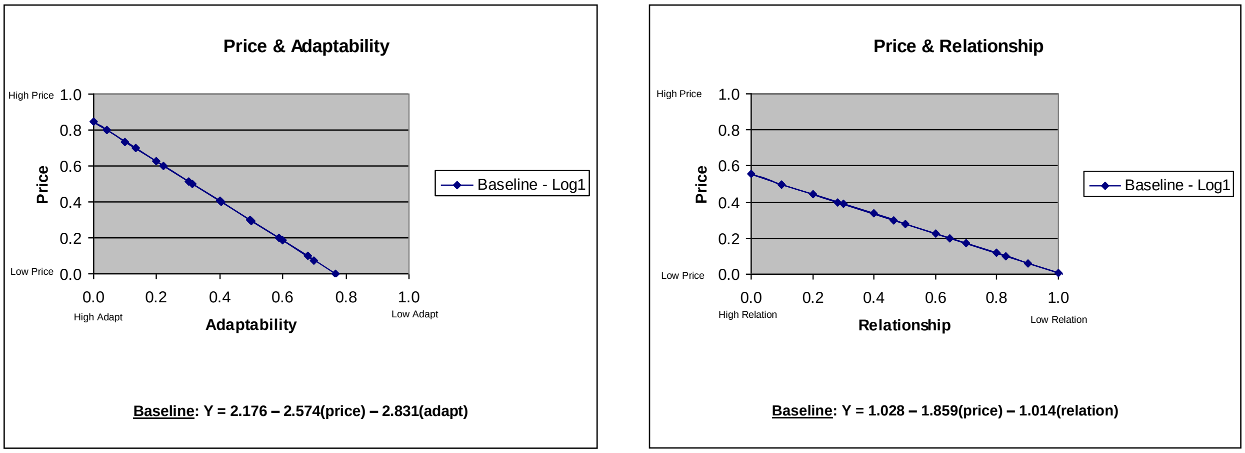
Table 23
Probability of Selecting a Sales Proposal

Manipulation	Sales Proposal	Probability of Selection
1	High Price High Adaptability High Relationship-Potential	56.93%
2	High Price High Adaptability Low Relationship-Potential	23.90%
3	High Price Low Adaptability High Relationship-Potential	5.75%
4	High Price Low Adaptability Low Relationship-Potential	1.43%
5	Low Price High Adaptability High Relationship-Potential	95.55%
6	Low Price High Adaptability Low Relationship-Potential	83.62%
7	Low Price Low Adaptability High Relationship-Potential	49.77%
8	Low Price Low Adaptability Low Relationship-Potential	19.06%

4.2.7. Indifference Curves

Binary logistic regression equations were again used in order calculate the trade-off between price and adaptability, as well as price and relationship-potential. In order to calculate this relative trade-off for our baseline slope, logistic regression equations were calculated at a Log 1, which indicates indifference between the dependent variables – Supplier 1 versus Supplier 2. Further, these logistic regression equations were calculated with just the two primary independent variables entered into the analysis (e.g., price/adaptability, price/relationship-potential). In addition to our baseline indifference curve, logistic regression equations were also tested for potential differences across respondent groups. In order to run separate regressions for various groups, descriptive respondent characteristics were split using the high/low groupings. All together, group regression equations were run at the high and low levels for the following descriptives: years of work experience, brand sensitivity, propensity to trust, purchasing decision involvement, purchasing dollar responsibility, company size, company sales and buying center role. Figures 10-29 provide results for the trade-off curves calculated for price and adaptability, as well as price and relationship-potential across these groups.

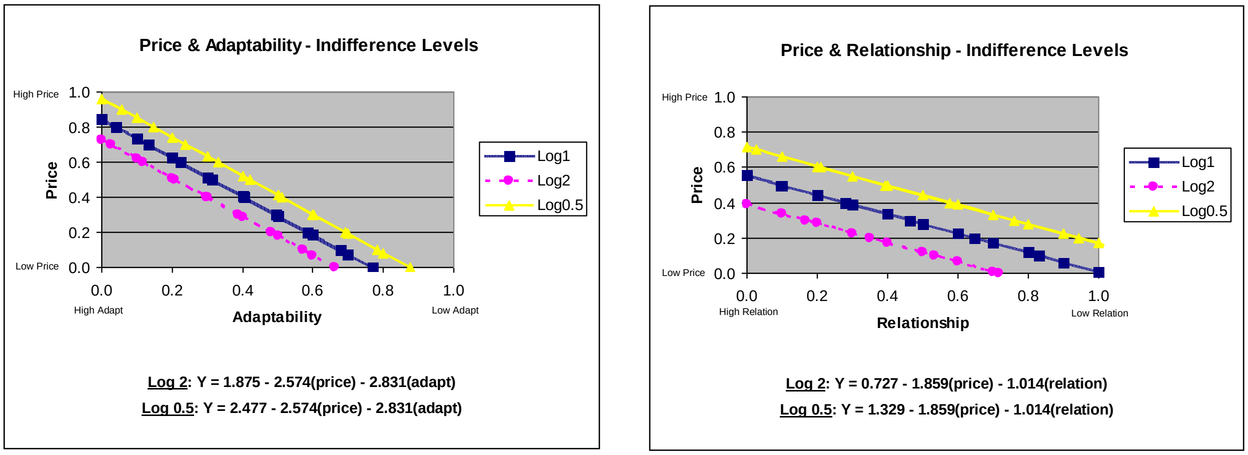
Figure 10 & 11
Baseline Regressions



Baseline: Y = 2.176 – 2.574(price) – 2.831(adapt)

Baseline: Y = 1.028 – 1.859(price) – 1.014(relation)

Figure 12 & 13
Indifference Levels



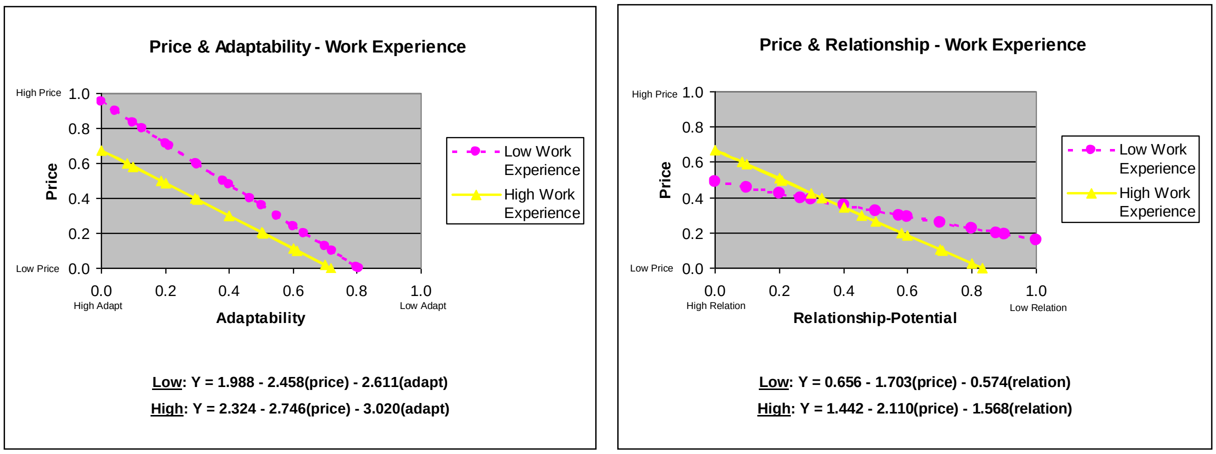
Log 2: Y = 1.875 - 2.574(price) - 2.831(adapt)

Log 0.5: Y = 2.477 - 2.574(price) - 2.831(adapt)

Log 2: Y = 0.727 - 1.859(price) - 1.014(relation)

Log 0.5: Y = 1.329 - 1.859(price) - 1.014(relation)

Figure 14 & 15
Work Experience



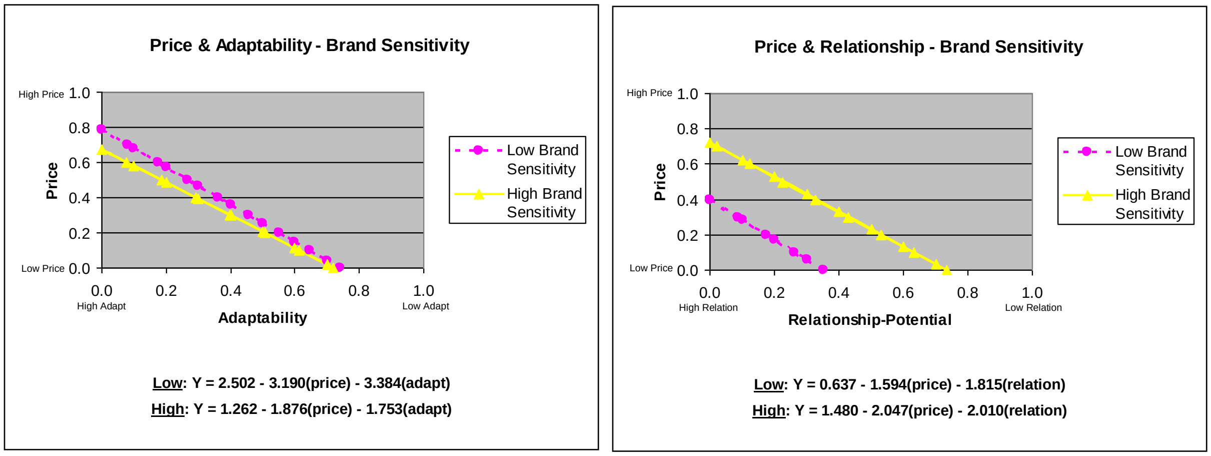
Low: Y = 1.988 - 2.458(price) - 2.611(adapt)

High: Y = 2.324 - 2.746(price) - 3.020(adapt)

Low: Y = 0.656 - 1.703(price) - 0.574(relation)

High: Y = 1.442 - 2.110(price) - 1.568(relation)

Figure 16 & 17
Brand Sensitivity



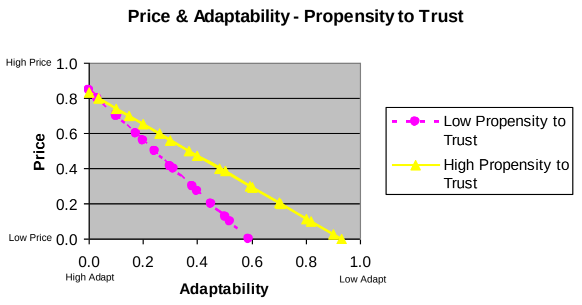
Low: Y = 2.502 - 3.190(price) - 3.384(adapt)

High: Y = 1.262 - 1.876(price) - 1.753(adapt)

Low: Y = 0.637 - 1.594(price) - 1.815(relation)

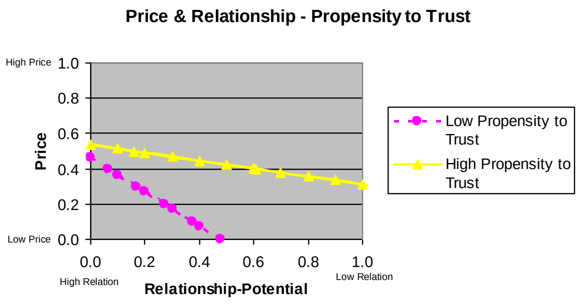
High: Y = 1.480 - 2.047(price) - 2.010(relation)

Figure 18 & 19
Propensity to Trust


Price & Adaptability - Propensity to Trust

Low: Y = 1.854 - 2.191(price) - 3.147(adapt)

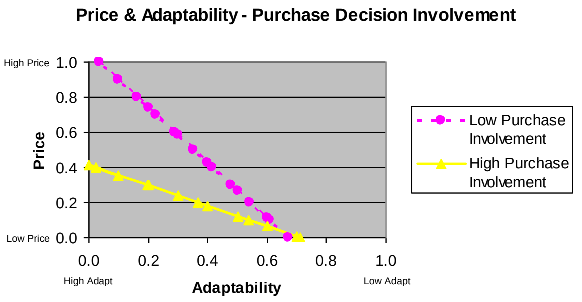
High: Y = 2.934 - 3.534(price) - 3.155(adapt)


Price & Relationship - Propensity to Trust

Low: Y = 0.721 - 1.553(price) - 1.507(relation)

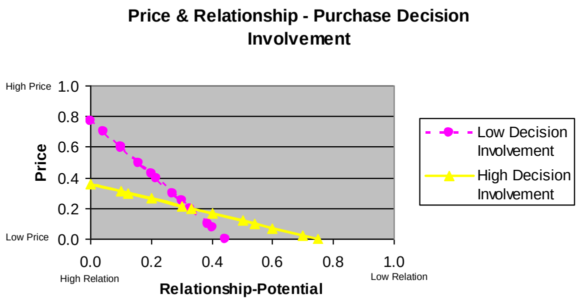
High: Y = 1.178 - 2.198(price) - 0.491(relation)

Figure 20 & 21
Purchasing Decision Involvement


Price & Adaptability - Purchase Decision Involvement

Low: Y = 1.788 - 1.691(price) - 2.668(adapt)

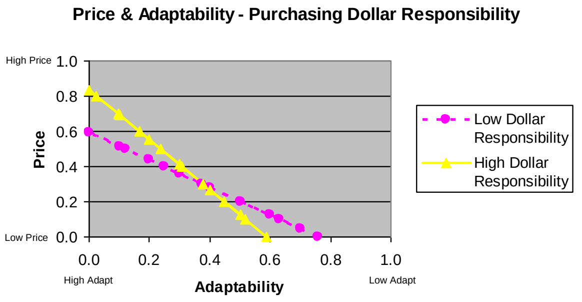
High: Y = 1.207 - 2.915(price) - 1.698(adapt)


Price & Relationship - Purchase Decision Involvement

Low: Y = 0.997 - 1.289(price) - 2.246(relation)

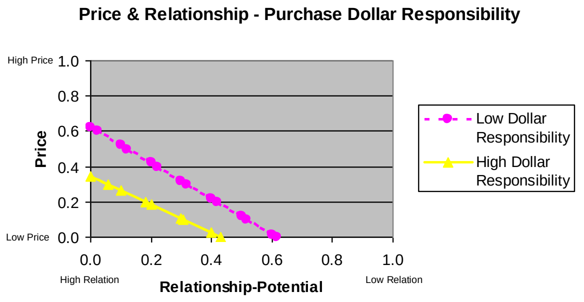
High: Y = 0.971 - 2.696(price) - 1.299(relation)

Figure 22 & 23
Purchasing Dollar Responsibility


Price & Adaptability - Purchasing Dollar Responsibility

Low: Y = 1.388 - 2.334(price) - 1.832(adapt)

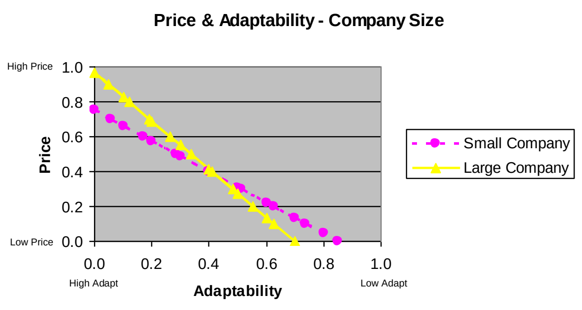
High: Y = 1.645 - 1.969(price) - 2.791(adapt)


Price & Relationship - Purchase Dollar Responsibility

Low: Y = 1.460 - 2.342(price) - 2.375(relation)

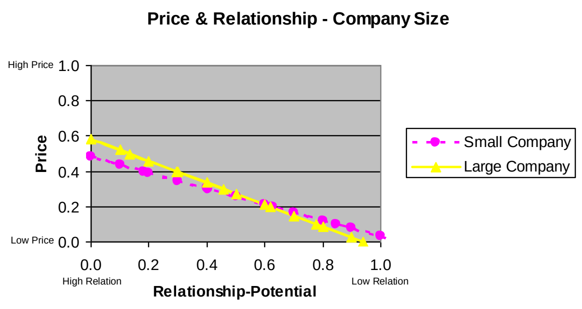
High: Y = 0.410 - 1.183(price) - 0.949(relation)

Figure 24 & 25
Company Size



Small: Y = 3.078 - 4.096(price) - 3.617(adapt)

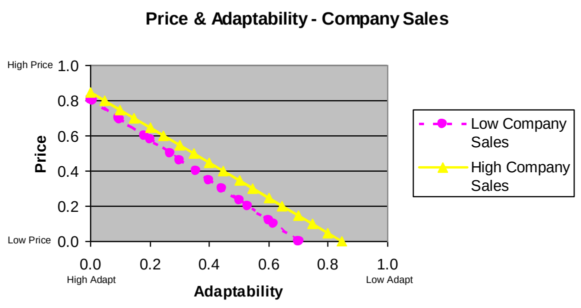
Large: Y = 1.851 - 1.915(price) - 2.649(adapt)



Small: Y = 1.067 - 2.212(price) - 0.998(relation)

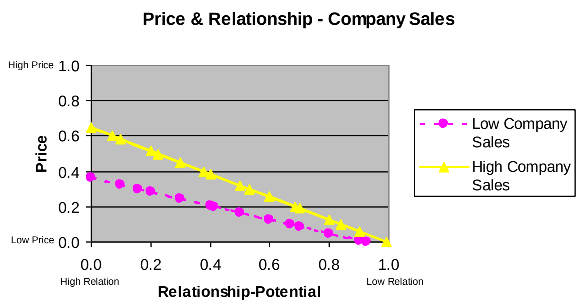
Large: Y = .0948 - 1.628(price) - 1.008(relation)

Figure 26 & 27
Company Sales



Low: Y = 2.387 - 2.955(price) - 3.396(adapt)

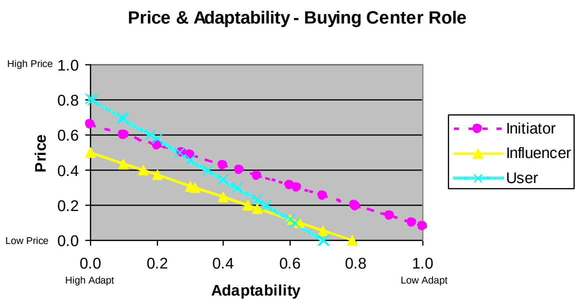
High: Y = 2.046 - 2.418(price) - 2.418(adapt)



Low: Y = 0.539 - 1.489(price) - 0.583(relation)

High: Y = 1.423 - 2.202(price) - 1.434(relation)

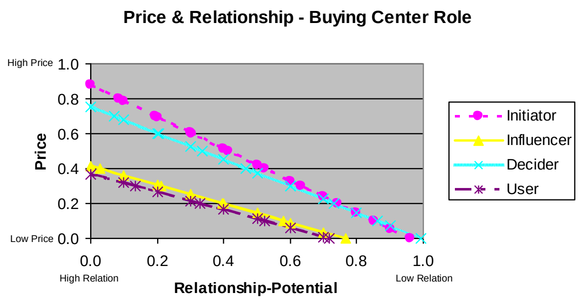
Figure 28 & 29
Buying Center Role



Initiator: Y = 1.838 - 2.790(price) - 1.613(adapt)

Influencer: Y = 1.655 - 3.310(price) - 2.105(adapt)

User: Y = 1.985 - 3.178(price) - 2.804(adapt)



Initiator: Y = 3.114 - 3.542(price) - 3.242(relation)

Influencer: Y = 1.189 - 2.868(price) - 1.553(relation)

Decider: Y = 1.623 - 2.151(price) - 1.632(relation)

User: Y = 0.856 - 2.321(price) - 1.191(relation)

A number of implications were derived from the calculated price/adaptability and price/relationship-potential indifference curves by looking at the comparative slopes, x- and y-intersects, beta-coefficients and cross group comparisons. The baseline regression equations provided a reference point for both sets of curves throughout this analysis. The baseline of Log1 was selected because this represents a point of indifference between the two potential suppliers. A comparison of the price/adaptability and price/relationship lines indicate that adaptability again demonstrated a stronger influence than relationship-potential on the price a sales organization can charge while still winning the sales proposal.

Log functions were used to represent varying degrees of selection probabilities, thus simulating inherent variance in the preference toward one supplier over the other. Specifically, Log 2 (odds of selecting supplier are 2 to 1; probability = 67%) and Log0.5 (odds of selecting supplier are 1 to 2; probability 33%) are provided in Figures 12 & 13. Results indicate that this level of preference can allow a sales organization to charge more at equivalent levels of adaptability or relationship-potential if their firm is preferred. Alternatively these same firms would have to provide a lower price point at equivalent levels of adaptability or relationship-potential if they are not the preferred supplier.

Figures 14 & 15 show the effects of high and low work experience on the price/adaptability and price/relationship-potential trade-offs. The mean level of work experience represented in the sample was 21.42 years, thus respondents with less than or equal to 21 years of work experience were placed in the ‘Low Work Experience’ group, while individuals with greater than 21 years of work experience were placed in the ‘High Work Experience’ group. The beta-weights indicate that price has a weaker impact than adaptability within both the low work experience (βprice: 2.458; βadapt: 2.611) and high work experience (βprice: 2.746; βadapt: 3.020) groups. The opposite holds true within the price/relationship-potential trade-off, as the beta-weights indicate that price has a stronger impact than relationship-potential within both the low work experience (βprice: 1.703; βrelation: 0.574) and high work experience (βprice: 2.110; βrelation: 1.568) groups.

Figures 16 & 17 show the effects of high and low brand sensitivity on the price/adaptability and price/relationship-potential trade-offs. Brand sensitivity was measured using an adapted version of the six-item Lachance, Beaudoin and Robitaille (2003) Likert-type scale (α = .917). The mean response on the seven point scale was 3.97, thus those whose average was less than or equal to 3.97 were placed into the 'Low Brand Sensitivity' group, whereas those whose average score was greater than 3.97 were placed in the 'High Brand Sensitivity' group. The beta-weights indicate that while adaptability was more important than price among low brand sensitive respondents (βprice: 3.190; βadapt: 3.384), price was more important than adaptability to high brand sensitive respondents (βprice: 1.876; βadapt: 1.753). The same pattern exists with regard to the price and relationship-potential trade-off: relationship-potential was more important than price among the low brand sensitive respondents (βprice: 1.594; βrelation: 1.815), but price was more important than relationship-potential among high brand sensitive respondents (βprice: 2.047; βrelation: 2.010).

Figures 18 & 19 show the effects of high and low propensity to trust on the price/adaptability and price/relationship-potential trade-offs. Propensity to trust was measured using the five-item Hawes, Mast and Swan (1989) Likert-type scale (α = .793). The mean response on the seven point scale was 3.99, thus those whose average was less than or equal to 3.99 were placed in the 'Low Propensity to Trust' group, whereas those whose average was greater than 3.99 were placed in the 'High Propensity to Trust' group. The slopes of the high versus low propensity to trust groups within the price/adaptability trade-off regressions indicate that shifts in adaptability have a greater effect on the acceptable proposal price among low trusting respondents. The beta-coefficients show that adaptability is more important than price within the low propensity to trust group (βprice: 2.191; βadapt: 3.147), while price is more important than adaptability within the high propensity to trust group (βprice: 3.534; βadapt: 3.155). In contrast, price was a more important than relationship-potential in the proposal selection among both high (βprice: 1.553; βrelation: 1.507) and low trusting (βprice: 2.198; βrelation: 0.491) respondents. Among respondents within the high propensity to trust group, relationship-potential has a minimal effect on the acceptable proposal price.

Figures 20 & 21 show the effects of high and low purchase decision involvement on the price/adaptability and price/relationship-potential trade-offs. The mean response to the seven-point Likert-type scale was 4.33, thus those who responded to the question with a 1-4 were placed in the ‘Low Purchase Involvement’ group, whereas those who responded 5-7 were placed in the ‘High Purchase Involvement’ group. Within the price/adaptability trade-off curve and price/relationship-potential trade-off curve, results indicated drastic differences in the Y-intercept between the low purchase involvement group and the high purchase involvement group. Respondents with low purchase involvement were willing to pay more for high levels of adaptability and high levels of relationship-potential. This interpretation is further developed within the group beta-coefficients, in which adaptability and relationship-potential are more important than price within the low purchase involvement group (βprice: 1.691; βadapt: 2.668)(βprice: 1.289; βrelation: 2.246), however price is more important than adaptability and relationship-potential within the high purchase involvement group (βprice: 2.915; βadapt:

1.698)(βprice: 2.696; βrelation: 1.299). Both sets of trade-off curves indicate a potential moderating effect of decision involvement on the decision selection.

Figures 22 & 23 show the effects of high and low purchasing dollar responsibility on the price/adaptability and price/relationship-potential trade-offs. The mean-split on the eight-point categorical scale was between the third and fourth classes, thus 65.1% of the respondents who were in categories 1-3 (≤$99,999) were placed in the 'Low Dollar Responsibility' group, while the remaining 34.9% of respondents who were in categories 4-8 (≥$100,000) were placed in the 'High Dollar Responsibility' group. Beta-coefficients show that price has a greater impact than adaptability on the proposal selection within the low dollar responsibility group (βprice: 2.334; βadapt: 1.832), while adaptability has a greater impact than price in the high dollar responsibility group (βprice: 1.969; βadapt: 2.791). Contrary, beta-coefficients in the price/relationship-potential analysis indicate that relationship-potential has a slightly greater impact than price within the low dollar responsibility group (βprice: 2.342; βrelation: 2.375), while price has a greater impact than relationship-potential in the high dollar responsibility group (βprice: 1.183; βrelation: 0.949).

Figures 24 & 25 show the effects of small and large company size on price/adaptability and price/relationship-potential trade-offs. The mean-split on the seven-point categorical scale was between the fifth and six classes, thus 41.8% of the respondents who were in categories 1-5 (≤999 employees) were placed in the 'Small Company' group, while the remaining 58.2% of respondents who were in categories 6-7 (≥1,000 employees) were placed in the 'Large Company' group. The regression beta-coefficients and the trade-off analysis indicate that price is more important than adaptability among smaller purchasing organizations (βprice: 4.096; βadapt: 2.617), while adaptability plays a greater role than price in proposal selection within large purchasing organizations (βprice: 1.915; βadapt: 2.649). These same group differences do not exist within the price/relationship-potential trade-off analysis. Price played a greater role that relationship-potential in the proposal selection within both small (βprice: 2.212; βrelation: 0.998) and large (βprice: 1.628; βrelation: 1.008) purchasing organizations.

Figures 26 & 27 show the effects of high and low company sales on price/adaptability and price/relationship-potential trade-offs. The mean-split on the six-point categorical scale was between the third and fourth classes, thus 44.1% of the respondents who were in categories 1-3 (≤$100 million) were placed in the 'Low Company Sales' group, while the remaining 55.9% of respondents who were in categories 4-6 (≥$100.1 million) were placed in the 'High Company Sales' group. The beta-coefficients within the price/adaptability comparison set indicate that while adaptability has a greater impact than price on the proposal selection within the low company sales group (βprice: 2.955; βadapt: 2.296), adaptability and price are equally weighted in the high company sales group (βprice: 2.418; βadapt: 2.418). Within the price/relationship-potential comparison set, the beta-coefficients indicate that price has a greater impact than relationship-potential on the proposal selection within both the low company sales group (βprice: 1.489; βrelation: 0.583) and high company sales group (βprice: 2.202; βrelation: 1.434). Comparing these results across trade-off sets, respondents within low company sales appear to be willing to pay more for adaptability than relationship-potential.

Figures 28 & 29 show the effects of the respondent's role played within the buying center on the price/adaptability and price/relationship-potential trade-offs. Response categories which provided an adequate number of unique responses per buying center role were incorporated in this analysis, resulting in the inclusion of the initiator, influencer and user categories within the price/adaptability comparison set, and the inclusion of initiator, influencer, decider and user within the price/relationship-potential comparison set. Based on the beta-coefficients produced in the logistic regression equations, neither adaptability nor relationship-potential are more important than price within any of the buying center role groups.

5. CONCLUSION

Together, the qualitative and quantitative findings provide a robust representation of the sales failure phenomenon. The depth interviews across 35 purchasing organizations provide insight into how large business-to-business purchasing decisions are made. The contexts of the sales proposal selection contained individual (e.g., salesperson), organizational (e.g., sales organization) and external attributes (e.g., competitor proposal). These overarching factors were depicted throughout the various constructs and subconstructs of non-adaptive sales proposals, non-relational sales proposals and excessive customer-perceived sacrifices. The outcome of the qualitative findings resulted in thematic dimensions, represented though exemplar quotations, and a conceptual model of the sales failure process. These findings were realized through the organizational purchasing decision makers' perspective.

The qualitative research efforts were followed by an experimental data collection which focused on manipulating the uncovered dimensions of failed sales proposals in order to understand the significance of their contributing role in the proposal selection. The experimental design manipulated the price (a representation of TCO), adaptability and relationship-potential of a given sales proposal at high and low levels. Findings from this 2x2x2 experiment provided answers to a number of research questions and hypotheses outlined in the early stages of this project, including: (RQ1) Are the derived sales outcome drivers statistically significant, (RQ2) Which driver has the strongest effect on the sales proposal selection, (RQ3) What is the trade-off relationship between adaptability, relational offering and sacrifices in the buyer's decision choice, and (RQ4) Are there significant differences among the importance of price, adaptability and relationship-potential when comparing the buyer's decision to select versus not select a sales proposal? The following section will provide detailed interpretation of the findings produced through this experimental design.

5.1. Interpretation of Quantitative Results

The experimental design was successful in answering each of the proposed hypotheses and research questions. H1-H3, as well as RQ1, were all answered through the binary logistic regression, which indicated that all of the derived sales outcome drivers were significantly related to the proposal selection. RQ2 was also answered through the binary logistic regression, as well as the mean difference tests, which indicated that adaptability had the strongest effect on the proposal selection process. RQ3 was answered through the indifference curve analysis, which showed the various trade-off relationships between price-adaptability and price-relationship across numerous respondent groups. H4a-c and RQ4 were answered through the paired-samples t-test, which indicated that there were significant differences among the importance of price, adaptability and relationship-potential when evaluating the organizational buyer's decision to select versus not select a sales proposal.

5.1.1. Winning vs. Losing Sales Proposals

The result of the respondent's perceived levels of importance on price, adaptability and relationship-potential across the evaluation of the winning sales proposals (sales performance) versus losing sales proposals (sales failure) indicated that significant differences existed. Respondents' indicated that the dimensions of price, adaptability and relationship-potential were all significantly more important in regard to their decision to select a given proposal, compared to their decision to not select a given proposal. This in turn means that these sales proposal dimensions are not pure inverses of one another with regard to these independent decisions. Stated another way, if the respondents did perceive the sales proposal dimensions as equal contributors to their decision to select a sales proposal (sales performance) versus not select a sales proposal (sales failure), then no significant differences would exist between the mean importance evaluations. The significant differences which did exist between the mean importance evaluations of price, adaptability and relationship-potential across sales performance and sales success support H4a-H4c.

These findings are important because in the existing sales literature, implied assumptions which view sales failure as the pure inverse of sales performance exist. Researchers have assumed that the characteristics which are perceived as important to an organizational purchaser's decision to select a proposal would be equally important in the individuals decision not to select a sales proposal if they were at opposed levels. Findings from this study indicate that this assumption is not correct and imply that researchers need to differentiate their dependent variable and analysis based on the research goals. Separate data collection efforts or questions need to be administered in order to accurately assess the determining factors in a buyer's evaluation of performance versus failure.

5.1.2. Importance of Price, Adaptability and Relationship-Potential

Despite differences between the evaluation criteria of sales performance versus sales failure, there were minimal differences in the perceived order of importance in which price, adaptability and relationship-potential played in the organizational purchaser's decision to select versus not select a sales proposal. When reflecting on the importance which the manipulated variables played in the decision maker's selection, adaptability was more important than price and relationship-potential in the decision to select, as well as not select, a given sales proposal. The mean importance evaluation of relationship-potential was greater than price for the sales performance outcome, while price was greater than relationship-potential for the sales failure outcome, however these differences were non-significant and thus the results are difficult to interpret. Results indicate that adaptability (or a lack thereof) of the salesperson and/or sales organization will play the largest role in the outcome of the sales proposal.

5.1.3. Binary Logistic Regression

The order of importance in which the independent variables played in the proposal selection dependent variable was reiterated to a large degree when interpreting the beta-coefficients provided in the binary logistic regression. As indicated by the beta-weights, adaptability was the strongest predictor of the proposal selection amongst the experimental variables (β=-3.077), followed by price (β=-2.788) and relationship-potential (β=-1.437). The results confirm that the three primary themes outlined in the qualitative findings, adaptability, relationship-potential and cost, do have a significant impact on the organizational buyer's sales proposal selection.

An additional finding provided by the binary logistic regression includes the probability of selecting a sales proposal based on the levels of the independent variables. When the proposals were paired against a moderate sales proposal, the calculated probabilities provided the following order of selection likelihood: (1) Low Price, High Adaptability, High Relationship-Potential [95.55%], (2) Low Price, High Adaptability, Low Relationship-Potential [83.62%], (3) High Price, High Adaptability, High Relationship-Potential [56.93%], (4) Low Price, Low Adaptability, High Relationship-Potential 49.77%], (5) High Price, High Adaptability, Low Relationship-Potential [23.90%], (6) Low Price, Low Adaptability, Low Relationship-Potential [19.06%], (7) High Price, Low Adaptability, High Relationship-Potential [5.75%], and (8) High Price, Low Adaptability, Low Relationship-Potential [1.43%],

5.1.4. Indifference Curves

With regard to the price/adaptability trade-off relationship, a comparison was developed using the calculated slope (βadapt / βprice), indicating a baseline slope of 1.10. A comparison indicates that the following groups indicated a flatter slope, meaning less pricing power for adaptability: low/high work experience (1.06; 1.10), low/high brand sensitivity (1.06; 0.93), high propensity to trust (0.89), high purchasing decision involvement (0.58), low purchasing dollar responsibility (0.78), small company size (0.88), high company sales (1.00) and initiator/influencer/user (0.58; 0.64; 0.88). Conversely, the following groups indicated a steeper slope, meaning greater pricing power for adaptability: low propensity to trust (1.44), low purchasing decision involvement (1.58), high purchasing dollar responsibility (1.42), large company size (1.38) and low company sales (1.15).

With regard to the price/relationship-potential trade-off relationship, a comparison was also developed using the calculated slope (βrelationship-potential / βprice), indicating a baseline slope of 0.55. A comparison indicates that the following groups indicated a flatter slop, meaning less pricing power for relationship-potential: low work experience (0.34), high propensity to trust (0.22), high decision involvement (0.48), small company size (0.45), low company sales (0.39) and influencer/user (0.54; 0.51). Conversely, the following groups indicated a steeper slope, meaning greater pricing power for relationship-potential: high work experience (0.74), low/high brand sensitivity (1.14; 0.98), low propensity to trust (0.97), low purchasing decision involvement (1.74), low/high purchasing dollar responsibility (1.01; 0.80), large company sales (0.62), high company sales (0.65) and initiator/decider (0.92; 0.76).

Per the baseline model, adaptability had a stronger trade-off effect than relationship-potential on the price the buyer was willing to pay for a sales proposal. This relationship however was not standardized across all respondent characteristics. Results indicate that respondent profile characteristics had an effect on the pricing power of adaptability and relationship-potential. This effect was most notably present when comparing the high and low brand sensitivity groups. Within both the high and low brand sensitivity groups, relationship-potential gained a higher degree of pricing power when compared to adaptability. This effect also occurred within the low purchasing decision involvement group and the low purchasing dollar responsibility group.

Results also show that within the propensity to trust group, respondents who had a low propensity to trust indicated adaptability and relationship-potential were more important to their comparative baseline slopes, whereas high propensity to trust respondents indicated that these trade-offs were less impactful compared to their baseline slopes. The same results occurred within the low/high purchasing decision involvement group. Conversely, results indicate that across respondents who worked for a small versus a large company, adaptability and relationship-potential had a weaker trade-off effect within small companies, yet a stronger trade-off effect within large companies. Finally, a crossing effect occurred within the company sales respondent profile, indicating that while adaptability had a stronger pricing effect within the low company sales group and a weaker pricing effect within the high company sales group, relationship-potential had a weaker pricing effect within the low company sales group and a stronger pricing effect within the high company sales group. Together, the derived slope comparisons demonstrate group-difference implications and the relative pricing power of adaptability and relationship-potential across respondent profiles.

5.2. Research Contributions

Failure is an enduring aspect of the sales profession, however the ability to reduce factors which contribute to sales failures, and thus create a more effective and efficient selling process, is highly desired by sales organizations. The results of this analysis are enlightening in regard to the drivers of sales failures and how organizational buyers make decisions not to select a given sales proposal. The three primary themes identified in this analysis include a lack of sales adaptability, a lack of relationship-potential and excessive total cost of ownership. Further, the research indicates the primary components of this decision follow the value framework, in which the buyer evaluates the relative adaptability and relationship-potential versus the perceived total cost of ownership. The ultimate purchasing decision is also a function of this value framework relative to the value offered by the competitor's proposal. The resulting comprehensive sales failure model expands across attributes at the individual (i.e., salesperson), organizational (i.e., sales organization) and environmental (i.e., competitors) levels. Each of these levels contributes to the decision outcome.

This research utilized a multi-method approach to collect data form the buyer's side of the dyadic transaction in order to minimize the potential attribution biases which potentially occurs when collecting data from sales organizations. This research approach allowed the researchers to understand failed sales efforts from the organizational perspective of those who determine the perceived value of the sales proposition and ultimately make the purchasing decision.

Within the literature review, the need to develop the research focus on sales failures was well established. Through a comprehensive review and comparison of the sales performance and sales failure literature streams, a categorization of 12 types of sales failures was developed. The literature review supported a need to conduct research on sales failures, a comparison of drivers of sales failure versus sales performance, and provided an a priori coding scheme with which to frame the naturalistic inquiry.

The qualitative findings utilized a grounded approach to understanding the emerging topic of sales failure, as well as provided direction for the experimental research design. Capturing in-depth data from multiple decision makers, post sales failure and within business-to-business key account service sales proposals, offers a number of valued contributions to the marketing literature. The exploratory research aided in establishing the sales failure concept as a unique phenomenon of research interest, as well as advances the ability to understand how sales failures occur.

The outcome of the qualitative research efforts was a conceptual model which outlines the thematic dimensions of the sales failure process. This model follows the value framework and depicts specific drivers of the sales failures' lack of benefits and excessive sacrifices. Additionally, the conceptual model posits a potential moderating effect of the sales failure classification, which appears to impact whether the decision maker attributes the sales failure to the salesperson or to the sales organization. As indicated by the pattern of responses, among the sales failure classifications in which the purchasing organization did not have a working history with the sales organization, the lack of proposal benefits were attributed to the salesperson. Comparatively, purchasing organizations which did have an existing working relationship with the sales organization tended to attribute the lack of proposal benefits at the sales organization level. Finally, the qualitative findings uncover thematic dimensions which need to be confirmed via statistical methods to enhance generalizability. The thematic dimensions were also structured into new definitions of 'Non-Adaptive Sales Proposal,' 'Non-Relational Sales Proposal,' and 'Excessive Cost Sales Proposal.'

The experimental research efforts add a confirmatory dimension to the qualitative findings which indicate that the themes identified in the naturalistic analysis do have a significant contribution to the sales proposal selection. This research thus adds a degree of generalization to the research findings. The quantitative results indicate that among the analyzed variables, sales adaptability has the greatest impact on the proposal outcome. However, variations of this impact are discussed via the calculated indifference curves. The results provide a unique take-away which shows the relative trade-off effects between price and adaptability, and price and relationship-potential. The results show the price elasticity of adaptability and relationship-potential. Adaptability was found to have a greater impact on a buyers' willingness to pay a higher price. The findings further indicate what sales proposal attributes given buyer segments would be willing to incur at higher cost to receive.

5.3. Managerial Implications

From a managerial perspective, results from the current research study indicate that an investment in failure deterrence training can provide a competitive advantage when competing against alternative sales proposals. Drivers and themes identified within this research should aid the failure deterrence training process, indicating that avoiding these thematic dimensions is the first step to improving sales outcomes and developing long-term success. Results indicate that improvement in sales adaptability will have the greatest impact on minimizing sales failures and have the greatest impact on a sellers’ ability to receive a higher price for their services. Results aid the ability to correctly attribute the causes of failed sales attempts, allowing sales managers and salespeople to reduce sales failures and win business more often.

The results analyze the organizational purchasers’ perspective on how sales proposal selection decisions are made. With regard to the qualitative interviews, these themes specifically focus on what caused the decision makers’ to not select a referenced sales proposal. Implications regarding both minimizing sales failures and customer turnover should improve organizational profits and sales force performance. Account retention can be particularly important during times of economic recession. The findings offer insights on customer retention while maintaining pricing power.

Implementing failure deterrence into the best practices training within sales organizations can result in improved customer satisfaction and improved salesperson satisfaction. Conducting failure analysis, such as the interviews conducted in this research, also sends a signal to organizational buyers which may in itself have a positive impact on the perceived trustworthiness and relationship-orientation of the salesperson or sales organization. This opportunity to allow the customer or prospect to voice their opinion and contribute to the conversation may add to the long-term potential of the buyer-seller relationship and identify growth opportunities. Overall, implementing sales failure deterrence will enable salespeople and sales managers alike to better manage the customer's perceptions of failure attribution and control.

From a marketing strategy perspective, while the adaptability and relationship-potential factors were manipulated within the experimental design, if organizations can calculate the cost of these procedures to their specific sales proposal process, then specific decisions regarding the maximum value received through the cost-benefit outcome of adjusting the price versus adaptability or relationship-potential can have enormous monetary benefits. This type of analysis would facilitate the sales proposal development process.

Results from this research allow sales managers to improve their strategy, training and coaching of sales personnel. Findings show specific drivers of improving the value based selling process, addressing strategic needs of sales prospects and the ability to foster partnering relationships. Findings can be segmented into areas which are directly under the control of the sales organization, thus allowing for direct implementation of improvement procedures, as well as areas in which competitors should be monitored in order to effectively plan and initiate targeted sales strategies.

5.4. Limitations and Future Research

Four primary areas of improvement could be added to future research in order to significantly advance the existing findings. First, while this research is novel in its conceptualization and data collection, the data is not dyadic and thus may be missing part of the sales failure determinants. Second, while the experimental data collection is effective in confirming the significance of the overarching themes identified in the qualitative analysis, a number of specific attributes and contexts of the sales proposal were not captured within this experimental effort. A survey which measures a more complete picture of the contextual factors present during an actual organizational purchasing process would be beneficial. This survey should also extend beyond the specific contexts of key account service proposals by also collecting data within other contexts (e.g., products). Next, while statistical procedures were adequately followed, the sample size is limiting in size and breadth. Finally, data collection efforts within the research were purely focused on the concept of single sales failures, where as a longitudinal study may be able to provide an extended perspective regarding what drives repeated sales failure.

This study should be viewed as a gateway into numerous research topics. Efforts are underway to launch a survey designed to empirically test the emergent conceptual model and provide a greater degree of generalization to the research findings. Goals of this study would be to triangulate the research findings, while further determining the comparative strength of the variables which contribute to sales failure versus performance. Additional efforts are also underway to extend this research into the a priori sales failure concept, in which the preventative nature of maintaining existing relationships and avoiding sales failure drivers within existing contracts. Further, based on findings which demonstrate that sales failure should not be on the same continuum as sales performance, scale development procedures building off of the existing qualitative themes is needed in order to create adaptability, relationship-potential, and TCO measures specific to sales failures. Following scale development procedures, the following scales developed out of the qualitative findings, which are outlined in Tables 25, 26 and 27 should be validated in order to further advance the sales failure research stream.

Table 24
Failed Adaptability Sales Proposal

A Lack of Understanding	Q1	Salesperson (sales firm) did not understand my (our firm's) needs.
	Q2	Salesperson (sales firm) incorrectly interpreted my (our firm's) proposal requests.
A Lack of Flexible Capabilities	Q3	Salesperson's (sales firm's) message (offering) was not tailored to my (our firm's) business.
	Q4	Salesperson (sales firm) was unwilling to create a new solution for my (our firm's) business.
A Lack of Perceived Future Adaptability	Q5	Salesperson (sales firm) was too focused on the past.
	Q6	Salesperson (sales firm) did not demonstrate ability to be adaptive in the future.
A Lack of a Willing Adaptive Attitude	Q7	Salesperson (sales firm) told me (our firm) what I (we) needed, rather than asking me (our firm) what I (we) needed.
	Q8	Salesperson (sales firm) was unresponsive to my (my firm's) business needs.
	Q9	Salesperson (sales firm) was arrogant when it came to recognizing my (my firm's) needs.
	Q10	Salesperson (sales firm) was more concerned with making a sale than developing a solution.

Table 25
Failed Relationship-Potential Sales Proposal

A Lack of a Partnership Approach	Q1	Salesperson (sales firm) failed to develop trust.
	Q2	Salesperson (sales firm) was not perceived to be committed to my (our) firm.
	Q3	Salesperson (sales firm) was not willing to share valued market information.
	Q4	Salesperson (sales firm) was not willing to invest in our partnership.
An Unsatisfactory Relationship	Q5	Salesperson (sales firm) broke my (our) trust.
	Q6	Salesperson (sales firm) did not meet my (our) performance expectations
	Q7	Salesperson (sales firm) did not portray future relationship potential.
No Existing Relationship	Q8	Too much risk was involved to commit to this salesperson (sales firm).
	Q9	Salesperson (sales firm) was unable to develop mutual benefits beyond our current processes.

Table 26
Failed TCO Sales Proposal

Greater Costs	Q1	Salesperson's (sales firm's) proposal was high priced.
	Q2	Salesperson's (sales firm's) proposal contained high total cost of ownership.
	Q3	Salesperson (sales firm) did not offer cost savings.
A Lack of Cost Justification	Q4	Based on the perceived benefits, the salesperson's (sales firm's) proposal was not worth the cost.
	Q5	Salesperson (sales firm) failed to justify the proposed costs.
An Inferior Cost Comparison	Q6	Compared to the alternatives, the salesperson's (sales firm's) proposed cost was unfavorable.
	Q7	Compared to my (our) expectations, the salesperson's (sales firm's) proposed cost was unfavorable.
Negative Cost Associations	Q8	Salesperson (sales firm) could not customize the (their) cost structure.
	Q9	Based on the proposed costs, the salesperson (sales firm) was perceived to be inefficient.

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7. APPENDIX

7.1. Informed Consent Form

Georgia State University
Department of Marketing
Informed Consent

I. Purpose

I am asking for your help in a study of how people respond in business situations. I am contacting a random sample of business professionals to ask for their response to a hypothetical business scenario. The purpose of the research is to study the factors that affect decisions in a business. This is part of my dissertation studies in my doctoral program.

II. Procedures

If you decide to participate, you will be given a hypothetical business scenario to read. After reading this scenario and you feel that you can imagine yourself within this business situation, you will proceed to a questionnaire. This procedure should take about 15 minutes of your time.

III. Risks

In this study, you will not have any more risks than you would in a normal day.

IV. Benefits

Participation in this study may not benefit you personally. Overall, we hope to gain a better understanding of how people would react to a given business scenario.

V. Voluntary Participation and Withdrawal:

This survey is voluntary. You do not have to be in this study, however taking a few minutes of your time to share your experiences and opinions will help me. If you decide to be in the study and change your mind, you have the right to drop out at any time.

VI. Confidentiality

The research team will have access to the information you provide. Information may also be shared with those who make sure the study is done correctly (GSU Institutional Review Board and/or The Office for Human Protection). Your answers are confidential and will be used only in combination with others. Since all answers are anonymous, no individual’s answers can be identified.

VII. Contact Persons

If you have any questions or comments about this study, I would be happy to talk with you. My telephone number is 404-413-7687, or you can write me at GSU.Dissertation@gmail.com. If you have questions or concerns about your rights as a participant in this study, you can contact Susan Vogtner in the Office of Research Integrity at 404-413-3513 or svogtner1@gsu.edu.

VIII. Copy of Consent Form to Subject:

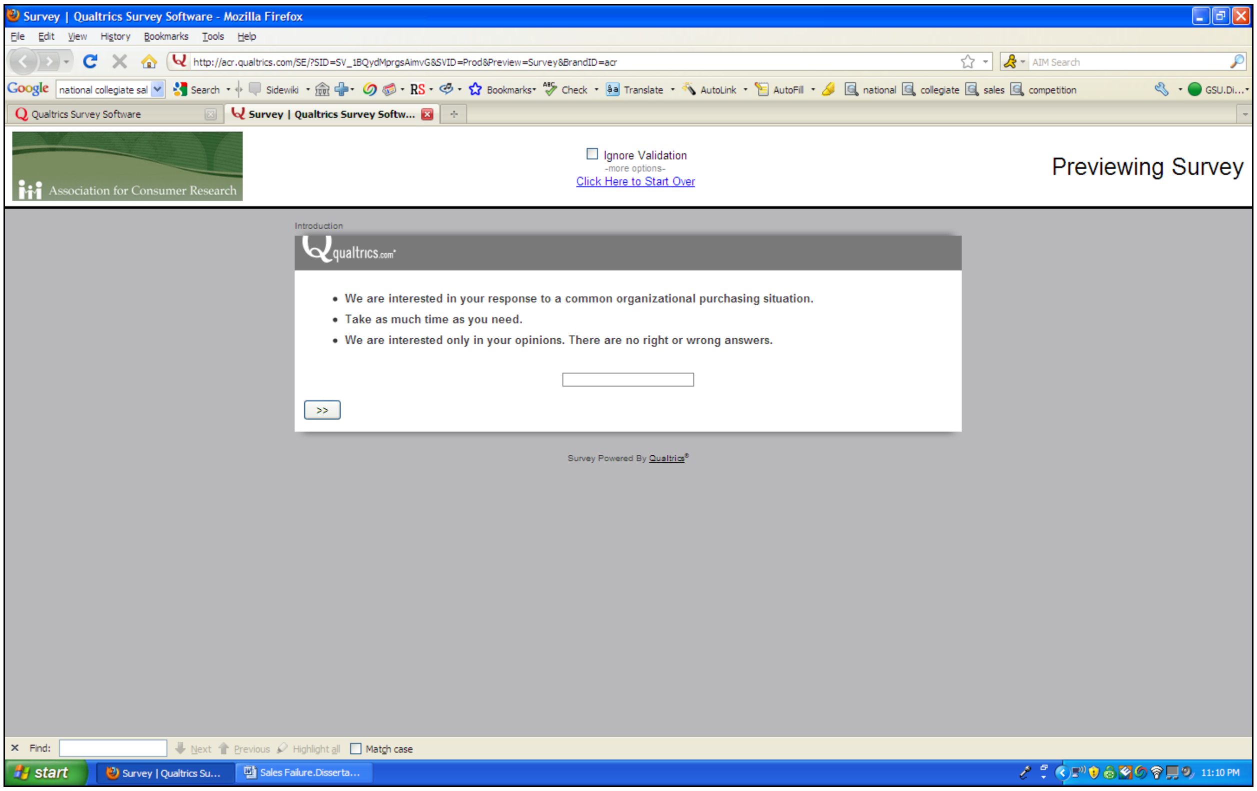
Please print this consent form for your personal files. If you are willing to volunteer for this research, please proceed. By continuing on with this research project you are granting your informed consent and acknowledging the statements outlined in this consent form.

Thank you very much for helping with this important study.

Regards,

Scott B. Friend
Doctoral Student

7.2. Sample Survey – Low Price, Low Adaptability, Low Relationship-Potential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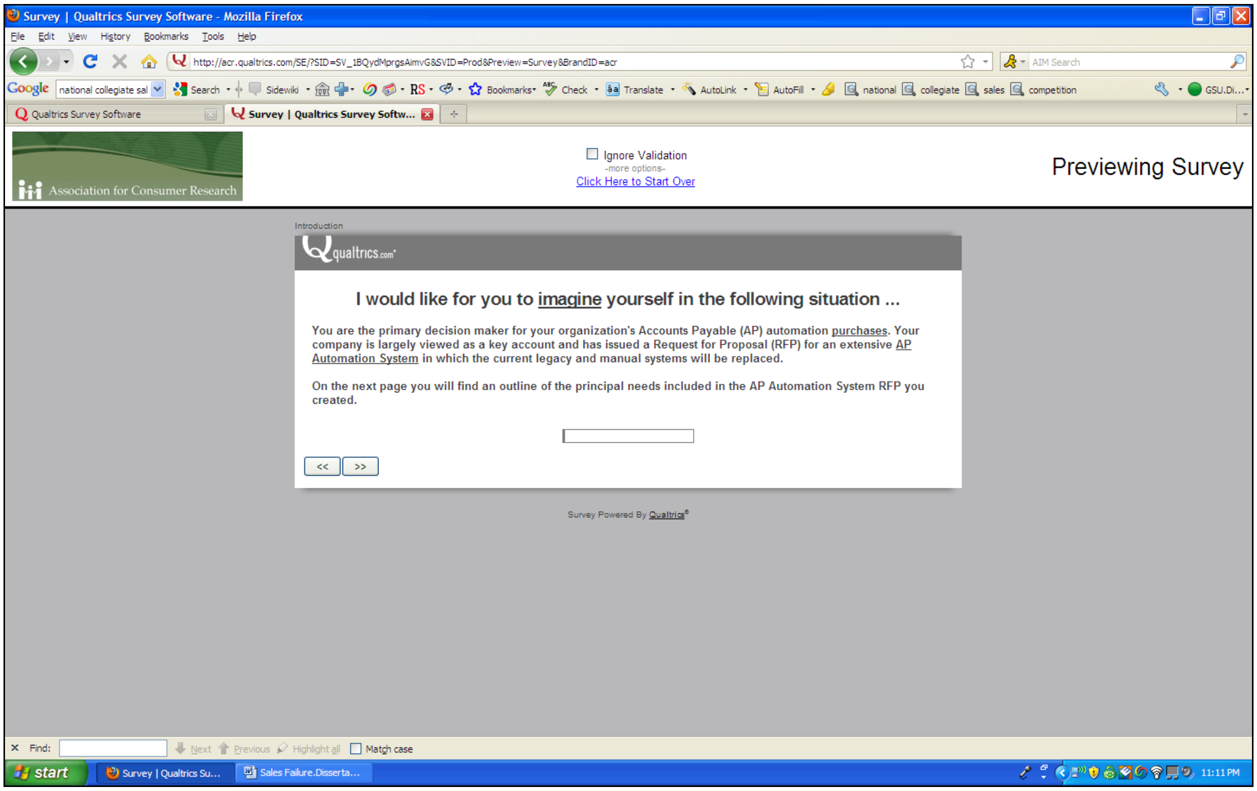
- We are interested in your response to a common organizational purchasing situation.
- Take as much time as you need.
- We are interested only in your opinions. There are no right or wrong answers.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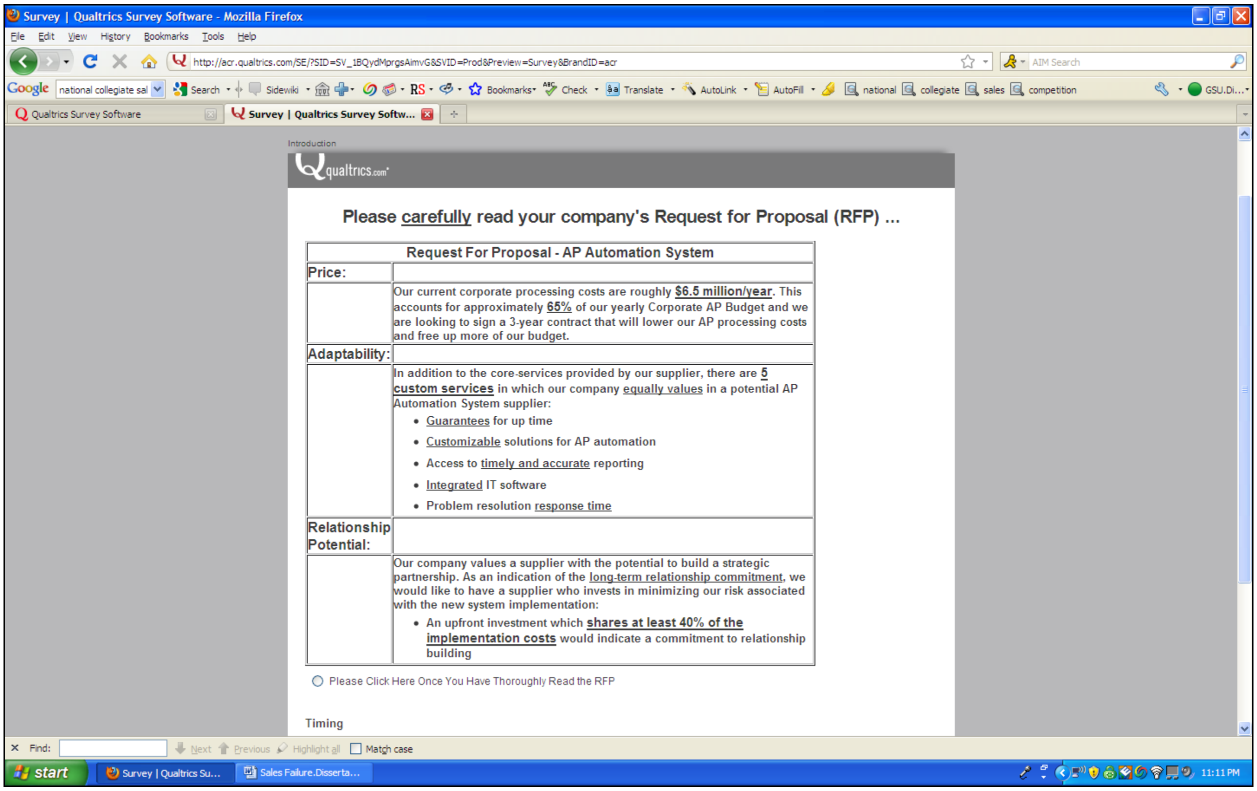
I would like for you to imagine yourself in the following situation ...

You are the primary decision maker for your organization's Accounts Payable (AP) automation purchases. Your company is largely viewed as a key account and has issued a Request for Proposal (RFP) for an extensive AP Automation System in which the current legacy and manual systems will be replaced.

On the next page you will find an outline of the principal needs included in the AP Automation System RFP you created.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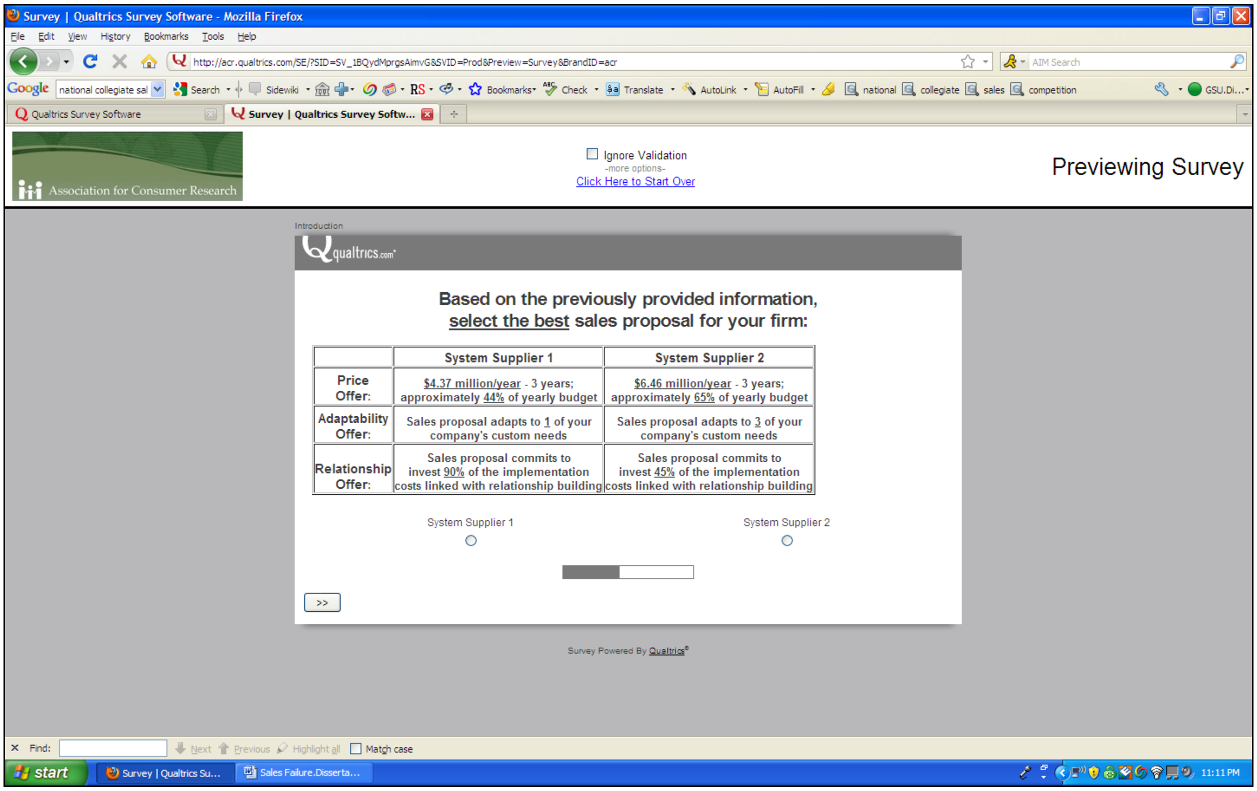
Please carefully read your company's Request for Proposal (RFP) ...

Request For Proposal - AP Automation System	
Price:	
	Our current corporate processing costs are roughly **$6.5 million/year**. This accounts for approximately **65%** of our yearly Corporate AP Budget and we are looking to sign a 3-year contract that will lower our AP processing costs and free up more of our budget.
Adaptability:	
	In addition to the core-services provided by our supplier, there are **5 custom services** in which our company equally values in a potential AP Automation System supplier: • Guarantees for up time • Customizable solutions for AP automation • Access to timely and accurate reporting • Integrated IT software • Problem resolution response time
Relationship Potential:	
	Our company values a supplier with the potential to build a strategic partnership. As an indication of the long-term relationship commitment, we would like to have a supplier who invests in minimizing our risk associated with the new system implementation: • An upfront investment which **shares at least 40% of the implementation costs** would indicate a commitment to relationship building

○ Please Click Here Once You Have Thoroughly Read the RFP

Timing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Based on the previously provided information, select the best sales proposal for your firm:

	System Supplier 1	System Supplier 2
Price Offer:	$4.37 million/year - 3 years; approximately 44% of yearly budget	$6.46 million/year - 3 years; approximately 65% of yearly budget
Adaptability Offer:	Sales proposal adapts to 1 of your company's custom needs	Sales proposal adapts to 3 of your company's custom needs
Relationship Offer:	Sales proposal commits to invest 90% of the implementation costs linked with relationship building	Sales proposal commits to invest 45% of the implementation costs linked with relationship building

System Supplier 1	System Supplier 2
○	○

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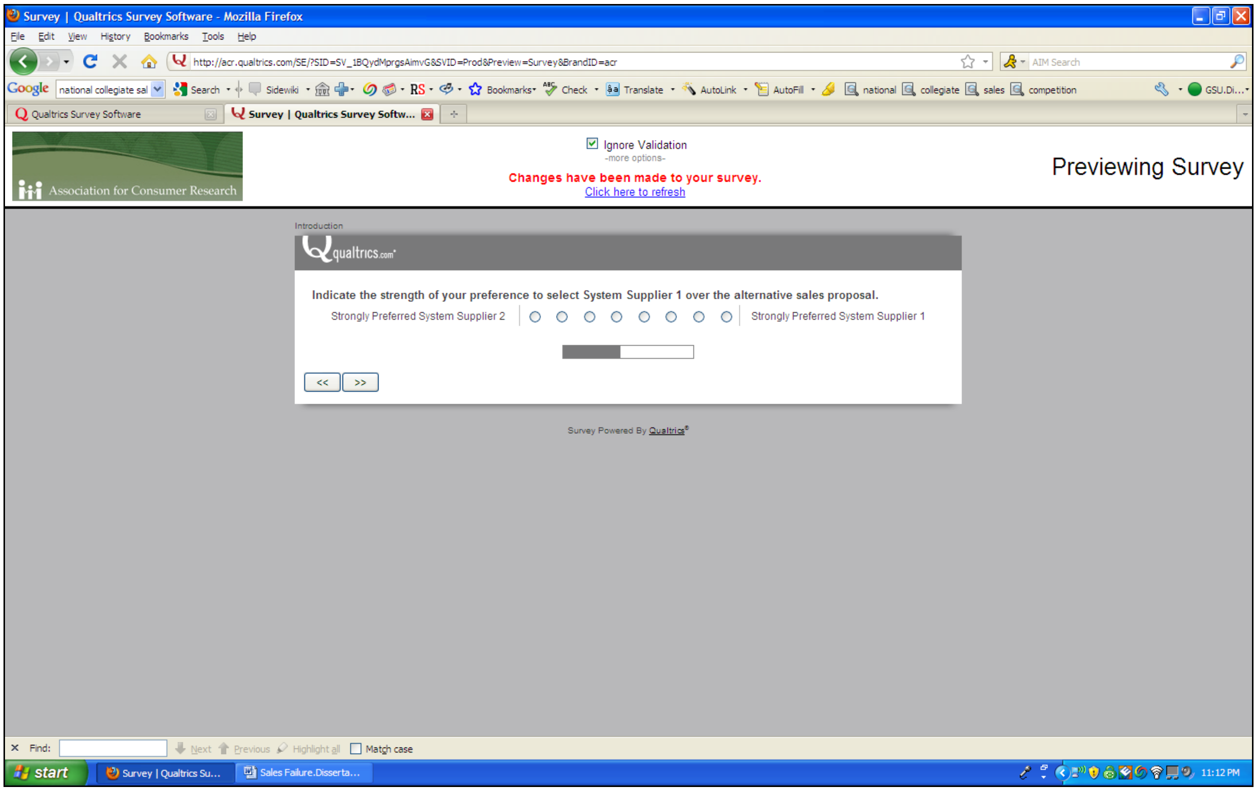
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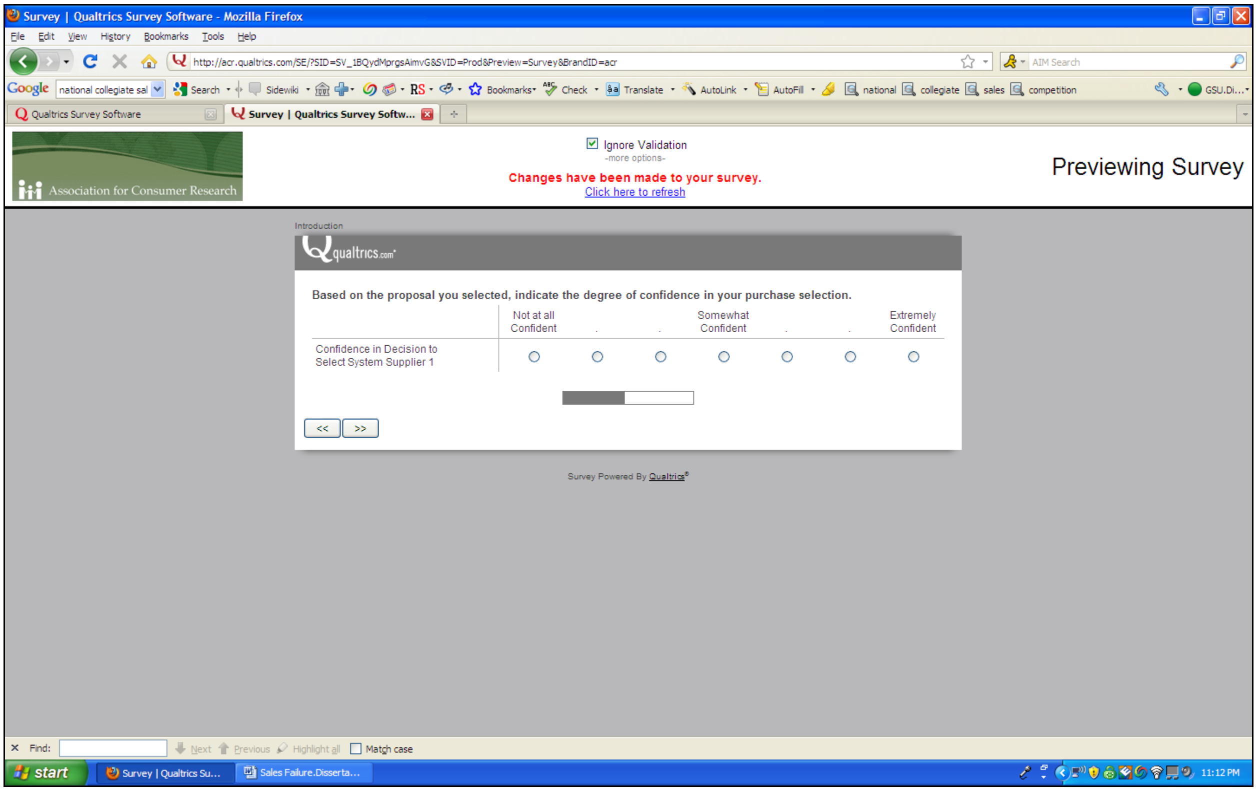
Indicate the strength of your preference to select System Supplier 1 over the alternative sales proposal.

Strongly Preferred System Supplier 2 ○ ○ ○ ○ ○ ○ ○ ○ Strongly Preferred System Supplier 1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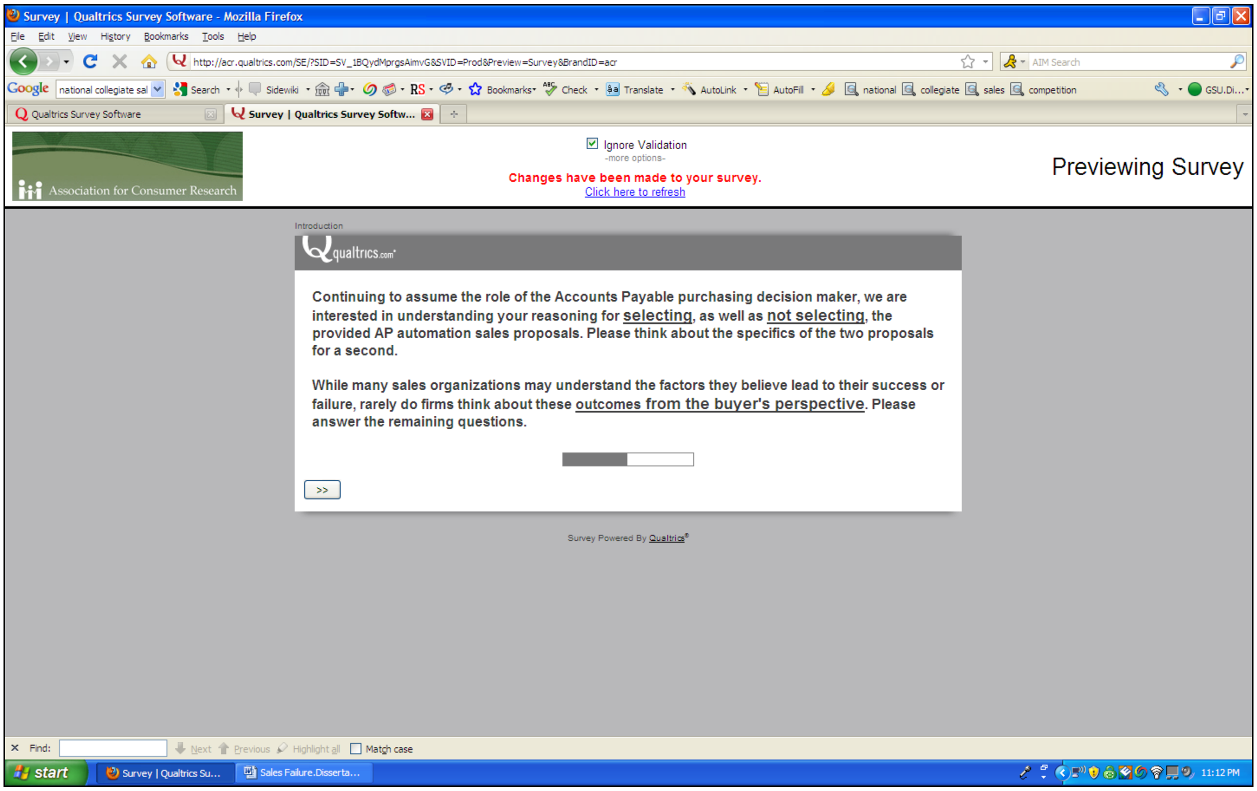
Based on the proposal you selected, indicate the degree of confidence in your purchase selection.

	Not at all Confident	.	.	Somewhat Confident	.	.	Extremely Confident
Confidence in Decision to Select System Supplier 1	○	○	○	○	○	○	○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Introduction

Continuing to assume the role of the Accounts Payable purchasing decision maker, we are interested in understanding your reasoning for selecting, as well as not selecting, the provided AP automation sales proposals. Please think about the specifics of the two proposals for a second.

While many sales organizations may understand the factors they believe lead to their success or failure, rarely do firms think about these outcomes from the buyer's perspective. Please answer the remaining questions.

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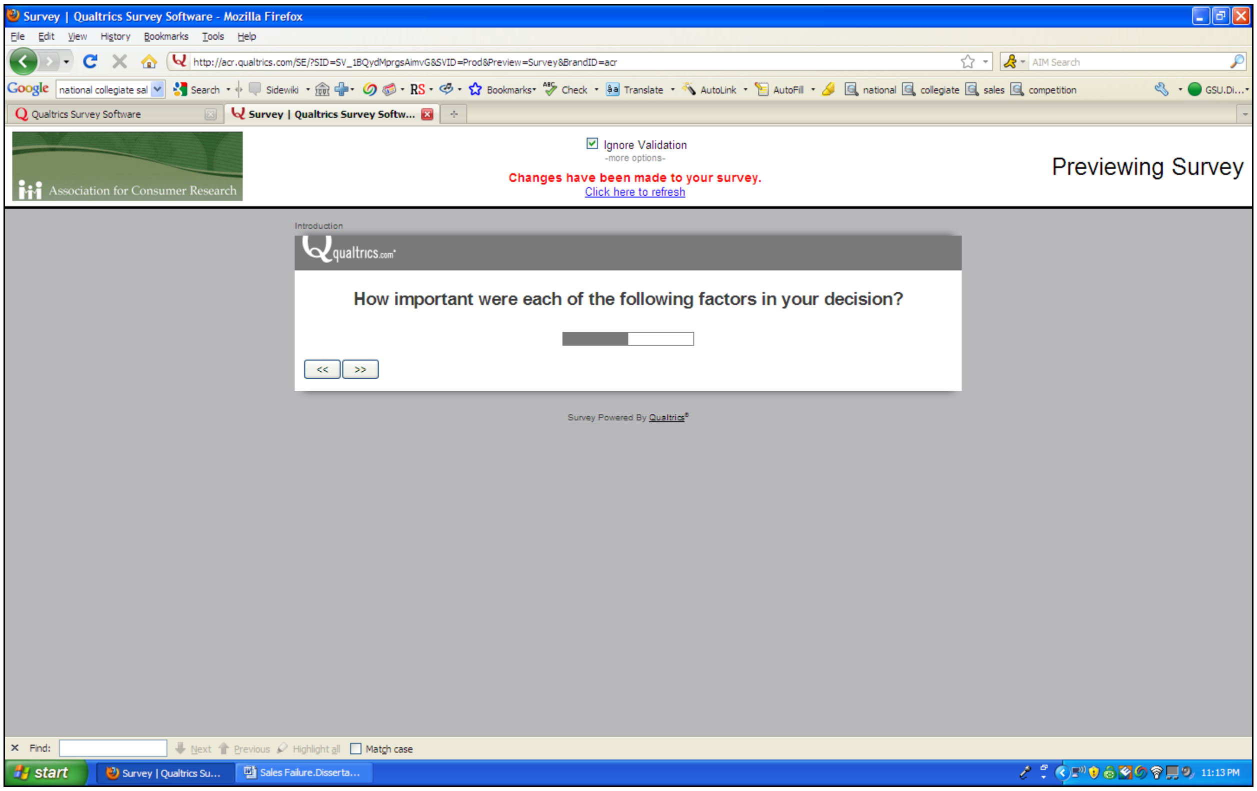
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Introduction

How important were each of the following factors in your decision?

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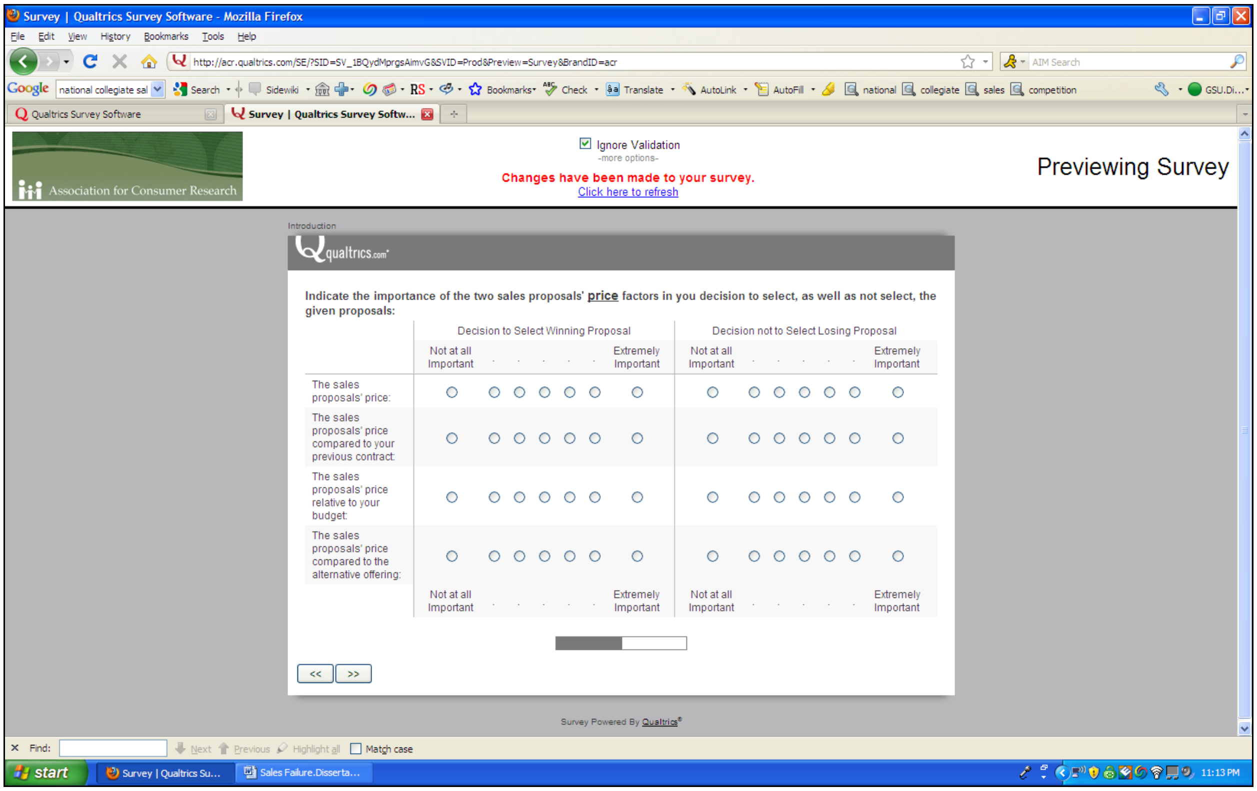
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Introduction

Indicate the importance of the two sales proposals' price factors in you decision to select, as well as not select, the given proposals:

	Decision to Select Winning Proposal							Decision not to Select Losing Proposal						
	Not at all Important	.	.	.	.	.	Extremely Important	Not at all Important	.	.	.	.	.	Extremely Important
The sales proposals' price:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' price compared to your previous contract:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' price relative to your budget:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' price compared to the alternative offering:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	Not at all Important	.	.	.	.	.	Extremely Important	Not at all Important	.	.	.	.	.	Extremely Important

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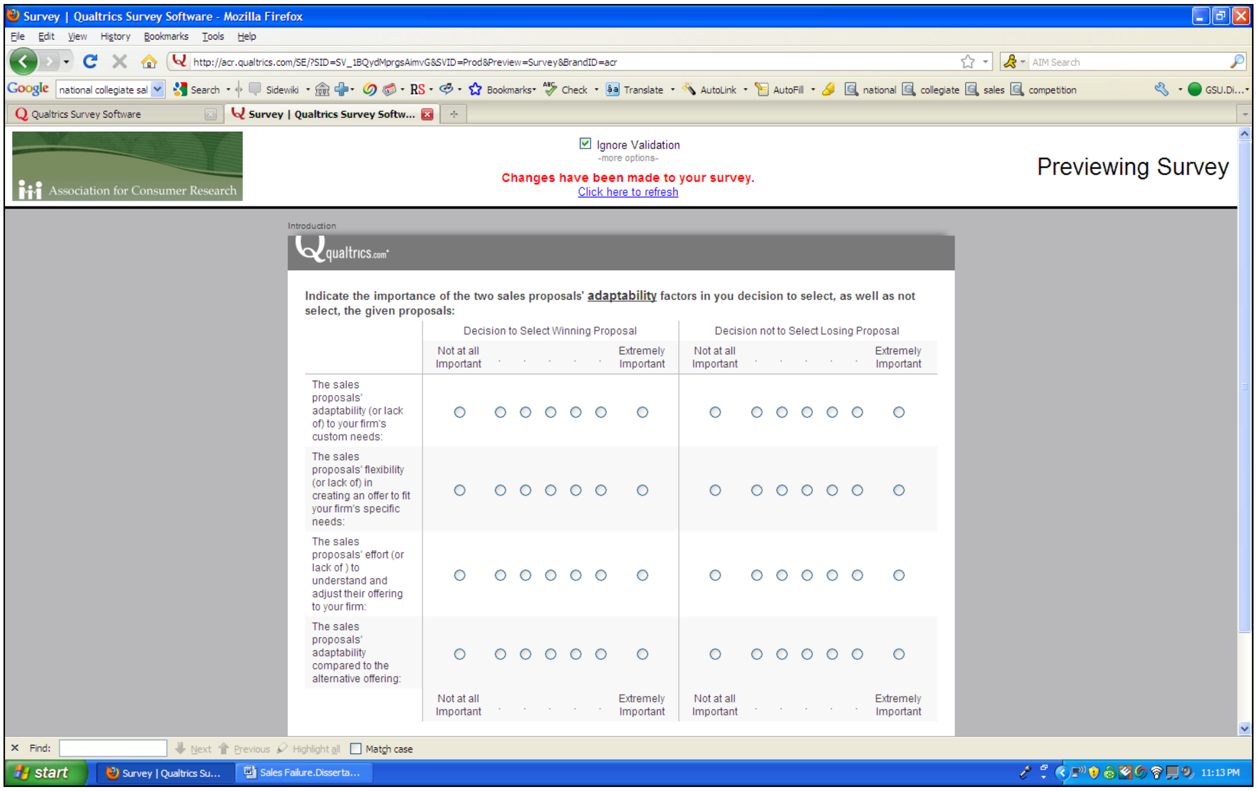
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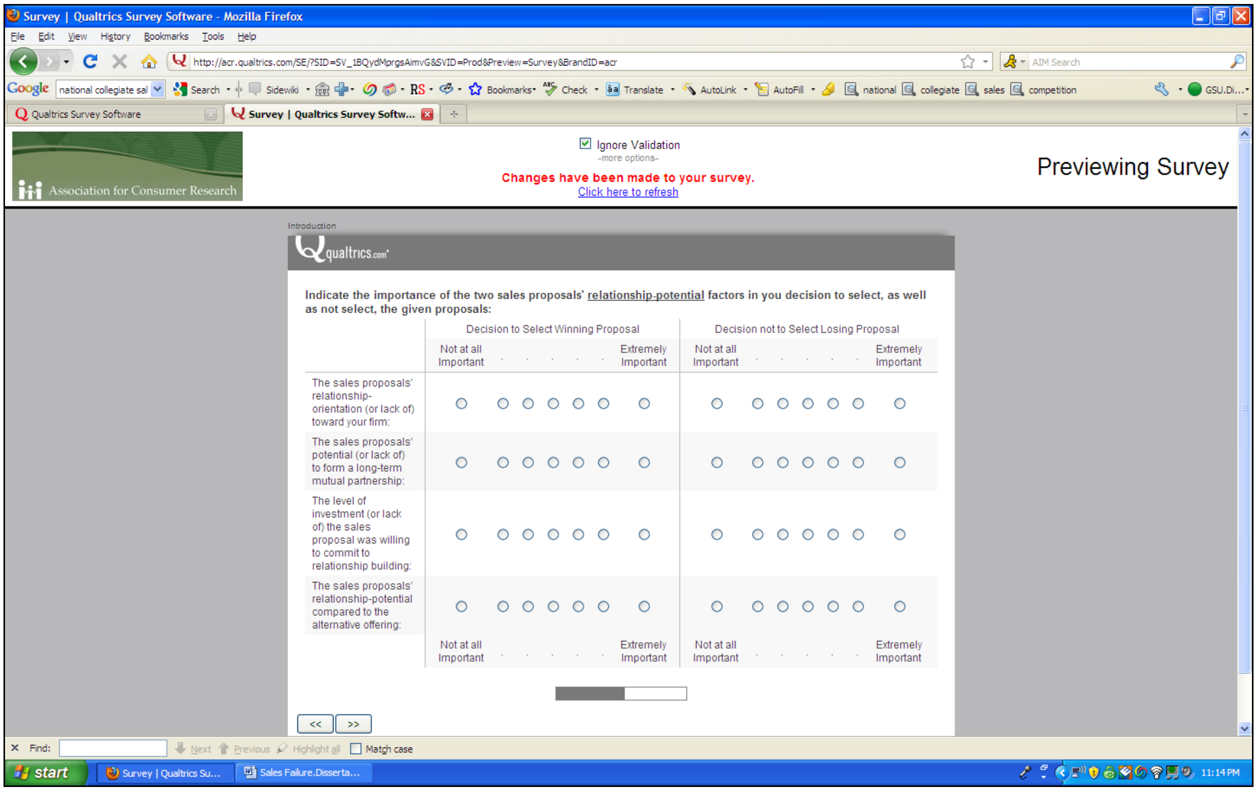
Introduction

Indicate the importance of the two sales proposals' adaptability factors in you decision to select, as well as not select, the given proposals:

	Decision to Select Winning Proposal							Decision not to Select Losing Proposal						
	Not at all Important	.	.	.	.	.	Extremely Important	Not at all Important	.	.	.	.	.	Extremely Important
The sales proposals' adaptability (or lack of) to your firm's custom needs:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' flexibility (or lack of) in creating an offer to fit your firm's specific needs:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' effort (or lack of) to understand and adjust their offering to your firm:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' adaptability compared to the alternative offering:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	Not at all Important	.	.	.	.	.	Extremely Important	Not at all Important	.	.	.	.	.	Extremely Important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Indicate the importance of the two sales proposals' relationship-potential factors in you decision to select, as well as not select, the given proposals:

	Decision to Select Winning Proposal							Decision not to Select Losing Proposal						
	Not at all Important	·	·	·	·	·	Extremely Important	Not at all Important	·	·	·	·	·	Extremely Important
The sales proposals' relationship-orientation (or lack of) toward your firm:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' potential (or lack of) to form a long-term mutual partnership:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The level of investment (or lack of) the sales proposal was willing to commit to relationship building:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
The sales proposals' relationship-potential compared to the alternative offering:	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	Not at all Important	·	·	·	·	·	Extremely Important	Not at all Important	·	·	·	·	·	Extremely Important

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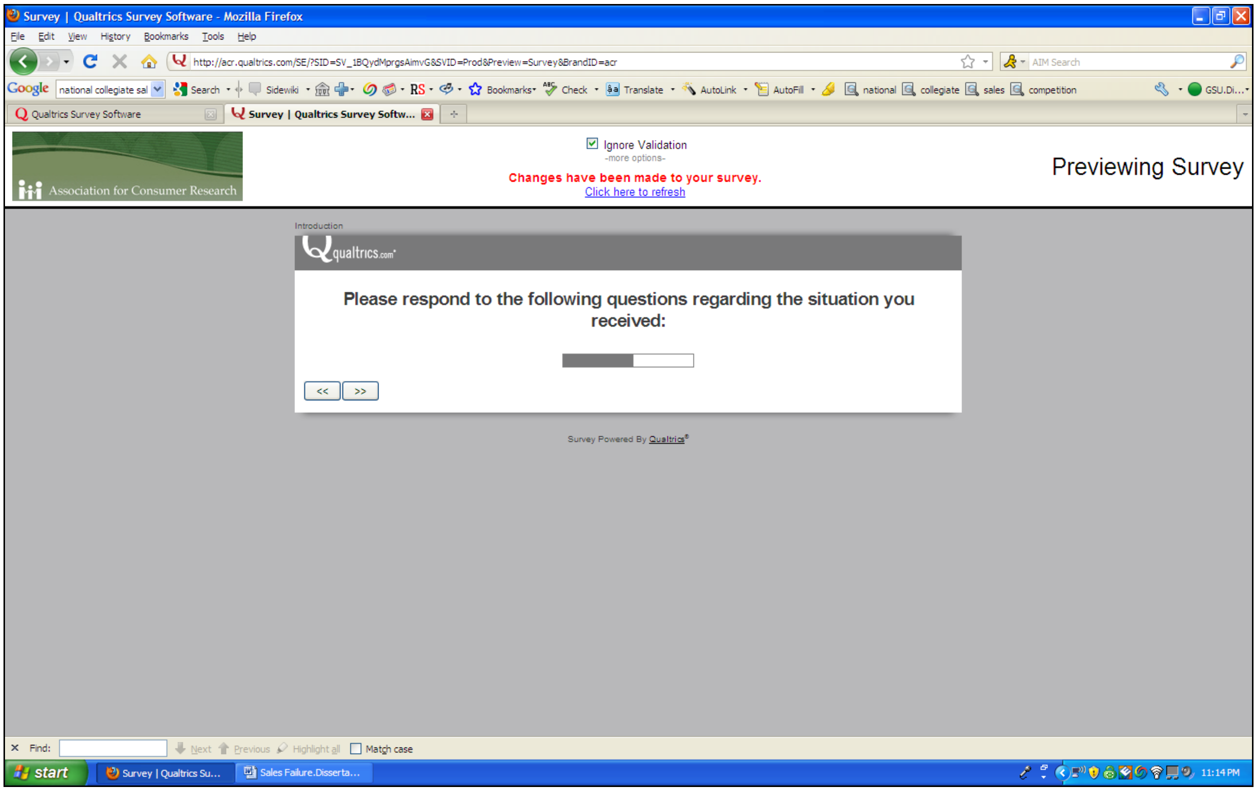
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Please respond to the following questions regarding the situation you received:

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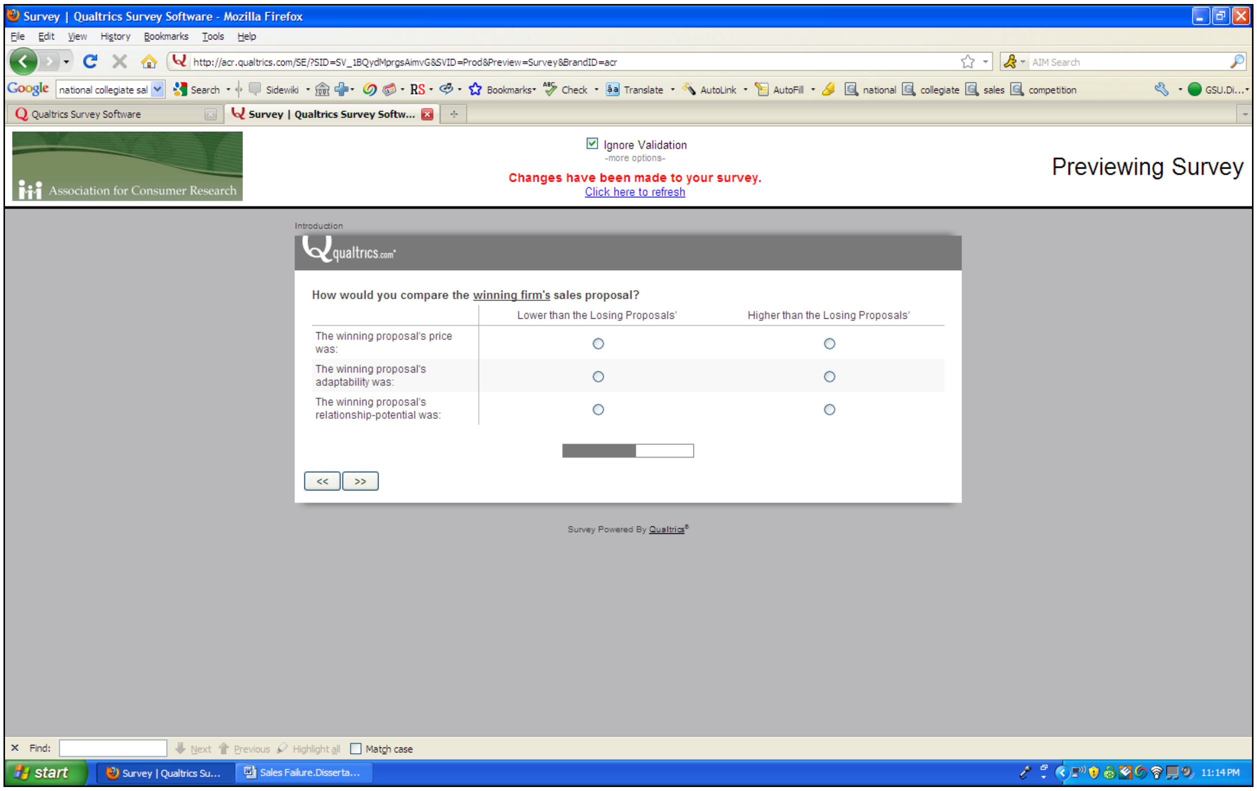
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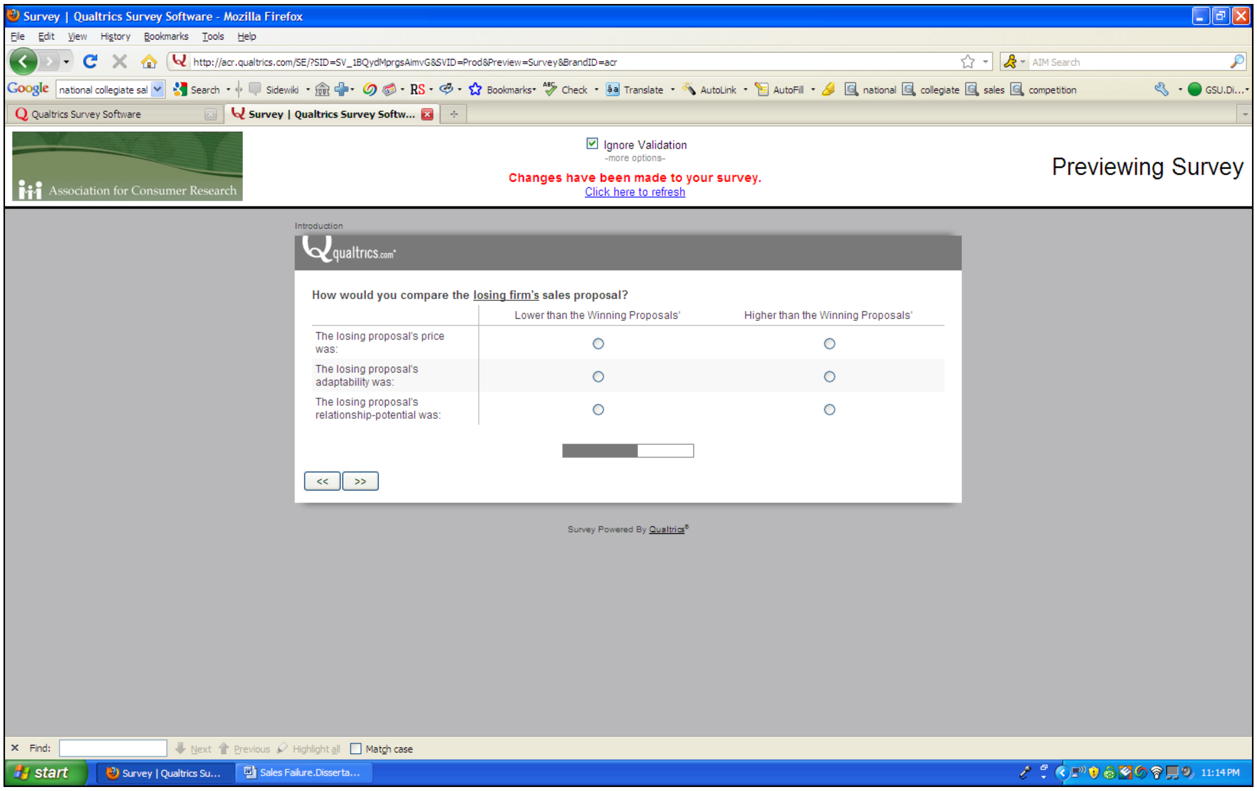
How would you compare the winning firm's sales proposal?

	Lower than the Losing Proposals'	Higher than the Losing Proposals'
The winning proposal's price was:	○	○
The winning proposal's adaptability was:	○	○
The winning proposal's relationship-potential was:	○	○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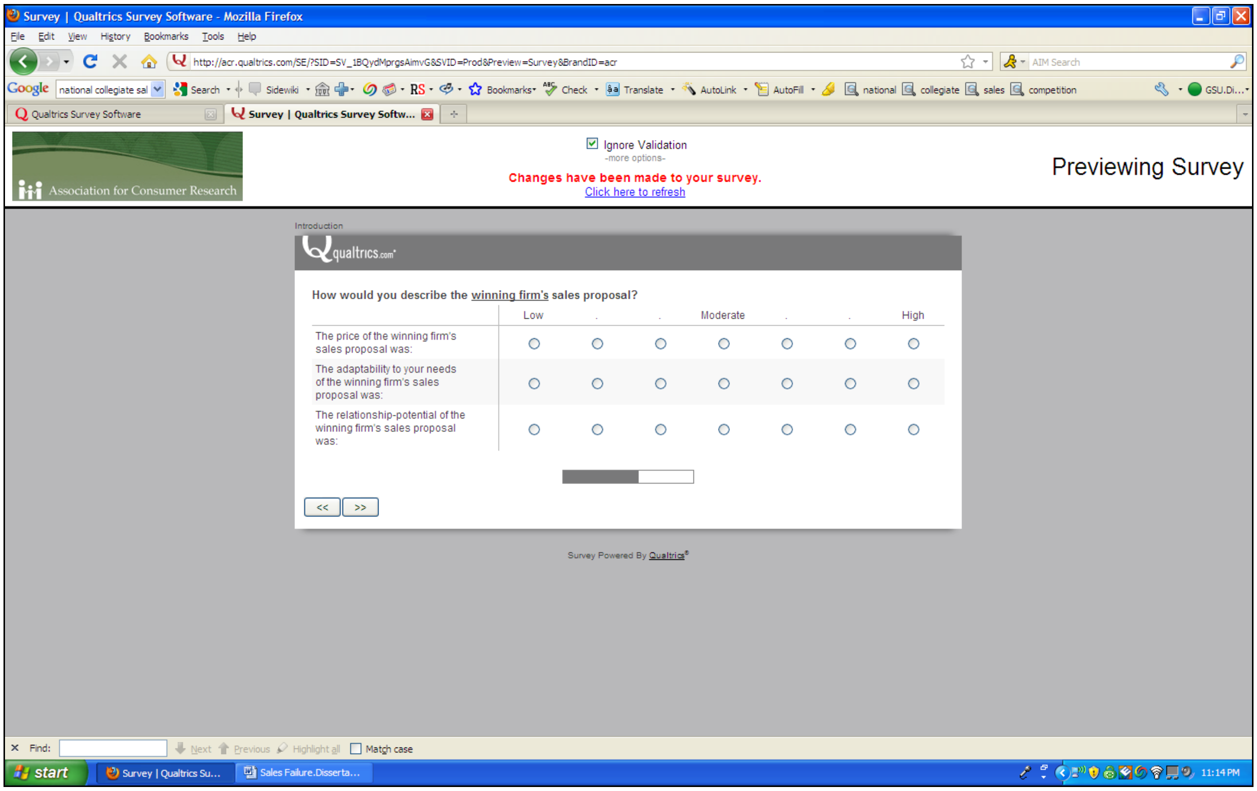
How would you compare the losing firm's sales proposal?

	Lower than the Winning Proposals'	Higher than the Winning Proposals'
The losing proposal's price was:	○	○
The losing proposal's adaptability was:	○	○
The losing proposal's relationship-potential was:	○	○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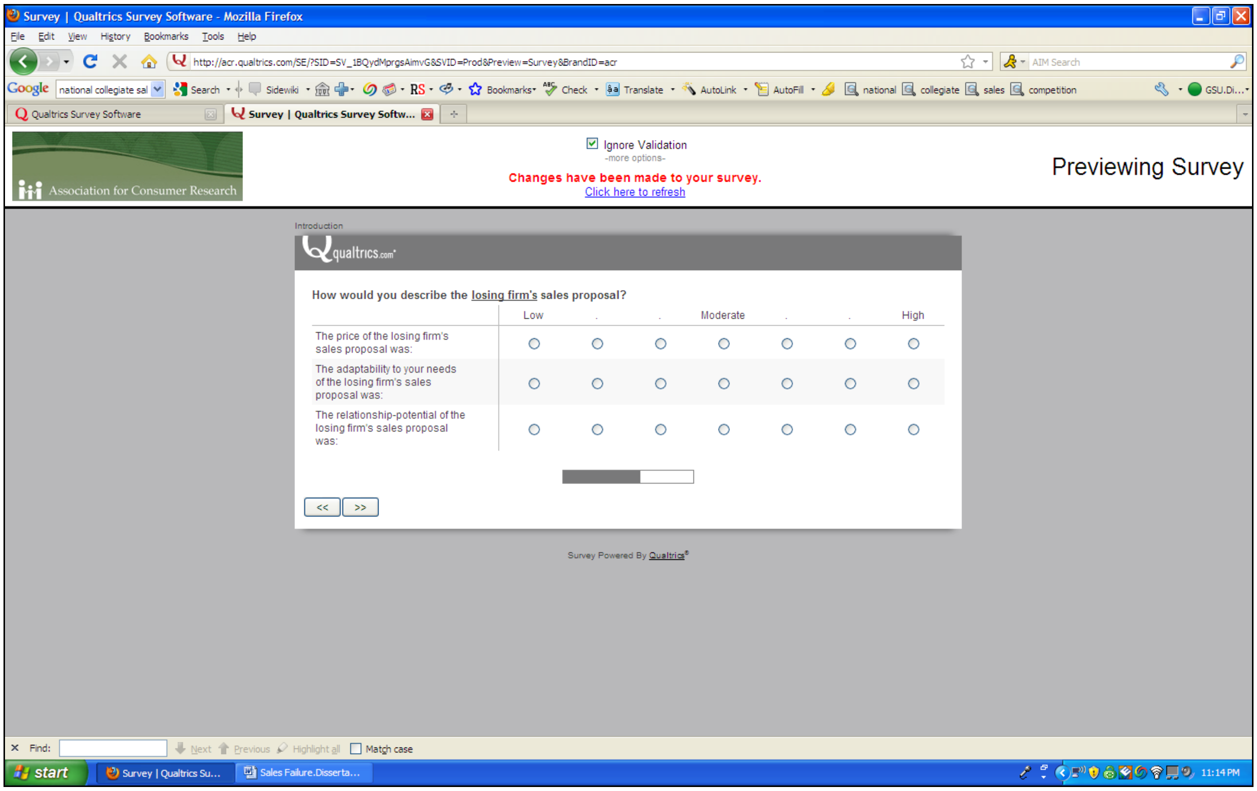
How would you describe the winning firm's sales proposal?

	Low	.	.	Moderate	.	.	High
The price of the winning firm's sales proposal was:	○	○	○	○	○	○	○
The adaptability to your needs of the winning firm's sales proposal was:	○	○	○	○	○	○	○
The relationship-potential of the winning firm's sales proposal was:	○	○	○	○	○	○	○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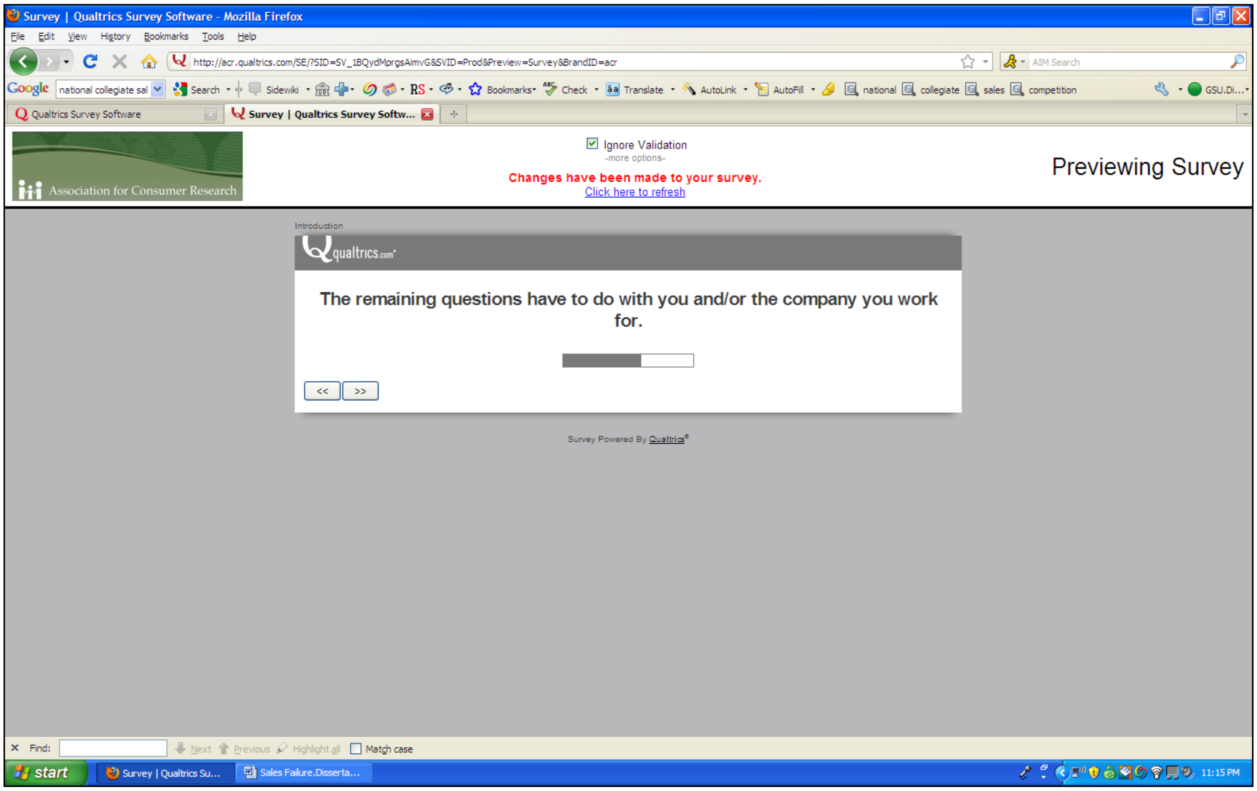
How would you describe the losing firm's sales proposal?

	Low	.	.	Moderate	.	.	High
The price of the losing firm's sales proposal was:	○	○	○	○	○	○	○
The adaptability to your needs of the losing firm's sales proposal was:	○	○	○	○	○	○	○
The relationship-potential of the losing firm's sales proposal was:	○	○	○	○	○	○	○



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The remaining questions have to do with you and/or the company you work for.

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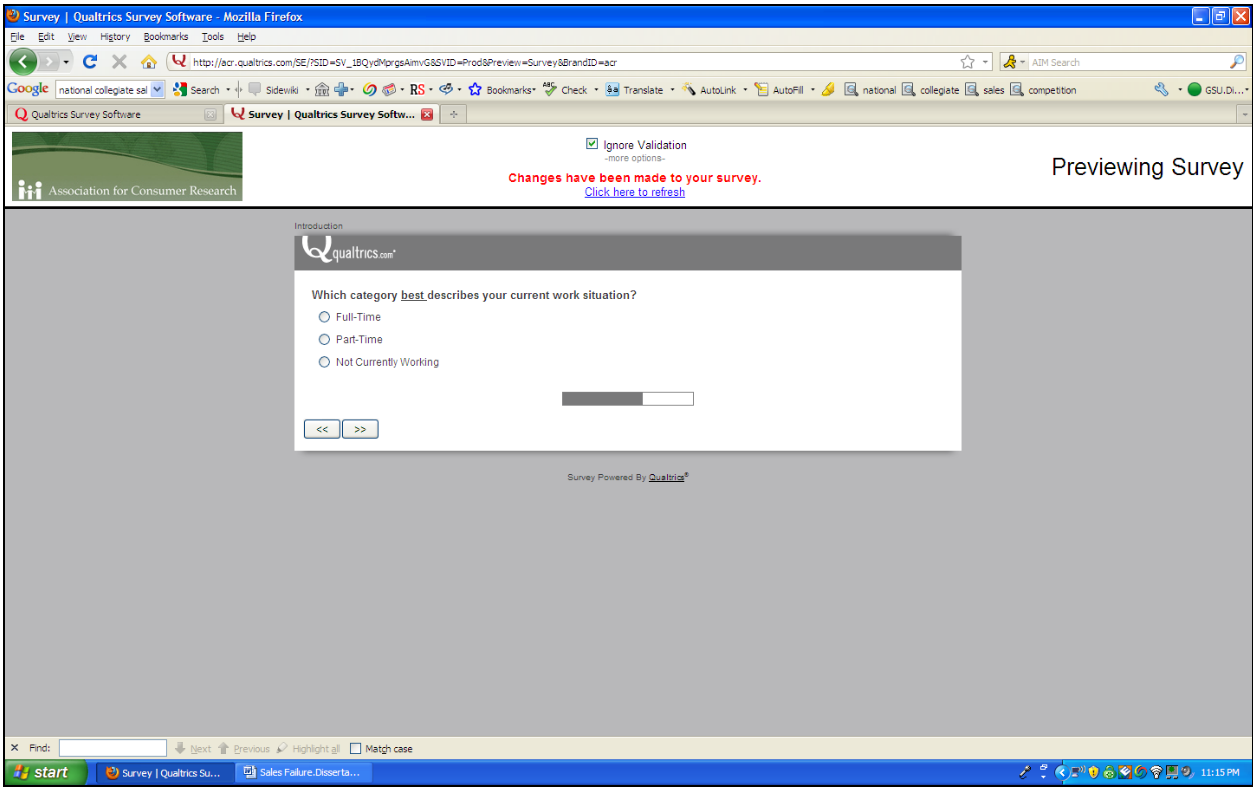

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Which category best describes your current work situation?

○ Full-Time

○ Part-Time

○ Not Currently Working

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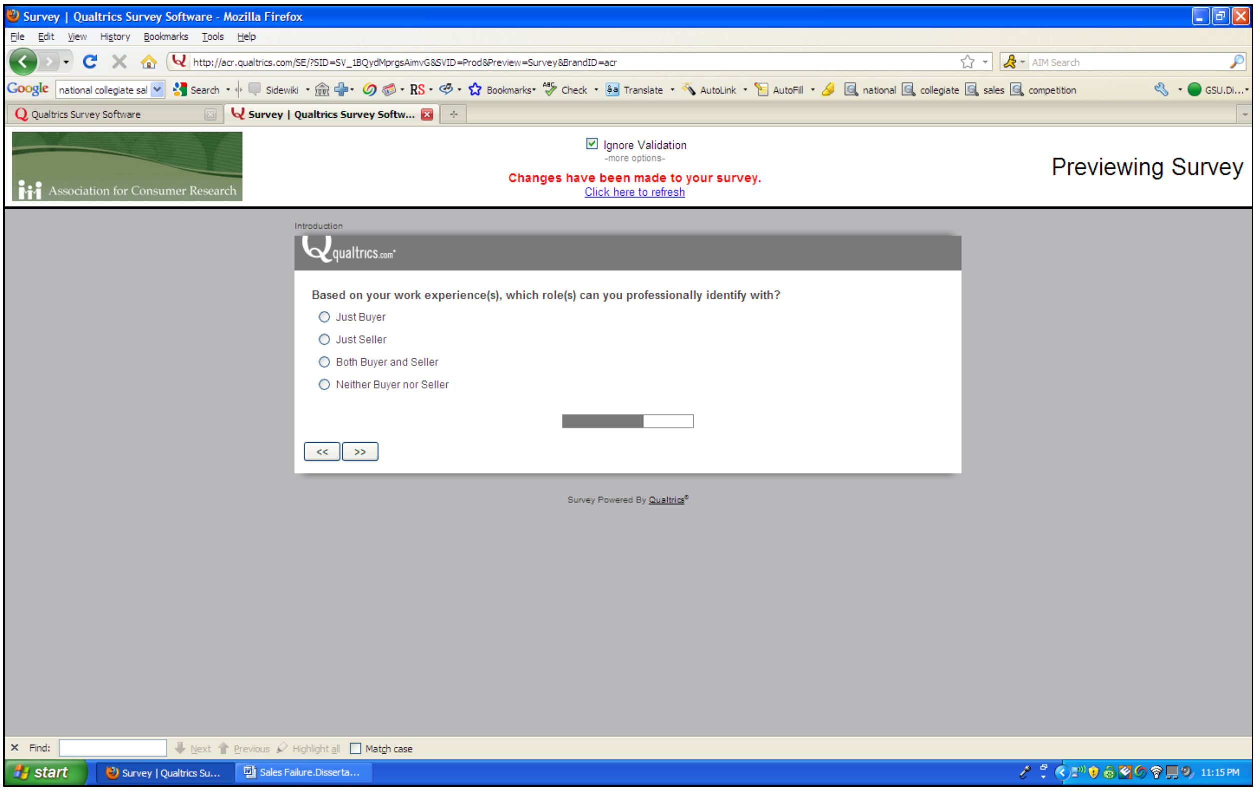
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Introduction

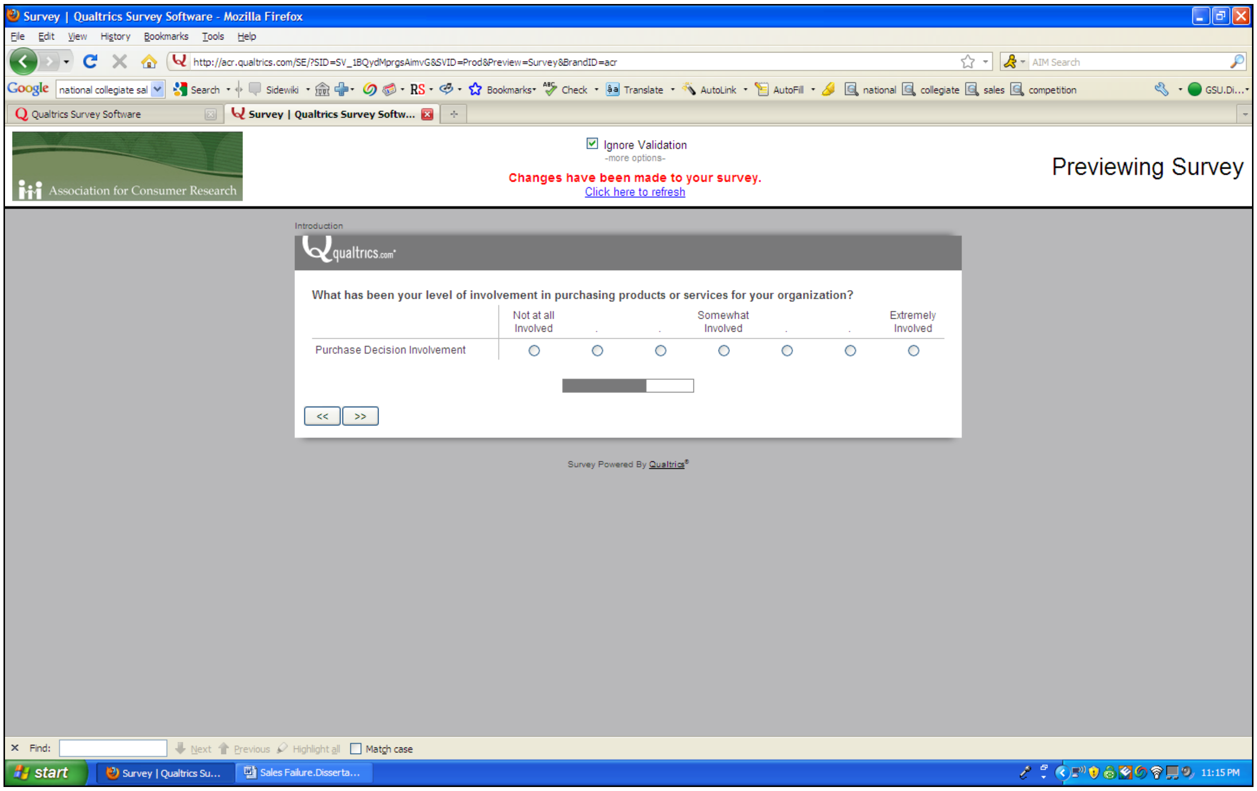
Based on your work experience(s), which role(s) can you professionally identify with?

○ Just Buyer

○ Just Seller

○ Both Buyer and Seller

○ Neither Buyer nor Seller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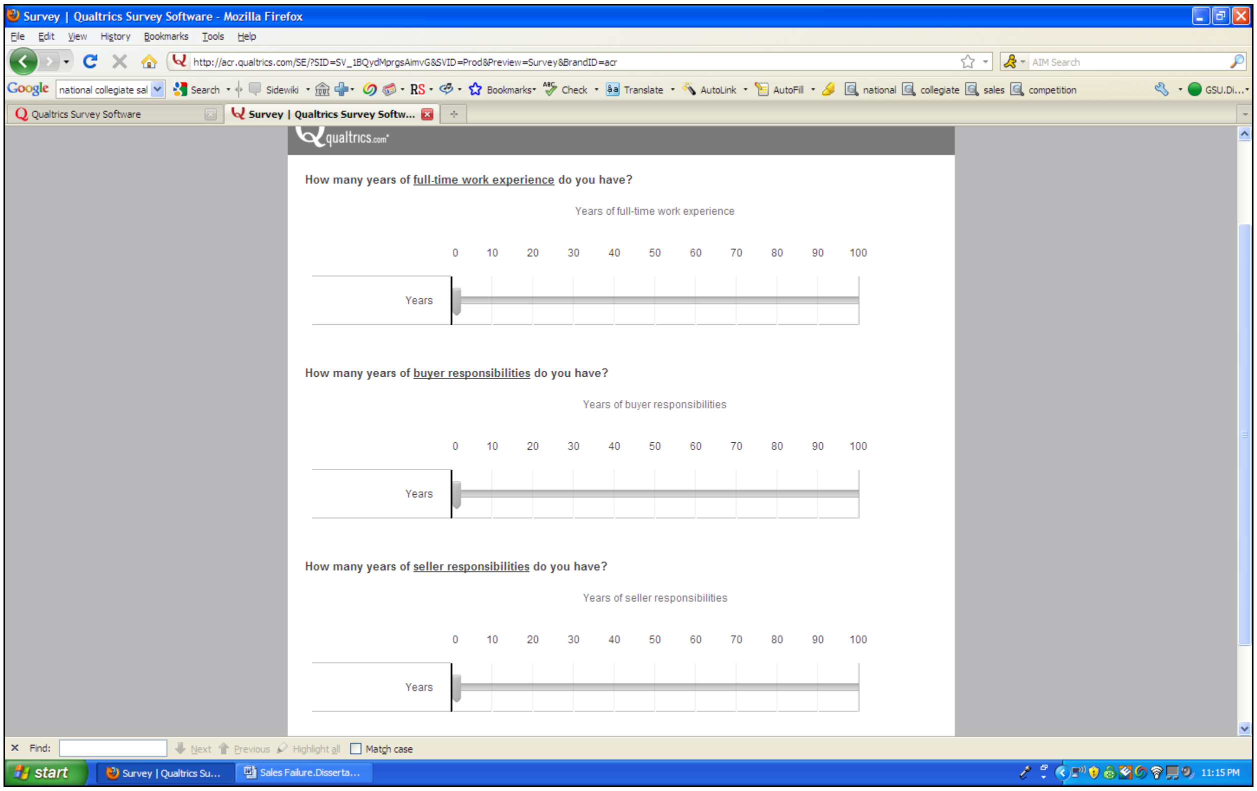
Introduction

What has been your level of involvement in purchasing products or services for your organization?

	Not at all Involved	.	.	Somewhat Involved	.	.	Extremely Involved
Purchase Decision Involvement	○	○	○	○	○	○	○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How many years of full-time work experience do you have?

Years of full-time work experience

0 10 20 30 40 50 60 70 80 90 100

Years

How many years of buyer responsibilities do you have?

Years of buyer responsibilities

0 10 20 30 40 50 60 70 80 90 100

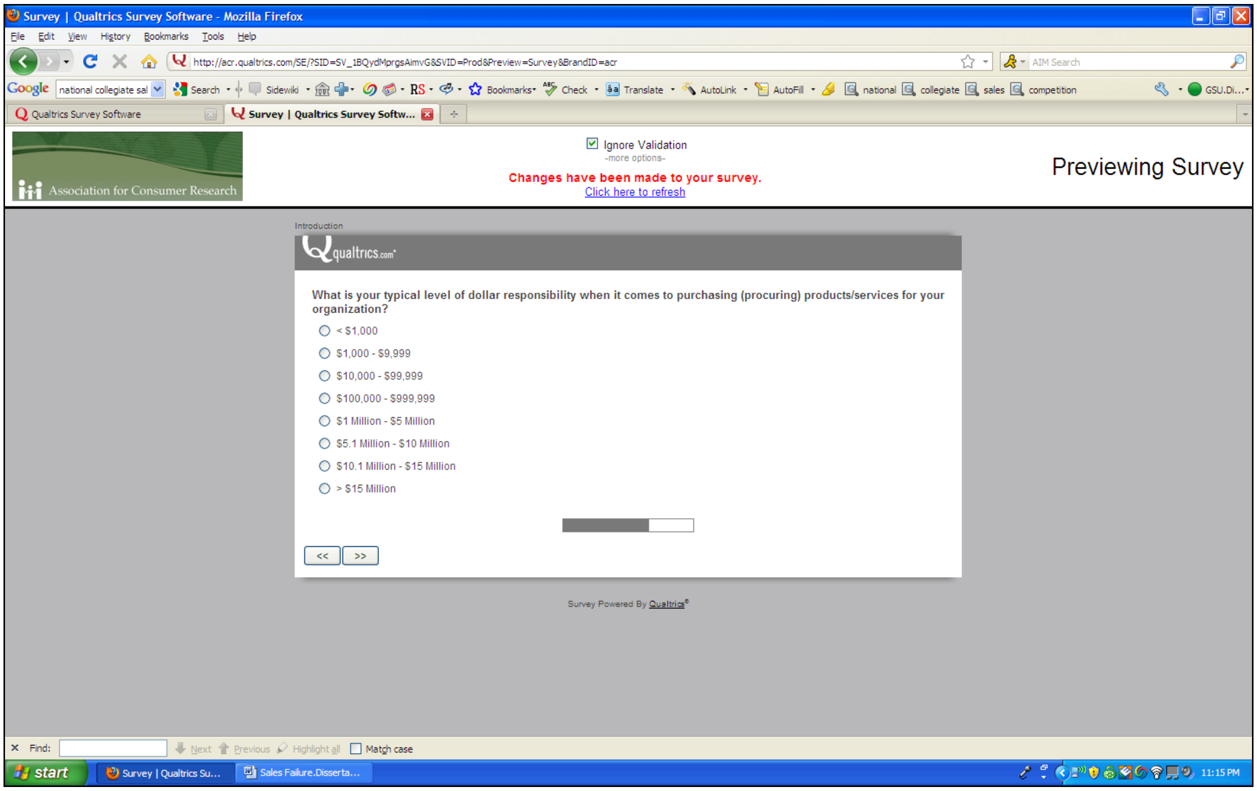
Years

How many years of seller responsibilities do you have?

Years of seller responsibilities

0 10 20 30 40 50 60 70 80 90 100

Years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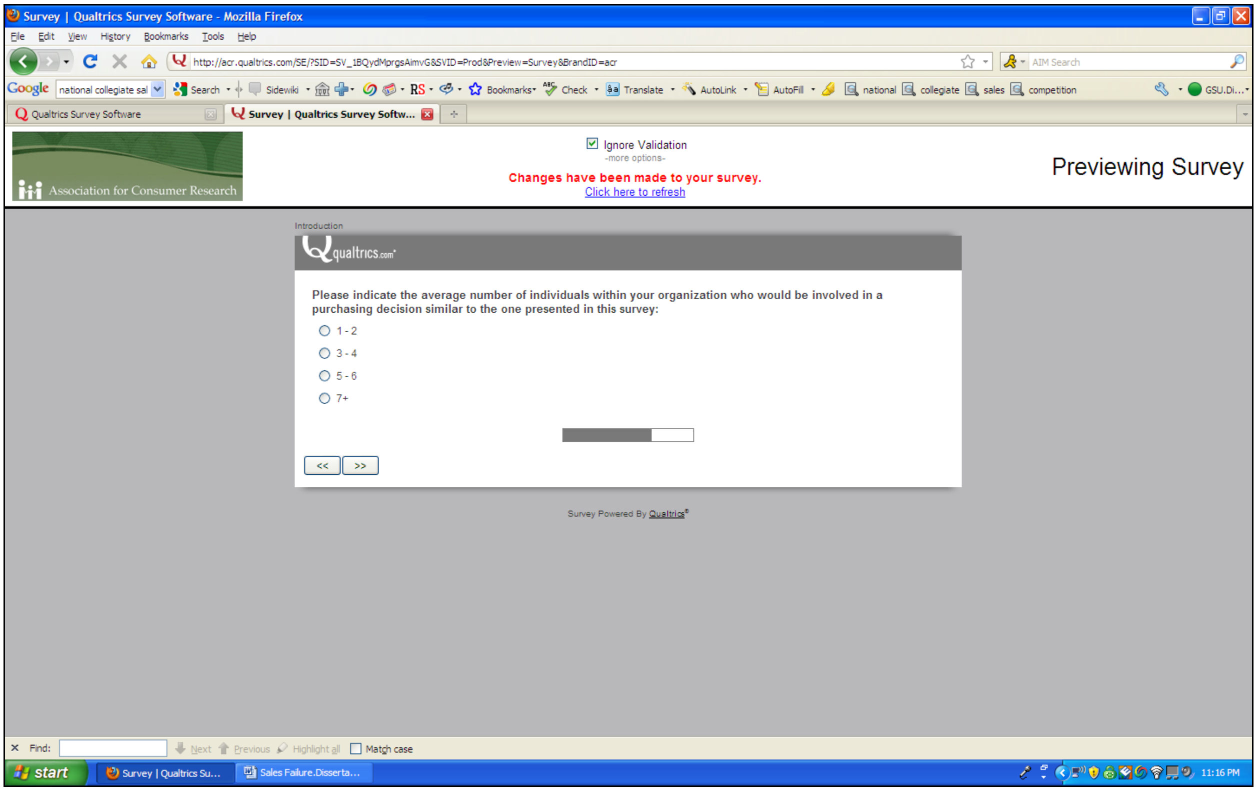
What is your typical level of dollar responsibility when it comes to purchasing (procuring) products/services for your organization?

- ○ < $1,000
- ○ $1,000 - $9,999
- ○ $10,000 - $99,999
- ○ $100,000 - $999,999
- ○ $1 Million - $5 Million
- ○ $5.1 Million - $10 Million
- ○ $10.1 Million - $15 Million
- ○ > $15 Million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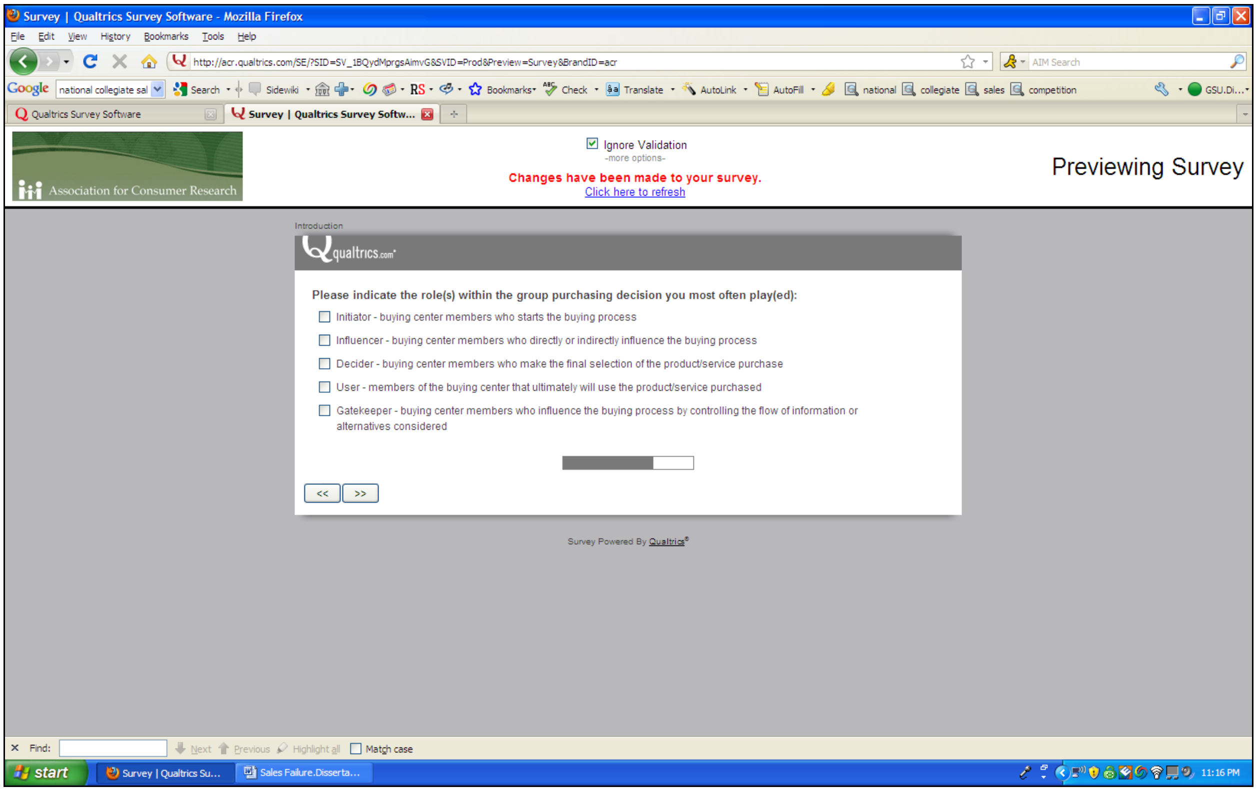
Please indicate the average number of individuals within your organization who would be involved in a purchasing decision similar to the one presented in this survey:

- ○ 1 - 2
- ○ 3 - 4
- ○ 5 - 6
- ○ 7+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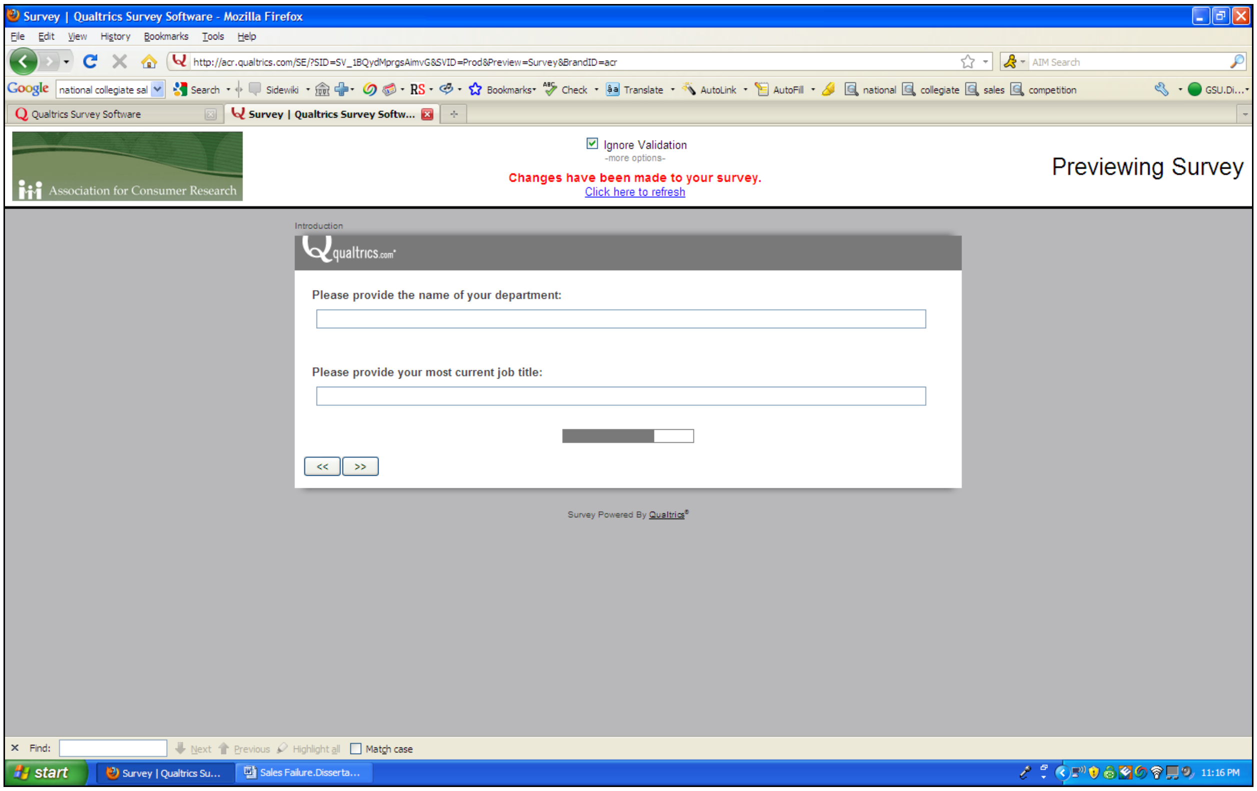
Please indicate the role(s) within the group purchasing decision you most often play(ed):

- ☐ Initiator - buying center members who starts the buying process
- ☐ Influencer - buying center members who directly or indirectly influence the buying process
- ☐ Decider - buying center members who make the final selection of the product/service purchase
- ☐ User - members of the buying center that ultimately will use the product/service purchased
- ☐ Gatekeeper - buying center members who influence the buying process by controlling the flow of information or alternatives considered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Please provide the name of your department:

Please provide your most current job title:

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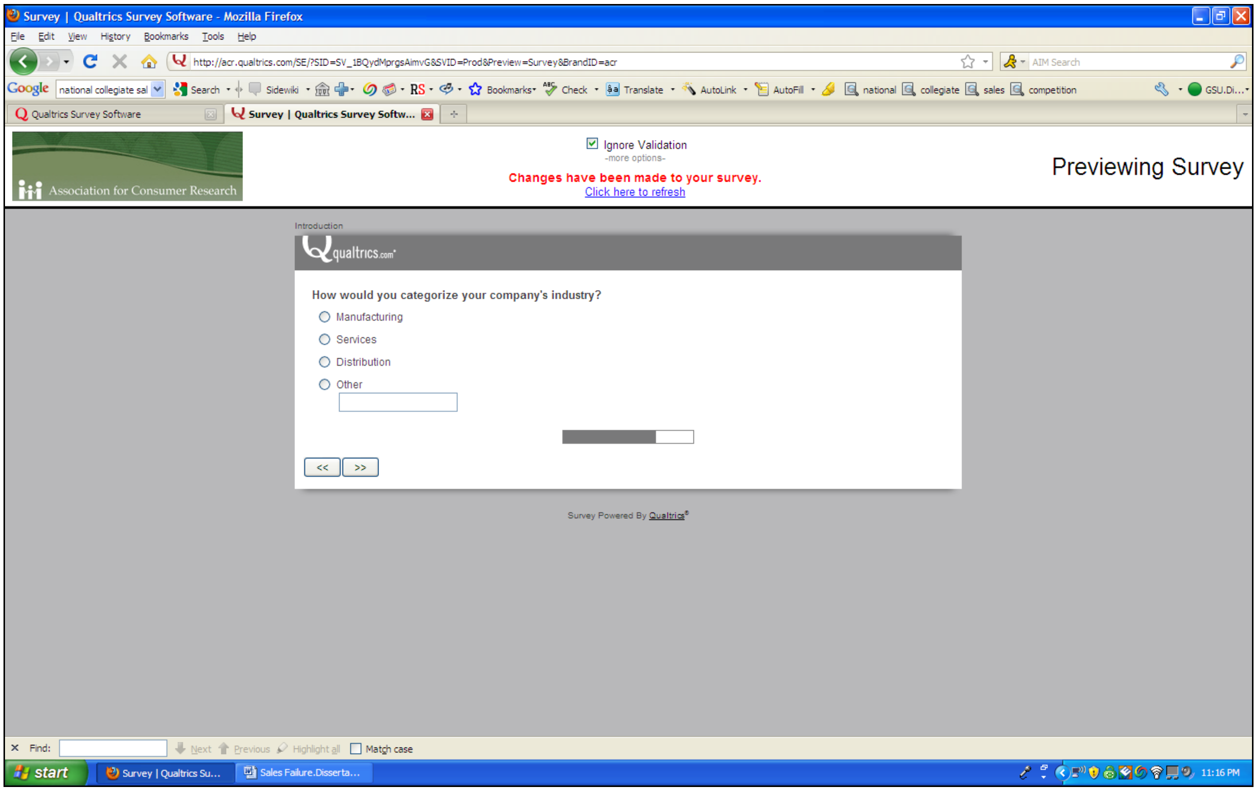
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How would you categorize your company's industry?

○ Manufacturing
○ Services
○ Distribution
○ Other

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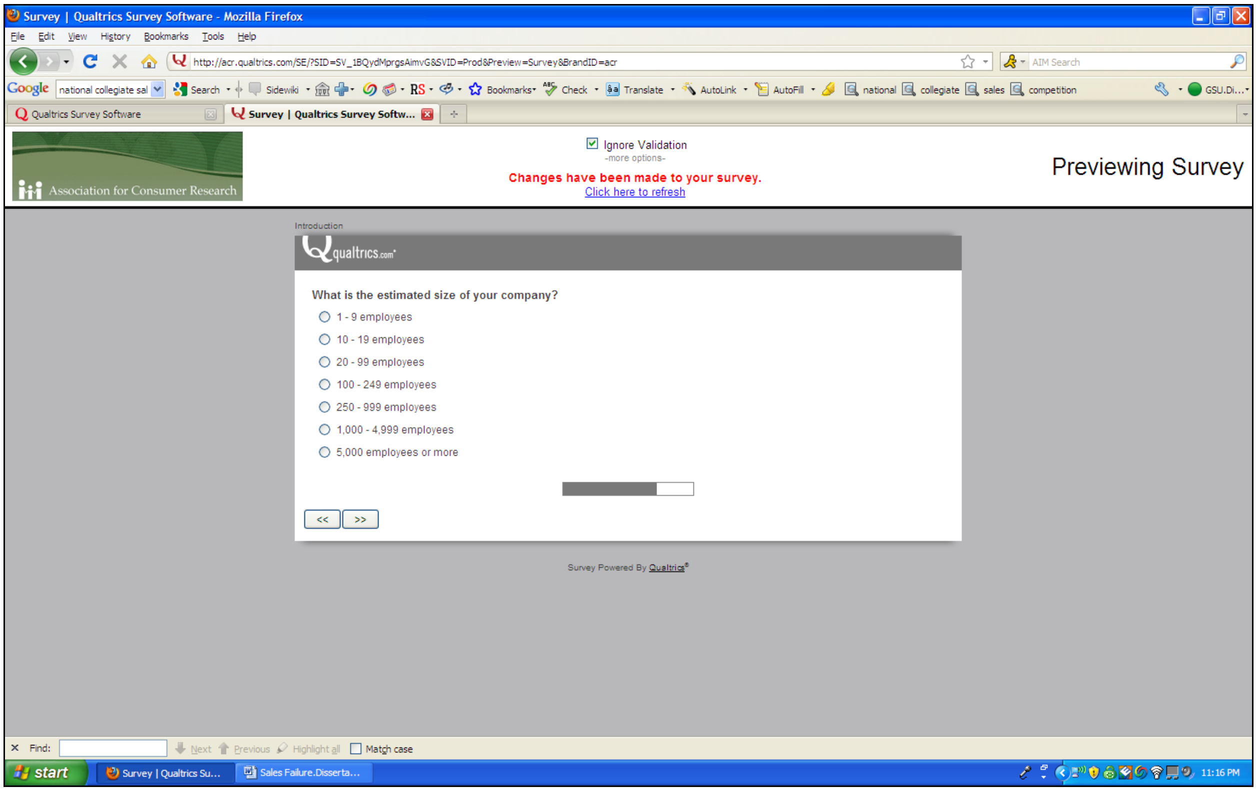
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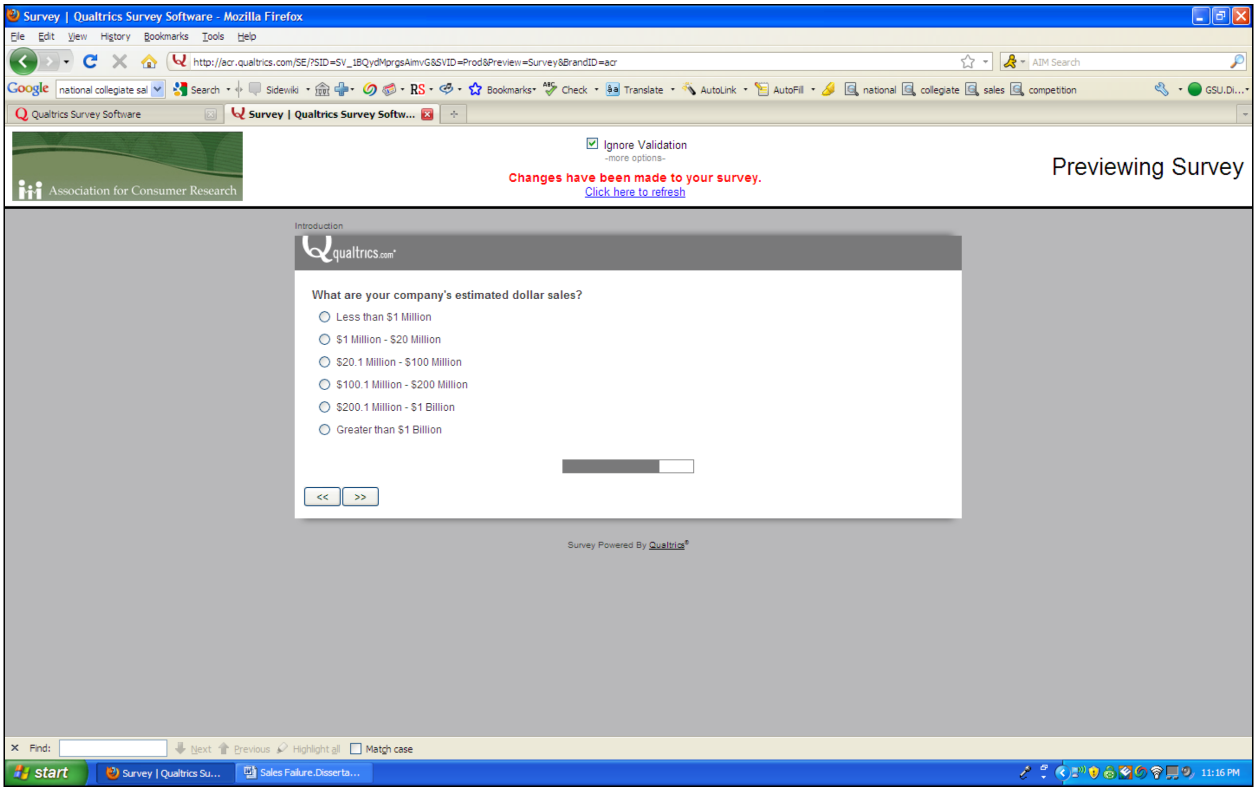
What is the estimated size of your company?

○ 1 - 9 employees
○ 10 - 19 employees
○ 20 - 99 employees
○ 100 - 249 employees
○ 250 - 999 employees
○ 1,000 - 4,999 employees
○ 5,000 employees or more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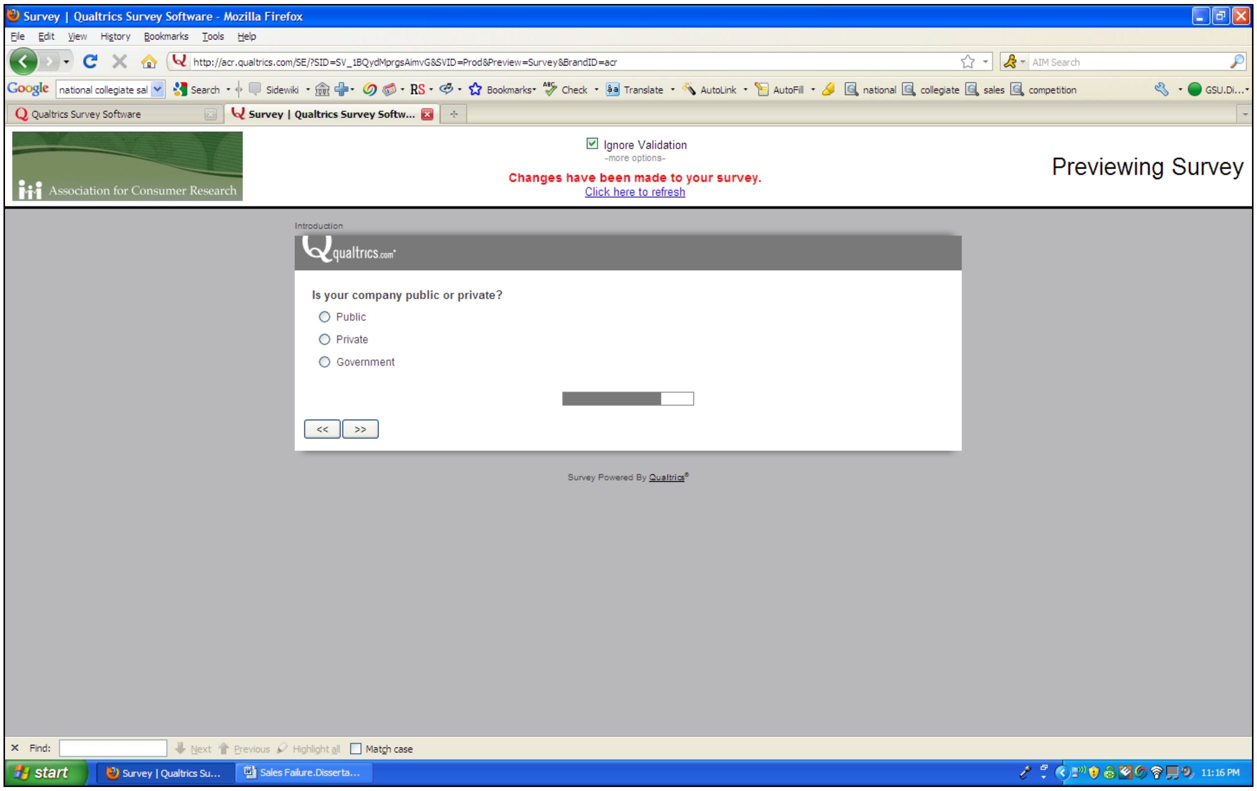
What are your company's estimated dollar sales?

○ Less than $1 Million
○ $1 Million - $20 Million
○ $20.1 Million - $100 Million
○ $100.1 Million - $200 Million
○ $200.1 Million - $1 Billion
○ Greater than $1 Billion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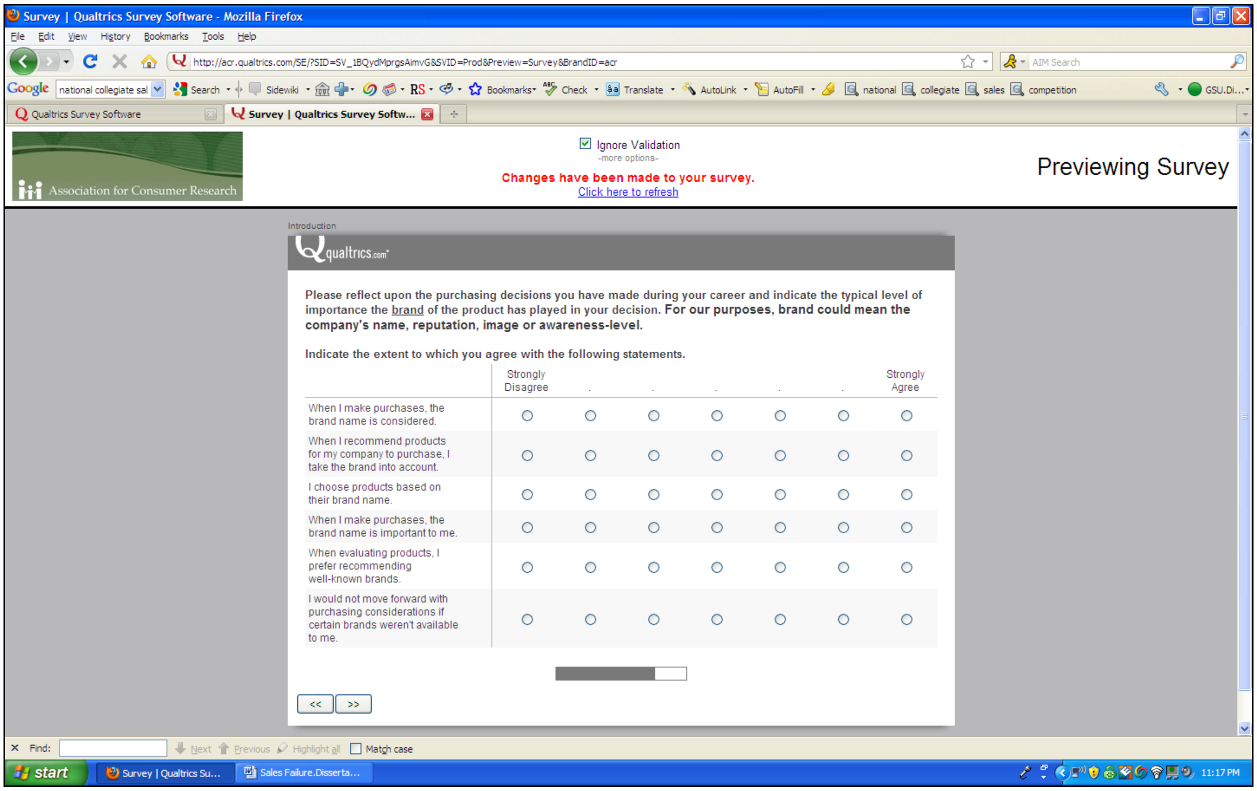
Is your company public or private?

○ Public
○ Private
○ Government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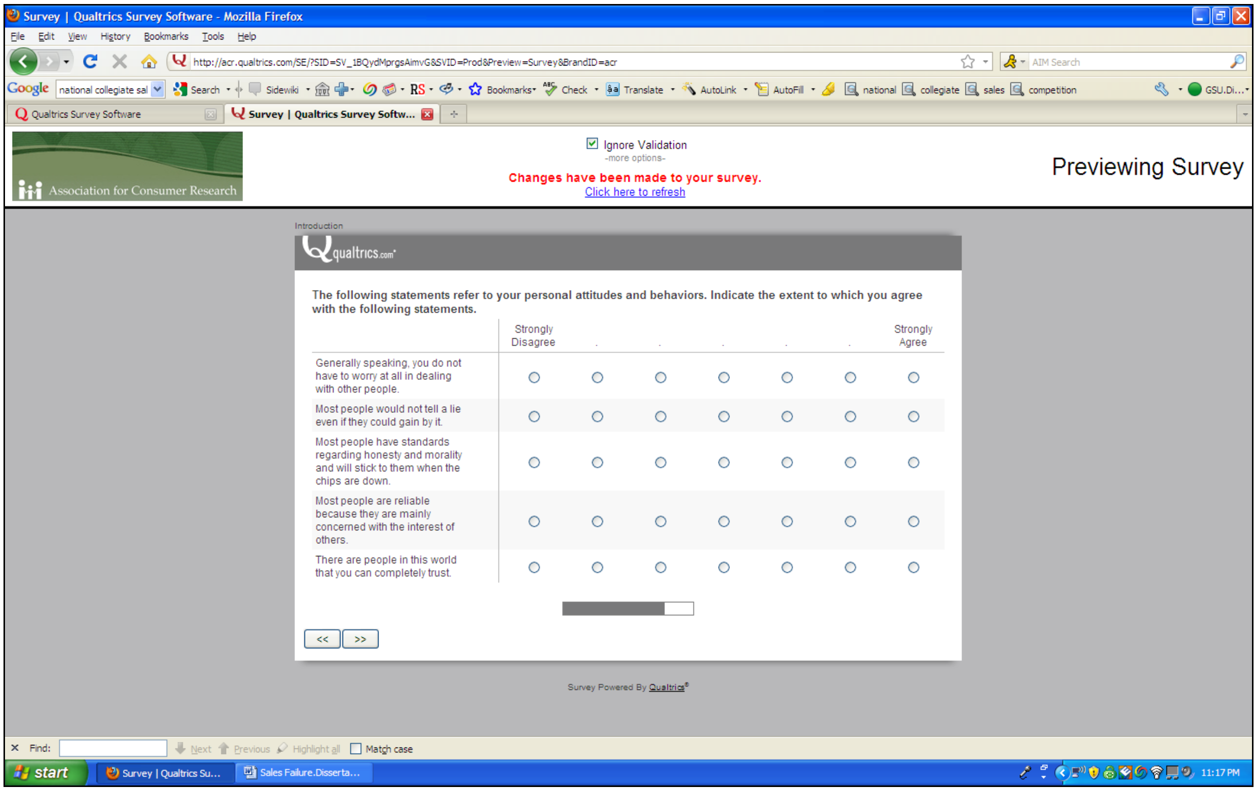
Please reflect upon the purchasing decisions you have made during your career and indicate the typical level of importance the brand of the product has played in your decision. For our purposes, brand could mean the company's name, reputation, image or awareness-level.

Indicate the extent to which you agree with the following statements.

	Strongly Disagree	.	.	.	.	.	Strongly Agree
When I make purchases, the brand name is considered.	○	○	○	○	○	○	○
When I recommend products for my company to purchase, I take the brand into account.	○	○	○	○	○	○	○
I choose products based on their brand name.	○	○	○	○	○	○	○
When I make purchases, the brand name is important to me.	○	○	○	○	○	○	○
When evaluating products, I prefer recommending well-known brands.	○	○	○	○	○	○	○
I would not move forward with purchasing considerations if certain brands weren't available to me.	○	○	○	○	○	○	○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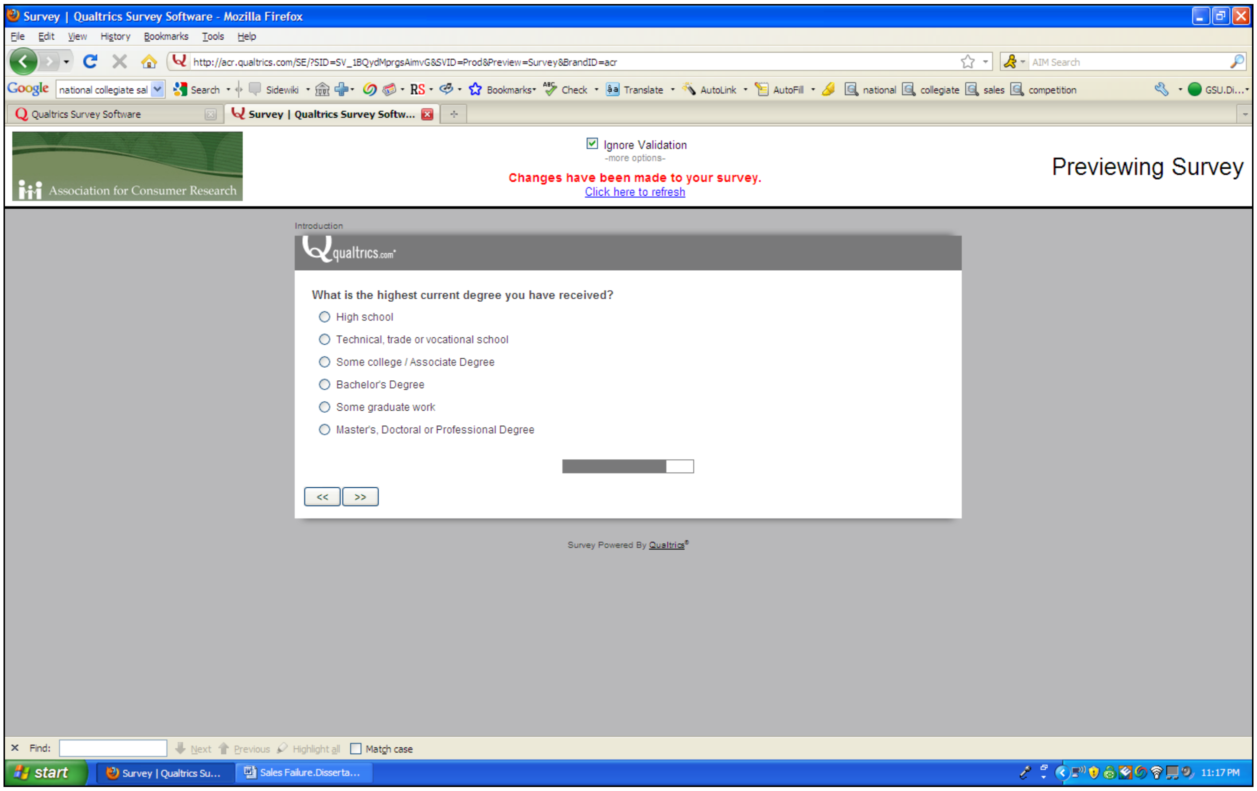
The following statements refer to your personal attitudes and behaviors. Indicate the extent to which you agree with the following statements.

	Strongly Disagree	.	.	.	.	.	Strongly Agree
Generally speaking, you do not have to worry at all in dealing with other people.	○	○	○	○	○	○	○
Most people would not tell a lie even if they could gain by it.	○	○	○	○	○	○	○
Most people have standards regarding honesty and morality and will stick to them when the chips are down.	○	○	○	○	○	○	○
Most people are reliable because they are mainly concerned with the interest of others.	○	○	○	○	○	○	○
There are people in this world that you can completely trust.	○	○	○	○	○	○	○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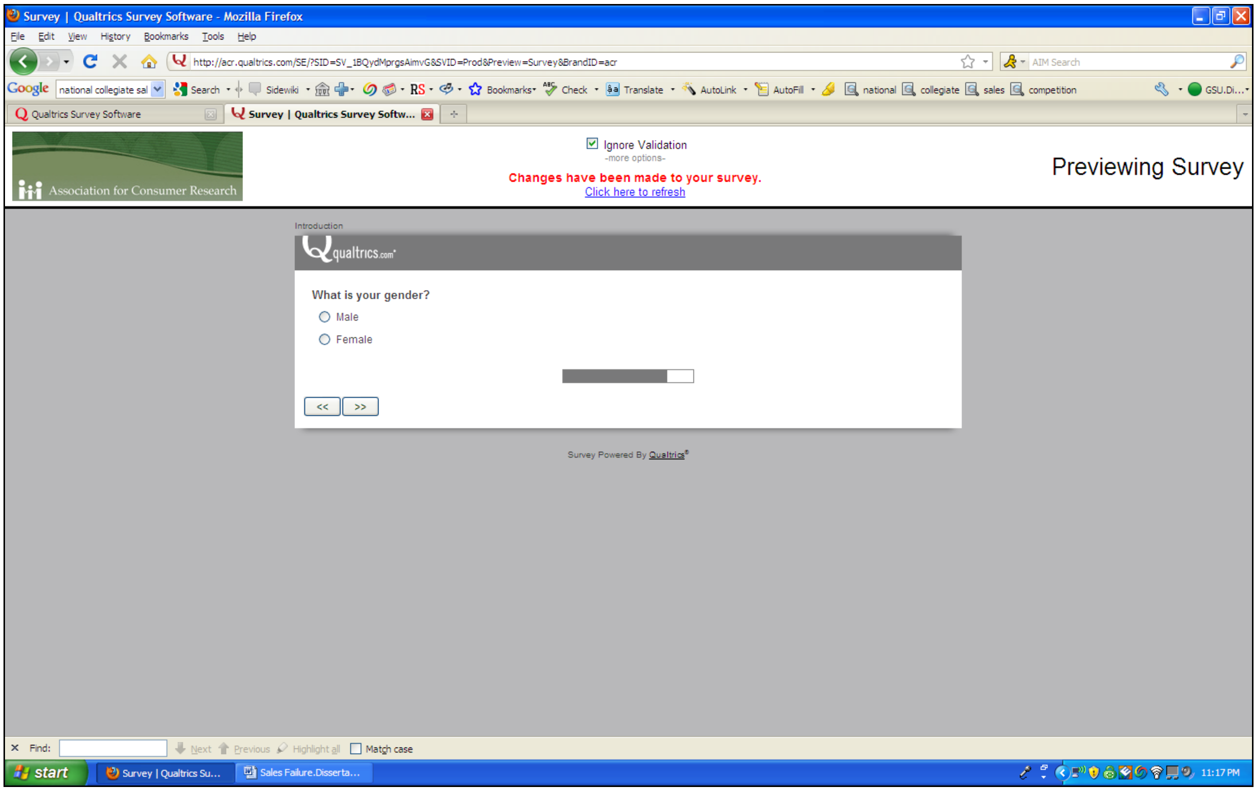
What is the highest current degree you have received?

- ○ High school
- ○ Technical, trade or vocational school
- ○ Some college / Associate Degree
- ○ Bachelor's Degree
- ○ Some graduate work
- ○ Master's, Doctoral or Professional Degree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What is your gender?

○ Male
○ Female

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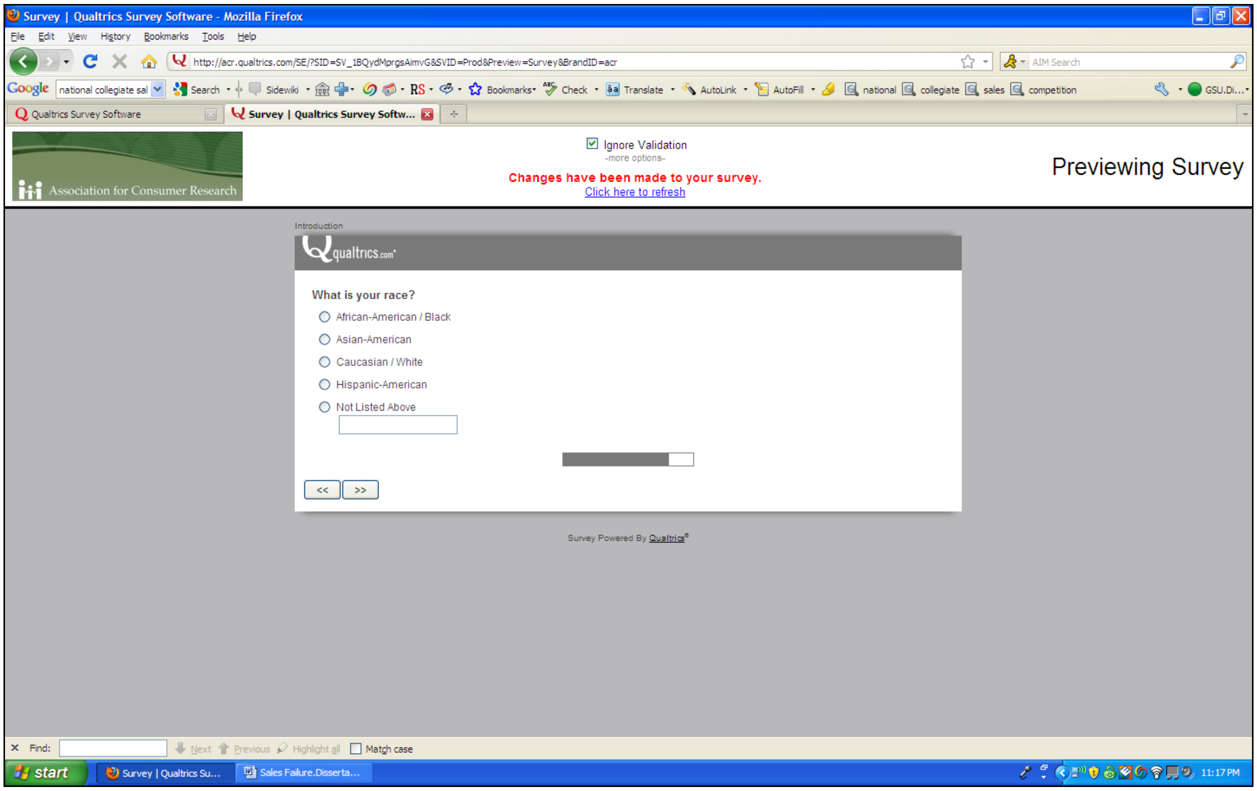
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What is your race?

○ African-American / Black
○ Asian-American
○ Caucasian / White
○ Hispanic-American
○ Not Listed Above

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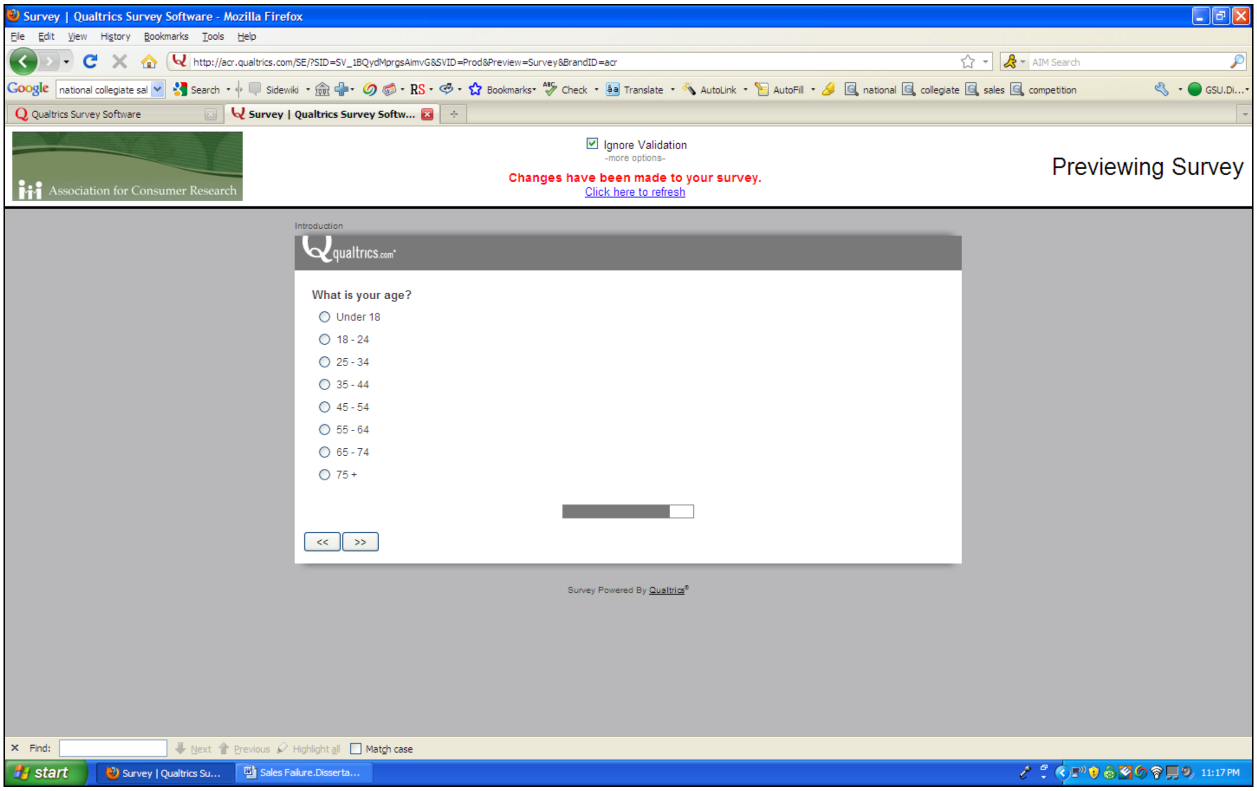
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Introduction

What is your age?

- ○ Under 18
- ○ 18 - 24
- ○ 25 - 34
- ○ 35 - 44
- ○ 45 - 54
- ○ 55 - 64
- ○ 65 - 74
- ○ 75 +

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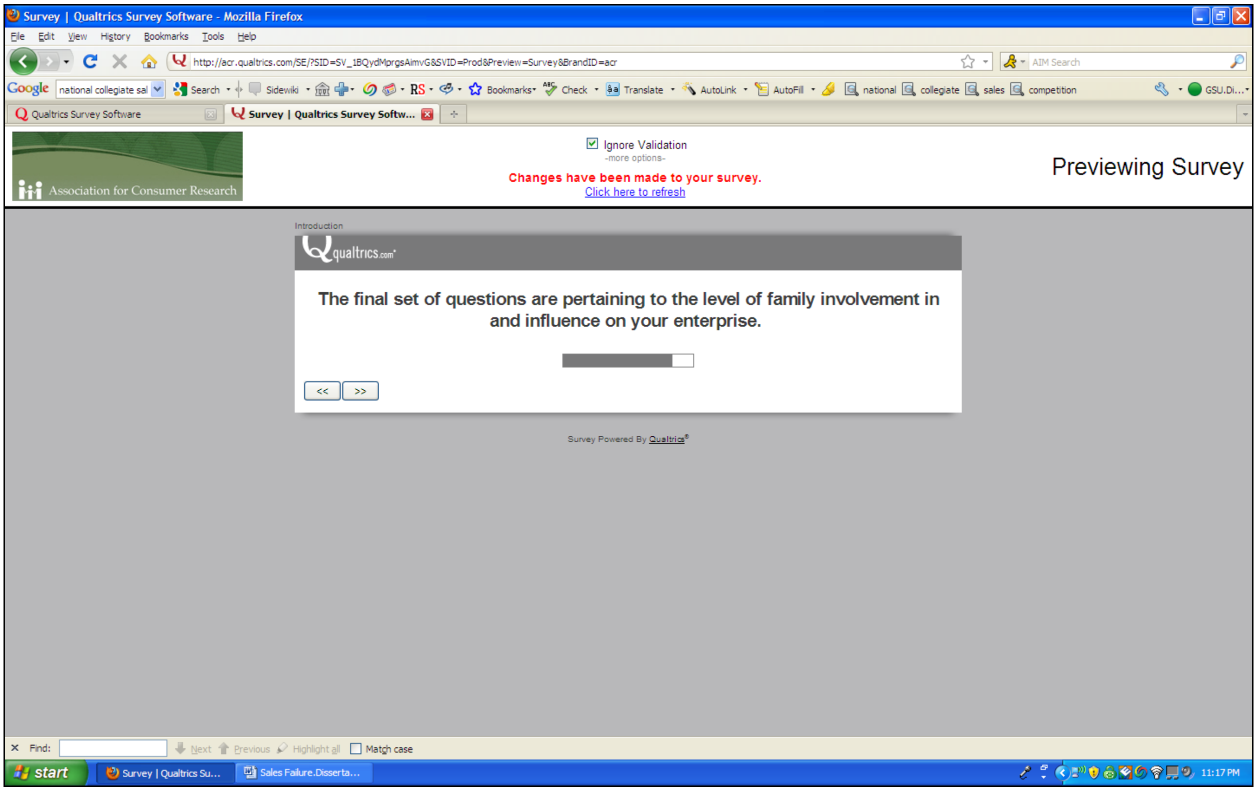
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Introduction

The final set of questions are pertaining to the level of family involvement in and influence on your enterprise.

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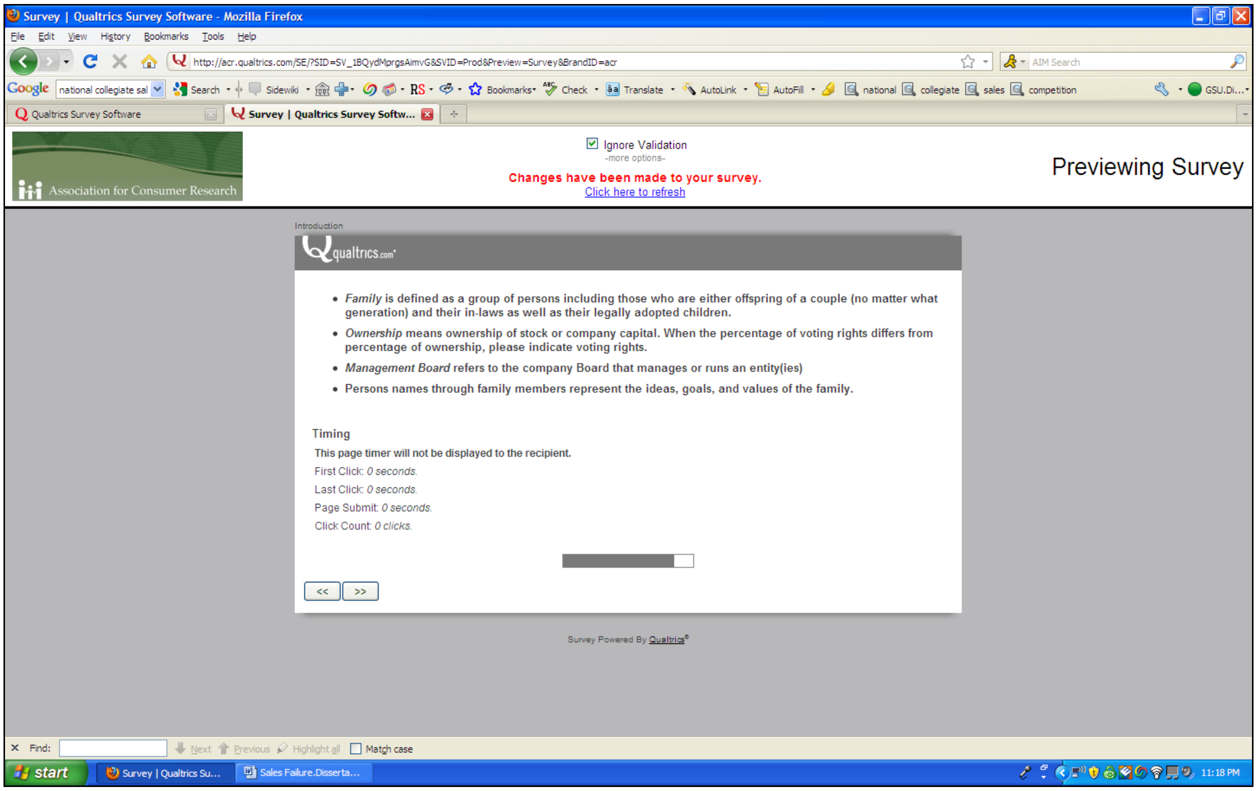
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Introduction

- *Family* is defined as a group of persons including those who are either offspring of a couple (no matter what generation) and their in-laws as well as their legally adopted children.
- *Ownership* means ownership of stock or company capital. When the percentage of voting rights differs from percentage of ownership, please indicate voting rights.
- *Management Board* refers to the company Board that manages or runs an entity(ies)
- Persons names through family members represent the ideas, goals, and values of the family.

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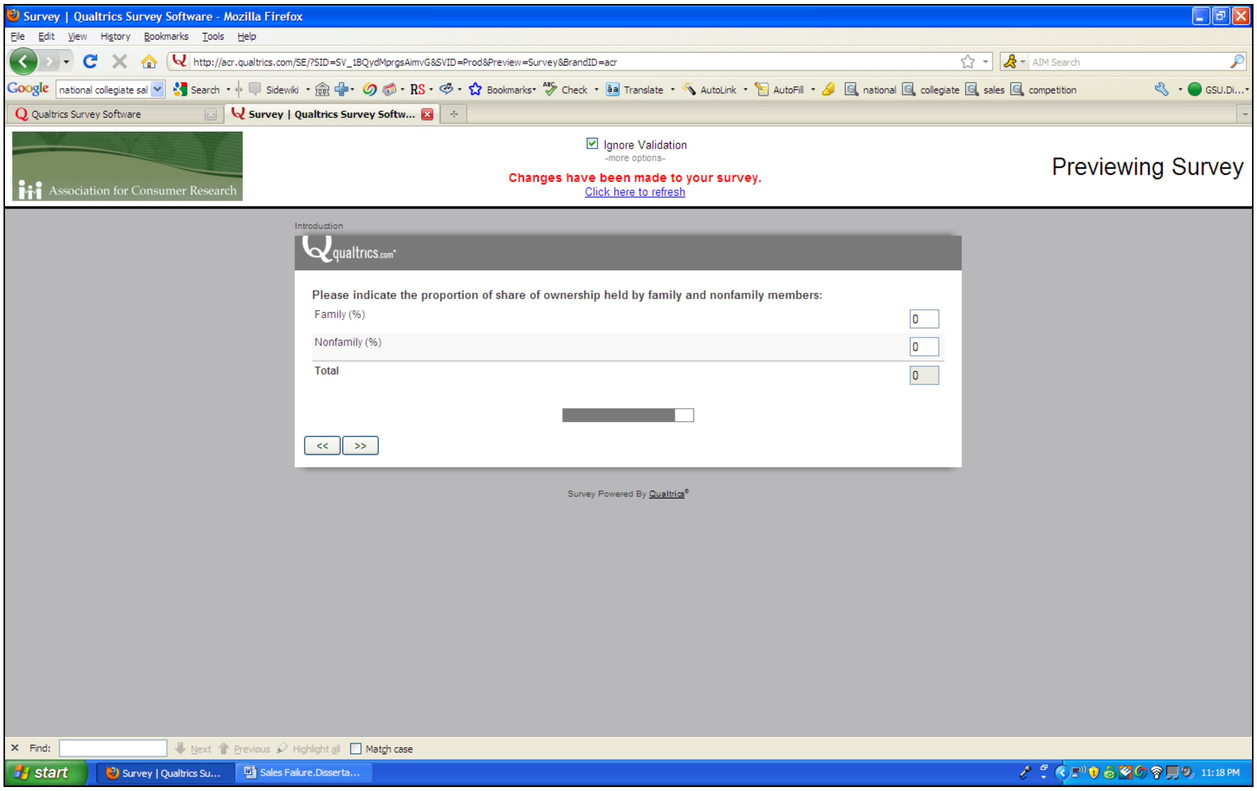
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Introduction

Please indicate the proportion of share of ownership held by family and nonfamily members:

Family (%)	0
Nonfamily (%)	0
Total	0

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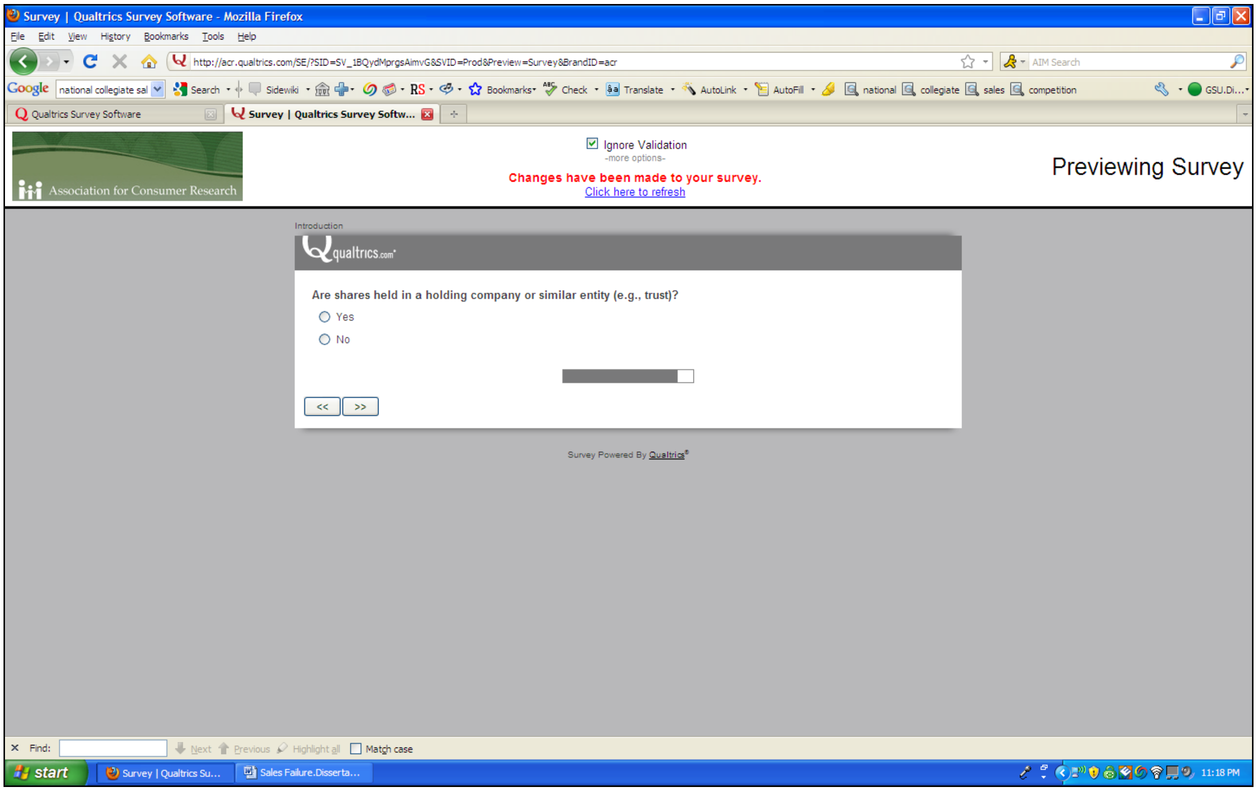
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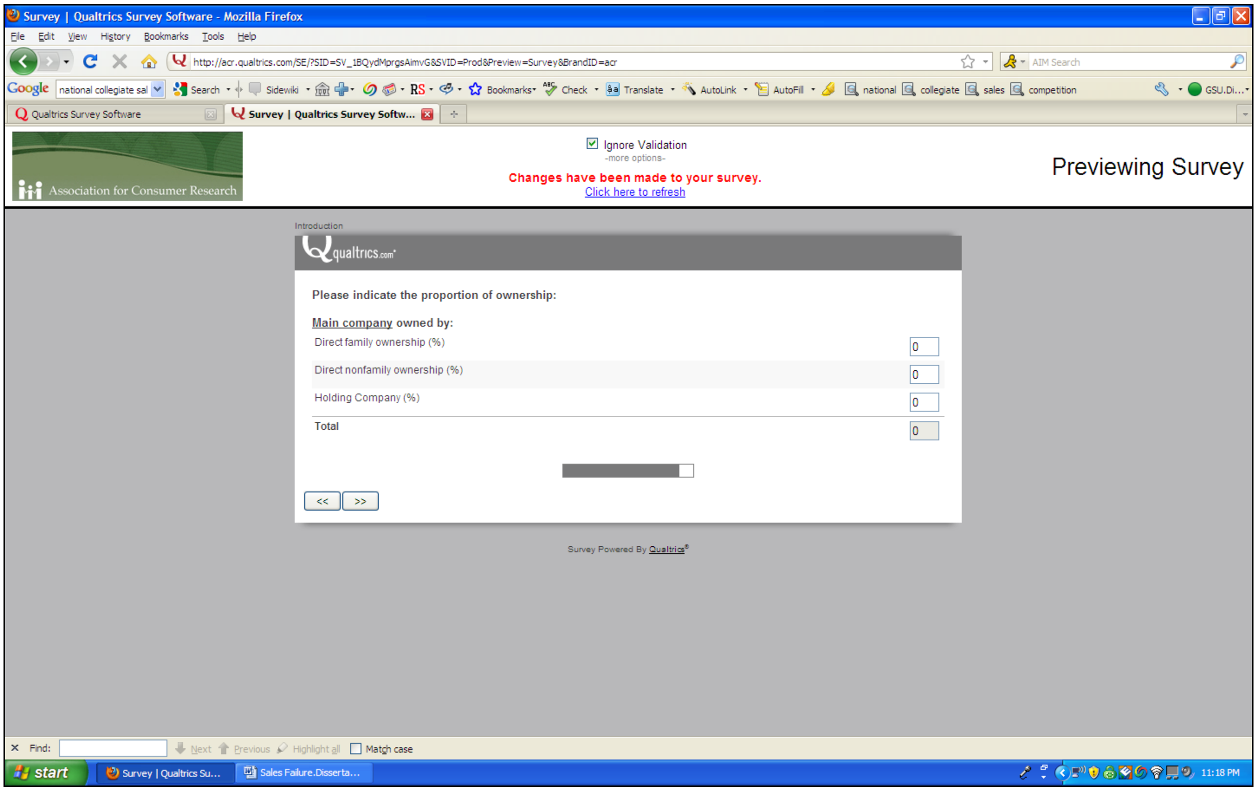
Are shares held in a holding company or similar entity (e.g., trust)?

○ Yes

○ No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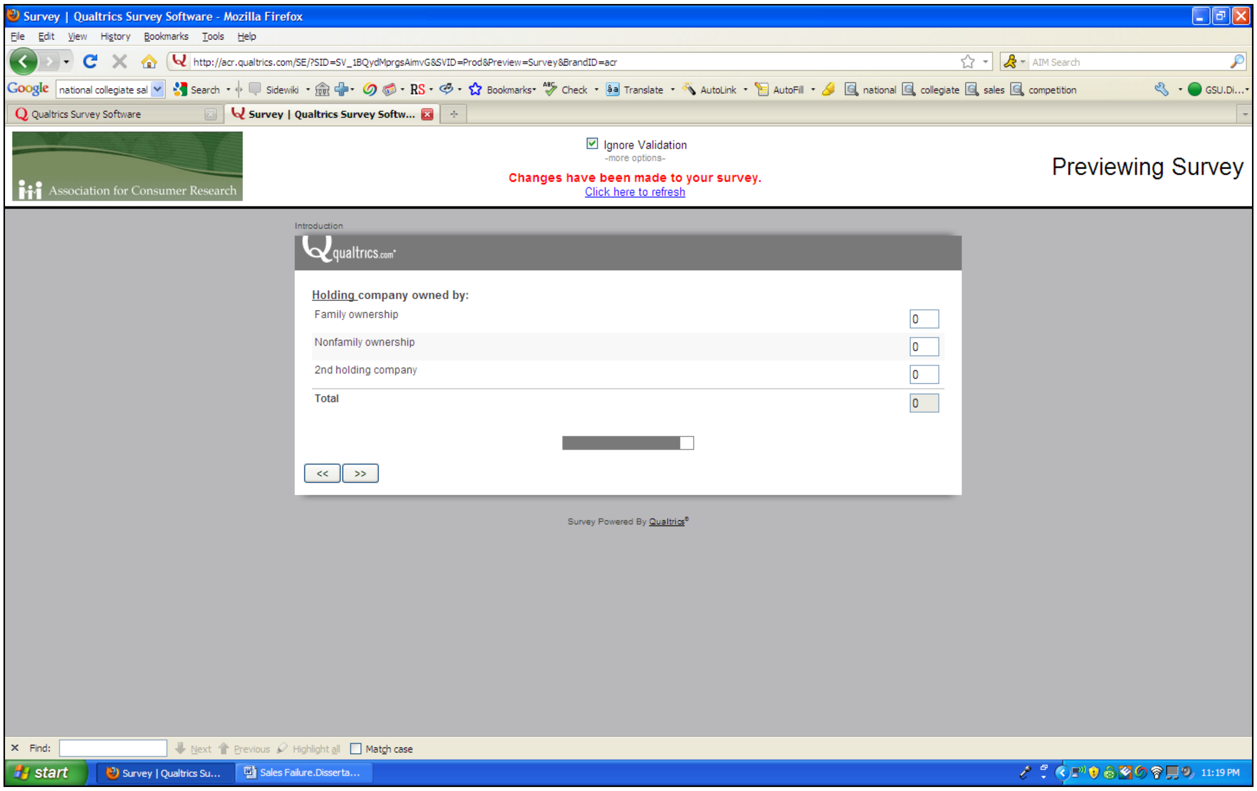
Please indicate the proportion of ownership:

Main company owned by:

Direct family ownership (%)	0
Direct nonfamily ownership (%)	0
Holding Company (%)	0
Total	0



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Introduction

Holding company owned by:

Family ownership	0
Nonfamily ownership	0
2nd holding company	0
Total	0

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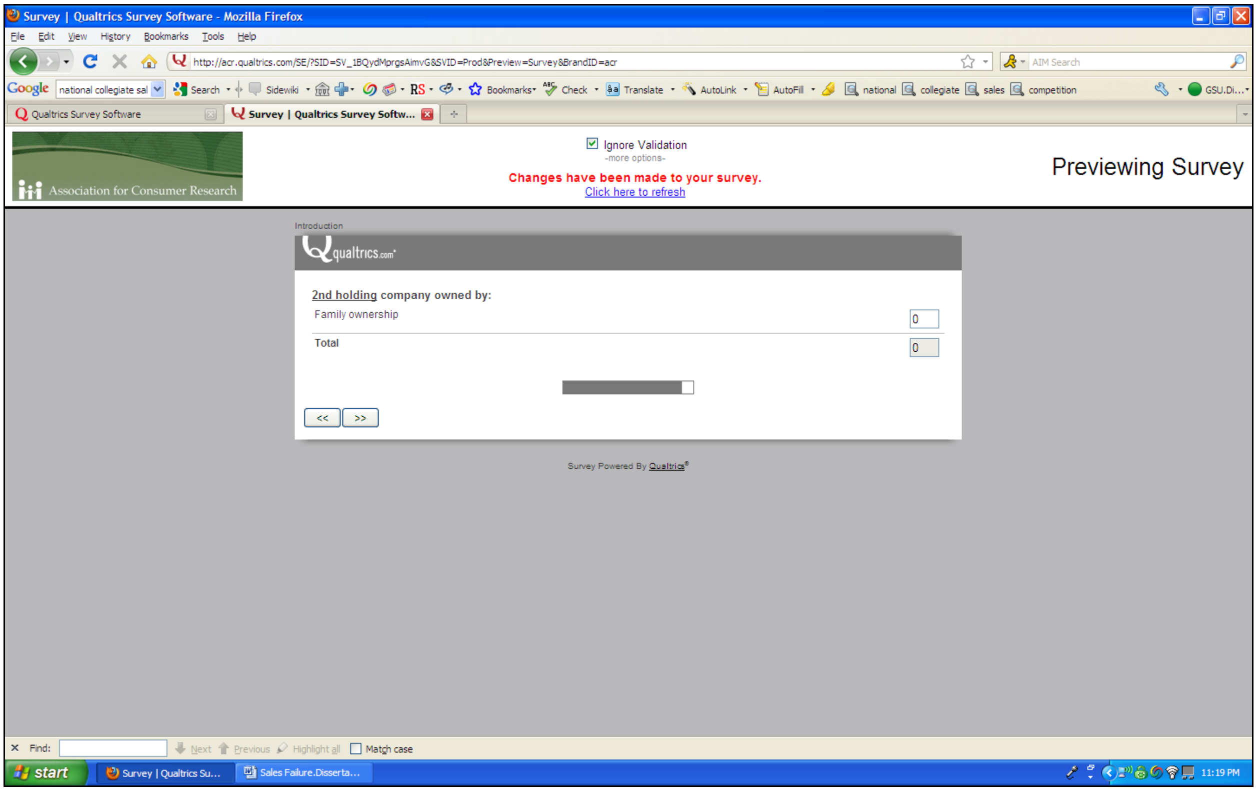

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Introduction

2nd holding company owned by:

Family ownership	0
Total	0

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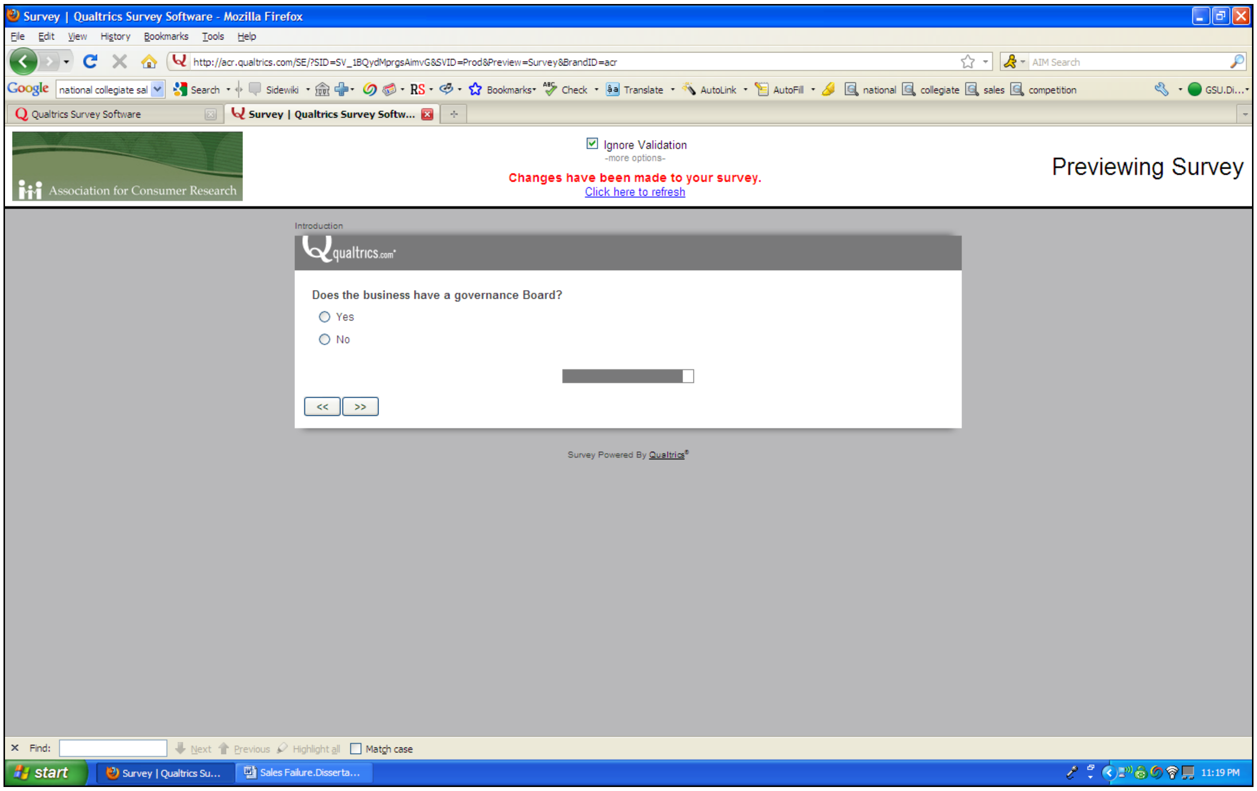
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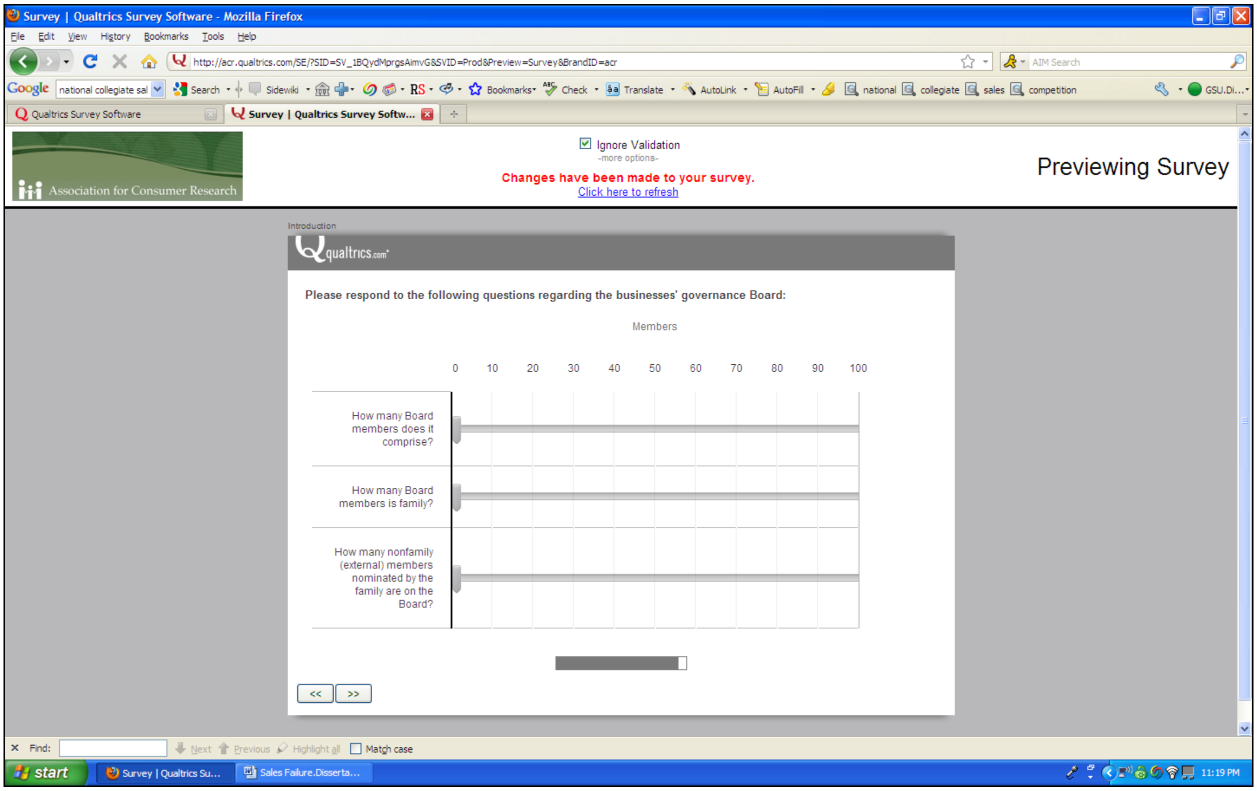
Does the business have a governance Board?

○ Yes
○ No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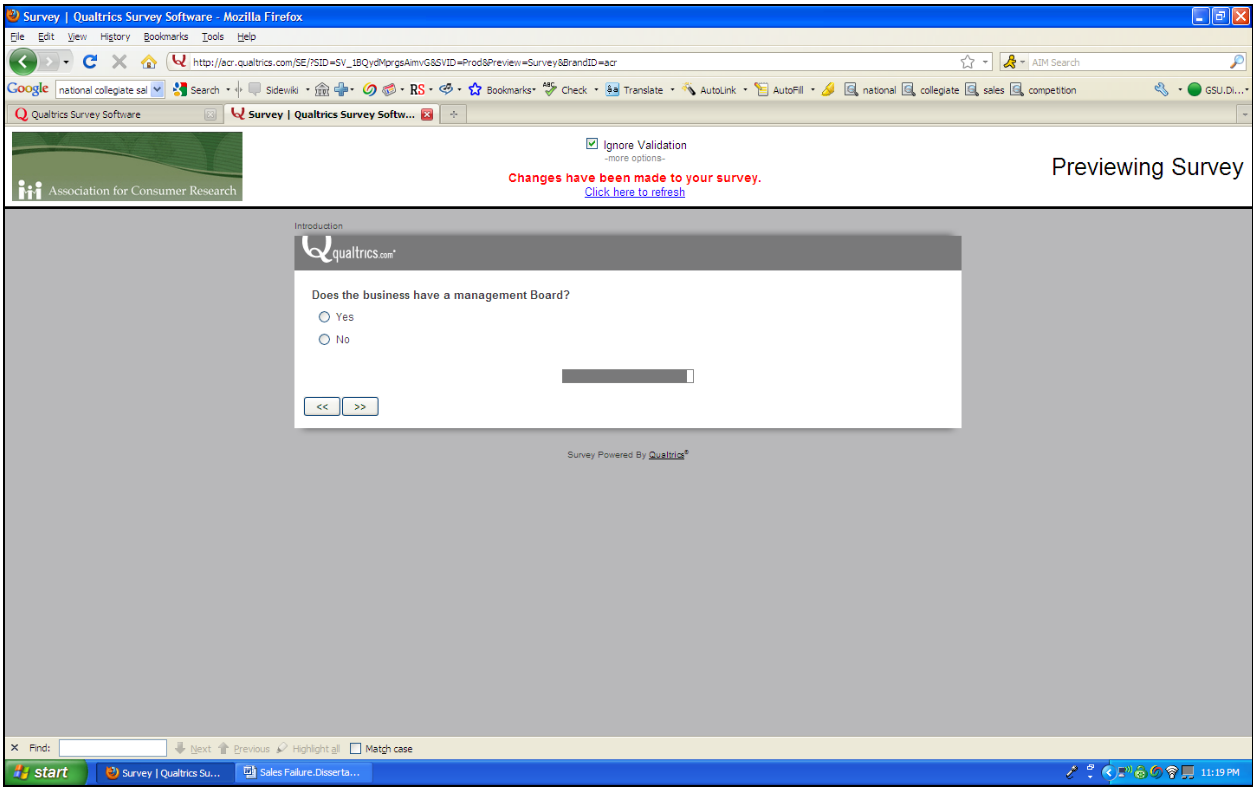
Please respond to the following questions regarding the businesses' governance Board:

How many Board members does it comprise?

How many Board members is family?

How many nonfamily (external) members nominated by the family are on the Board?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Does the business have a management Board?

○ Yes

○ No

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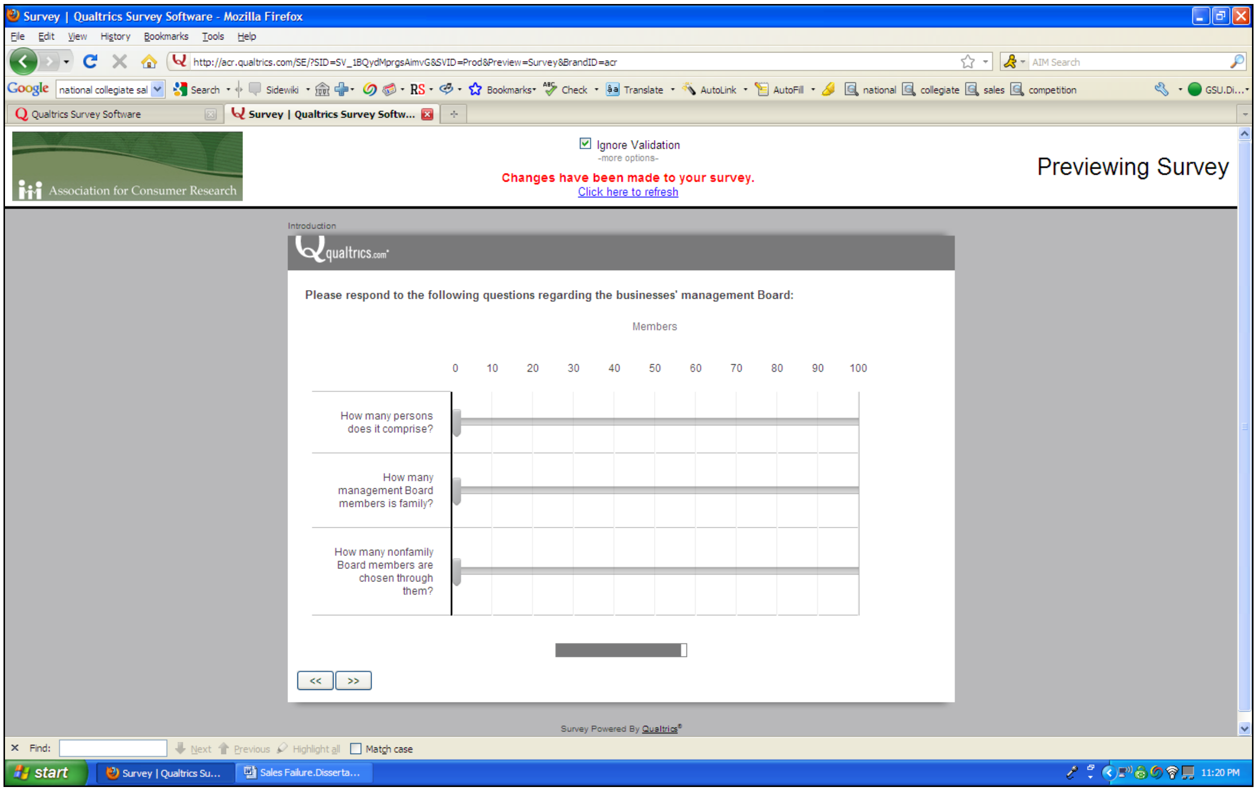
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Introduction

Please respond to the following questions regarding the businesses' management Board:

Members

0 10 20 30 40 50 60 70 80 90 100

How many persons does it comprise?

How many management Board members is family?

How many nonfamily Board members are chosen through them?

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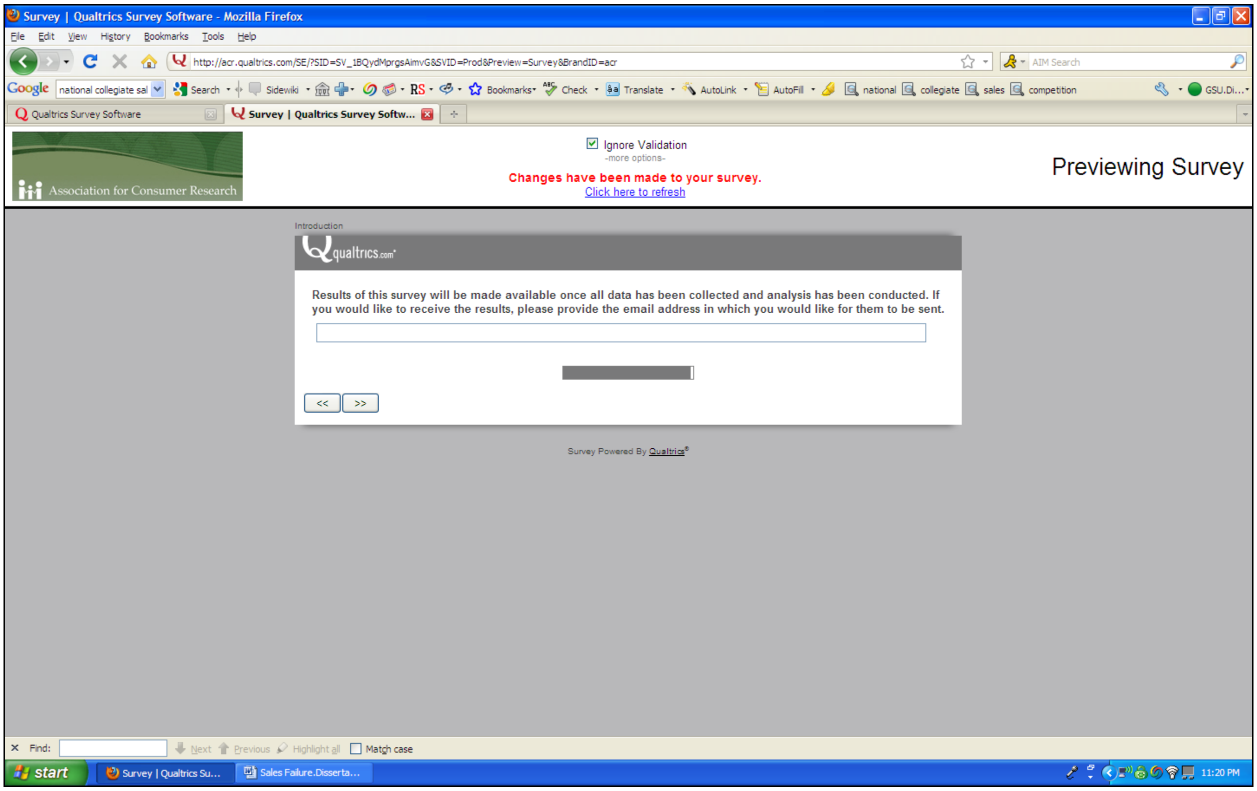
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Results of this survey will be made available once all data has been collected and analysis has been conducted. If you would like to receive the results, please provide the email address in which you would like for them to be sent.

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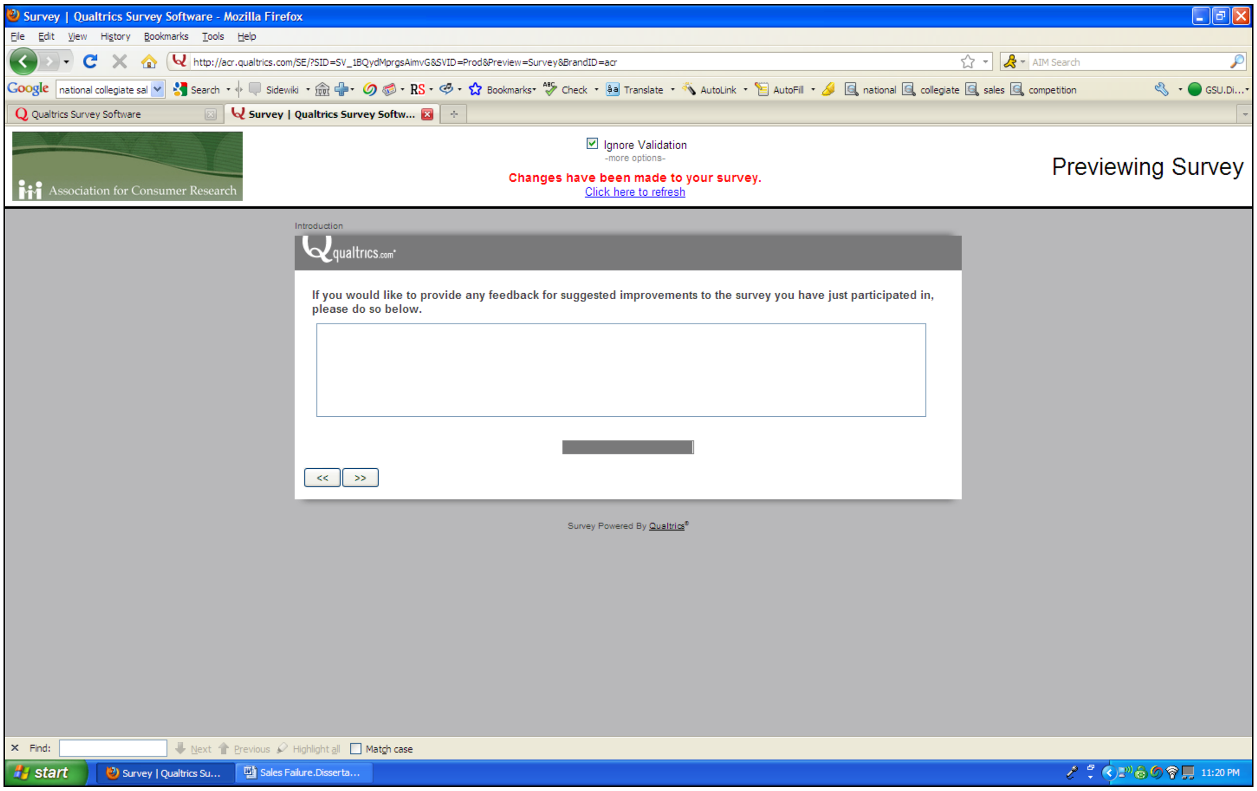
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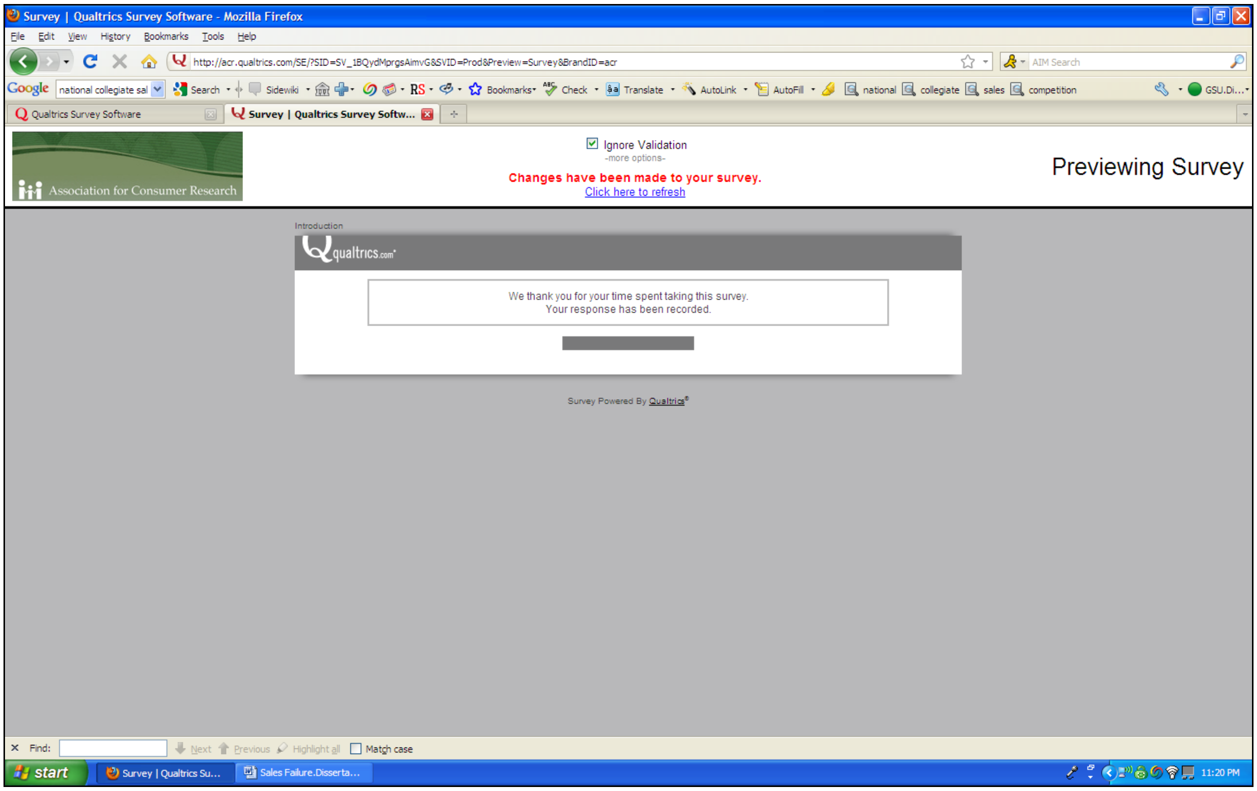

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We thank you for your time spent taking this survey.
Your response has been recorded.

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