DEVELOPMENT OF A BENCHMARKING TOOL TO IMPROVE SALES PERFORMANCE IN A MULTINATIONAL CORPORATION

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Development of a Benchmarking Tool to Improve Sales Performance in a Multinational Corporation

The thesis is submitted in partial fulfilment of the requirements for the award of the degree of Doctor of Business Administration of the University of Portsmouth

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Declaration

The thesis is submitted in partial fulfilment of the requirements for the award of the degree of Doctor of Business Administration of the University of Portsmouth. While registered as a candidate for the above degree; I have not been registered for any other research award. The results and conclusions embodied in this thesis are the work of the named candidate and have not been submitted for any other academic award.

Jeremy Noad

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Abstract

This research thesis addresses issues of sales performance within a multinational corporation. The study identifies sales force effectiveness processes that are important for improved performance. Sales force effectiveness is a key challenge for organisations, but few studies have addressed the issues in relation to multinational organisations. As an applied professional doctorate, this study also contributes the design of a sales effectiveness benchmarking tool that can be used in countries to assess their sales effectiveness processes and identify actions for improvement.

The research reported here was undertaken through a case study methodology encompassing two research phases. The first phase developed a model of sales force effectiveness and identified sales force effectiveness processes appropriate to a benchmarking tool. The second phase applied the knowledge created in phase 1 to develop and implement a benchmarking tool. The research design involved qualitative interviews with chief sales officers in phase 1 and participatory action research in phase 2.

The applied outcome of the study is a benchmarking tool that was developed and implemented in 11 countries and contributes a new measure of sales force effectiveness. The study adds to the body of knowledge on the topic of benchmarking, business process management, and sales force effectiveness processes.
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Abbreviations & Definitions

ARC  Action Research Cycle
BPM  Business Process Management
CSO  Chief Sales Officer
DBA  Professional Doctorate of Business Administration
HPO  High Performance Organisation
IPA  Interpretative Phenomenological Analysis
ITR  Interview Transcript Review
PAR  Participatory Action Research
SFE  Sales Force Effectiveness

Definitions
Sales Manager  Individual responsible for leading a team of salespeople
Chief Sales Officer  A senior leader or functional head in charge of the activities of sales managers and sales people within a country
1 CHAPTER 1: INTRODUCTION

Having an effective high performing sales organisation is desirable for any business. Having an efficient means of improving sales performance is of particular importance to multinational organisations. There have been numerous studies on individual elements that may enhance sales effectiveness to improve sales performance; several are discussed in chapter 2. This study aims to identify if sales effectiveness processes are transferable across countries in a Multinational Corporation (MNC) and establish a tool to enable improvements in sales performance across multiple sales organisations.

1.1 SALES EFFECTIVENESS AND SALES PERFORMANCE

Sales force effectiveness is commonly described as the outcomes of the sales person and the sales organisation (Churchill et al. 2000). Zoltners et al. (2008) expanded the sales force definition to encompass additional variables and constructs. However, it remains an under-researched topic within the sales discipline (Küster & Canales 2008; Cron et al. 2014), despite becoming a key activity to improve sales performance (Ledingham & Kovac 2006; Piercy 2010; Bernard et al. 2016), and lacks a robust definition of elements that make up its composition. As many companies face the need to compete in an increasingly turbulent globalised market, a greater understanding of sales force effectiveness and how it might be achieved remains prevalent.

Sales force effectiveness has had little scholarly attention compared to other elements of sales research. Research has focused on the activity of the salesperson and their role in sales force effectiveness. Research on sales force effectiveness has typically been marked by the use of a single driver of sales force effectiveness, such as territory design (Longino 2007), or a few variables, such as role stress and organisational commitment (Lagace et al. 2011).

However, there have been few studies on applying multiple processes of sales force effectiveness. This lack of knowledge within a single study presents a
limitation for the application of knowledge by practitioners. Each previous study proposed to contribute to sales force effectiveness; however, there is no clarity whether certain processes of sales force effectiveness are more potent than other processes. This lack of clarity presents an opportunity to establish which processes of sales force effectiveness should be prioritised over others.

Furthermore, the sales manager plays a pivotal role in the sales organisation, acting as a critical enabler of sales force effectiveness within the sales team, creating sales success. Despite this, research examining sales manager effectiveness is limited (Deeter-Schmelz et al. 2002; Piercy et al. 2009).

Studies investigating sales force effectiveness across multiple countries are relatively rare (Murphy & Li 2012). Previous studies, involving multinational participants, have predominantly relied on input from Europe or the USA for participation (Panagopoulos et al. 2011), and frequently, these studies have focused on comparisons between 2 countries (DeCarlo et al. 1999; Liu et al. 2001). Managing the sales effort globally is becoming increasingly important in multinational corporations; therefore, it is important to identify which sales force effectiveness processes can be utilised to support this (Murphy & Li 2012). This globalisation of sales organisations is driving the need for convergence of sales manager activities (Cravens et al. 2006); however, these multinational corporations must know role of culture within the country and how this may affect the efficacy of sales force effectiveness processes (Mehta & Anderson 2015). Therefore, the opportunity to study within a multinational corporation, encompassing participants from four continents, presents an opportunity to advance knowledge in this area.
1.2 STRUCTURE OF THE THESIS

The object of this study is to explore sales performance improvement in a Multinational Corporation. The thesis is presented in chapters, including the introduction, the literature review, research methodology and the methods utilised in the research, accompanied by chapters analysing and presenting the data and expressing conclusions, including recommendations for further research on this topic. The structure is set out in figure 1.1 overleaf.
Figure 1-1 Overview of the thesis
Chapter 1 introduces the research concerning sales effectiveness and its participants, giving the research problem and the research aims and objectives. Figure 1.2 reflects this.

![Figure 1-2 Overview of Chapter 1](image)

Chapter 2 reviews the literature on sales force effectiveness and sales performance. The chapter examines sales force effectiveness to develop the performance of sales organisations and offers an understanding of sales performance. It examines earlier definitions of sales force effectiveness, then continues to establish the participants who create sales force effectiveness and the processes that may increase the effectiveness of the salesperson or sales team. The research project was established to gain an understanding of which processes of sales force effectiveness improve sales performance and to find how to apply this knowledge integrally in an MNC. Therefore, the literature on benchmarking and the creation and use of sales force effectiveness processes in a maturity model roadmap that could be used to diagnose the current and future state of sales force effectiveness at a country sales organisation level is reviewed. The chapter also presents the research questions. The outline of this chapter is illustrated in figure CH 2.1

Chapter 3 looks at the research methodologies and the research approach. The starting point of the research was to determine any potential for improvement in sales force effectiveness to enable countries to increase sales performance. The research had two specific parts: Research phase 1 investigates research questions one and two, and research phase 2 addresses research question 3, enabled through the actions taken in research phase 1. The outline of this chapter is illustrated in figure CH 3.1
Chapter 4 presents the data analysis of both research phases and provides a discussion of the data analysis. The chapter is divided into two principal sections; Section 1 discusses the outcomes of the research to show the potential for improving sales performance and how research questions 1 & 2 are answered. Section 2 provides analysis and discussion of the benchmarking process in individual countries relating to research question 3. The chapter is represented in figure 4.1.

Chapter 5 concludes the study by presenting empirical findings and how this study contributes to theory and application. Chapter 5 makes recommendations for subsequent investigations and acknowledges identified limitations of this study to help future inquiries. This is depicted in figure 5.1.

Chapter 6 provides reflection on undertaking a professional doctorate. The thesis is concluded with appendices and referencing.

1.3 RESEARCH PROBLEM

The research problem is established through the needs of the sponsoring company. The company operates within a declining marketplace affected by rising costs and global reduction and relocation of manufacturing. In 2008, the company launched its business transformation programme, entitled high-performance organisation (HPO). This programme initially focused on synergies and productivity improvements and measured success, based on cost savings achieved. In 2010, sales activities were included in the scope. For the sales organisation, the HPO programme was intended to be significantly different, moving the focus away from cost savings towards improving sales performance in multiple countries within the group.

Therefore, to improve sales performance, there needs to be an understanding of whether processes of sales force effectiveness can be created globally and transferred into the countries. If it is found that this transfer is possible, then there is a need to identify a number of implementable sales effectiveness processes. A preliminary review of existing research identifies that cultural factors may influence the effectiveness of such a programme. Cultural
factors could be defined as a potential constraint; therefore, there is a need to investigate the role of constraints in achieving sales force effectiveness.

In summary, the research problem is how to improve sales performance systematically in multiple countries within a single MNC.

1.3.1 Research questions

The overall purpose of the study is to understand the processes of sales force effectiveness that a sales organisation can adopt to improve sales performance. The three research questions were created after the review of the literature to address the research problem.

1) Are sales force effectiveness processes transferable across countries’ sales teams within an MNC?
2) Which sales force effectiveness processes could be included in a tool to improve sales performance?
3) How can a benchmarking tool for sales effectiveness processes be used to implement and improve sales performance in multiple countries?
1.3.2 Research Approach

Having established the research problem and the three research questions, figure 1.3 presents a graphical interpretation of the research.

![Figure 1.3 Research Approach]
The secondary research focuses on existing knowledge of sales performance and sales force effectiveness. It presents previous research on using benchmarking to improve performance. The research is presented consecutively, as figure 1.3 describes, as the research is undertaken in a sequential manner. As the research aims to contribute to practice and knowledge and potentially achieve the desired outcome for the sponsoring company, the research phases have been split into two distinct phases. Research phase 1, having considered the literature and identified a gap, examines if there is potential for transferable sales force effectiveness processes to improve sales performance and, if this potential exists, which sales force effectiveness processes should be included. This part of the study uses the knowledge of chief sales officers, operating in multiple countries, in the context of a single multinational company, using an interpretive epistemological research philosophy.

After completing research phase 1, the study continues to research phase 2. This describes the creation of a tool to benchmark and track progress in improving sales force effectiveness, including the outputs from research phase 1, to create content and the rationale to undertake the work. It presents the methodology used in benchmarking and analysis and a discussion of sales performance based on the benchmarking and the improvements that certain sales effectiveness processes have on sales performance at the country level.

The research uses a case study based on a single multinational corporation. The research includes primary and secondary research. Secondary research comprises the literature review to deepen the knowledge of sales force effectiveness role in improving sales performance. The initial research phase uses an Interpretative Phenomenological Analysis (IPA) methodology and conducts semi-structured interviews to gather primary data. Qualitative data is analysed using NVivo software to identify themes, concerning sales manager and sales force effectiveness. The second research phase utilises a participatory action research approach to frame the establishment of a benchmarking tool and its role in changing sales performance in individual country sales organisations within the same MNC. RP2 examines the outcomes of a pilot of the tool and its application in
multiple countries. It seeks to identify, through analysis of company performance data, any impact of using benchmarking on sales performance.

1.4 RESEARCH PARTICIPANTS

There are three participant groups within this research. The sponsoring organisation, a multinational corporation within the chemical sector, is regarded as number 1 in their market, with annual revenue over $20 billion, employing over 60,000 individuals in 100 countries; the corporation’s operating model meets the definition of a regional maximise company (Yip 2001). This operating model is characterised by a global headquarter function, associated with several regional headquarters to whom the countries report, making it a suitable subject of a case study. Using a single multinational corporation may provide further insight into the effect of culture on sales force effectiveness and provide an opportunity to identify common processes of sales force effectiveness.

The second participant is the researcher, a sales and marketing practitioner with 25 years’ experience in sales and marketing, employed by the participating organisation since 2002, who took responsibility for global sales force effectiveness in 2010 and is involved in all phases of the research.

The main participants, who provide the primary data, are employees of the sponsoring company.

For research phase 1, the participants are senior executives within sales organisations in their country, who are employees of the sponsoring company. Previous research has focused on lower levels of a participating organisation, implementing research with sales managers and salespeople as participants (Williams & Plouffe 2007). A chief sales officer leads and heads the entire sales organisation within a country, and these individuals exercise significant influence and power within their organisations. The study benefits from having access to individuals, who are part of this sales elite (Javalgi et al. 2011; Welch et al. 2002). Chief sales officers may provide new and relevant insight into "what" and "if" the sales force effectiveness process can improve sales performance. These participants provide input from multiple countries: Australia, Austria, France, Italy, South Africa,
Sweden, the United States, and the United Kingdom. It is hoped the diverse range of countries provides new insights.

For research phase 2, participants are again drawn from the sponsoring organisation. For the first action research cycle, these are Regional Process Owners (Trkman 2010). For action research cycle 2, the country sales organisations that undertake the benchmarking are USA, Brazil, Austria, Italy, Sweden, France, UK, South Africa, Australia, China, and Malaysia.

1.5 SUMMARY
This chapter introduced the study, explaining the shape and structure of the thesis. The research aims and objectives, along with the research participants, are identified. In the next chapter, the study presents the literature review.


2  **CHAPTER 2 IMPROVING SALES PERFORMANCE**

The previous chapter introduced the research topic, the business imperative to identify sales effectiveness opportunities at the sponsoring company, and reviewed the structure of the thesis. The research problem focuses on improving sales performance in multiple countries within the same organisation, and the literature review seeks to identify if it is achievable.

The literature review commences with the examination of business process management and benchmarking to identify the mechanism that a business programme seeking to improve sales performance could utilise. The literature considers how previous research has examined salesforce effectiveness to improve sales performance and examines the definition of salesforce effectiveness and how sales performance can be measured. The literature is further examined to establish the participants impacted by a sales performance improvement programme. Having considered the how, who, and why, the literature review focuses on the salesforce effectiveness processes that have been subject to previous research. The salesforce effectiveness processes present the potential of “what” the content of any sales performance improvement programme could be.

As the research problem relates to a multinational corporation, the literature review seeks to identify the role of culture and any other constraints to improving sales performance. The chapter concludes with a summary of identified research gaps relevant to the research problem. Figure 2.1 overleaf summarises the chapter.
Figure 2-1 Overview of Chapter 2
2.1 Implementing a Sales Performance Improvement Programme

To address the research problem of improving sales performance across multiple country sales organisations within the same MNC through an evolutionary approach, this section of the literature review examines business processes and benchmarking. The review first seeks to examine business processes as an approach to improving sales performance.

2.1.1 Business Process Management

Business Process Management (BPM) is the approach taken by organisations to analyse and continuously enhance their core activities within their organisational functions, including sales and marketing (Trkman 2010). Implementation of a BPM orientation involves placing processes at the core of the organisation and applying a systematic method considered efficient, effective, and capable of adoption in multiple countries (Swapna & Shankaraman 2015).

By adopting a business process management approach, an organisation can identify areas of improvement, resulting in positive outcomes for the organisation and its customers (McCormack & Johnson 2001). Irrespective of its function, an organisation has people, systems, and processes to enable it to serve its customers. Competitive pressure and globalisation have created an environment that has brought processes into focus for companies as a source of differentiation, therefore, a strategic asset (McCormack et al. 2009). A BPM approach is relevant, as processes may vary across institutions; process management can be applied to all organisations (Vlahovic et al. 2010) using an evolutionary approach (McCormack et al. 2009).

Studies have found BPM can influence performance (Harmon 2010), identifying that organisations that focus on improving and optimising their business processes experienced better performance compared to organisations that do not (Swapna & Shankaraman 2015; Vlahovic et al. 2010; Creed et al. 2008). Identification of the cause for improved performance was due to a focus on BPM with improved financial (McCormack & Johnson 2001) and non-financial (Škrinjar et al. 2008) measures. Therefore, using BPM can provide and enable sustained
corporate success (Swapna & Shankaraman 2015), which can be applied globally (Vlahovic et al. 2010). BPM has been identified as focusing on five elements: customer experience, an end to end processes, the integration of initiatives, tracking of process measures, and adjusting employees mindset (Creed et al. 2008).

The effectiveness of BPM can result, not only improvements in performance but also in improved adaptability of organisations to changing market environments (Creed et al. 2008), and are more likely to achieve their required operating efficiencies in a disciplined and focused manner (Swapna & Shankaraman 2015; Creed et al. 2008). Success is not always guaranteed through the adoption of a process orientation; while there are clear links to high performance, implementing a business process orientation can present risks that must be mitigated to ensure the desired results are achieved (Škrinjar et al. 2008).

When considering a sales performance improvement programme, BPM can be used to meet established success factors (Trkman 2010). However, a study has shown most BPM programmes fail to achieve all the desired outcomes (Abdolvand et al. 2008). By focusing on a few key processes and having detailed and specific critical success factors, this risk of failure is mitigated (Trkman 2010). The definition of a critical success factor is described as focusing on a few processes in which satisfactory results ensure successful performance (Rockart 1979). Additionally, an organisation must potentially undertake a change in its outlook and culture. A definition of business process orientation is: “an organisation that in all its thinking emphasises processes as opposed to hierarchies with a particular emphasis on outcomes and customer satisfaction” (McCormack & Johnson 2001). Undertaking a process based transformation is critical, as sustained transformation does not happen quickly (Creed et al. 2008).

Culture can be seen as a source of success and failure in BPM (Van Looy et al. 2011) and is influenced by the culture of the team, the organisation, or the country. Therefore, culture is a central factor influencing BPM and is affected by BPM (Brocke & Sinnl 2011). Cultural resistance has been found to lead to the failure of BPM programmes within organisations (Wong et al. 2014).

This change to placing processes at the core of the organisation presents a risk to the success of any programme, as this creates a dependency relating to the
quality of the change management (Trkman 2010). Implementation of a BPM programme is identified as requiring five elements: top management support, defined and documented business processes, a desire to advance and improve, the establishment of process owners at the local level, and an understanding of the role of culture (Vlahovic et al. 2010). A study in 2008 identified using a programme based approach is better than taking a project-based approach, as this minimises the risk of conflict between business priorities and recognises the journey to becoming a fully processed orientated business has a longer timeline than a standard project (Creed et al. 2008). Top management support is required, as studies have shown it needs the commitment of the staff and the leadership team to achieve a business process orientation (Creed et al. 2008). The establishment of business process owners responsible for reviewing the processes and driving continuous improvement (Lee & Dale 1998) increases engagement throughout the organisation (Hammer & Stanton 1999), enhancing the likelihood of the change to a business process orientation through BPM and achieving the desired strategic objectives of the organisation.

In summary, previous research has shown BPM can provide an evolutionary approach to improving performance. Several requirements to implement BPM are addressable through a programme. Culture plays a major role in achieving success, as does the establishment of process owners. As part of the objective to improve sales performance, the range of key processes to be managed, documented, and defined are considered later in this chapter. Once these processes have been established, to achieve the research aims, a method of implementing a programme to improve sales performance through salesforce effectiveness must be considered. The next section considers the approach of benchmarking as a method.

2.1.2 Benchmarking

Having examined a BPM approach to address the research problem of improving sales performance across multiple countries within the MNC, this section reviews benchmarking as a suitable approach to identify areas for improvement and track the progress of action plans to improve individual business processes within the sales organisation that result in improving performance. A benchmarking approach is one of several management tools available to an organisation that is
implementable in parallel to other initiatives within the organisation (Francis & Holloway 2007).

The definition of benchmarking is: “a method for identifying aspects of an organisation that could be more efficient and/or effective” (Francis & Holloway 2007). Benchmarking examines the resources and the effectiveness of processes by comparing them with other organisations or defined standards (Ceric et al. 2016). The first recognised Western occurrence of benchmarking as a performance enhancing activity is usually attributed to Xerox in 1983 (Giles & Starkey 1988) as an examination of business practices and processes using an inter-firm comparison approach (Francis & Holloway 2007). Studies have found benchmarking contributes to improving performance in public and private sector organisations through the identification of process efficiencies (Francis & Holloway 2007) and by targeting key business processes for sustainable improvement (Ceric et al. 2016; Zairi & Whymark 2000). Benchmarking studies in sales are limited; however, a study of benchmarking in sales in 2007 identified clear performance improvements measured by sales growth when considering two sales teams, where one was benchmarked and the other was not (Sweet et al. 2007).

Benchmarking is a method for developing compliance in organisations, particularly when process standardisation is a desired strategic intent (Wuellenweber et al. 2009; Francis & Holloway 2007). Process standardisation achieved through benchmarking has been shown to support an organisation’s objectives to lower their costs, thereby increasing profits (Madritsch 2009).

Benchmarking is an approach that utilises a tool comprising business processes to identify best practice required changes in the major processes to maximise success (Hinton et al. 2000). This method has seen widespread use since the 1980s, establishing it as a recognised and accepted management practice (Francis & Holloway 2007).

There are several benchmarking models identified in previous studies:

- **Internal**- similar operations within a single organisation benchmarked (Camp 1995)
- **Competitive**- where an organisation benchmarked itself against industry best practice (Camp 1995)
- **International**- comparisons of organisations, industries, or companies within the same organisation (Watson 1993)

- **Explicit**- a deliberately structured process based approach to facilitate comparison (Schofield 1998; Jackson & Lund 2000)

It is common for organisations that commence a benchmarking programme to focus on internal benchmarking (Hinton et al. 2000). This internal benchmarking can be multichannel or multicountry, but the benchmarking programme must relate to the organisation’s performance (Francis & Holloway 2007).

Previous studies have identified five elements involved in benchmarking: the identification of the major business processes, precise definition of the main elements of each process, creating a benchmarking tool, undertaking a pilot benchmarking, followed by the adoption of the benchmarking tool for implementation (Zairi & Whymark 2000). A successful implementation of benchmarking practices requires the organisation’s management to engage honestly and openly about their performance with others (Ammons & Rivenbark 2008) to mitigate the desire to cluster around the average (Francis & Holloway 2007). This desire to cluster around the mean can be understood, as outliers of poor practice or best practice within an organisation may result in additional scrutiny that dilutes the organisation’s focus on creating sustained performance improvements. The effectiveness of benchmarking against the desired objectives to create sustainable performance improvement requires recognising it is the journey of progress to improve the business processes as opposed to measuring the effectiveness of the programme management (Jackson & Lund 2000; Ahmed & Rafiq 1998), which is critical.

Several limitations of benchmarking exist, including the cost involved for small organisations outweighing the benefits and, for large organisations, there can be several hidden costs, including the time and effort in coordination and a general lack of quantification of incurred costs resulting from cultural resistance or change resistance (Elnathan et al. 1996). In addition to costs, benchmarking can affect an organisation's performance if the benchmarking distracts the organisation from its priorities (Ahmed & Rafiq 1998).
Benchmarking can be inappropriate between competitors, when the benchmarking objectives do not align to the organisational strategy or when the cost of benchmarking outweighs the expected benefits for the organisation. Focusing on benchmarking as the single improvement programme creates a risk of stifling innovation, as benchmarking has been shown to take an organisation only to the level of best in class, without progressing to new levels (Leseure et al. 2004; Camp 1995). A lack of understanding of the organisation’s history and culture, along with the organisation’s needs, can affect the focus of a benchmarking programme and a country organisation’s desire to participate in a benchmarking programme if it conflicts with their other priorities (Francis & Holloway 2007).

Therefore, it is critical to developing a benchmarking programme that has clarity on the key processes, an objective approach, and clear action plans and success factors.

2.1.2.1 Best Practice

Best practice refers to processes that can produce superior results. Developing best practice evolves from a good idea (not substantiated by data) to good practices (processes that improve key results sustainably) to the pinnacle of best practice identified as the best approach for the market or industry the organisation operates within (Jarrar & Zairi 2000).

This best practice ideal can be gathered by looking internally at the organisation and externally at other organisations (Camp 1995). However, the focus on best practice provides a limitation, as consideration of the cost and effort involved to achieve best practice, as opposed to good practice, can result in organisational distraction from focusing resources on areas that do not need to be best practice (Francis & Holloway 2007). A further limitation of best practice is that best practice indicates there is a single best way to undertake a process (Leseure et al. 2004; Francis & Holloway 2007), whereas benchmarking good practice not only provides organisations with an improvement journey, but it also allows the concept of having more than one way to undertake a process effectively. Of particular importance is the need to evaluate each process within the benchmarking to establish whether achieving best practice is the objective. For some processes,
based on the organisation of priorities, good practice may be sufficient (Ahmed & Rafiq 1998).

A maturity model roadmap can be used to enable companies and organisations to undertake benchmarking by recognising the need to encapsulate their current business process maturity, noting their priorities, and providing opportunities to achieve best practices and good practices (Creed et al. 2008). This approach, focused on the improvement of business process maturity, may benefit organisations whose priorities are the institutionalisation of policies and processes from which standardisation and process efficiency are desirable outcomes (McCormack et al. 2009).

Creating a business process maturity roadmap that encapsulates processes and provides an organisation with the opportunity to record current business process maturity clearly identifies good practice and best practice. It supports and enables the transfer of best practice throughout the organisation (Jarrar & Zairi 2000) and provides a roadmap that outlines a route to success (McCormack et al. 2009). Having a high level of business process maturity has been shown to provide organisations with improved forecasting, improved effectiveness (in BPM), which provides better control of results (McCormack et al. 2009; Ranjbarfard 2016; Vlahovic et al. 2010).

Studies identified that a maturity model roadmap comprises several stages (Vlahovic et al. 2010):

- Each entity of a business process is simplified and described with a few maturity levels (Ranjbarfard 2016; McCormack et al. 2009; Robinson et al. 2006).
- Levels of maturity are ordered sequentially from initial to best in class (Ranjbarfard 2016).
- Each level of maturity has certain requirements that must be achieved by the benchmarking group, and these demands must be met before progressing to the next level of maturity (Ranjbarfard 2016; McCormack et al. 2009; Lockamy & McCormack 2004).
While studies show there is no scarcity of maturity models (Skrinjar et al. 2006), an organisation can utilise the principles of a maturity model structure, populated with their key processes that require assessing and improving.

In summary, BPM using a benchmarking approach that includes a maturity level to improve sales performance in country sales organisations systematically and sustainably has significant potential to address the research problem. Business Process management and benchmarking have been used to research operational efficiencies and performance improvements in a number of sales related fields. Table 2.1 displays a summary of studies relating to benchmarking studies and BPM-focused studies within the sales discipline. The literature review did not uncover specific research on the use of BPM and Benchmarking of sales force effective processes; therefore, there is a gap in the research literature, which this current study seeks to address.

<table>
<thead>
<tr>
<th>Business Process in sales related fields of study</th>
<th>Benchmarking in sales related fields of study</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales &amp; operational Planning ((Thomé et al. 2012; Tuomikangas &amp; Kaipia 2014))</td>
<td>Organisational Learning (Ammons &amp; Roenigk 2015; Bennett &amp; Gabriel 1999)</td>
</tr>
<tr>
<td>CRM (Ranjbarfard 2016; Raman et al. 2006; Ahearne et al. 2012; Bohari et al. 2011)</td>
<td>Organisational Capability (Sweet et al. 2007; Nath et al. 2010; Morgan 2009; Vlachos et al. 2010; Piercy &amp; Lane 2005)</td>
</tr>
<tr>
<td>Key Accounts (Rogers &amp; Ryals 2007; Ryals &amp; Rogers 2007)</td>
<td>Value Based selling (Töytäri &amp; Rajala 2015)</td>
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<tr>
<td>Marketing Resources (O’Cass et al. 2015)</td>
<td>Sales Quotas (Morelli 2009)</td>
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<td>Sales Outsourcing (Rogers 2013)</td>
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<td>Sales Quotas (Morelli 2009)</td>
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<td>Sales Organisation (Piercy 2006)</td>
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*Table 2-1 Previous BPM and Benchmarking Studies*
In the next section, the literature review considers the concepts of sales force effectiveness, sales performance, and the role of sales force effectiveness, and the chapter concludes with the processes of sales force effectiveness that could form part of a benchmarking tool.

2.2 **Sales Force Effectiveness as an Approach to Improve Sales Performance**

The concept of sales force effectiveness has received little attention in marketing and personal selling literature (Küster & Canales 2008). However, sales force effectiveness has grown into an essential tool used by companies to achieve revenue targets and achieve the required levels of sales performance (Lane & Piercy 2010). Research associates are increasing the focus of organisations on sales force effectiveness to the internal and external changes in the business environment typified by shortened product cycles, heightened customer demands, increased product similarities, and intensified global competition (Jones et al. 2005). These changes require increased abilities for the sales force to learn, understand, and adapt to change to ensure sustained sales performance.

Despite the prominence of the sales force as a strategic marketing tool, the concept of improving its effectiveness, labelled as sales force effectiveness, has various definitions for stakeholders within an organisation. From a sales manager’s perspective, sales force effectiveness involves the processes of value addition to the customer beyond product value achieved by a shift from transactional selling to consultative selling processes. From a sales compensation analyst’s view, it is about using better compensation packages to enhance the motivation of salespeople. From a sales training manager’s view, it is about increasing competency through education and skill development. From a finance manager’s view, it is about increasing sales per person, while keeping operational costs at a minimum (Zoltners et al. 2008). While all these definitions are valid, the present study explores the sales force effectiveness from a sales manager’s point of view, with effectiveness referring to the processes of increasing sales performance.
High sales force effectiveness is essential, as it contributes by providing a substantial improvement in organisational performance. Sales force effectiveness enables maximising revenues from existing customers and providing systematic identification and management of new prospects. It offers a platform to sales organisations for accelerating growth in a world of increased competitiveness (Ledingham & Kovac 2006).

2.2.1 Defining Sales Force Effectiveness

Sales force effectiveness has struggled to achieve a robust definition since its inception. In particular, the terminology associated with sales force effectiveness has been inconsistently applied, i.e., sales team performance being interchangeable with sales force effectiveness (Walker et al. 1977; Piercy et al. 1997; Jones et al. 2005; Zoltners et al. 2008; Sujan et al. 1988). The construct of sales force effectiveness did not significantly evolve from its inception in 1977 (Walker et al. 1977) to 2008 (Zoltners et al. 2008). During this period, two models provided the basis for sales force effectiveness research: the Walker Churchill Ford (WCF) model (Walker et al. 1977) and the model created by created by Weitz (Weitz 1981).

Walker et al. (1977) described sales performance as:

“The result of carrying out a number of discreet and specific activities which may vary greatly across different types of selling jobs and situations“ (page 22).

The (WCF) model encompasses five distinct sets of variables: personal, organisational and environmental factors, motivation, aptitude, skill level, and role perceptions. Critically, although the model identifies variables that contribute to sales force effectiveness, the model offers no definition of sales force effectiveness beyond that salesperson performance is a moderator in sales force effectiveness, with effectiveness defined as a summary of organisational outcomes to which the sales organisation and the sales person is partly responsible. In their subsequent study, the model was advanced, based on a meta-analysis of 116 papers, related to salesperson performance, including a 6th element by splitting roles and skills. The meta-analysis argued external factors, such as environment and organisational factors, only contribute to 1% of sales force effectiveness (Churchill et al. 1985).
The Weitz Model (Weitz 1979; Weitz 1981; Weitz et al. 1986) provided the alternative model for sales force effectiveness. The model focuses on four elements: adapting to customers, influencing bases (implying networking), influencing skills, control of the sales process. The model asserts these variables, like those of the WCF, impact sales force effectiveness, but the model does not put forward a clear definition of sales force effectiveness, except that sales force effectiveness can be measured using sales performance indicators.

Since its recognised inception in the 1970’s, scholars have developed a range of theories and models to identify and determine the main antecedents to sales force effectiveness, either directly or indirectly, through other mediating variables (Churchill et al. 1985; Cravens et al. 1992; Walker et al. 1977; Weitz 1981; Piercy et al. 1997; Zoltners et al. 2008; Murphy & Li 2012; Barker 1997; Jirawuttinaunt & Akkrawimut 2012; Küster & Canales 2008). The models created have their roots in the original WCF model (Walker et al. 1977).

Figure 2.2 presents a view of sales force effectiveness, synthesised from research (Walker et al. 1977; Weitz 1981; Cravens et al. 1992; Churchill et al. 2000; Zoltners et al. 2008; Murphy & Li 2012), starting with the creation of sales performance goals. The first or top level identifies goals and actions of the wider organisation generate the performance goals for the sales team. The middle section puts forward the concept that sales force effectiveness drivers (sic Processes), combined with the performance of the sales person and the impact this has on the customer, creates the sales teams’ performance outcomes that contribute to the organisation’s outcomes or results. The third (bottom) tier puts forward the concept that the outcomes of the sales teams, when calculated against their performance goals, would result in a percentage measure of sales force effectiveness, which, while limited as one dimensional, can be ascribed as a measure of performance. Applying sales force effectiveness processes to sales person performance impacts customer results. The customer results provide the financial effects of the sales team performance outcomes that contribute to the organisation’s outcomes. The sales team performance outcomes, compared with the sales team performance goals, can provide a measure of sales force.
In research published in 2008, Zoltners et al. (2008) expanded the sales force definition to encompass variables and constructs not previously considered directly in the scope of sales force effectiveness. Before this research, sales force effectiveness frequently considered only a single or few variables across a single sub-construct of sales force effectiveness, such as salesperson performance (Evans et al. 2002; Podsakoff & MacKenzie 1994; Baldauf et al. 2002). In broadening the definition of sales force effectiveness, Zoltners identified effectiveness is affected by more than the sales person’s performance effectiveness. Decisions and actions of the organisation, such as business strategies and product service offerings, impact the efficiency of the sales force (Zoltners et al. 2008). Additional external factors within the marketplace, such as the economic and political environment, can exert a positive or a negative influence on sales force effectiveness (Katsikea et al. 2007). The model of sales force effectiveness is subject to these additional variables and their impact on the sub-constructs of sales force effectiveness.
2.2.2 Measuring Sales Performance
Sales performance has been previously identified as consisting of a wide range of variables (Evans et al. 2012). The evaluation of sales performance can be conducted by using the outcomes or evaluating the salespersons’ behaviours (Anderson & Oliver 1987). Previous research into sales force effectiveness has utilised the outcomes of the organisation as a measure of sales effectiveness (Babakus et al. 1996). Typically, the outcomes measured are revenue growth, profit improvement, and return on assets (Cravens et al. 1992; Plank & Reid 1994; Walker et al. 1977; Deeter-Schmelz et al. 2002). Further research has utilised sales volume, market share, and customer satisfaction as outcome measures of sales force effectiveness (Piercy et al. 1997).

Additionally, research has been completed, using a synthesis of these outcome measures (Baldauf & Cravens 1999; Piercy 2006; Cravens et al. 2006). These measures, when assessed against historical performance of the sales organisation or utilised in intercompany benchmarking, provide the outcome-based performance indicators used to describe sales force effectiveness (Churchill et al. 2000).

Irrespective of how the sales performance is measured, the role of the sales manager is the key to enabling a salesperson to reach their goals (Zallocco et al. 2009). Sales performance is a composite evaluation of the results achieved by the organisation. This composite evaluation uses the most relevant organisational financial information to assess sales force effectiveness (Churchill et al. 2000). This financial information can include indicators, such as new customer acquisition (Baldauf & Cravens 1999) and profit improvement (Autry et al. 2013). Some studies have added qualitative indicators, such as customer satisfaction (Piercy et al. 1997), as a non-financial measure of sales performance. Behavioural measures are consistently measured and analysed at the individual role holder level, rather than at the organisational level (Oliver & Anderson 1994). Typically, these behavioural measures focus on aspects of the role holder’s tasks, such as contact management or time management.

Therefore, the measurement of sales performance is positioned as containing three sub-constructs: salesperson performance, sales team
performance, and organisational performance. Participants influence each sub-construct, and each sub-construct influences the other sub-constructs. Each sub-construct is affected by many variables, dependent on the organisation goals and the organisation’s market position.

The acceptance of achievement of results (Churchill et al. 2000) as the measure of sales performance is questionable due to the impact of uncontrollable sales force effectiveness processes that can influence the results. This measurement of sales performance does not address the efficacy of the initial goal setting for the salesperson and sales organisation (Skinner 2000; Sweet et al. 2007). Therefore, the measurement of sales performance possesses uncertainty that requires investigation.

2.2.3 Participants in Sales Force Effectiveness

The importance of sales force effectiveness to business organisations is evident in the large numbers of people engaged in sales and sales management (Küster & Canales 2008) and the huge investments organisations make towards the sales force. In 2006, the U.S. had about 20 million people working in sales and sales management (Zoltners et al. 2008). Organisational budgets for the U.S. sales force range from 10% to 40% of the cumulative sales budget (Bradley 2006).

Although it is argued that sales force effectiveness extends past the sales organisation in many companies (Zoltners et al. 2008), especially within Multi-National Corporations (MNCs) that operate matrix organisations, such as the sponsoring organisation, the core of sales force effectiveness and its processes are focused on the sales organisation. Typically, the sales organisation reflects a hierarchy, containing salespeople, sales managers, and a chief sales officer.

The complete organisation can influence sales force effectiveness through its various functions and their decisions. This extended group includes Finance, Legal, Marketing, Operations, Health & Safety, Human Resources, Information Services, and Operations. Further participants in Sales Force Effectiveness are external to the organisation, including Customers, Shareholders, Competitors, and Regulators. While each functional area can enable or constrain sales force effectiveness through their actions, previous studies have focused on the contribution of various stakeholders (e.g., customers, investors, other internal
functions) to sales force effectiveness, and their contribution is well-researched (Zoltners et al. 2008; Asiegbu et al. 2011; Garrido et al. 2005; Pelham & Lieb 2004; Ferrell et al. 2007; Homburg & Jensen 2007). However, the role of sales managers has received scant attention in the research literature. The role of sales managers is also an area where process improvement may be relevant and within the control of the organisation, so this forms the area of focus of this study.

2.2.3.1 Sales Organisation

The definition of the sales force is the division of business responsible for selling services and products for an organisation (Rackham & DeVincentis 1999). The term “sales force” is a collective term, used to refer to salespeople in a business organisation entrusted with the responsibility for customer interactions to influence buying activities, with the primary aim of improving sales revenues (Zoltners et al. 2008). While interacting with the customer, salespeople perform five basic duties: contacting customers, selling products or services, working with wholesalers (business-to-business), servicing accounts, and managing information between seller and buyer (Davies et al. 2010). The primary duty of salespeople is to generate sales revenues through communicating and influencing relationships with the customer to make sales (Rouziès et al. 2005). In their function, the salesperson can deal with competitive market intelligence, personal selling, distributor management, account management, merchandising, and after sales services. Once an organisation has determined the structure and functions of the sales force, the way salespeople perform their roles becomes an important driver for the effectiveness of the sales force, since they are responsible for customer interaction to stimulate sales. Therefore, the role of the sales person has seen significant attention by scholars in sales force effectiveness. In the 20-year period between 1983 -2002, 373 published sales force effectiveness studies focused on the salesperson, compared to 104 focusing on the sales manager (Williams & Plouffe 2007).

Sales managers are the employees who work for an organisation and are responsible for the direct management of selling and salespeople. Sales management requires setting objectives and targets by inputs and assigning the actions responsible for achieving overall goals (Fu et al. 2009). Sales managers focus
on doing things efficiently (Ingram et al. 2005). If the sales force is effective, it fuels the growth of an organisation. For sales managers to increase the effectiveness of the sales force, they should possess the required skills, capabilities, and values shared by the sales team members (Deeter-Schmelz et al. 2002). Additionally, sales managers should possess the capacity to develop and lead skilled individuals (DelVecchio 1998; Ahearne et al. 2005) and motivate individuals and their team of sales people (Miao et al. 2007; Lane et al. 2012). They can achieve this by defining what works well, following processes that repeatedly enhance effectiveness, and motivating the salespeople to remain in the organisation. This retention approach prevents loss of valuable skills and minimises costs associated with recruitment (Mulki et al. 2009; Jaramillo & Mulki 2008). Given the importance of the sales organisation in the performance of a firm (Haas et al. 2012; Avlonitis & Panagopoulos 2007), the sales manager performs a crucial role in enhancing the revenue generation capabilities of the sales team (Shoemaker 2003). However, the cost of sales forces is a considerable part of any firms’ marketing expenses (Piercy et al. 1997) and instils the practical business need for high performance and increasing sales force effectiveness to meet the goals of the organisation. Therefore, the literature proposes that the sales managers’ actions are pivotal to sales force effectiveness; therefore, these actions form part of the research project. Previous research on an effective sales manager is limited (Deeter-Schmelz et al. 2002; Rich 1998), which reinforces the relevance of this part of the research project to investigate the characteristics of an effective sales manager. Typically, sales managers link, within an organisation’s hierarchy, to the Chief Sales Officer (CSO).

The Chief Sales Officer is a role within an organisation with the ultimate responsibility for defining sales strategies and tactics. This senior role within an organisation is accountable for the delivery of sales performance (Fiss 2006). The CSO is the leader of the sales organisation. Sales leadership focuses on doing the right thing and being effective (Ingram et al. 2005). The leadership style and activities of the CSO influence the salesperson’s confidence in performing their role (Jaramillo & Mulki 2008). It also significantly determines the level of salesperson performance (Yammarino 1997; Chakrabarty et al. 2008), which is the primary impactor on sales performance (Cravens et al. 1992). Further studies found
leadership is an important driver of success within an organisation (Druskat & Wheeler 2003), and supportive leadership directly leads to higher sales performance (Jaramillo et al. 2005). The CSO represents the sales organisation to the remainder of the organisation to identify and agree on the sales team performance goals as part of the organisation’s goals. The CSO provides the sales organisation’s input in discussions on strategy (Baldauf et al. 2005) and the allocation of the overall organisation’s finite resources. A key result of this intra-organisational activity is the CSOs have clarity of both the constraints and opportunities that affect their sales organisation.

2.2.3.2 Role of the Sales Manager in Sales Force Effectiveness

The sales manager’s role is to focus on the successful execution of the company strategies through the motivation and capabilities of their sales team. However, research examining sales manager effectiveness is limited (Deeter-Schmelz et al. 2002), although sales managers play a central role in implementing marketing and sales strategies (Mulki et al. 2009). Sales managers also mediate between the short-term orientation of the sales force and the long-term direction of the marketing department, enabling the pursuance and achievement of mutual understanding and common objectives (Le Bon & Merunka 2006). Sales managers provide a vital link between an organisation’s mission, vision, and values by connecting upper management to the sales force. Identification of the ideal mix of sales management activities that improve the sales effectiveness of the sales teams to deliver sales performance and the ability to learn and adapt sales force effectiveness processes in response to changing markets is highly desirable. The sales manager’s role, therefore, has the potential to be identified as a critical part of building sales force effectiveness within a sales team to meet the goals and objectives of the organisation. Through their interaction and their actions with and for their sales team, the sales manager can directly affect the sales force effectiveness of individuals within their team. Therefore, the development and understanding of the actions and interactions with their sales team within the control of the sales manager to initiate and implement are the foci of this study.
The sales manager must concentrate on the leadership and management of the sales force, as opposed to managing the sale (Mulki et al. 2009). The first in line sales manager can undertake tasks and activities that affect sales force effectiveness; examples include building capability and motivation within their sales team to deliver improved efficiency and influence the sales performance. Three elements - the structure and role of the sales force, the sales people, and the activities of the sales force - are within the sales system and fall under the responsibilities of the sales manager (Zoltners et al. 2008). Studies show several sales force effectiveness processes influence sales performance: motivation and capability and knowledge of salespeople (Sharma et al. 2007; Asiegbu et al. 2011; Weitz et al. 1986); structure and functions, selling activities, and the sales force (Katsikea & Skarmeas 2003); information technology (Hunter & Perreault 2007); compensation structure (Erevelles et al. 2004; Darmon & Rouzies 2002); and monitoring performance (Oliver & Anderson 1994). The sales manager is an integral part of designing performance appraisal and measurement models for the sales force (Pettijohn et al. 2001; DeNisi & Pritchard 2006; Franco-Santos & Bourne 2008). Sales managers also play the role of instilling customer focus among sales people, using appropriate sales leadership styles and developing models of desired behaviour for the salespeople to work together and create a real focus on customer needs and perceptions (Mulki et al. 2009).

2.2.3.3 Summary of Participants

Understanding the relationship between the sales force, company strategy, and marketing and sales strategies enables businesses to understand the significant role sales-force effectiveness plays in achieving revenue targets, formulating marketing strategies, acquiring and retaining customers, and launching new products. The study focuses on the sales organisation. The scope and limitations of the study are driven by the requirements of the sponsoring company to undertake an evolutionary change in the sales organisation (as opposed to revolutionary activities) through the utilisation of existing resources and processes. Within the scope of this study, the focus is the sales organisation. Therefore, the study excludes external factors, which can be reacted to and planned for by the sales
managers but are not within their direct control. It excludes the company strategies, as the sales manager may participate in the creation, but is not usually a key decision maker of these strategies. Therefore, the study restricts itself to identifying sales force effectiveness processes that are actionable by the sales organisation.

The next part of the chapter discusses research on the processes of sales force effectiveness. The processes focus on the elements of sales force effectiveness that are potentially relevant to the sales manager to control or initiate with their sales team to improve sales performance.

2.3 **SALES FORCE EFFECTIVENESS PROCESSES**

The second part of the chapter deals with the sales force effectiveness processes available to a sales manager. Effective sales managers enable the sales team to carry out their activities at optimal levels (Deeter-Schmelz et al. 2002; Piercy et al. 1997). The sales force effectiveness processes have been grouped into clusters of sales force effectiveness for discussion within the chapter:

- Leading the sales team
- Organising the sales team
- Developing the sales team
- Managing the sales team

The culture of the organisation and the country that can influence sales force effectiveness and literature on this topic is reviewed. Consideration is also given to moderators regarded as constraints against which the sales manager must mitigate to achieve sales force effectiveness. The chapter concludes with the outline of the research gap and the research question.

2.3.1 **Leading the Sales Team**

Sales leadership is an important driver of success within an organisation (Druskat & Wheeler 2003; MacKenzie et al. 2001). Leadership styles influence salespersons’ confidence to perform their role (Román & Iacobucci 2010; Miao &
Evans 2012), which influences salesperson performance (Yammarino 1997; Chakrabarty et al. 2012). Salesperson performance is the primary impactor on the selling unit’s effectiveness (Piercy et al. 1997).

The effectiveness of the sales manager’s leadership is increased when used within empowered settings (Ahearne et al. 2005), and supportive leadership directly leads to higher sales performance (Jaramillo et al. 2005). The salesperson's discretionary effort enhances an organisation's competitive advantage, and this discretionary effort is influenced by the sales manager's leadership style (Dubinsky & Skinner 2002). Salesperson motivation enhances self-efficacy, and motivation is intrinsically linked to supportive sales leadership behaviours (Jaramillo & Mulki 2008). However, two studies identified sales people might receive effective leadership from their sales manager but do not recognise it and do not benefit from it (Wilkinson 2009; Sweet et al. 2007). Therefore, it is accepted that the sales manager’s leadership behaviours influence sales force effectiveness.

2.3.1.1 Sales Leadership

The leadership role of the sales manager involves undertaking activities that enable motivated salespeople to pursue organisational goals. Commonly, these goals are aimed at improving short-term sales objectives and long-term customer relations that enhance sales performance (Jaramillo & Mulki 2008). Therefore, the non-action or action of sales managers can significantly affect sales force performance. The sales manager affects the effectiveness of the sales force on processes, such as job satisfaction, organisational commitment, and motivation and salesperson self-esteem (Weitz et al. 1986; Jaramillo et al. 2009; Asiegbu et al. 2011). Incorporation of the desired leadership behaviours by the sales manager encourages the sales force to exhibit heightened customer focus, linking to higher levels of performance. Theories on the relevance of sales manager leadership behaviour include the relationship between positive leadership reward behaviour (PLRB) and its impact on the effectiveness of the sales force. One study (Amyx & Alford 2005) found a sales manager’s use of PLRB was most effective with salespeople who had a strong internal need for achievement. In controlling the activities of the sales team, the sales manager plays a critical role in building a
culture that enhances selling through the advocacy of organisation citizen behaviours (Piercy et al. 2006). The leadership behaviours further drive sales force effectiveness through influencing the effective coordination and communication of the sales team (Murphy & Li 2012).

Sales managers undertake several roles in managing the sales force-determining structure and roles, formulating the sales strategy (Zoltners et al. 2008), and monitoring and measuring the performance of the sales team (Franco-Santos & Bourne 2008; Murphy & Li 2012). A comprehensive study undertaken in Australia, utilising sales respondents from three business to business companies, identified over 50% of sales professionals perceived they experienced inadequate leadership support, and 20% reported experiencing inadequate leadership support (Wilkinson 2006b). Other research put forward that salespeople receive effective leadership from their managers but do not recognise it or benefit from it (Sweet et al. 2007). A potential reason is that salespeople within the same team respond differently to sales manager interactions (Avlonitis & Panagopoulos 2007). This work supported previous findings (Anderson & Oliver 1987; Shoemaker 2003), which reinforced the need for sales managers to offer an efficient feedback loop to enhance sales force effectiveness. In summary, the need exists for a sales manager to have a positive and consistent leadership style to engender sales force effectiveness (Deeter-Schmelz et al. 2008). However, the challenge remains, as recent literature on the global definition and categorisation of the skills and capabilities needed by sales leaders is lacking; a study in 1991 was the last to undertake a comprehensive examination of the complete sales leader (Butler & Reese 1991).

2.3.1.2 Motivation in Sales Teams

Motivation within sales literature is described as the willingness of the salesperson to expend effort to improve sales performance (Walker et al. 1977). Employee job performance results from the interaction between motivation and ability (Heneman & Schwab 1972). Factors that motivate a salesperson are individualistic; therefore, the sales manager must know each salesperson's needs (Vlachos et al. 2010). Salespeople are identified as having higher egoistic needs
than other roles. This need is usually demonstrated through their role selection and their need to measure performance and achieve success through winning business. This need for achievement interrelates with the desired behaviours of the sales manager. Recognising and rewarding achievement, the sales manager centralises and indicates the required behaviours of the salespeople (Ingram et al. 2005; Jaramillo & Mulki 2008).

A motivated salesperson is more likely to be receptive to actions and goals required to achieve sales force effectiveness. Therefore, sales performance can be engendered through motivation processes. Motivation in sales research has previously found it to be significant when linked with other sales force effectiveness processes. Walker et al. (1977) established motivation is clearly linked to sales performance. Weitz and Sujan (1986) linked motivation and knowledge to sales force effectiveness. Other studies have linked motivation to quota performance and territory design (Badovick et al. 1992; Grant et al. 2001). Motivation and its connection to compensation for salespeople, resulting in higher sales performance, have been established in multiple studies (Ryals & Rogers 2005; Pousa & Mathieu 2010; Pullins 2001). Motivation has also been identified as a key attribute of management control systems and performance appraisals (Kuvaas 2007; DeNisi & Pritchard 2006). Motivation, therefore, is a major component in sales force effectiveness, created through the actions of the salesperson and the sales manager (Piercy et al. 1997; Colletti & Fiss 2006; Colletti & Chonko 1997). There are multiple options for the sales manager to engender motivation within the sales team, and the optimal actions of the sales manager to engender motivation must be established.

2.3.2 Organising the Sales Team

For an effective sales force, strategy and planning are crucial to directing sales teams and their activities. Sales strategy and planning provide a business with a foundation on which to build decisions on the structure and roles in the sales force. The structure of the sales organisation and its optimal staffing is necessary but is subject to a level of constraint based on resource availability and budget pressures. The effectiveness of the sales force requires the right mix of sales
positions, between field salespeople and inside salespeople, to enhance sales performance (Kotler et al. 2006). The role of the sales manager is to optimise sales performance by managing their sales team and through coaching and mentoring the salespeople to increase productivity and to reduce turnover rates that introduce regretted costs of recruitment and training, which affect the overall organisation performance.

The structure and roles of the sales force should focus on the identified functions and activities undertaken to meet the needs of the organisation and satisfy customer needs. The sales force structure and roles are essential processes that define the tasks of the salespeople by determining and clarifying the roles each member of the sales team plays (Murphy & Li 2012). The structure and the roles of the sales force should be consistent with the marketing and sales strategies. The structure and roles of a sales team are built around three elements: the design of the sales organisation, the clarity of each member’s role, and the recruitment of individuals into that role.

2.3.2.1 Organisation Design

Recognising the organisational structure of the sales force is a core driver of the effectiveness of the sales force (Zoltners et al. 2008), the sales manager’s role in initiating and managing the structure makes it an essential component for increasing the effectiveness of the sales force. A clear sales organisational design provides salespeople with an opportunity to benefit from sales force effectiveness (Piercy et al. 2006). Poor organisational design demonstrated by inadequate market coverage can negatively affect sales performance by affecting salesperson motivation and role ambiguity (Onyemah 2008) and disrupt sales management focus away from improving sales performance (Küster & Canales 2008). High performing sales organisations place greater emphasis on organisation design (Cravens et al. 2006). Key elements of an effective sales organisation are the right structure, optimal numbers of salespeople, and efficient territory allocation (Babakus et al. 1996).

The design of the sales organisation considers the vertical and horizontal structures of the organisation (Cron & DeCarlo 2006). The horizontal structure
encompasses the allocation of resources to the sales effort, while the vertical structure relates to the span of control (Avlonitis et al. 2007). The optimum span of control for a sales manager has been subject to debate in the literature, with arguments for a small span of control as the most efficient for some researchers (Lopez & McMillan-Capehart 2009) and a broader span of control achieving the same result in other research (Churchill et al. 2000).

Therefore, there is uncertainty on the optimal organisation design for high performing sales teams. Although the need for effective sales organisations has been established as a driver for sales force effectiveness, investigation is required on its importance, compared with other sales force effectiveness processes.

2.3.2.2 Role clarity

The definition of role clarity is the certainty the salesperson possesses to do their role correctly (Shoemaker 1999). Sales managers, who articulate and communicate marketing and sales strategies and the support for the sales force, improve sales performance (Román & Iacobucci 2010). Close interaction and effective communication by the sales manager also assist the salespeople in avoiding uncertain or ambiguous situations, while selling products or services to customers (Román & Iacobucci 2010). Avoidance of uncertain situations increases the confidence levels of salespeople, an essential ingredient in the seller-customer interaction that encourages customers to trust the seller (Jaramillo et al. 2009). Role ambiguity has been identified as having a detrimental effect on sales performance (Onyemah 2008).

Through increasing role clarity and reducing role ambiguity, the sales manager assists the sales force to meet the challenges associated with selling activities and facilitates quick information gathering, processing, and decision-making to create and sustain a competitive advantage. Close supervision and efficient communication also assist salespeople in avoiding uncertain or ambiguous situations while selling products or services to customers (Jaramillo & Grisaffe 2009). In summary, the sales manager has a role in reducing role ambiguity through providing role clarity for salespeople to affect the sales effectiveness of the sales team positively and improve performance (Murphy & Li 2012).
2.3.3  Developing the Sales Team

Building the capability of the sales team is characteristic of an effective sales organisation (Piercy et al. 1997). Developing a salesperson’s knowledge and skills improves their capability, leading to improved sales effectiveness (Weitz et al. 1986). The concept of capabilities can depend upon the foundation of understanding the required capabilities to perform a single task or group of tasks effectively and efficiently. Sales force effectiveness includes the methods that develop the knowledge and practices to improve the selling process to enhance the capability of the salesperson (Wachner et al. 2009). Strengthening the ability of the salespeople via knowledge concerning customers, markets, and products helps the salespeople to prioritise their opportunities, to solve customers’ problems, and to utilise their time efficiently and effectively (Jaramillo et al. 2005). Development of the sales team to improve capability is considered in the subsequent sections:

- Coaching the sales person
- Training the sales person
- Developing the knowledge and skills of the sales person

2.3.3.1  Coaching

Coaching is an activity that sales managers undertake to enable a sales person to develop skills to achieve sustained and long-term success (Deeter-Schmelz et al. 2002; Rich 1998). Focusing on coaching, the sales manager can improve sales person performance (Cron & DeCarlo 2006). Besides achieving the organisation’s goals and enabling subordinates to succeed (Ingram et al. 2005; Chakrabarty et al. 2008), effective sales organisations place much more emphasis on coaching (Piercy et al. 1997). Teams coached effectively had significant improvements in overall performance measures, such as employee retention and team morale, compared to similar functional sales teams whose sales managers did not engage in coaching (Piercy 2006). Highly effective sales units benefit from sales manager coaching (Pousa & Mathieu 2010). Sales managers, who coached, experienced positive change in the level of their sales unit performance (Hellman 2009; Piercy et al. 1997).
One study concluded, to maximise the effectiveness of salespeople, there was a need for coaching to achieve high sales performance (Sweet et al. 2007). Sales managers, who effectively coached their sales personnel, on average, delivered 20% more, regarding sales performance against internal targets (Piercy et al. 2006). Coaching has also been identified to impact less productive staff positively to develop focus and skills to become more effective members of the sales organisation (Pitt et al. 2002; Jaramillo & Mulki 2008). Coaching improved sales force effectiveness through reducing role ambiguity and improved the performance of underachieving salespeople (Baldauf et al. 2001b; Deeter-Schmelz et al. 2008; Pitt et al. 2002; Dubinsky 1999).

However, another study found over 50% of sales professionals perceived they had received inadequate leadership support. This lack of support was typified by the absence of coaching received from their sales managers, compared to the respondent’s perceived level of need and wants (Wilkinson 2006a).

Although sales managers identified coaching was an essential and integral part of their role, sales managers admitted they did little, citing time issues as a fundamental reason (Onyemah 2009), despite the understanding that coaching developed salesperson skills and knowledge and increased sales performance.

Therefore, the sales manager should strive to improve the effectiveness of the sales force through coaching (Zoltners et al. 2008). An open question is if the sales manager is sufficiently trained in coaching skills (Chakrabarty et al. 2008). Additionally, do sales managers have the intent and the capacity to coach their salespeople? This uncertainty results in the question, is coaching regarded as a priority driver for sales force effectiveness in a global MNC?

2.3.3.2 Training

Training has been identified as a critical process in developing the knowledge and skills of the salesperson to achieve strategic advantage (Román et al. 2002), to maximise their efficacy, which enhances sales effectiveness by the salesperson, resulting in improved sales performance (Piercy et al. 1998). Continual change in the sales environment has increased the need for ongoing and effective training of salespeople to meet the organisation’s needs (Baldauf et al. 2001a;
Corcoran et al. 1995). Training can be delivered through formal workshops by professional trainers or more commonly by the sales manager, utilising training content, developed in-house or purchased, to meet a specific training need. Therefore, the role of the sales manager has expanded to include a training and enablement role (Shoemaker 2003). This role expansion has created the need for the training skills of a sales manager to become more important; therefore, the sales manager must develop training skills (Chakrabarty et al. 2008). A competent sales manager trains salespeople to achieve the organisational goals and enable subordinates to succeed (Ingram et al. 2005).

Effective training of the sales team improves sales motivation (Attia et al. 2002) as a driver of sales force effectiveness as previously discussed. Increasing the skills and knowledge of the salesperson via training builds confidence within the sales team to achieve their sales goals (Asiegbu et al. 2011). Training can be a lever for strategic advantage (Boehle 2010), and a prioritised approach to training by the sales manager reduces salespeople, within the same sales unit, responding differently to the sales manager’s intentions (Avlonitis & Panagopoulos 2007; Onyemah & Anderson 2009). However, measurement and the effectiveness of sales training remains a requirement not answered in previous research (Attia et al. 2008).

The established importance of training, despite the lack of a defined measurement of the effectiveness, indicate training is an important enabler of sales force effectiveness. However, as an enabler, it does not (in isolation) improve sales performance. The lack of clear measurement of the effectiveness of training creates a question of how it is prioritised as a driver of the sales force effectiveness in a global MNC.

2.3.3.3 Developing knowledge and skills
Sales skills relate to the individual’s capacity to implement sales tasks effectively (Ambady et al. 2006). Through possessing the right mix of knowledge and skills, the sales person can maximise their efficacy and reach their performance goals, which contribute to the sales performance. A core skill is their ability to learn and adapt their sales activities to match customer’s needs and anticipate
customer's future desires to enable the salesperson to expand business with existing customers and acquire new customers (Asiegbu et al. 2011). The need to gather up-to-date information about customers and the market segment in which they operate is crucial to the company to formulate growth strategies (Homburg et al. 2008); therefore, the skill of gathering information improves sales efficacy. Knowledge of the product and services of the company and how these products and services can relate to the customers’ needs is also required. The complexity of the product or the lack of knowledge of the product influences the successful introduction of products to the customer (Kotler 2006) and can affect sales performance.

The salesperson’s skill of acquiring knowledge of the marketplace influences the salesperson’s effort in identifying opportunities to sell. The greater knowledge the salesperson possesses, concerning markets, customers, and products, increases sales force effectiveness (Ingram et al. 2005). An effective sales force should know the type of customer and the buying process to enable them to serve customers better. The salesperson should possess the knowledge to identify the customers’ buying behaviour and the skills to modify the sales process to match the customer behaviour (Rackham & DeVincentis 1999). The salesperson’s technology orientation increases opportunities to leverage information to facilitate sales planning and smart selling activities that improve sales performance (Johnston & Marshall 2005). Information technology plays a key role in improving the sales force effectiveness through developing sales-based customer relationship management and sales force automation, improving the effectiveness of the sales force (Hunter & Perreault 2006).

The sales manager’s role is to ensure each salesperson has the requisite skills and knowledge. These skills include knowledge management, self-management skills, selling competencies, and negotiation skills (Mariadoss et al. 2014; Román et al. 2002; Pettijohn et al. 2007). Knowledge and skills of the salesperson directly affect the efficacy of the salesperson to perform their role. The sales manager, through monitoring, coaching, and conducting performance appraisals, can identify opportunities to address deficiencies in the salesperson’s knowledge and skills, improving sales force effectiveness. Therefore, it can be
questioned if developing the knowledge and skills of the salesperson is a topic of sales force effectiveness relevant for an MNC.

2.3.4 Managing the Sales Team

The active management of the sales team is a key driver of sales force effectiveness (Murphy & Li 2012). Management of the sales team is a broad topic; therefore, the focus is applied to processes that influence sales force effectiveness. Performance appraisals contribute to sales force effectiveness (Kuvaas 2007). Performance appraisals enable a salesperson or sales manager to reflect on past performance and agree on changes undertaken to maximise salesperson efficacy. Sales compensation can motivate salespeople to perform their required role, using the appropriate behaviours, knowledge, and skill, rewarded through sales compensation (Conlin 2008). Monitoring the sales force is a key driver of sales force effectiveness; it is essential for sales managers to manage the sales force (Murphy & Li 2012). Managing includes measuring the salesperson against performance targets, enabling a sales manager to influence positive culture and desired behaviours to improve sales performance (Franco-Santos & Bourne 2008).

2.3.4.1 Performance reviews-appraisals

The primary purpose of performance appraisal is to reflect on past performance and discuss actions for the future. Performance appraisals are conducted between the sales manager and the salesperson and can contribute to sales force effectiveness (Muczyk & Gable 1987; DeNisi & Pritchard 2006). Evaluation of outcomes and behaviours of the salesperson determines the level of appropriateness, effectiveness, and efficiency of the individual, with the impact of that salesperson contributing to achieving sales performance. Performance reviews can provide an advantage through the identification of opportunities to enhance the salesperson’s capability. Similarly, performance appraisal of employees provides opportunities and information for employee development (Kuvaas 2007).

The process of the appraisal review can be productive and profitable for the success of organisations, as they can counter the risks involved in failing to meet targets and failing to identify the development needs of the salesperson (Silver et al. 2006). An effective performance appraisal process enables the sales manager
and the salesperson to understand poor performance and take action (Risher 2003).

For a performance appraisal system to be effective, there needs to be an accurate and reliable methodology through which current levels of performance can be determined and compared with the strategized levels of acceptability. Therefore, there is a need to link expected performance with the job descriptions (Ahearne et al. 2005). Salesperson behaviours discussed at appraisal should be related to the compensation system (Brent & Rogers 2007).

The sales manager has a role in implementing a practical and transparent performance measurement and appraisal system for the sales team to improve sales performance. An effective and fair performance appraisal process contributes to sales force effectiveness, providing participation is ensured and learning derived from the appraisal is applied by both the salesperson and the sales manager when developing sales force effectiveness plans (Pettijohn et al. 2001).

2.3.4.2 Sales Compensation Programmes

Sales compensation is a sales effectiveness driver in motivating salespeople (Rouziès et al. 2009). However, despite significant changes in the global economy and sales processes over the past decades, sales compensations plans have not evolved at a similar rate (Ryals & Rogers 2005). While the organisation’s executive leadership formulates and implements compensation policies within the sales force, sales managers play a critical role in determining compensation structure in both fixed and variable pay (Krafft et al. 2012). For a sales manager to implement a compensation structure with the right combination of fixed salary, variable pay, and non-financial rewards that stimulate sales performance, there are several factors to be assessed: organisational demographics (size, sector and length of time in business); the role of the sales person in the selling process; nature of the sales process; the strategies of the company; the customers and customer segments; and the types products or services sold (Krafft et al. 2012). It is important to set sales compensation at a level where it does not influence unethical selling behaviour but is sufficient to motivate extra efforts to enhance performance. Sales compensation packages, with low variable pay, compared to fixed pay, have been identified as
improving sales person behaviour and salesperson performance, enhancing sales performance (Küster & Canales 2011).

2.3.4.3 Monitoring the Sales Force

The monitoring role is essential to sales managers to initiate and manage the sales force; it is a key driver of sales force effectiveness (Murphy & Li 2012). The monitoring of the salesperson can provide insight into the capability and motivation of the salesperson through the monitoring of outcome and behavioural controls. Sales managers have several mechanisms they could employ to monitor and evaluate the performance of the sales force. Effective sales managers focus on monitoring activities in which the salesperson performs with the customer (Piercy et al. 1997). Outcome control used in monitoring and evaluating the performance of the sales force uses sales revenues and other financial measures as the basis for evaluation (Murphy & Li 2012). Outcome controls also provide sales managers with knowledge about the strengths and weaknesses of individual members of the sales force, which are useful for informing the decision to assign roles and set sales targets (Jones et al. 2005).

Piercy and Lane identified that a salesperson's behavioural performance influences the salesperson's outcome performance, and the sales manager control activities have a direct impact on the salesperson's behavioural performance (Piercy & Lane 2005). Outcome control is the control managers set and monitor to evaluate performance, standards, or sales outcomes. Process control is the extent to which the sales manager monitors salespeople's selling strategies and work procedures and other behavioural aspects of the job performance of the sales force. To remedy the limitation of the outcome metric, sales managers can also use behavioural controls to examine specific behaviours required in achieving a sales outcome to provide clarity for salespeople (Murphy & Li 2012) and to identify gaps in skills and knowledge. Sales managers’ behaviour control comprises monitoring, directing, evaluating, and rewarding activities. Jaworski reported a significant positive relationship between output monitoring and job performance, which was contradicted by Oliver and Anderson’s findings in 1994, where they found no significant association between output monitoring and performance (Jaworski &
Kohli 1993; Oliver & Anderson 1994). To achieve optimal results, sales managers should use outcome and behavioural performance metrics to achieve higher sales performance results (Gabcanova 2012; Mulki et al. 2009).

Sales managers may use performance targets to influence positive culture and desired behaviour on the salespeople (Franco-Santos & Bourne 2008). While performance targets are useful tools for motivation and measuring performance, companies set targets at higher levels to encourage salespeople to put in extra effort. For the salespeople to achieve higher targets, they have to perceive them as achievable to invest extra effort (Dubinsky & Skinner 2002). Measuring performance uses data to set targets, communicate goals and quotas to the sales people, and generate agreement for the set targets (Franco-Santos & Bourne 2008).

The monitoring role of the sales manager that considers both outcome and behavioural performance metrics is more likely to improve the effectiveness of the sales force by clarifying sales targets and modelling required behaviour to improve performance than using either performance or outcome metrics in isolation. Measurement of salesperson against targets of performance is necessary to build product and market knowledge, selling skills, efficient time usage, and motivation.

In summary, the sales manager has a role of monitoring salesperson behaviours and outcomes. This role positively effects the sales effectiveness of the sales team, improving sales performance.

2.3.5 Culture and Sales Force Effectiveness

Culture is an important aspect of sales force effectiveness, as both organisational culture and country culture can affect the efficacy of any sales force effectiveness programme. Culture is defined as the way a group deals with problems and reconciles dilemmas (Hofstede 1980). Multinational corporations require an understanding of culture and the way it impacts a sales force effectiveness programme. The way a sales manager interacts and relates to salespeople can be affected by the national culture. Multi-national corporations must know the application of one country’s sales management practices to another country may lead to inefficiency and weak performance (DeCarlo et al. 1999) due to the moderating effect of culture. A country’s attitudes and beliefs, customs, laws,
and traditions contribute to the national culture, which may not align with an organisational culture (Javalgi et al. 2011). Therefore, sales force effectiveness programmes from multinational companies must have flexibility within the programme design to ensure the efficacy of the programme in multiple countries (Attia et al. 2008; Murphy 1999).

Organisational culture affects employee fit and motivation, which impacts the effectiveness of the organisation (Küster 2008). However, efficiencies and effectiveness of the sales force can be achieved through managing the sales force globally in a way that relates closely to the customers (Cravens et al. 2006), making it highly desirable to introduce global sales force effectiveness programmes. Ongoing globalisation of the world economy has created similarities in sales management practices, such as behavioural control. However, national culture influences compensation packages, as these remain divergent across different countries (Cravens et al. 2006). Therefore, it can be agreed that culture plays a major role in MNC sales management (Murphy et al. 2004; Honeycutt & Ford 1995). Therefore, the culture of an organisation across multiple countries could result in the varying efficacy of sales force effectiveness, and this needs further investigation.

2.3.6 Constraints Impacting Sales Force Effectiveness

A fundamental aim of sales force effectiveness in an organisation is to generate maximum benefits for a product or service, but that aim is subject to certain constraints. In organisations, constraints to sales force effectiveness are evident and expected. First is the lack of adequate capital and resources to train and increase the skills and knowledge of the salespeople on the products or services they sell. In-depth knowledge about a product or service increases the confidence of the salespeople when demonstrating the quality and value-addition of the product to the customer to influence them to make purchases (Zoltners et al. 2008). Second, the resource constraint concerning funding may lead to less optimal organisation design or insufficient numbers within a sales team to serve each territory. However, these types of constraints are known and actively managed. The question remains, are there other constraints that impact the sales manager’s
desire to improve sales performance that must be identified and considered within a sales effectiveness programme?

2.4 Outcomes of Sales Force Effectiveness for the Sales Force

Stakeholder needs and customer results are contributors to the need for sales force effectiveness. The economic perspective views sales force productivity such that the sales force should consider the main beneficiaries of the selling activities, their needs, and expectations as predictors of effectiveness to achieve the required sales performance. The value perspective considers the sales force related to the delivery of value addition to their customers in a cost-effective way to achieve long-term competitive advantage (Corcoran et al. 1995). Achieving both short-term and long-term competitive advantages indicates an effective sales force.

Customer results, as measured using satisfaction scores, repeat sales, and retention rates, present essential inputs for calculating sales forecasts for subsequent financial periods along with measuring the performance of salespeople (Chonko et al. 2000). Customer results are instrumental for identifying and correcting or enhancing the effectiveness of the sales force. Customer results depend on resources and processes in which an organisation invests to improve the effectiveness of the selling process.

Research and development are essential in developing effective marketing strategies, product offering, pricing, and sales channels strategies with the collective aim of improving sales revenues and sustainable, profitable relations with existing and new customers (Hunter & Perreault 2006).

Company results exist outside the sales system and affect the effectiveness of the sales force (Zoltners et al. 2008). Business results are distinct from customer results, since factors in the external environment affect business results, while factors in the internal organisation environment affect customer results (Piercy et al. 2003).

Environmental forces, such as market growth, competition, government regulations, and rate of technology advancement, impact the effectiveness of the
sales force in carrying out their activities, with the rate of investment required to facilitate selling (Colletti & Fiss 2006). Understanding the environment for factors that affect company results relates to the sales force, since it contributes to the calculation of sales and profit forecasts, market share, and both short-term and long-term sales goals and objectives (Homburg & Jensen 2007).

2.5 SUMMARY OF CHAPTER AND RESEARCH GAP

The chapter has examined research on business process management and benchmarking and reached the conclusion this could be a suitable approach to meet the research objectives. This chapter has introduced the concept of sales force effectiveness as understood by the published research to date. The importance of sales force effectiveness to business is a substantial and real business problem. A high performing sales team, utilising all available sales force effectiveness processes, has a direct impact on sales performance. The context of sales force effectiveness, the need to identify effectiveness processes, and their relevance to the study and the business problem of the participating company have been discussed.

In conclusion, benchmarking the differing sales organisations and generating a roadmap of sales force effectiveness processes could provide the sales manager with a role in the delivery of sales force effectiveness through focusing on specific sales force effectiveness processes. The concept of sales force effectiveness has had little scholarly attention, compared to its widespread adoption by organisations, as a strategic marketing and sales management tool. The importance of the sales force to business organisations stems from the operations of the salespeople at the boundary of an organisation, interacting with the customer purposely to stimulate sales and to create and sustain a positive relationship to improve sales revenues. The sales force helps businesses to achieve revenue targets, provide feedback data useful for developing effective marketing strategies, play a fundamental role in acquiring and retaining customers, and assist in launching new products. Further, external factors, such as customer, competitors, information technology, and the general economy, and internal organisation factors, such as marketing and sales
strategies, sales people, and selling activities, affect the performance of sales people. The sales manager holds the responsibilities of leading, organising, developing, and monitoring the sales team to achieve the performance goals defined by the organisation. In summary, the literature suggests:

1. *Sales performance can be improved through sales force effectiveness processes; however, it is unclear which processes are most relevant to improving sales performance.*

2. *There are processes of sales force effectiveness that may be applicable in multiple countries through the actions of the sales manager that improve sales performance, but culture may be a moderating factor.*

3. *Benchmarking sales effectiveness processes may provide the opportunity to track and improves sales effectiveness resulting in improved sales performance.*

The literature review suggests two distinct research phases. The first research phase draws on primary data to identify sales effectiveness processes that can improve sales performance across multiple countries. The second phase applies the findings from phase one and develops a benchmarking tool through which sales effectiveness processes in an organisational context can be developed and sustained. This is developed further in the next chapter, which examines the research design and the methodology of the study undertaken.
3 Chapter 3 Research Methods

In the previous chapter, the thesis examined the literature relating to improving sales performance. It reviewed business process management as a framework to improve sales performance, with the processes of sales force effectiveness that could be used within such a framework. This chapter focuses on the research methodology, the research method, and the research strategy.

The chapter is split into four main sections: first, the methodological approach; second the research strategy, which utilises a case study comprising two distinct, but related, data collection phases. The third section presents the first phase of the research. The first phase identifies the potential for a tool and its content. The method used qualitative semi-structured interviews to gather primary data to answer the first two research questions.

The fourth main section presents the second phase of the research. The second phase relates to the creation and implementation of a benchmarking tool to improve sales performance using a BPM approach. It uses the primary data collected in the first phase as part of the participatory action research into the creation and implementation of a benchmarking tool to answer the third research question. Figure 3.1 over page presents the chapter.
Figure 3-1 Overview of Chapter 3
3.1 Research Methodology

3.1.1 Research Problem and Questions

The research problem was established through the needs of the sponsoring company. The company, at its core, operates within a declining marketplace, affected heavily by rising costs, global reduction, and relocation of manufacturing. In 2008, the company launched its business transformation programme, entitled High-Performance Organisation (HPO). This programme initially focused on synergies and productivity improvements and measured success based on cost savings achieved. In 2010, sales activities were included in the scope. The programme for the sales functions significantly different, moving the focus away from cost saving towards improving sales force effectiveness across multiple countries within the group, resulting in sustained improved sales performance. Therefore, to improve sales force effectiveness, there needed to be an understanding of whether sales force effectiveness processes could be created globally and transferred into the countries via a tool. Additionally, there was a need to identify which sales force effectiveness drivers should be in focus. The research problem is: “the need to improve sales performance in an evolutionary way in multiple countries in a sustainable manner within an MNC.”

Before the sponsoring company invests in a significant business improvement programme related to improving sales performance across multiple countries within the group, the efficacy of such a concept must be established. Having identified within the literature review that transferring of corporate processes may lead to inefficiency and weak performance (DeCarlo et al. 1999), the need to establish the transferability of effective sales processes between countries was required (Attia et al. 2008). This need led to the creation of research question 1:

1. Are sales force effectiveness drivers transferable across country sales teams within an MNC?

The literature review identified there are several potential processes of sales force effectiveness that could be utilised to improve sales performance (Lane & Piercy 2010). Chapter 2.3 identified a range of Individual processes related
to leading, organising, developing, and managing a sales team, which, if improved, would potentially achieve a sales performance benefit. As the literature demonstrated they all worked in their specific research environment, it prompted understandable business concerns related to cost, complexity, and organisational focus as to which sales force effectiveness processes would have the desired impact on improving sales performance across multiple countries. This led to the creation of research question 2:

2. Which sales force effectiveness processes could be included in a tool to improve sales performance?

To identify a method to implement a programme of sales performance improvement that was both sustainable and measurable, the literature examined the concept of business process management (McCormack et al. 2009) and using a benchmarking tool (Francis & Holloway 2007) in chapter 2.2. This led to research question 3:

3. How can a benchmarking tool for sales effectiveness processes be used to implement and improve sales performance in multiple countries?

3.1.2 Research Methodology

Research methodology refers to the approach a study adopts to investigate a social phenomenon to produce new knowledge or to deepen the understanding of the phenomenon under study (Saunders et al. 2009). Research methodology is a collective term that encompasses research philosophy, approach, methods, techniques, and procedures employed to conduct research to produce new knowledge or to deepen current understanding of a topic or to prove a conceptual framework (Saunders et al. 2009). The choice of a suitable research methodology depends primarily on the purpose of the research and secondarily on the researcher’s understanding of the available options for research and the target audience of the research (Creswell 2009). Research philosophy relates to the development of knowledge and the nature of that knowledge (Flowers 2009). Usually, the research philosophy a researcher adopts for research reflects the assumptions the researcher holds or how the researcher views the world. The assumptions are significant in the conduct of both the researcher and the understanding of the objectives of the research (Saunders et al. 2009). The choice
of research philosophy depends on the researcher’s view of the relationship between knowledge and the process by which the researcher develops knowledge, including practical considerations.

Academic literature on sales related activities is not voluminous. In a study of 15 prominent peer-reviewed journals over a 20-year period, 1,012 articles related to selling or sales management were identified, and empirical studies made up 76% of articles (Williams & Plouffe 2007). Most studies over the period have focused on the activities of the salesperson on an individual level. Research at the organisation or team level has focused predominantly on sales management control processes and leadership behaviours (Cravens et al. 2006; Le Meunier-FitzHugh et al. 2011; Piercy et al. 2006). As the study focused on a single MNC operating in multiple countries, seeking to identify what and how the sales performance could be improved using a global approach, the study adopted an interpretive epistemological research philosophy. Interpretive philosophy believes a social phenomenon cannot be isolated from social actors, and perceptions and consequential actions of social actors create a social phenomenon. This belief implies that a researcher can study a social phenomenon in its natural environment to develop a subjective interpretation of the phenomenon (Flowers 2009). This means the social roles these actors undertake can be interpreted with the meanings each social actor holds for each role they undertake within the social world. As the researcher was part of that social world and therefore influenced observations, it is believed an interpretive philosophy is appropriate for the study. To apply interpretive philosophy, the research was split into three phases. The first phase investigated the literature on sales performance, sales effectiveness process, and benchmarking. The second phase focused on If and What (research questions 1 & 2), and the third phase on How and to what effect (research question 3). An inductive approach is used, as this approach is an appropriate strategy when existing theories do not reflect the perceptions of the participants (Anderson 2004).
3.2 Research Method

Research Method refers to a systematic plan that a study utilises to identify useful and relevant data about a social phenomenon under study within a specified period (Crowther & Lancaster 2005). The selection of an appropriate research method depends on the research philosophy adopted for the study. While quantitative surveys dominate in the field of sales research (Williams & Plouffe 2007), the nature of the research problem and the requirements of the sponsoring company led to the belief that quantitative surveys would be insufficient. A quantitative survey approach is useful when utilising a hypothesis led research project. As the project focused on a real-life problem needing contemporaneous investigation (Yin 2009), the case study method can be considered as the research process. Additionally, the case study method is appropriate, given that the research is not seeking to prove a specific hypothesis or concept but rather to investigate how sales performance can be improved through a process led approach in multiple countries within a single business improvement programme.

A case study focuses on one or a few participants or events to gather a collection of in-depth data to explain a social phenomenon under study (Yin 2009). It emphasises narrative data to identify and describe trends or events. A case study is an appropriate research strategy for data collection to explore the issues and to understand them within a particular context, such as, in this study, a single international corporation. A case study helps transcend the boundaries experienced when using other investigative methods (Eisenhardt & Graebner 2014).

A case study is suitable when research variables are unknown or when the social phenomenon under study is continuously changing (Yin 2009). Case study research is a recognised research method for applying existing knowledge in a new environment (Yin 2009). While case studies can exhibit a lack of rigour, mitigation of this weakness is achievable through a recognised methodology and a standardised systemic approach (Yin 2009). A case study was appropriate to provide depth in understanding empirical findings from the data collection of the research process.
The research project has two distinct phases. The first phase draws on primary data to identify sales effectiveness processes. The second phase applies the findings from phase one and develops a benchmarking tool through which sales effectiveness processes in an organisational context can be developed and sustained.

The sponsoring company provided the environment for the case study. Besides the practical point of being the sponsoring company, the research problem of needing to improve sales performance in an evolutionary way in multiple countries in a sustainable manner within an MNC is a revelatory case study (Yin 2009). A revelatory case study is relevant when there is an opportunity to research, through observation and analysis, a phenomenon that is generally inaccessible to external researchers (Yin 2009). In this case, the interconnectedness of researcher, research problem, and case study company provides a research opportunity that can be revelatory and valuable as a single-case design (Yin 2009).

The study focused on benchmarking tool creation and implementation, which has benefited from previous studies (McCormack et al. 2009). The content of the tool would use sales effectiveness processes that have been identified from previous studies discussed in the literature review (Chapter 2.3). The revelatory case study approach is relevant, as it seeks to apply a methodology of benchmarking using sales effectiveness processes across sales organisations in multiple countries, which is a research gap.

The case study in Phase 1 sought to understand the subjective reality of sales leaders, investigating the “if” and the “what” involved in improving sales performance, described as research question 1 & 2. This phase was of exploratory nature, as opposed to investigating specific outcomes of individual hypotheses related to individual drivers of sales force effectiveness using an interview method. Phase one aimed to identify the potential for a sales performance improvement programme and its content in a meaningful way. Additionally, it could potentially identify any new information the study had not initially envisaged.

Phase 2 of the case study used a participatory action research approach (Coghlan & Brannick 2014). Phase two aimed to answer research question 3
through the creation and implementation of a benchmarking tool that supported the ambition to improve sales performance. The second phase started with a search conference to create a benchmarking road-map of sales processes derived from the primary data obtained within research phase one with secondary sources, such as industry information held by the sponsoring company. The core focus of research phase 2 was the implementation of the benchmarking tool created at the start of phase 2. The implementation of the benchmarking tool provides primary data on individual countries’ business process maturity in the selected salesforce effectiveness of processes through the participants of the sales organisations in a range of countries within the MNC, where the researcher was a complete participant (Gill & Johnson 2010). The collected primary data would be used, along with secondary data provided by the sponsoring company of individual country sales performance in the analysis, to establish the impact of sales business process management on sales performance.

In summary, the case study method is identified as the most appropriate research method to address the research problem. It has two clear phases, the first investigating if and what, using a qualitative interview approach and second, an investigation of the whether benchmarking of sales processes utilising participatory action research results in improving sales performance.

### 3.3 Data Collection

The research method identifies the data collection. Data collection differs according to the type of data a study intends to collect (Saunders et al. 2009). The study used a case study method for data collection, analysis, and findings. The study used primary data, secondary data, and the literature review process, which examined existing studies on sales force effectiveness to deepen understanding of the current roles of sales effectiveness processes and their effect on sales performance. The literature was also useful for reviewing existing theoretical frameworks on sales force effectiveness to develop a conceptual framework that is valid and relevant to the principal factors and situations acting on sales force effectiveness. The literature provided a general understanding of the variables
affecting sales force effectiveness to guide the conduct of research and findings from previous related studies to compare findings in this study to enhance the reliability of data and conclusions.

The selected approach was semi-structured interviews. Recognising the study proposed to identify if sales performance can be improved across multiple countries, the case study approach identified the need for qualitative interview data collection. Qualitative research has become increasingly prominent as a tool for providing insight into the meaning and context of sales force studies (Javalgi et al. 2011).

Primary data in research phase 1 of the case study was collected through the analysis of eight semi-structured interviews undertaken with chief sales offices in different countries within the sponsoring company. This is described in section 3.4 later in this chapter. This primary data, with the literature review process, led to the creation of a benchmarking tool.

In research phase 2, this tool was used to gather primary data concerning business process maturity of the identified sales effectiveness processes. The primary data in phase 2 was the specific business maturity each country had for each sales effectiveness process identified through the benchmarking activity. This data would be analysed using secondary data provided by the sponsoring company, focusing on individual country sales performance. This is described in section 3.6 later in this chapter.

### 3.3.1 Timeline of Study

The fieldwork associated with the collection of primary data was conducted between January 2010 and December 2011. The fieldwork was conducted in two phases, each related to a specific research phase. Phase 1, relating to research questions one and two, was conducted between January 2010 and January 2011. This involved interviewing chief sales officers. Phase 2, which relates to research question three and commenced in March 2011 with a search conference workshop to develop a draft business process maturity roadmap tool for benchmarking, was tested in a pilot in Australia in May 2011. Post Pilot adjustments were made, then benchmarking assessments in individual countries were carried out. These involved each country assembling a focus group of sales leaders and sales professionals, who
participated in the benchmarking exercise. The focus groups were conducted between July 2011 and December 2011. Table 3.1 below provides the timeline.

Table 3-1 Timeline of Fieldwork

<table>
<thead>
<tr>
<th>Month</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>IV Pilot - TH</td>
<td>Analysis Phase 1</td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>Revision</td>
<td></td>
<td></td>
</tr>
<tr>
<td>March</td>
<td>IV - USA</td>
<td>Tool Creation Workshop</td>
<td></td>
</tr>
<tr>
<td>April</td>
<td></td>
<td>Tool Development</td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>IV - Fr</td>
<td>Tool Pilot Australia</td>
<td></td>
</tr>
<tr>
<td>June</td>
<td></td>
<td>Revision</td>
<td></td>
</tr>
<tr>
<td>July</td>
<td>IV - AUS</td>
<td>Bench-marking France</td>
<td></td>
</tr>
<tr>
<td>August</td>
<td></td>
<td>Bench-marking Brazil</td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>IV - SW</td>
<td>Bench-marking UK</td>
<td></td>
</tr>
<tr>
<td>October</td>
<td>IV - IT/AT</td>
<td>Bench-marking Nordics/Austria/Italy</td>
<td></td>
</tr>
<tr>
<td>November</td>
<td>IV - ZA</td>
<td>Bench-marking PR China/Malaysia</td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>IV - UK</td>
<td>Bench-marking USA/ South Africa</td>
<td></td>
</tr>
</tbody>
</table>
3.4 RESEARCH PHASE 1: IDENTIFYING THE POTENTIAL

3.4.1 Interpretative Phenomenological Analysis

The study is based on the principles of Interpretative Phenomenological Analysis (IPA), as described by (Smith & Osborn 2008). IPA was established as a research approach in 1996 (Smith et al. 2009). There is no single definitive method of data analysis in IPA. IPA adopts a range of flexible strategies towards analytic development. Common processes in IPA move from the particular (idiographic) to the shared and from the descriptive to the interpretative (hermeneutic). The principles of IPA are a commitment to understanding the participants lived, conscious experience and adopting a psychological focus on personal meaning-making in specific contexts (the double hermeneutic), enabling the researcher to examine the details of the individual, as well as the context.

The researcher aims to make sense of the participant, who is trying to make sense of their experiences, using memory and language (Smith 2011; Smith & Osborn 2008). IPA is a phenomenological methodology intending to understand and elucidate the human lived conscious experience of phenomena, but psychological in its analysis of meaning-making and hermeneutic interpretation. These principles informed the analytical strategy adopted in this study and derived from practical guidelines (Smith & Osborn 2008) for the process of data analysis and interpretation.

In contrast to qualitative research, being evaluated according to the criteria utilised in quantitative research concerning validity and reliability, the quality of qualitative research can be assessed using four principles (Yardley 2000). The four principles are sensitivity to context, commitment and rigour, transparency and coherence, and impact and importance.

IPA offers a means of understanding the perceptions and feelings of participants, giving sensitivity to context. This context is enabled through interviews, the interview process, and data analysis, which give the participants an ongoing voice in the study through their verbatim extracts. Commitment and rigour are displayed through the thoroughness of the study, the sampling, the interview quality, and the systematic analysis of data. Recording and transcribing interviews maintained an ongoing reflection on the participants’ perceptions during the
interviews. Transparency and coherence are addressed through the written reports, using participants’ words extensively and development of the superordinate themes. The final principle of impact and importance is tested through submission as to whether the research tells the reader something interesting, important, or useful (Smith et al. 2009).

3.4.1.1 Phenomenology
Access to data and respondents in the business world has become increasingly more difficult, leading to the increasing use of surveys to gain data (Marshall & Michaels 2001). Therefore, awareness of this restriction enables understanding why phenomenological research methods only occurred in 6% of the studies within the sales discipline over a 25-year period (Williams & Plouffe 2007). Phenomenology is the philosophical approach to the study of experience, focusing on the real-life experience of participants. It takes a subjective point of view to study conscious awareness of the world through the experiences of the participants. Phenomenologists share a particular interest in thinking about the human condition, focusing on events that constitute the real world and relate to the participants (Smith et al. 2009). Each experience observed provides different perspectives, unique to each participant. It can be inferred from the study by Wilkinson (Wilkinson 2006a) that, as sales people expressed differing points of view whether they had received effective sales leadership, each has a different perspective on the same experience. Through IPA research, the ambition to understand other people’s relationship to the world is interpretive, and from there, the researcher seeks to make meaning out of the participants’ actions and experiences (Smith et al. 2009).

3.4.2 Qualitative Interview Approach

3.4.3 Interviews as a Primary Data Collection Method
Before selecting interviews as a primary data collection approach, the assessment of four alternative data collection instruments—observation, experiment, participation, and surveys—was undertaken. These approaches were discarded, as they are less suitable to collect rich, in-depth data. The study
identified interviews as the appropriate data collection method. Interview involves two or more participants holding a meeting face-to-face, over the telephone, or the internet (Yin 2009).

Interviews can reveal ideas and deliver insight that no other method can provide (Diefenbach 2009). Interviews were identified as the most appropriate methodology for primary data collection due to the availability of experienced and expert participants for the study. The interviewees displayed a deep and complex knowledge of sales as a discipline. This depth of knowledge allowed interviewees to provide more relevant and representative answers to the open questions. Using open questions allowed participants to be as explicit as they wished to meet the desire for relevant data. The goal of interviews is to reveal existing knowledge to be studied (Flick 2009b).

Using interviews provides a wealth of unstructured data (Wainwright 1997). The data analysis approach can provide the objective criteria of the selection grouping of the data, addressing any weaknesses or over-emphasis of answers obtained, using interviews as the primary data collection method.

**Interview Limitations**

However, interviews present some risk concerning bias and validity. Interviews, especially face-to-face, had a risk of unconscious bias being shown by the interviewer and responded to by the interviewee. This is normally mitigated through conscious recognition of this potential bias and can be identified, if present, during the data analysis phase of the research. The core role of the interviewer is to help moderate and focus the interviewees on the topic and questions being explored at the time (Diefenbach 2009). Where interviewees attempt to mislead the interviewer, this may be socially acceptable for people who perceive themselves to be more senior in any hierarchy as they seek to mitigate any risk of being seen to say anything that may have negative connotations. The interview process mitigates this through offering confidentiality and cross-checking and triangulation of answers to identify response outliers to help detect significant deviance from reality (Meijer & Beijaard 2002). Asking different people about the same issues improves the quality of the data collected. In this case, it was also mitigated given the hierarchical position that each person held and the
commonality of organisational culture with which the interviewees and the interviewer were fully experienced.

3.4.3.1 Interview Questions Origin

Interview question development was guided by the need to have clarity of the overall objective of the research (Crowther & Lancaster 2005). The overall objective of research phase one was to identify the participant's perceptions of the transferability of sales force effectiveness processes and to establish which sales force effectiveness processes could be identified as suitable for inclusion. The questions were structured to minimise the risk of misunderstanding by non-native English speakers. The questions were grouped thematically and were exploratory questions to support the need to explore fully the participant's knowledge and perceptions of the topic (Lewis & Ritchie 2003).

The table below (Table 3.2) shows the questions used in the interviews. It links each interview question to the research question and references the section of the literature review to which it pertains.
<table>
<thead>
<tr>
<th>Interview Question #</th>
<th>Interview Question text</th>
<th>Question Type</th>
<th>Research Question</th>
<th>Origin from Literature Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>What is meant by the term sales effectiveness?</td>
<td>Exploratory</td>
<td>1. Are sales force effectiveness drivers transferable across country sales teams within an MNC?</td>
<td>CH2.2.1</td>
</tr>
<tr>
<td>2</td>
<td>Why is it important to a business?</td>
<td>Exploratory</td>
<td>1. Are sales force effectiveness drivers transferable across country sales teams within an MNC?</td>
<td>CH2.2.1</td>
</tr>
<tr>
<td>3</td>
<td>What elements are drivers of sales effectiveness?</td>
<td>Exploratory</td>
<td>2. Which sales force effectiveness processes could be included in a tool to improve sales performance?</td>
<td>CH2.3</td>
</tr>
<tr>
<td>4</td>
<td>What elements or activities can a sales manager impact on to increase sales effectiveness?</td>
<td>Exploratory</td>
<td>2. Which sales force effectiveness processes could be included in a tool to improve sales performance?</td>
<td>CH2.3</td>
</tr>
<tr>
<td>5</td>
<td>How would you define a High Performing Sales team?</td>
<td>Exploratory</td>
<td>1. Are sales force effectiveness drivers transferable across country sales teams within an MNC?</td>
<td>CH2.2.2</td>
</tr>
<tr>
<td>6</td>
<td>Do you consider having a high-performance sales team important? Why is this?</td>
<td>Exploratory</td>
<td>1. Are sales force effectiveness drivers transferable across country sales teams within an MNC?</td>
<td>CH2.2.2</td>
</tr>
<tr>
<td>7</td>
<td>What are the activities a sales manager should focus on to build an effective high performing sales team?</td>
<td>Exploratory</td>
<td>2. Which sales force effectiveness processes could be included in a tool to improve sales performance?</td>
<td>CH2.3</td>
</tr>
<tr>
<td>8</td>
<td>What do you think are the sales management activities, which are marginal when managing a High-performance sales team?</td>
<td>Exploratory</td>
<td>2. Which sales force effectiveness processes could be included in a tool to improve sales performance?</td>
<td>CH2.3.6</td>
</tr>
<tr>
<td>9</td>
<td>How does culture influence the building of a high-performance sales team?</td>
<td>Exploratory</td>
<td>1. Are sales force effectiveness drivers transferable across country sales teams within an MNC?</td>
<td>CH2.3.5</td>
</tr>
<tr>
<td>10</td>
<td>How do the market conditions influence the building of a high-performance sales team?</td>
<td>Exploratory</td>
<td>1. Are sales force effectiveness drivers transferable across country sales teams within an MNC?</td>
<td>CH2.3.5</td>
</tr>
</tbody>
</table>
3.4.3.2 Interview Strategy

For qualitative research, the choice of data collection instrument depended on the ability to collect in-depth data from a small sample of participants. Chief Sales Officers (CSO) from 29 countries directly responsible for sales teams and sales managers within their country were invited to participate. Final participants included in the study represented eight countries on four different continents - Australia, Austria, France, Italy, South Africa, Sweden, the United States, and the United Kingdom. These CSOs controlled sales teams amounting to over 1,000 salespeople and sales managers.

Previous research has identified CSOs are critical to enabling sales force effectiveness activities within their organisations (Cron et al. 2014; Baldauf et al. 2001a; Rehme & Rennhak 2011). Their level of expertise and knowledge of sales can add value to a research project of this nature (Flick 2007; Flick 2009a). The chief sales officer for each organisation is focused on enabling the sales organisation to reach maximum possible sales performance and ultimately are accountable for performance. As they are rewarded for the outcomes of making good decisions that generate revenues, profits, and other performance targets, a CSO desires research that can guide their decision-making processes of where to focus their time and their resources (Robertson et al. 2006). CSOs were included in this part of the research to address the business research problem described in chapter 1. It is identified as a practical measure to include the senior levels in the investigatory research phase, not only for their deep and expert knowledge, but to prepare for their potential participation in any future activity resulting from this research project.

The interviews occurred in the eight countries where the selected CSOs worked. The face-to-face interview approach benefits from cues, such as facial expression and body language (Sinkovics et al. 2005). The study benefited from having access to individuals, who are part of the “sales elite.” The sales elite comprises senior sales executives, who are not normally accessible for sales research (Welch et al. 2002; Cron et al. 2014; Javalgi et al. 2011); the norm is that much research effort is focused at the lower levels of a participating organisation, often focusing on salespeople and sales managers (Williams & Plouffe 2007),
although CSOs exercise significant influence and power in their organisations, being better placed to provide insight. The interview strategy supported the research aim by allowing the views and perceptions of the participants to be explored.

3.4.3.3 Interview Approach
To test the interview efficacy, a pilot list of questions was developed and reviewed several times before a pilot was completed with a senior sales leader from a country within South East Asia to test, not only the questions, but also the comprehension for non-native English speaking participants. Following the pilot, the questions were reviewed and adjusted, resulting in the final questions seen in Table 3.2.

Face-to-face interviews were completed between January 2010 and January 2011. Each interview utilised the prepared semi-structured interview questions. First, consent to record the interview was requested. The recorded interview provided an accurate record of the discussion to clarify details during analysis, in which case a written record is more likely to miss vital data. Second, the face-to-face meeting provided the researcher with an opportunity to seek clarification in areas of doubt or ambiguity to ensure data collected is accurate and valid. Third, face-to-face interviews enabled the study to achieve a high response rate after proper scheduling of interview times to reduce cases of postponement, which increased the duration of the research period but reduced the risk of collecting insufficient data.

3.4.3.4 Interview Process
Each participant received a copy of the research questions and an interview appointment. They were notified that interviews would be recorded and transcribed. A period of 45-75 minutes was allocated to each interview. This time allowance was never fully utilised; however, it was a starting point. It was perceived to allow more time than required for the course and content of an interview, which cannot be determined in advance (Smith et al. 2009). While both the researcher and the participants had a copy of the interview questions, the process did not
always follow the precise sequence of the questions, as this could have impeded the richness of responses and reduced the opportunity for new ideas to be identified and discussed. However, each interview covered the content of all questions. Using a semi-structured interview process enabled each participant to engage in dialogue, which may not be apparent with a structured interview process, nor with a questionnaire. As the researcher and participants were previously known to each other before the study, there existed a relationship, which engendered a relaxed and conversational discussion. No participant expressed concerns about participation before, during, or after the interview process. More than one expressed satisfaction with the opportunity to reflect and discuss the topics in the interviews. The interviews were recorded as MP3 files and professionally transcribed. To ensure accuracy, the researcher then reviewed the transcriptions, while listening to the MP3 files. Once the researcher had assessed the transcripts as being accurate, they were then shared with the participant to give the participant the opportunity to confirm or correct their comments.

This opportunity to clarify correct comments follows the principles of interview transcript review (Hagens et al. 2009). Interview transcript review (ITR) is a technique to improve the rigour of interview-based qualitative research. It does this by providing participants with a copy of the transcript, which they review, and this verification of accuracy seeks to increase the reliability of the interview process (Morse et al. 2008). While previous research indicates the process adds little to the level of accuracy of transcription and presents a risk of data removal or selective editing, the research found the additional effort of conducting a thorough review resulted in few changes made (Poland 1995). ITR provides the interviewee with an opportunity to reflect and potentially add new information (Forbat & Henderson 2005). An additional benefit is it reinforces the relationship between the interviewer and interviewee through the transparency and willingness to share the data to promote inclusion and engender a positive inclination towards the research project by the interviewee.

One risk of utilising an ITR approach is that it adds a delay to the research progress (Hagens et al. 2009). However, this is normally manageable with effective planning. A further risk is that of data leakage through sending the wrong transcript
to the wrong person (Mero-Jaffe 2011). This was mitigated through care in
distribution, including the drafting of messages and holding the draft for a double
check after 24 hours before sending it. This double check involved confirming the
e-mail address and read opening the attached transcript to ensure it matched the
addressee. As part of this review by the participants, each participant was asked to
confirm their permission to use the transcripts from the study.

3.4.4 Sampling
A sampling procedure refers to choosing a subset (sample) of individuals
from the target population to participate in research (Teddlie & Yu 2007). In
research, sampling methods fall into two broad categories – probabilistic and non-
probabilistic sampling procedures (Creswell 2007). Non-probabilistic sampling
methods depend on the subjective thinking of the researcher to select a sample
knowledgeable about the phenomenon under study, while reducing the level of
attention to the representativeness of the sample to the target population (Lewis &
Thornhill 2009). Non-probabilistic sampling methods introduce concerns of
selection bias, which might alter the outcome of the research. Frequent examples
of non-probabilistic sampling methods include convenience sampling, judgmental
sampling, and quota sampling procedures. With the attachment to research
approach, probabilistic sampling methods link to quantitative research approach,
while non-probabilistic sampling procedures link to qualitative research approach
(Lewis & Thornhill 2009). In qualitative case studies, the sample size can be
impacted by practicalities, such as research project length and scale of the project
(Johnson & Clarke 2006).

The sponsoring company would provide the sample pool for both research
phases. To meet the research problem of needing to improve sales performance
in an evolutionary way in multiple countries in a sustainable manner within an
MNC, the sponsoring company is a suitable case study, as it has an interest in
improving sales performance, it operates in multiple countries, and can provide
participants and secondary data to support the case study.
### 3.4.4.1 Sample Selection

A sample refers to a subset of the target population selected for a study to participate in research (Gay et al. 2006). For qualitative research, the sample size is not a significant issue (Saunders et al. 2009). The effect of sample size depended on the participants selected and the amount and relevancy of information they provided to the research. An additional constraint is that response rates for sales research are declining (Panagopoulos et al. 2011; Carter et al. 2008). The study used the judgmental sampling procedure as a form of non-probabilistic sampling procedure (Coviello & Jones 2004). The study used the sponsoring company as a case study on sales force effectiveness. Using chief sales officers allowed the study to gather data from international markets, which is consistent with previous studies on sales force effectiveness.

The selection of the chief sales officers from countries within the sponsoring company depended on the researcher’s perception of the participants and their suitability based on predefined criteria. These perceptions include the participant having deep knowledge of sales and sales management. Other factors included the availability of the chief sales officers during the time frame planned for data collection and their acceptance for voluntary participation. The subjective selection ensured the chief sales officers selected had profound and relevant knowledge about the roles of sales managers and sales strategies and their impact on the performance of the salespeople. This knowledge would be valuable for the study to achieve deeper meaning and to provide explanations of the relationships established in the quantitative data collection. Voluntary participation and the availability of chief sales officers during the research period were useful for satisfying ethical concerns associated with research involving human subjects and for proper planning for the research.

A further reason for the selection of the CSO community as participants in the research was to address the needs of research phase 2. This relates to the creation and implementation of a benchmarking tool. The adoption of a successful business process benchmarking approach has been identified in the literature as requiring: top management support, a desire to advance and improve, and the establishment of regional and local process owners (Vlahovic et al. 2010; Lee & Dale
Involvement of members of the CSO community was regarded by the researcher to support these requirements effectively.

The use of sales managers as the sample group was considered in this phase, as this audience would be prime beneficiaries of any subsequent programme. This approach was discounted for the following reasons; the method focused on a qualitative interview approach. The research questions focused on the If and What, and a large sample size would not produce the required data to answer these questions. The sample pool of sales managers for the top 29 countries in the sponsor company exceeds 100. The constraints of time, budget, and potential business disruption resulted in the decision to exclude them. For future research, this sample pool could be utilised in a quantitative survey approach to measure the established programme.

The study invited participation from 29 chief sales officers and selected eight countries’ CSOs of the sponsoring company from the 16 that indicated a willingness to participate. To make the selection from the volunteers, a prior selection criterion was established (Flick 2009b):

**Business Importance:** The sample pool of 29 was established based on revenue generation importance. A review of country revenue compared to group revenue was undertaken by the reviewer. This review identified that 29 countries contributed 80% of group revenue and, therefore, were significant in respective business importance based on revenue generation.

**Role:** The role holder within the company responsible for the sales activities within their country.

**Language:** How comfortable they were with English - if non-native speaking. This was important, as the study was conducted in English and included ideas and language that may not be understood by speakers with only conversational levels of English. This was a subjective decision by the researcher based in part from previous business interactions with the possible participants.

**Geographical spread:** To address the global nature of the research problem, it was identified that a study populated purely from a European perspective may result in resistance to any subsequent global programme, and a
broad exposure to different cultural perspectives could enrich and improve the study.

As a result of reviewing volunteers against this criterion for research phase 1, the study comprised participants from 8 countries, drawn from 4 continents, and is comparable with previous studies (Cravens et al. 2006; Murphy & Li 2012). Other small-scale qualitative studies with 4 to 16 participants have been effective (Zallocco et al. 2009; Ryals & Rogers 2007; Cascio et al. 2010; Rogers 2009).

The participant group produced eight interviews, drawn from Australia, Austria, France, Italy, South Africa, Sweden, the United States, and the United Kingdom, to provide a diversity of views representing opinions from multiple countries and global markets. Table 3.3 provides additional insight into the participants in the study.

<table>
<thead>
<tr>
<th>Gender</th>
<th>Australia</th>
<th>Austria</th>
<th>France</th>
<th>UK</th>
<th>Italy</th>
<th>South Africa</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age Range</td>
<td>Male</td>
<td>Male</td>
<td>Male</td>
<td>Male</td>
<td>Male</td>
<td>Male</td>
<td>Male</td>
<td>Male</td>
</tr>
<tr>
<td>40-50</td>
<td>50-60</td>
<td>50-60</td>
<td>60-65</td>
<td>40-50</td>
<td>40-50</td>
<td>50-60</td>
<td>60-65</td>
<td></td>
</tr>
<tr>
<td>Industry Experience (Years)</td>
<td>5+</td>
<td>30+</td>
<td>30+</td>
<td>5+</td>
<td>30+</td>
<td>5+</td>
<td>30+</td>
<td>5+</td>
</tr>
<tr>
<td>Time in role</td>
<td>5+</td>
<td>10+</td>
<td>5+</td>
<td>5+</td>
<td>10+</td>
<td>5+</td>
<td>10+</td>
<td>5+</td>
</tr>
<tr>
<td>Time with Company</td>
<td>5+</td>
<td>30+</td>
<td>30+</td>
<td>30+</td>
<td>25+</td>
<td>20+</td>
<td>20+</td>
<td>15+</td>
</tr>
<tr>
<td>Time in Sales</td>
<td>25+</td>
<td>30+</td>
<td>30+</td>
<td>30+</td>
<td>25+</td>
<td>25+</td>
<td>25+</td>
<td>40+</td>
</tr>
<tr>
<td>Sales Force Size</td>
<td>&gt;150</td>
<td>&gt;60</td>
<td>&gt;90</td>
<td>&gt;30</td>
<td>&gt;200</td>
<td>&gt;90</td>
<td>&gt;120</td>
<td></td>
</tr>
<tr>
<td>Aprox Turnover Euro’s ( Millions) at time of research</td>
<td>650</td>
<td>250</td>
<td>250</td>
<td>680</td>
<td>120</td>
<td>400</td>
<td>300</td>
<td>900</td>
</tr>
<tr>
<td>hierachy (Board =1, Functional Head =2)</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td># of sales managers (direct leading of sales people / first in line Manager)</td>
<td>60</td>
<td>3</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>40</td>
<td>8</td>
<td>18</td>
</tr>
</tbody>
</table>

**Table 3.3 Characteristics of Participants**

3.4.5 Data Collection and Analysis

Qualitative research is a research approach that takes account of contexts within which human experiences occur; therefore, it is concerned with learning from particular instances or case studies seeking to provide insight and understanding of the research problem (Flyvbjerg 2006). Qualitative research aims to access the participants’ inner world of perception and meaning-making to understand, describe, and explain the social process from the perspective of the study participants (Maykut & Morehouse 1994). Qualitative research is systematic in its approach to data collection and analysis. Framed by the topic of inquiry, data
are collected through interviews with open-ended questioning, allowing the study participants to expand on their perceptions and experiences freely.

The responses are not grouped according to pre-defined categories. The categories of meaning and the relationships between the categories are derived from the data, through the process of inductive reasoning, known as coding. This IPA approach offers the means to access and analyse these articulated perspectives, so they may be integrated into a model that seeks to explain the issues in the study (Smith & Osborn 2008). This approach does not start with a prior hypothesis to be tested and proved, but with a focus-of-inquiry that takes the researcher on an inductive approach to data analysis. Therefore, the research outcomes are not broad generalisations, but contextual findings, with a degree of transferability from one context to another context, as opposed to the generalisability found in quantitative research (Creswell 2009).

The analytical approach involved breaking down the data into discrete segments, or ‘units of meaning’ (Maykut & Morehouse 1994), and coding them into categories. Categories arising from this method can take two forms: First, categories are derived from the participants’ customs and language – descriptive categories; second are those the researcher identifies as significant to the research’s focus-of-inquiry - explanatory categories. The aim of the first type is to reconstruct the categories used by subjects to conceptualise their experiences and views, while the goal of the second is to assist in developing insights through developing themes that illuminate the research. Therefore, using this analytical approach enables thinking that created both descriptive and explanatory categories (Guba & Lincoln 1988).

Using qualitative data analysis software does not mean the researcher capitulates the critical thinking tasks to the logic of the computer; the software is used as a tool to aid research efficiency, not as a tool that conducts analysis and draws conclusions. The software supports analysis by the researcher (Fielding & Lee 1998). Using approved and recognised software supports transparency in the research by providing an audit trail. The audit trail is the critical criteria on which the trustworthiness and plausibility of a study can be established. The key features of recording data movements and coding patterns and the evolution of mapping
conceptual categories make all stages of the analytical process traceable and transparent through qualitative analysis software. This enables the production of a detailed and comprehensive audit trail.

3.4.5.1 **NVivo Analysis Process**

The research used NVivo 10 as a software tool to undertake the data analysis. The NVivo analysis process conducted in the research is described below.

The 1st stage was to import the data; both the audio files and the transcripts, relating to each of the eight audio files, was loaded into NVivo. The demographic information, referenced in chapter 3, was also added. Each interview was identified by country, and the country was used as the description of each case.

The transcripts of the cases were read with the audio files, and annotations were captured within the software when variances to the audio file were identified. The 2nd phase undertook open coding on the semi-structured interview questions, working line by line and in an iterative manner, linking responses to each question for each interview. On reviewing the restructured data, it was then possible to develop 12 subordinate categories reconstructing the data into a new framework.

The next phase was to analyse the subordinate categories, including referring to the original memos and associated annotations to establish the nine superordinate themes. These were cross-checked by running queries, based on original case (country), to establish which respondent said what in which theme. In-case and cross-case analysis was then undertaken. Some reports were created including: coding summary by node report, coding summary by source report, node classification summary report, structure node report, node summary report, source classification summary report, and source summary report. Following the NVivo analysis, several tables and charts were created, which are used in the following chapter. Avoidance of bias and researcher manipulation was mitigated through a systematic approach to coding, annotations being recorded of how things were said and the context in which they were said, providing a systematic linking of analysis and observation.
3.4.5.2 Steps Taken in the Analytical Process

Eight discrete phases of analyses were conducted in the iterative process of data analysis. These phases comprised three separate phases of coding, two phases of managing codes, one for initial categorisation of open codes and one for data reduction through consolidating codes into themes, and finally, one that used the writing of the research as a tool to prompt deeper thinking about the data (Bazeley 2009). These 8 phases led to findings from which conclusions have been drawn. These eight phases are now described and explained:

Phase 1: Reading and Initial Noting involved transcribing, reading, and re-reading the interview data and noting initial ideas. It further involved importing the transcripts and related notes and observations into a data management tool, NVivo 10.

Phase 2: Open coding involved broad participant-driven initial coding of the interviews to deconstruct the data from its original chronology into initial non-hierarchical general codes. These codes, containing ‘units of meaning’ coded from the interview scripts, were assigned clear names and definitions that would serve as ‘rules for inclusion’ as the coding process progressed (Maykut & Morehouse 1994). The open coding is shown in appendix 8.3.1.

Phase 3: Categorisation of Codes involved re-ordering codes, identified in Phase 2, into categories of codes by grouping related codes under these categories and organising them into a framework that made sense to the analysis of the data set and addressed the research questions. This phase included distilling, renaming, and merging of categories to ensure names and definitions accurately reflected the coded content. Categories could be described as a halfway-house between organising initial codes into logical groups and generating themes (Appendix 8.3.2 – Interview Analysis Subordinate Categories).

Phase 4: Coding On involved breaking down the restructured categories into subordinate categories to offer a more in-depth understanding of the highly qualitative aspects under scrutiny and to consider divergent views, negative cases, attitudes, beliefs, and behaviours coded to these categories, to glean clearer insights into the meanings embedded therein.
Phase 5: Data Reduction involved consolidating codes from preceding phases into more abstract, philosophical, and literature-based superordinate themes, creating a final framework to support the write-up (Appendix 8.3.3 – Interview Analysis Superordinate Themes).

Phase 6: Involved writing analytical memos against the higher-level themes to summarise accurately the content of each category and its codes and propose empirical findings against such categories. These memos considered five key areas:

- The content of the cluster of codes on which it is reporting (what was said)
- The coding patterns, where relevant (levels of coding, for example, although this could be used to identify exceptional cases and shared experiences)
- Considering background information recorded against participants and considering any patterns that may exist about participants’ profiles (who said it)
- Situating the code(s) in the storyboard – meaning, considering the relatedness of themes, their importance regarding the research questions, and sequencing disparate codes and clusters of codes into a story or narrative, which is structured and can be expressed in a coherent and cohesive findings chapter
- Considering primary sources in the context of relationships with the literature and identifying gaps in the literature

Phase 7 – Validation involved testing, validating, and revising analytical memos to self-audit proposed findings by seeking evidence in the data beyond textual quotes to support the stated findings and seeking to expand on deeper meanings embedded in the data. This process involved interrogation of data and enabled the researcher to consider elements beyond the theme, drawing on relationships across and between themes, and cross tabulation with observations and literature. This phase resulted in evidence-based findings, as each finding had been validated by being rooted in the examined data to substantiate findings.

Phase 8: Involved synthesising analytical memos into a coherent, cohesive, and well-supported findings chapter, offering a descriptive account of the study
participants’ views and perceptions of drivers and inhibitors of sales force effectiveness in their respective countries.

Table 3.4 links these stages and processes conducted in NVivo to the IPA practical guidelines for data analysis and interpretation (Smith & Osborn 2008):

<table>
<thead>
<tr>
<th>IPA analytical focus (Smith et al. 2009)</th>
<th>NVivo Process</th>
</tr>
</thead>
</table>
| **Steps 1 & 2: Reading and Initial Noting**  
  Complete immersion in the original data (interview transcripts) and the first noting.  
  Three main processes are involved:  
  1. Descriptive comments on the content of the transcript  
  2. Linguistic comments on how the participant has used language  
  3. Conceptual (interrogative and reflexive) comments to start interpreting the text. | **Open coding**  
  As far as possible, the participant’s words are used to summarise the sense or meaning that he is trying to convey about a particular experience from the transcript. Open codes (‘nodes’ in NVivo) are created for the participant’s transcript. Codes aim to make the first pass at reducing the original data to descriptive phrases and notes. This is an iterative process as follows:  
  1. Code Names capture the overall summary description of the content  
  2. Rich descriptive comments to provide coding transparency are included in the Code Description.  
  3. A journal captures reflexive and conceptual comments arising from the interview. |
<table>
<thead>
<tr>
<th><strong>IPA analytical focus</strong> (Smith et al. 2009)</th>
<th><strong>NVivo Process</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 3: Developing emerging themes.</strong></td>
<td><strong>Category creation</strong></td>
</tr>
<tr>
<td>The researcher attempts to reduce the</td>
<td>As the first step in data</td>
</tr>
<tr>
<td>volume of data (by summarising) while</td>
<td>reduction, a ‘Category’ folder holds</td>
</tr>
<tr>
<td>retaining its complexity by looking for</td>
<td>a copy of the set of open codes,</td>
</tr>
<tr>
<td>patterns and connections.</td>
<td>leaving the original open codes</td>
</tr>
<tr>
<td></td>
<td>folder for the participant intact,</td>
</tr>
<tr>
<td></td>
<td>then reviewing each code in the</td>
</tr>
<tr>
<td></td>
<td>category folder, reordering codes</td>
</tr>
<tr>
<td></td>
<td>into broad categories (codes are</td>
</tr>
<tr>
<td></td>
<td>added to other codes either as</td>
</tr>
<tr>
<td></td>
<td>parent or, more usually, as child</td>
</tr>
<tr>
<td></td>
<td>codes), merged, and renamed.</td>
</tr>
<tr>
<td><strong>Category creation</strong></td>
<td><strong>Category Development</strong></td>
</tr>
<tr>
<td>As the first step in data reduction, a</td>
<td>Employing IPA strategies to</td>
</tr>
<tr>
<td>‘Category’ folder holds a copy of the set of</td>
<td>create superordinate themes for</td>
</tr>
<tr>
<td>open codes, leaving the original open codes</td>
<td>clusters of codes. The first step is to</td>
</tr>
<tr>
<td>folder for the participant intact, then</td>
<td>consider how categories may be</td>
</tr>
<tr>
<td>reviewing each code in the category folder,</td>
<td>linked or reduced into emergent</td>
</tr>
<tr>
<td>reordering codes into broad categories (codes</td>
<td>themes. New names are created for</td>
</tr>
<tr>
<td>are added to other codes either as parent or,</td>
<td>category themes that reflect both</td>
</tr>
<tr>
<td>more usually, as child codes), merged, and</td>
<td>the descriptive and the</td>
</tr>
<tr>
<td>renamed.</td>
<td>interpretative to create</td>
</tr>
<tr>
<td>**Step 4: Searching for connections across</td>
<td>‘superordinate’ themes. For</td>
</tr>
<tr>
<td>emergent themes.**</td>
<td>example, reducing risk, avoiding</td>
</tr>
<tr>
<td>This step maps how the themes fit together.</td>
<td>risk, and taking a risk may all be</td>
</tr>
<tr>
<td>Several strategies may be helpful:</td>
<td>clustered under one theme, e.g.</td>
</tr>
<tr>
<td><strong>Abstraction</strong>: Development of a ‘super-</td>
<td>‘coaching’. The aim is to reduce the</td>
</tr>
<tr>
<td>ordinate’ theme for theme clusters.</td>
<td>original data to between three and</td>
</tr>
<tr>
<td><strong>Subsumption</strong>: An emergent theme may</td>
<td>six themes that relate to the</td>
</tr>
<tr>
<td>naturally become a superordinate theme.</td>
<td>research question: consolidating</td>
</tr>
<tr>
<td><strong>Polarisation</strong>: Looking for differences</td>
<td>codes into a more abstract and</td>
</tr>
<tr>
<td>and similarities – adversarial</td>
<td>conceptual map of a final</td>
</tr>
<tr>
<td>relationship.</td>
<td>framework of nodes.</td>
</tr>
<tr>
<td><strong>Contextualization</strong>: Identifying narrative</td>
<td></td>
</tr>
<tr>
<td>contextual elements: organising into explicit</td>
<td></td>
</tr>
<tr>
<td>temporal, cultural, and narrative themes</td>
<td></td>
</tr>
<tr>
<td>can highlight patterns.</td>
<td></td>
</tr>
<tr>
<td><strong>Numeration</strong>: An indication of frequency</td>
<td></td>
</tr>
<tr>
<td>themes appears.</td>
<td></td>
</tr>
<tr>
<td><strong>Function</strong>: e.g. positive and negative</td>
<td></td>
</tr>
<tr>
<td>meanings (language/discourse analysis).</td>
<td></td>
</tr>
<tr>
<td><strong>Bringing it together</strong>: Summarising the</td>
<td></td>
</tr>
<tr>
<td>development of the emergent themes from</td>
<td></td>
</tr>
<tr>
<td>the raw data in a table or graphic.</td>
<td></td>
</tr>
<tr>
<td>IPA analytical focus (Smith et al. 2009)</td>
<td>NVivo Process</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td><strong>Step 5: Moving to the next case</strong></td>
<td>Next Transcript</td>
</tr>
<tr>
<td>Repeating all the previous steps for</td>
<td>A new open codes folder is</td>
</tr>
<tr>
<td>each participant without, as far as</td>
<td>created in NVivo in which to store</td>
</tr>
<tr>
<td>possible, reference to the other</td>
<td>the new codes created for each</td>
</tr>
<tr>
<td>transcripts (i.e. bracketing ideas</td>
<td>participant’s transcript</td>
</tr>
<tr>
<td>emerging from one case to the next).</td>
<td>separate from other</td>
</tr>
<tr>
<td>IPA’s project is a commitment to</td>
<td>transcripts. Each</td>
</tr>
<tr>
<td>idiographic analysis. Bracketing, as</td>
<td>transcript is, therefore,</td>
</tr>
<tr>
<td>used by Smith et al. (2008) simply</td>
<td>treated as a new analysis</td>
</tr>
<tr>
<td>means to allow new structures to</td>
<td>(i.e. corresponding to</td>
</tr>
<tr>
<td>emerge with each case, yet be aware</td>
<td>Steps 1-4), as far as</td>
</tr>
<tr>
<td>that the ‘fore-structures’ (hermeneutics)</td>
<td>possible, bracketing out</td>
</tr>
<tr>
<td>have inevitably changed and been</td>
<td>references to codes</td>
</tr>
<tr>
<td>influenced by what was previously</td>
<td>in other transcripts.</td>
</tr>
<tr>
<td>found.</td>
<td></td>
</tr>
<tr>
<td><strong>Step 6: Looking for patterns across cases</strong></td>
<td>Consolidation and Matrix coding</td>
</tr>
<tr>
<td>Looking at themes across participants</td>
<td>Emergent themes from the</td>
</tr>
<tr>
<td>to detect patterns. Looking for</td>
<td>participant’s transcript</td>
</tr>
<tr>
<td>connections- do themes from one case</td>
<td>are copied into a common ‘Themes’ folder,</td>
</tr>
<tr>
<td>illuminate another? Which themes are</td>
<td>where they are all merged</td>
</tr>
<tr>
<td>the most potent? This process can cause</td>
<td>for the first time (leaving</td>
</tr>
<tr>
<td>moving towards a more theoretical level</td>
<td>the category folders for each</td>
</tr>
<tr>
<td>of analysis as individual themes, or</td>
<td>participant intact).</td>
</tr>
<tr>
<td>superordinate themes may also reflect</td>
<td>Merging and further</td>
</tr>
<tr>
<td>higher order concepts shared by all</td>
<td>consolidation of superordinate</td>
</tr>
<tr>
<td>cases. The analysis has gone from the</td>
<td>themes may be conducted</td>
</tr>
<tr>
<td>part to the whole. This is now reversed,</td>
<td>within the Themes folder.</td>
</tr>
<tr>
<td>and the whole is considered, regarding</td>
<td>A specific query in NVivo</td>
</tr>
<tr>
<td>each part. Also, recurrence of themes</td>
<td>(Matrix Coding) produces a</td>
</tr>
<tr>
<td>across cases is considered. For a</td>
<td>table, that shows</td>
</tr>
<tr>
<td>superordinate theme to be classed as</td>
<td>participants in columns and</td>
</tr>
<tr>
<td>recurrent, it has to be present in at</td>
<td>themes in rows. This can be</td>
</tr>
<tr>
<td>least half of cases and best cases</td>
<td>used to look at themes both</td>
</tr>
<tr>
<td>across all participant interviews.</td>
<td>between and within</td>
</tr>
<tr>
<td></td>
<td>participants’ transcripts</td>
</tr>
<tr>
<td></td>
<td>(Appendix 8.3.4 Example</td>
</tr>
<tr>
<td></td>
<td>Transcript).</td>
</tr>
</tbody>
</table>

**Table 3-4 Linking IPA and NVivo**

In the design of the data analysis steps, as outlined in Table 3.4, consideration was given to the aim of the study and its underlying philosophical foundation. King stated tensions exist “between the need to be open to the data and the need to impose some shape and structure on the analytical process” (King 2004). The objective was to design and undertake a systematic and disciplined data
analysis process that encouraged completeness and impartiality (Lillis 1999), while recognising the complexity of the data under review and the interpretative nature of the study. The data analysis process involved four inter-linked and iterative processes, based on IPA methodology and using NVivo data analysis software: Data preparation, Data coding, Analytical cycle, Assessing the conceptualisations, and outcomes.

3.4.6 Summary research phase 1
The first part of the study explores two research questions. The first focused on “if” a business process approach could work in the case study organisation. The second focused on “what” would be included. In pursuing this purpose, this part of the study details the research method for phase 1. It briefly discusses phenomenology and puts forward arguments concerning the use of IPA as a methodology. The chapter establishes the case study method will support the answering of research questions 1 & 2 and how a case study is appropriate for business research of a single multinational corporation. The section presents the interview strategy, including detailing the interview approach and process. It has discussed sampling and argues the small sample size used in this research is not unusual in qualitative sales research focusing on senior executives. The approach for data collection and analysis is explained. The actual usage of NVivo data analysis software is described and demonstrated to link to the IPA methodology. The next section will focus on research phase 2, relating to research question 3.
3.5 **Research Phase 2: Creation & Application of Benchmarking Tool**

3.5.1 **Introduction**

Research phase 1 used qualitative interviews to establish answers to research questions one and two. Research phase 2 is focused on answering research question 3: “How can a benchmarking tool for sales performance processes be used to implement and improve sales performance in multiple countries?” The literature review considered business process management, benchmarking, and maturity models (McCormack et al. 2009) as the approach.

This subchapter presents the methodology used in the creation and implementation of a benchmarking tool to improve sales performance using sales effectiveness processes. The research approach for this phase of the case study is action research (Coghlan & Brannick 2014). It introduces action research as a method for business research. The research project focused on a real management issue requiring an actionable solution, and as the research was conducted by the researcher, who was an active member of the organisation being researched, using action research as a method could be considered appropriate (Thorpe & Holt 2008).

It presents the method and the narrative for the creation of the benchmarking tool. Having created the benchmarking tool, the action research continues by gathering primary data derived from conducting benchmarking in 11 countries. It presents each stage in conducting the benchmarking and how data is collected and analysed in comparison with secondary data relating to performance provided by the sponsoring organisation.

3.5.2 **Research Method**

Action research, as its name implies, focuses on taking action with the aim to solve a problem and contribute to knowledge (Gummesson 2000) in real time. Action research has been utilised as a method for research since the 1940s, with an emphasis on work-based learning (Anderson et al. 2015). It is widely credited to Kurt Lewin (Coghlan & Brannick 2014) in 1946, when it was used to solve social issues around intergroup relationships in the USA, focusing on comparative
research leading to social action (Lewin 1946). Subsequently, action research has increased in prominence as a research method for both organisational learning and management studies (Thorpe & Holt 2008). Action research has been characterised as learning by doing (Zuber-Skerritt & Fletcher 2007), focusing on utilising a group of people to address a research problem. Importantly, action research focuses on research in action, rather than researching the action, thereby describing a sequence of events leading to problem-solving and contributing to practice in the workplace (Coghlan & Brannick 2014; Anderson et al. 2015).

Action research encompasses a variety of practices and understandings; however, the approach has several common principles (Coghlan & Brannick 2014; Anderson et al. 2015):

**Problem focused:** The research concentrates on a real problem of improving sales performance at a multinational corporation in multiple countries. It seeks to establish whether sales effectiveness processes can be enhanced, resulting in improved sales performance.

**Contextual:** The research is context specific, as the research was conducted within the business wherein the researcher was employed and in a field of study - business to business sales, with which he had many years of experience.

**Participative:** The study approach enabled individuals to participate as process owners and as members of country sales organisations involved in the benchmarking to address the research problem and to generate new organisational knowledge.

**Learning:** The research process and its results provided opportunities for individual learning by the researcher and organisational learning for the sponsoring company.

Action research provides several contexts with differing characteristics applied in multiple fields. These contexts include pragmatic action research, participatory action research, action science, contextual action research, and action learning (Greenwood & Levin 2006; Anderson et al. 2015). This research phase utilises participatory action research. Participatory Action Research (PAR) allows the researcher to overcome the implied division between theory and implementation (McIntyre et al. 2007). PAR features researchers who operate as full collaborators with other members of the organisation to address the research problem and the
subsequent change management. It is an ongoing learning process that supports organisational participation, learning, and transformation (Greenwood et al. 1993; Anderson et al. 2015).

To achieve this, PAR focuses on the change, with the intention to improve and understand the research environment and its participants (Greenwood et al. 1993).

**Context-specific:** Focusing on the needs of the particular group or project, in this case, improving sales performance globally in the sales organisations.

**Collaboration:** It has an emphasis on collaboration - the individual participants and the researcher are working together in a collaborative way to improve sales performance, where possible.

**Participants:** The research is aided by the participation of competent and experienced senior sales professionals, who engage in the creation of the benchmarking tool, implementing of the benchmarking tool, or both.

**Knowledge generation:** Knowledge is created and shared throughout the action research cycles by the researcher and the participants. It provides participants and the researcher with a greater awareness of the problem and the proposed solution.

**Success:** The approach supports the opportunity for success in resolving the research problem and generating knowledge.

At the core of the research problem, there is a need to change. This shift envisions the need to improve sales performance will require individual country sales organisations to benchmark their sales effectiveness processes and, as a result of that benchmarking, identify where changes are necessary and create and implement action plans to enable the change. This will lead to future action research cycles. This approach supports the need for organisations to prepare for frequent change, rather than episodic changes (Weick & Quinn 1999).

### 3.5.2.1 Action research cycles

Commonly, action research projects undertake an iterative process of identifying, planning, taking action, and evaluating in a cyclical way (Coghlan & Brannick 2014; Saunders et al. 2009), and an action research project can have multiple cycles. The cyclical process needs a clear starting point (Saunders et al. 2009). This starting point provides the context and purpose of the research. It then
moves onto diagnosing, planning, taking action, and evaluating. On completing the evaluation phase, a second research spiral is commenced (Saunders et al. 2009). Figure 3.2 below illustrates the action research spiral.

![Image of action research spiral](image)

*Figure 3.2 Action research cycles P11 (Coghlan & Brannick 2014)*

While all action research projects include the action research spiral and have a clear starting point, it is characteristic that a research problem being addressed by action research may be complex and fuzzy, with no preconceived solution at the start of the process (Saunders et al. 2009). The solution of the research problem can be approached in various ways, and this is influenced by whether the achieved outcome can be accepted as a solution (Pedler 2011). As the solution is not predefined, there is no definitive endpoint to the project, as the solution can undertake evolutionary change throughout the project and post-project. The research process will aid the design of the proposed solution and the implementation of the proposed solution, conduct fieldwork to gather primary data and assess the study’s effectiveness in resolving the research problem and generating knowledge.
3.5.2.2 **Internal action research**

Traditional research can be characterised as being conducted by a researcher or a research team external to the case study organisation. However, internally led action research possesses some advantages and issues. A researcher can take various positions during the action research process. A dominant theme is a relationship with the researcher to the participants of the research and the organisation being researched, and during the research project, these relationships may evolve (Saunders et al. 2009). The table below identifies the six main positions moving along a continuum from insider research to outsider research contributing to academic knowledge (Herr & Anderson 2014).

<table>
<thead>
<tr>
<th>Researcher Position</th>
<th>Contributes to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Insider – Own Practice</td>
<td>Knowledge base – Self Transformation</td>
</tr>
<tr>
<td>2 Insider-collaboration with other</td>
<td>Knowledge base/organisational</td>
</tr>
<tr>
<td>insiders</td>
<td>practice/self-transformation</td>
</tr>
<tr>
<td>3 Insider in collaboration with</td>
<td>Knowledge base/organisational</td>
</tr>
<tr>
<td>outsiders</td>
<td>practice/self-transformation</td>
</tr>
<tr>
<td>4 Reciprocal collaboration (insider</td>
<td>Knowledge base/organisational</td>
</tr>
<tr>
<td>and outsider)</td>
<td>practice/self-transformation</td>
</tr>
<tr>
<td>5 Outsider in collaboration with</td>
<td>Knowledge base/organisational</td>
</tr>
<tr>
<td>insiders</td>
<td>practice/self-transformation</td>
</tr>
<tr>
<td>6 Outsiders studying insiders</td>
<td>Knowledge base</td>
</tr>
</tbody>
</table>

*Table 3-5 Researcher Position (Herr & Anderson 2014)*

The positioning of the researcher is important, as understanding the position provides clarity of the objectivity of the researcher to ensure academic rigour (Crowther & Lancaster 2005). By their nature, action research projects are collaborative, and the researcher is often part of the organisation (Coghlan & Brannick 2014). For this study, the research position meets the definition of number two.

The three most important issues with insider research are pre-understanding, role duality, and organisational politics (Gill & Johnson 2010). The study had to consider the nature of pre-understanding, as not only was the researcher a member of the corporate team who had previously experienced many
challenges the participants face but also due to the requirement to offer a solution to the research problem as demanded by the organisation, which could lead to the adoption of a dominant position. To minimise this, the researcher focused participation in research cycles one and two as a facilitator and guide to enable participants’ voices, perceptions, and knowledge to be heard, considered, and included.

The duality of roles between a member of the organisation’s corporate team and that of researcher had to be considered, as participants may feel their input could have influence, both positive and negative, on their role or their individual organisations. From the researcher’s philosophical perspective, this needed to be addressed, despite not considered an important issue in the research, due to the collective nature and the relative anonymity provided by the terms of reference derived in the research design.

The need to manage organisational politics was critical to the success of the research project, as to achieve the desire to create and implement a benchmarking tool required positive engagement from the organisation, especially the country sales organisations. These concerns included the potential for victimisation (Ammons & Rivenbark 2008) or a lack of desire to be seen as an outlier (Francis & Holloway 2007). To address this, terms of reference were established for both the business and academic elements of the research.

3.5.2.3 Rigour and Ethics

Rigour is used to describe the trustworthiness, plausibility, and credibility of a research project through the use of theory and the design of the research, including the collection of primary data and its analysis (Anderson 2017). To achieve a high level of academic rigour, there needs to be high validity (Saunders et al. 2009). With insider-led action research, the results can be highly contextualised and must consider specific criteria to demonstrate the rigour. Using an interpretivist approach requires rigour to be recognised through its transferability as opposed to its generalisability. Transferability and creditability can be applied to the majority of action research projects (Melrose 2001; Crowther & Lancaster 2005). Rather than looking for generic knowledge, transferability focuses on
transferring the knowledge created through the research project to new settings (Walby & Luscombe 2016).

As the purpose of this action research project is to create and implement a benchmarking tool, data collection focused on the benchmarking results and their comparison to secondary data provided by the sponsoring company. The purpose of the benchmarking is to drive continual sustained change in the sales organisations in multiple countries. Therefore, it is unlikely there is direct repeatability of the results of the benchmarking process, as this takes place in a single moment in time, and country sales organisations will continue to evolve and improve. (Coghlan & Brannick 2014). Research phase 2 provides an opportunity for transferability throughout the research process of building a benchmarking tool that can be replicated and developing the benchmarking process, which can be transferred to other applications, providing a level of rigour. The prolonged engagement experienced by the research project from the interview stage in research phase 1 to the action research cycles in research phase 2 additionally contributes to the rigour of the research project (Anderson 2017) and to its credibility (Barusch et al. 2011; Creswell 2007).

### 3.5.3 Overview of action research cycles

Research phase 2 comprised an action research approach comprising two action research cycles. Each action research cycle contained four elements: diagnosis, planning, taking action, and evaluating (Gummesson 2000; Coghlan & Brannick 2014; Saunders et al. 2009; Smither & London 2009) to generate actionable knowledge by taking a decision on the research problem central to the project. Action research projects cannot be fully determined or designed at the beginning of the research project (Herr & Anderson 2014). It is an emergent approach that develops through the action research cycles, and detailed planning prior to commencing the action research cycles would contradict the action research methodology and result in numerous revisions during each action research cycle, when the findings are subject to evaluation and reflection.

Action research cycle one focused on the creation of the benchmarking tool. The first step in the cycle is diagnosing and establishing a method to create the
benchmarking tool, following the elements presented in chapter 2. Specifically, these elements are the identification of the major business processes to be benchmarked, the precise definition of the main elements of each process, and the creation of a benchmarking tool (Zairi & Whymark 2000). The second step of planning focused on three areas, identification of participants, a method to access participants and establish a communication method to enable the participants to become knowledgeable about the objectives, and reasons for the activity. The third stage is taking action, comprising a workshop led by the researcher, whose primary role was facilitation. The workshop took place over several days and focused on the design of the benchmarking tool, including its processes and agreement on how to measure progress and success through the definition of a performance indicator. The final stage of action research cycle one was the evaluation of how the benchmarking tool and the associated processes could support the solution of research question three. The knowledge and tool and its supporting implementation methodology were then linked to action research cycle two.

Action research cycle two commenced with the diagnosing phase, reflecting on the learning from action research cycle one, and the feedback of the participants from the creation workshop led the researcher to establish the guidance from conducting the benchmarking assessments. The second phase focused on planning the evaluation process of the benchmarking tool, focusing on which countries and when. The taking action phase comprised conducting the pilot and subsequent benchmarking assessments in multiple countries. The final stage of evaluating focused on analysing the data regarding the process maturity level (Vlahovic et al. 2010) against secondary data provided by the sponsoring organisation. On completion of action research cycle two, the researcher considered the outcomes of the complete research project regarding addressing the research problem and answering the research questions. Figure 3.3 overleaf presents the action research cycles.
Figure 3.3 Action research Cycles Phases

1. Analysis of the Research Problem, preparing future actions and adding to organisational knowledge.
2. Reflecting of the research process and outcomes, thesis writing to add to academic knowledge.
3.5.4 **Action research cycle One**

Action research cycle one was conducted over eight weeks, following the completion of research phase 1, which determines the relevancy of the problem for the organisation or the wider sales community. The outcomes of research phase 1 were communicated to executive members of the organisations, intending to gain approval and sponsorship to progress to research phase 2. Research phase 1, in conjunction with the literature review, sought to provide responses to research questions one and two, focusing on identification of sales effectiveness processes that could be used in the organisation to improve sales performance.

To address research question three, action needed was to create a benchmarking tool. Benchmarking has been identified in the literature as being appropriate, as it focuses on the creation of knowledge for practitioners (Yasin 2002). The scope of the benchmarking would be internal (Camp 1995; Hinton et al. 2000), reflecting the need to focus on improving sales performance across multiple countries within the same organisation. The benchmarking approach would follow a five-step process (Zairi & Whymark 2000):

- Identification of the major business processes (research phase 1)
- Definition of the main elements of each process (Action research cycle 1)
- Creating a benchmarking tool (Action research cycle 1)
- Undertaking a pilot benchmarking (Action research cycle 2)
- Adoption of the benchmarking tool for implementation (Action research cycle 2)

3.5.4.1 **Diagnosing action research cycle one**

Based on the understanding of the research problem, the literature review, and the outcomes of research phase 1, the first action research cycle focused on developing a benchmarking tool for sales effectiveness processes to improve sales performance. The literature review identified a structure for the benchmarking tool (Hinton et al. 2000). Having identified the major sales effectiveness processes in research phase 1, with the literature review, the research identified the benchmarking tool creation process required the engagement of regional process
owners (RPO). These RPO could support the development of precise definitions of the sales effectiveness processes and maturity levels for each process (Zairi & Whymark 2000; McCormack et al. 2009; Vlahovic et al. 2010). These regional process owners must be identified and participate in knowledge transfer of the research project, including the research problem and the objectives for this action research cycle. In order for the action research cycle to achieve its overall goal, it was identified that a seminar process would need to be undertaken to engage participants in the creation of the benchmarking tool. The identified action research method to undertake this phase of the research project was the search conference approach (Coghlan 2011).

The search conference process provides a participatory approach to action research (Schafft & Greenwood 2003). The planning process for a search conference is context specific and utilises local knowledge, in this case, the local knowledge being employees of the sponsoring company. It comprises a bottom-up and top-down collaborative approach, enabling the researcher to present the ideas for benchmarking, with the sales effectiveness processes identified in research phase 1 from a top-down perspective, and gain honest and collaborative participation in developing the benchmarking tool (Schafft & Greenwood 2003). A typical search conference has several characteristics. It is conducted under social island conditions. The social island is a term used to describe the running of a conference. To enable focus and effective participation, it is held at a location away from the day-to-day business; during the sessions participants do not use their laptops or phones to attend to their normal activities, such as emailing; it comprises a preconference process, an introductory plenary, group sessions, a final plenary, and post-conference processes (Polanyi 2001; Schafft & Greenwood 2003). This approach recognises the expertise of the participants in the action research cycle to strengthen the quality and suitability of the benchmarking tool under development (Madritsch 2009). Having established the need for further participation using the search conference approach, the research cycle progressed to the planning stage.
3.5.4.2 Planning action research cycle one

The first action research cycle was planned and designed utilising the outcomes of research phase 1 and the literature review to facilitate addressing research question three. Planning commenced with the identification of participants.

The corporation’s operating model is that of a regional maximised company (Yip 2001). This operating model is characterised by a global headquarter function, where the researcher was located, and nine regional headquarters to whom the countries report. The regional headquarters were experienced in the concept of regional process owners (RPO’s) from previous business improvement programmes within the financial and supply chain functions. Therefore, the researcher requested the appointment of regional process owners for sales effectiveness. While the researcher could not nominate individual participants into the RPO role for each region, the criteria for selection was provided. This criterion included the characteristics defined in the literature concerning regional process owners (Trkman 2010) in combination with the selection criteria utilised for participants in research phase 1 (Ch. 3.4.4.1).

The executive leadership of each of the regional business units then identified suitable and willing individuals, who would act as regional process owners. Continental Europe, which operated as two regional business units, contained 44 operating countries in total. This size of the region was considered too diverse to be represented by only two people. The issue was discussed with the researcher and agreement reached that additional regional process owners would be required for this geography. Regional process owners were appointed for North and South America, Southeast Asia, China, South Pacific, Africa, United Kingdom and Ireland, Western Europe, Scandinavia, Mediterranean Europe, Central Europe, Eastern Europe. Although unplanned, the use of the selection criteria resulted in 5 of the regional process owners being participants in research phase 1. This contributed to the efficiency and continuity of the case study.

As part of the planning phase, the researcher spoke with each nominated RPO to socialise the research problem, the research outcomes of phase 1, and discuss the proposed workshop (the use of the phrase “workshop” relates to the
proposed search conference, as the workshop has greater implied understanding within the organisation). The researcher used these conversations to identify and answer any queries and concerns apparent at this stage of the action research cycle to build participant knowledge and engagement in the research project. Discussions were also held concerning the timing and location of the workshop. Invitations were issued for a four-day workshop held over a five-day workweek in the UK.

**Workshop approach**

Having successfully identified the regional process owners, work moved to the workshop design. The design would follow the principles of the search conference (Coghlan 2011; Schafft & Greenwood 2003; Polanyi 2001). The success factor for the workshop would be based on how the workshop outputs addressed the first part of research question 3, namely the creation of a benchmarking tool. The planned outputs would include a benchmarking tool with identifiable sales force effectiveness processes, complete with detailed definitions for each process linked to process maturity (Vlahovic et al. 2010). The benchmarking tool was to be an instrument that did not require complex software or programming expertise to complete. The benchmarking tool creation process will be considered complete if participants achieve consensus on the outputs. Consensus is reached when each participant acknowledges the output of the workshop is acceptable, even if the output does not reflect that participant’s preferred option (Turcotte & Pasquero 2001).

Having established the approach of a search conference-based workshop using a participant group comprising regional process owners briefed on the objective and the work to date and the location and timings of the workshop being agreed, the planning phase of the action research cycle was complete.
3.5.4.3 Taking action in action research cycle one

The search conference workshop to create the benchmarking tool was conducted in one week in March 2011. The workshop ran from Monday afternoon until Friday lunchtime to facilitate the travel needs of the participants. The workshop comprised group sessions and planning sessions. The structure of the workshop is presented in Table 3.6. As the focus was research in action as opposed to research on action (Coghlan & Brannick 2014), detailed notes of interactions within the workshop were not recorded. The outputs of the workshop became the record of the workshop.

The workshop commenced with a plenary session, where the regional process owners introduced themselves; the workshop agenda was presented with the sales effectiveness key processes that needed to be developed into a benchmarking tool by the researcher. A discussion was held on the approach to content development, and a decision was made to split the participants into two groups that would work on the benchmarking tool content in the plenary sessions. Three examples of external benchmarking tools related to sales effectiveness were presented and discussed (SBI 2009; Blackdot.com.au 2010; Sales Leadership Council 2008). The concept of maturity levels was introduced by the researcher and a discussion held on the usefulness and how that will affect the development of the tool. The consensus was reached on the use of maturity levels, and guiding principles were agreed upon as to what each maturity level would look like and that the benchmarking tool should present the countries with the opportunity not only to identify their status but also to identify which processes to improve within an agreed timeframe.

On the second day, two plenary sessions and two plenary presentations were held. In each plenary session, each of the two groups focused on one key sales effectiveness process for each session. The participants worked in their groups, engaging in debate and presenting their experiences and knowledge to define what each process definition should be. At the end of each plenary session, a plenary presentation was held, where each group presented the process area they had worked on to the whole group; feedback was taken and adjustments made in the moment. By the end of day two, the four main process areas of leading, organising,
developing, and managing had a first draft of detailed process definitions linked to maturity levels. The day concluded with a group session discussing how sales performance can be measured.

Day three replicated day 2 regarding the number of plenary sessions and presentations. The variation was that, for each session, each of the groups examined the work on a process area the other group had completed the day before to enhance and, where necessary, simplify the detail process definitions. This made the creation of the process definitions a two-stage process; the first stage focused on creating the draft, and the second stage, having benefited from a presentation of the work of the first stage, sought to enhance and improve the draft to reach a final version. Day three included a group session to agree on how the benchmarking would be conducted in a country and how the responses of the benchmarking could be seen as valid.

Day four was effectively the summation of the workshop; the group reviewed the completed benchmarking tool processes, including the detailed definitions and maturity levels, along with the proposed measures of success and validation. Discussion and improvements were made, and consensus was achieved. The group then moved to a new group session, where the pilot country was identified, along with the need to develop a communication pack to educate countries to be benchmarked. This pack would be communicated to the countries to inform them of when, how long, who would be involved, and the expected preparation needed by the country sales organisation.
<table>
<thead>
<tr>
<th>Day</th>
<th>Session Type</th>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Introductory plenary</td>
<td>Introductions, objectives, workshop design</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Introductions by each of the participants, including name area of responsibility and region represented. Workshop agenda presented. Research to date presented and discussed. Examples of external benchmarking tools were presented and reviewed. Suggested approach for content development presented and discussed.</td>
</tr>
<tr>
<td>1</td>
<td>Group Session 1</td>
<td>Maturity Levels</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Definition of differing maturity levels and how these could be assessed were reviewed and consensus reached.</td>
</tr>
<tr>
<td>2</td>
<td>Plenary Session 1</td>
<td>Identification and development of detailed definitions of each sales effectiveness process.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Participants split into two groups. Each group to develop a draft definition of the elements of a single sales effectiveness process, linking to levels of maturity (Ranjbarfard 2016).</td>
</tr>
<tr>
<td>2</td>
<td>Presentation plenary 1</td>
<td>Each group presenting their first process topic including detailed definitions for each maturity level for the processes reviewed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Topics: Group 1-Leading, group 2 Organising. Feedback gathered by each group and added to their work to date.</td>
</tr>
<tr>
<td>2</td>
<td>Plenary Session 2</td>
<td>As per plenary session 1</td>
</tr>
<tr>
<td>2</td>
<td>Presentation plenary 2</td>
<td>As per presentation plenary 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Topics: Group 1-Managing, Group 2 Developing. Feedback gathered by each group and added to their work to date.</td>
</tr>
<tr>
<td>2</td>
<td>Group Session 3</td>
<td>Measuring</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Roundtable discussion on measuring success</td>
</tr>
<tr>
<td>3</td>
<td>Plenary Session 3</td>
<td>As per plenary session 1</td>
</tr>
<tr>
<td>3</td>
<td>Presentation plenary 3</td>
<td>As per presentation plenary 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Topics: Group 2 Leading, Group 1 Organising. Feedback gathered by each group and added to their work to date.</td>
</tr>
<tr>
<td>3</td>
<td>Plenary Session 4</td>
<td>As per plenary session 1</td>
</tr>
<tr>
<td>3</td>
<td>Presentation plenary 4</td>
<td>As per presentation plenary 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Topics: Group 2 Managing, Group 1 Developing. Feedback gathered by each group and added to their work to date.</td>
</tr>
<tr>
<td>3</td>
<td>Group Session 4</td>
<td>Validation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Roundtable discussion on country benchmarking approach and how results could be regarded as valid</td>
</tr>
<tr>
<td>4</td>
<td>Group Session 5</td>
<td>Presentation of benchmarking tool, measures and validation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Discussion and consensus sought from participants</td>
</tr>
<tr>
<td>4</td>
<td>Group Session 6</td>
<td>Next Steps</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Selection of Pilot and timings, review process for finalised tool, development of communications for countries.</td>
</tr>
</tbody>
</table>

*Table 3-6 Search Conference Agenda*
On completion of the search conference, the researcher who had facilitated the workshop gathered the outputs, including the agreed benchmarking processes, complete with detailed definitions, the agreed concepts concerning the methodology for conducting the benchmarking, and the agreed measure of sales performance. The researcher then converted the benchmarking tool into Excel and other material into suitable documentation for use in the benchmarking of countries.

3.5.4.4 Evaluating action research cycle one

The search conference proved a reliable approach for developing the tool. The participants, through their interactions and enthusiasm, indicated to the researcher this work was significant to the business. As a positive, consensus was achieved; however, the start of the workshop was met with mixed reception by the participants, especially concerning examples of external benchmarking tools. The tools were presented by the researcher, and participants were split between simple adoption of an existing external tool perceived to be the easier path, and this was countered by other participants and the researcher, who perceived the external tools did not carry the level of detail required to link to the key sales effectiveness processes relevant to the sponsoring organisation. The concept of maturity levels reached consensus quickly, which was seen as a positive. However, the focus of the debate was around the detailed definition of each maturity level. The plenary sessions started slowly, and this could be addressed in the future through greater engagement and understanding created before the workshop. However, after the first plenary session and presentation, the participants became familiar with the process and therefore more efficient. The group session concerning measurements created discussion as participants represented differing views on what measures to adopt, and consensus was achieved through a process of simplification. Reflecting on the work of the search conference gave the researcher the belief that the work will continue to be valued throughout the benchmarking of countries evidenced by the enthusiasm and desire expressed by the participants to be the pilot country.
Overall action research cycle one achieved the objective to create a benchmarking tool that reflects the key sales effectiveness processes in detail, complete with maturity levels in line with the existing literature (Trkman 2010; Zairi & Whymark 2000; Vlahovic et al. 2010). Following the completion of action research cycle one, the research project and the researcher moved on to action research cycle two, which addresses research question three: *How can a benchmarking tool for sales effectiveness processes be used to implement and improve sales performance?*

### 3.5.5 Action research cycle two

Action research cycle two represents the culmination of the preceding research. Research phase 1 identified if business process management and benchmarking could be applied to the identified sales effectiveness processes. Research phase 2 commenced with action research cycle one, which presented the creation of the benchmarking tool. Action research cycle two explores the use of the benchmarking tool in 11 countries, including a pilot. The 11 countries represent the regional business unit structure of the sponsoring company and provide a representative sample of the sponsoring company sales practices in six continents. The countries benchmarked were: South Africa, Austria, United Kingdom, Scandinavia, France, United States of America, Brazil, Malaysia, the People’s Republic of China, and Australia.

One of the outcomes of action research cycle one was the identification of a pilot country. The researcher, with the regional process owners, established that the pilot would be conducted in Australia. Similar to all countries undergoing the benchmarking, the Australian business was significant to the group when measured by revenue contribution. Also, the scale of Australia made it a representative example of a complex business within the sponsoring organisation, as all sales functions are self-sufficient, in contrast to Europe, where countries share sales resources with other countries. The perception from the regional process owners was that the Australian language was more international than the British language; therefore, this would help identify any complex language within the benchmarking tool. This was relevant, as only three of the 11 countries were identified as native
English speakers. The researcher recognised this could be a valid concern and therefore supported the consensus decision that Australia would be the pilot.

### 3.5.5.1 Diagnosing action research cycle one

The outcomes of action research cycle one identified the pilot country and the benchmark countries. It also identified the need to communicate with relevant stakeholders in the country to be benchmarked to allow them to plan and prepare for the benchmarking. To achieve this, a communication pack was produced, which explained the rationale behind the benchmarking, the ideal participants for the country benchmarking exercise, the process of benchmarking, and the post-benchmarking activities.

### 3.5.5.2 Planning action research cycle two

The planning of action research cycle two focused on the researcher engaging with the participant countries to establish a timeline for the researcher to attend the country to conduct the benchmarking process. The research identified that, for consistency and to support any possible future deployments of the benchmarking process, the regional process owner should attend any benchmarking in their region of responsibility. Planning was undertaken to arrange the relevant benchmarking workshops and the timeline in this fieldwork as reflected in table 3.1.

The planning phase also included preparing to gather secondary data, such as the performance and market share of the countries available for the data analysis phase of the research. The data analysis focuses on the maturity level of the benchmarked sales effectiveness processes compared to sales performance data provided by the sponsoring company. This analysis took place after all 11 countries had been benchmarked to answer the research question whether benchmarking can improve sales performance. This is discussed in greater detail in chapter 4.

### 3.5.5.3 Taking Action in action research cycle two

The process for conducting the benchmarking assessment was developed as a seven-stage process.
1. Invitation to participate and presentation of a background briefing to the country by the researcher

2. Two weeks before the benchmarking assessment, a copy of the benchmarking tool and instructions for preparation were sent to the country. These preparations included identification of the suggested attendees for the benchmarking and the need for the country to prepare examples and evidence for achieving a certain process maturity level. The necessity of evidence contributes to the validation of the benchmarking assessment and acts as an area of consistency across multiple countries.

3. The researcher conducts an introductory briefing to the country leadership team and the country sales personnel involved in the benchmarking. The briefing explains how the benchmarking will be performed, how the results will be presented for use in the country, and how action plans for process improvement will be developed.

4. Following the briefing, the benchmarking session takes place. Each process area is examined by considering each process definition statement, a discussion and review of any supporting evidence is held, and the outcome of the benchmarking for that process definition is recorded in the tool by the researcher. This process takes a full day.

5. Having completed the initial benchmarking and recorded the responses in the benchmarking tool, the benchmarking tool is reviewed, and the country has an opportunity to identify process areas they wish to improve in a facilitated discussion with the researcher and the regional process owner.

6. Once the current benchmarked position of the sales effectiveness processes is recorded and the improvement areas agreed, the benchmarking outcomes are presented to the country leadership team.

7. The results of the benchmarking are retained by the researcher and the country for further analysis against sales performance data as part of this research project.

The pilot in Australia was conducted over a week-long period in May 2011. Allocation of a week to the benchmarking exercise was appropriate for the pilot, as
this allowed for developing both the benchmarking tool and the benchmarking methodology. Participants included the researcher, the regional process owner (who was also the head of sales), two sales managers, the technical sales manager, and two sales representatives. The pilot was conducted using the seven steps previously described. The objectives of the pilot, besides benchmarking the sales effectiveness processes for the country, were to assess the understandability of the precise process definitions and to test the methodology of conducting the benchmarking assessment.

The benchmarking was completed within the week, and while no processes were changed, adjustments were made to the process definitions to enhance understanding for non-native English speakers. Improvements were identified in the methodology of conducting the benchmarking assessments. The finalised benchmarking tool and updated methodology were then applied to the remaining ten countries without modification.

3.5.5.4 Evaluating action research cycle two

Action research cycle two was assessed in several ways. Reflection on the pilot enabled the researcher to clarify the methodology to achieve validation of the benchmarking results. The validation was through triangulation. Triangulation is an accepted method for validating action research projects (Anderson 2017; Coghlan & Brannick 2014). Triangulation is the method of convergent validation (Jick 1979), based on the maritime practice of using multiple reference points to establish the location of a ship. In organisational research, this method is used by researchers to improve their understanding of a phenomenon through the use of multiple data points (Jick 1979). The method of triangulation included the responses of the sales leadership team in the country, compared to the perceptions of the participating salespeople with the requirement to provide evidence at the benchmarking assessment that the countries’ sales organisation meets the detailed process definition. An example of evidence would be: a review of the documented role profile of salesperson when benchmarking the sales effectiveness process of role clarity.
Also, the pilot identified an improvement in the benchmarking tool would be the ability to summarise action plans for those processes where the country had identified they wished to make improvements in their maturity level within the benchmarking tool. The tool was updated to achieve this before the remainder of the benchmarking assessments were carried out. The pilot achieved its aim to check and improve the methodology for the benchmarking, including the identification of the value of using multiple participants from the sales hierarchy in the benchmarking. The pilot also reinforced the belief that the participation of the regional process owner in the benchmarking can provide future opportunities for the regional process owner to utilise the benchmarking tool in different countries within their region, without the direct involvement of the researcher.

When conducting the balance of the benchmarking assessments, the researcher benefited from the participation of the relevant regional process owner to aid understanding and to translate, where necessary, the defined sales effectiveness process definitions for the participating country.

Data gathered in the benchmarking assessments provided the researcher with a representative sample of benchmarking assessments to analyse to answer research question three. This is discussed in greater detail in chapter 4, but in summary, the business process maturity level for each of the sales force effectiveness processes provided the primary data for each country, which could then be assessed against secondary data provided by the sponsoring company relating to market share and revenue performance.

Action research cycle two provided insight into the business process maturity of the sales force effectiveness drivers across 11 countries on six continents. It proved an effective data collection tool to address the research problem. Through the creation and implementation of the benchmarking tool, the research project, before any data analysis, contributed to organisational knowledge around benchmarking as a process and improved the understanding and relevance of sales effectiveness process improvement.
3.5.6 Summary of research phase 2

Research phase 2 investigated research question three in the case study organisation. This phase of the research used participatory action research as an approach to address the issue in the context of the sponsoring company. Taking a participatory action research approach enables research to demonstrate how learning is achieved for both the researcher and the organisation being researched. The research was conducted in two action research cycles, taking an insider collaboration position. The first action research cycle examines the process of creating a benchmarking tool using a search conference approach. The second action research cycle focused on applying the benchmarking tool to the sales organisations in 11 countries that are part of the case study organisation.

3.6 Ethics

Research ethics is an important component of a successful research study involving human subjects. Research ethics relates to the appropriateness of a researcher’s behaviour about the rights of the participating human subjects and those to whom the results will or might affect (Babbie 2007). Adhering to ethical standards and norms is important to institutions, professionals, and researchers to encourage respondents to provide honest opinions, without any doubts of potential suffering from adverse effects brought by their honest contributions (Terrell 2012). Further, the study acknowledged that sales force effectiveness is a strategic and sensitive issue in organisations, which meant some CSOs taking part in the survey would feel uncomfortable or insecure to provide updated strategies they employ to enhance sales force effectiveness. As such, adhering to ethical concerns enables participants to provide honest opinions, since the researcher would be accountable for any inconvenience resulting from their contributions. Ethics approval from the University was received before the commencement of the research project.

Research phase one

Towards this end, the study upheld ethical considerations in six main ways. First, the interview questions observed anonymity of participants by not requiring participants to provide personally identifying information to eliminate chances of
identification and possible victimisation. The interview sessions identified participants through numbers assigned to their responses. Second, all interviewees were informed about the nature of the study in the initial invitation requesting their voluntary participation to enable them to make an informed decision to accept the invitation to take part in the survey voluntarily. Forceful participation or enticements may encourage some participants to provide inaccurate data to influence the outcome of the research or to gain the enticement (Babbie 2007). Additionally, participation was entirely voluntary, and participants were told they could opt out of the research at any time during the research, without any consequences. Third, since the interview sessions were recorded, the request for consent for recording was communicated in advance to all interview participants. Fourth, all participants were assured that all data provided and the recording would be kept strictly confidential and used for no other purpose than the intended purpose of this study. Fifth, all materials and data from the survey would be held electronically for five years after the study was completed for reference purposes in case clarification was required after completion of the study and, after that, destroyed to guarantee the confidentiality of the collected data. Sixth, as a gesture of goodwill, all interviewees were promised copies of the study’s findings to be delivered to emails they would provide upon completion.

**Research phase Two**

In the action research phase, action was taken to address ethical risks and to meet the University ethical approval requirements. Terms of reference were agreed upon by the researcher and senior executives within the sponsoring company. These terms of references included a declaration of sponsorship, a brief description of the research, a declaration of confidentiality, and a statement that participation has no negative consequences on participants (Saunders et al. 2009). The participants in each action research cycle were informed about the background of the investigation, their role, and the anonymity of their contribution, along with how the data would be used and shared (Saunders et al. 2009).

To protect participants from being adversely affected, confidentiality was maintained for all those involved throughout action research cycle one and two. This meant the researcher knew each member’s contribution; however, this was
not shared. For the benchmarking in research cycle two, the organisation who sponsored the research problem required visibility of outputs.

To maintain confidentiality of participants, the organisation and the researcher agreed that results in the benchmarking would be shared and transparent within the organisation’s executive at the summary level. The overall position of the maturity of the sales effectiveness processes would be visible and identifiable by country. Individual salesforce effectiveness processes maturity and action plans would remain visible to the researcher and the specific country leadership team only. This approach was taken to minimise the desire for countries to compete among each other and to mitigate against countries clustering around the average (Francis & Holloway 2007). Finally, no benefits were offered to the respondents in return for their participation (Fowler 2009). For the research project, no incentives were promised, except a summary report of the study.

3.7 Summary of Chapter 3

The chapter presented the research method. Figure 3.1 outlines the steps taken in the research. The chapter identified a case study approach comprising two research phases. Research phase 1 examined research questions one and two using a qualitative interview approach based on IPA. Research phase 1 used chief sales officers as participants. The primary data collected in this phase was analysed using NVivo, and the findings were applied to research phase 2.

Research phase 2 used a participatory action research approach in the case study organisation to address research question three. The action research was undertaken in two action research cycles. The first action research cycle investigated the creation of the benchmarking tool. Once the tool was created, action research cycle two was initiated and focused on the piloting and implementation of the benchmarking tool. Implementing the tool created primary data to be analysed to answer research question three. The data collected from the benchmarking activities, in addition to the primary data collected in research phase 1, is analysed and discussed in the next chapter.
4 CHAPTER 4: PRESENTATION OF FINDINGS

4.1 INTRODUCTION

The research questions provide the chapter structure. The primary data collected through the interview process in research phase 1 relate to research questions one and two, referring to the literature review and the individual interview questions. Research question three utilised the outcomes of research phase 1 in action research cycles, which formed research phase 2. Each section of the chapter relates to an individual research question. The outline of Chapter 4 is shown in figure 4.1 below.
Figure 4-1 Overview of Chapter
The table 4.1 below shows each research question and its relevant subchapter.

<table>
<thead>
<tr>
<th>Research question</th>
<th>Research Phase</th>
<th>Research Approach</th>
<th>relevant subchapter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are salesforce effectiveness processes transferable across country sales teams within an MNC?</td>
<td>1</td>
<td>Interviews</td>
<td>Chapter 4.2</td>
</tr>
<tr>
<td>Which sales force effectiveness processes could be included in a tool to improve sales performance?</td>
<td>1</td>
<td>Interviews</td>
<td>Chapter 4.3</td>
</tr>
<tr>
<td>How can a benchmarking tool for sales effectiveness processes be used to implement and improve sales performance in multiple countries?</td>
<td>2</td>
<td>action research cycles</td>
<td>1 &amp; 2</td>
</tr>
</tbody>
</table>

Table 4-1 Research questions and related subchapters

Chapter 4.2 is primarily relevant for the underlying practical problem of understanding the transferability of predefined sales force effectiveness processes to different country’s sales organisations within a single multinational corporation. The study used several questions from the interviews conducted in research phase 1 to address research question one. The topics focused on understanding what sales effectiveness is and its importance to business and considered the relevance of culture and market conditions to transferability.

The research problem required the identification of sales force effectiveness processes that could improve sales performance. Chapter 4.3 seeks to identify these processes through the analysis of the interview questions relevant to research question two.

The structure of Chapter 4.4 relates to the action research conducted with the case study company in research phase 3. The chapter focuses on addressing research question three and uses the outputs of research phase 1 as a starting point for developing the sales effectiveness processes to be utilised in the benchmarking tool.
The chapter concludes with a summary of the two research phases and their findings with a focus on the benchmarking tool and the sales force effectiveness processes.

4.1.1 Research Participation

The research featured two distinct phases. Research phase one used Chief Sales Officers from 8 countries to gather data through interviews. Research phase 2 required regional process owners to be appointed by the organisation to participate in action research cycle one, which focused on developing the benchmarking tool. Action research cycle 2 required participant country sales teams and regional process owners to undertake the benchmarking of the sales effectiveness processes.

Table 4.2 provides a simple overview of the research participants. The left-hand column identifies the interview participants by country. The middle column reflects the participants for action research cycle one in research phase 2, and the right-hand column indicates the lead participant from each country for the benchmarking. Of the eight interview participants, five continued as regional process owners. Four of the eight became regional process owners, who also participated as country sales lead for the benchmarking. One of the interview participants also participated as a country sales lead, but they were not a participant in action research cycle one. One participant, who was a regional process owner, was not an interview participant but was a country sales lead.
<table>
<thead>
<tr>
<th>Interview Participant</th>
<th>Regional Process Owner (RPO)</th>
<th>Country Sales Lead for Benchmarking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>Same participant</td>
<td>Same participant</td>
</tr>
<tr>
<td>Austria</td>
<td>New participant</td>
<td>Same participant as interview</td>
</tr>
<tr>
<td>France</td>
<td>Same participant</td>
<td>Same participant as interview</td>
</tr>
<tr>
<td>Italy</td>
<td>New participant</td>
<td>Same participant as interview</td>
</tr>
<tr>
<td>Scandinavia (Sweden)</td>
<td>Same participant</td>
<td>New participant</td>
</tr>
<tr>
<td>South Africa</td>
<td>Same participant</td>
<td>Same participant</td>
</tr>
<tr>
<td>United States of America</td>
<td>Same participant</td>
<td>Same participant</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>New participant</td>
<td>The Same participant as the interview</td>
</tr>
<tr>
<td></td>
<td>South America (new participant)</td>
<td>Brazil (new participant)</td>
</tr>
<tr>
<td></td>
<td>South East Asia (new participant)</td>
<td>Malaysia (new participant)</td>
</tr>
<tr>
<td></td>
<td>East Asia (new participant)</td>
<td>People’s Republic of China (same participant as RPO)</td>
</tr>
</tbody>
</table>

Table 4-2 Participants through the research phases

The study had not identified the need for continuity in the research design, but the participant criteria specified in the research methods contributed to the continuity, positively impacting the research process.
4.2 RESEARCH PHASE 1- FINDINGS OF RESEARCH QUESTION 1: ARE SALESFORCE EFFECTIVENESS PROCESSES TRANSFERABLE ACROSS COUNTRY SALES TEAMS WITHIN AN MNC?

The data collected through the interview stage was analysed using NVivo. First, the interviews were open coded, then subordinate categories were developed from these open codes, and then the subordinate categories were developed into superordinate themes. Several interview questions related to research question 1. To understand the transferability of sales effectiveness processes to multiple countries, there was a need to identify the participant’s perceptions of sales force effectiveness, the measurement of sales force effectiveness, and the importance of sales force effectiveness to the organisation. To address the transferability of sales force business processes, the interviews explored the role and impact of culture, the influence of market conditions on sales performance, and factors that inhibit sales effectiveness. The literature review identified the relevance of these topics. Table 4.3 below shows the superordinate themes, the units of meaning coded for each theme, and the number of interviews that contributed to each theme. Section 4.2 discusses the interview responses for each of these superordinate themes.

<table>
<thead>
<tr>
<th>Research Question</th>
<th>Phase 4 Superordinate Theme</th>
<th>RQ Theme</th>
<th>Phase 4 Code definitions</th>
<th>Units of meaning coded</th>
<th>Interviews Coded</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 SFE Importance</td>
<td>Define &amp; Measure</td>
<td>Importance of sales force effectiveness</td>
<td>32</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>1 Measuring SFE</td>
<td>Define &amp; Measure</td>
<td>How sales force effectiveness can be measured</td>
<td>31</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>1 Understanding of SFE</td>
<td>Define &amp; Measure</td>
<td>Defining sales force effectiveness</td>
<td>49</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>1 Role of Culture</td>
<td>Transferability</td>
<td>Role and impact of culture</td>
<td>38</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>1 Role of Market Conditions</td>
<td>Transferability</td>
<td>Influence of market conditions on sales performance</td>
<td>12</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>1 Inhibitors of SFE</td>
<td>Transferability</td>
<td>Factors that inhibit sales effectiveness</td>
<td>17</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

Table 4-3 Superordinate Themes Research question 1
4.2.1 Understanding Salesforce Effectiveness

This section discusses the interview responses defining sales force effectiveness. Seven of the respondents argued that sales force effectiveness focuses on improving performance. Participant 2 argued sales effectiveness is about results and customer retention similar to the view of participant 3.

“Sales effectiveness is that the sales people get the best result for the company. You deliver the best quality for the customer, and you can ensure that the customer is still with us in ten years too.” Participant 2

“to improve the profitability of the company of course, but in my thought, is to improve sustainability.” Participant 3

Participants 6 and 8 considered it to be the relationship between revenue and costs, which are financially measurable.

“the relationship between the revenue generated by the sales force and the sales force costs.” Participant 6

“It's a measure of how much is the selling organisation contributing to the goals of the corporation.” Participant 8

Two participants identified sales force effectiveness to be related to ability;

“Sales effectiveness to me is the ability of a salesperson to identify what activities he needs to be busy with to understand his customers and what they do.” Participant 5

“the ability to sell the company’s PSO to the target customers.” Participant 7

The second significant theme that emerged related to processes, with six of the interviewees identifying processes as being part of salesforce effectiveness.

“following the standard processes and procedures, the sales processes, sales training and all those kinds of things all fit into that sales effectiveness bucket.”

Participant 7

“we tend to view selling not as a process but as an art, and some guys are just fantastic at this art, other people are struggling, they struggle so. Therefore, we
only get the standard level of performance. The real trick is to understand (a) it is a process and (b) it can be understood, managed, improved.” Participant 8

The views of the definition of sales force effectiveness uncovered in the interviews show the definition is not readily identifiable and supports the literature view that the term is applied to sales performance and sales effectiveness interchangeably (Zoltners et al. 2008; Walker et al. 1977). The emphasis on results, turnover, profitability, and contribution to the company has been linked to sales performance (Schwepker 2013). Customer retention identifies as a subset of sales performance, as this can be moderated by the salesperson (Evans et al. 2002). Revenue from existing customers contributes to the results of the organisation. Two respondents mentioned ability, and the context suggests the knowledge, skills, and capability of the salesperson are factors within salesforce effectiveness. Skills and knowledge have been included in the Walker Churchill Ford and the Weitz models (Walker et al. 1977; Weitz 1981). However, while the ability is not interpreted as linking directly to the definition of sales force effectiveness, it provides insight into what contributes to sales effectiveness and reinforces the elements that relate to sales force effectiveness.

Six respondents contributed the use and improvement of processes to the definition, with two participants focusing on improving the use of standard processes affecting sales effectiveness, supporting the literature view that process improvement improves performance (Harmon 2010).

The interviews highlighted the range of understanding of sales force effectiveness, and while definitions varied across participants, the analysis proposes that, although the definition is fuzzy, there is an understanding of the elements involved in sales effectiveness.

4.2.2 Measuring Sales Effectiveness

The literature on measuring sales force effectiveness presents a broad range of variables dominated by outcome measures, such as revenue generation, profit improvement, and market share (Deeter-Schmelz et al. 2002). All interviews
reflected this dominance. Profit was the dominant measure, which aligned to previous research discussed in the literature.

“measure the sales effectiveness in the profits the sales rep is bringing to the company.”  Participant 3

“the profit at the moment is the focus.”  Participant 4

Some interviewees expanded their views of measures to include qualitative elements. Participant 4 discussed quality as a measure regarding increasing customer satisfaction, as did participant 5, who identified customer satisfaction indices as a measure of sales force effectiveness. Participant 5 highlighted the need for salespeople to enjoy what they do. Participants 2 and 3 offered customer retention as an important measure.

The dominance of financial measures, such as profitability, in the interviews is congruent to the nature of the role of the participants. Sales have historically focused on financial measures, such as revenue and profits, as a measure of success (Babakus et al. 1996; Jahromi et al. 2014; Pelham 2006). The use of customer satisfaction measures in respect to sales force effectiveness matched previous studies (Piercy et al. 1997). This use of financial measures can be carried forward to research phase 2, where the action research cycles will seek to identify a measure of sales force effectiveness for use in the benchmarking.

4.2.3 Importance of sales force effectiveness

Although all respondents provided their views on defining and measuring sales effectiveness, differing views exist about the importance of sales effectiveness. This section explores this importance. Seven interviewees emphasised the importance of sales effectiveness. The interviews identified two main themes, the need for sustainable growth and the ever-increasing competitiveness of the marketplace.

The interviews indicate sustained growth is a reason sales force effectiveness is important. Participant seven put it simply:

“is important because we need to maintain and grow market share.”

Participant three expanded this by identifying it is necessary
“to improve the profitability of the company and to improve the sustainability of the customer portfolio.”

Building on this, participant six observed:

“all income comes from the sales organisation one way or another.”

Participant one argued that effectiveness is significant as a way to achieve productivity improvements:

“there is such pressure on organisations to make productivity gains.”

The interviews concluded there is continual pressure from the organisation and its stakeholders to grow continually. Much of the responsibility for generating the profits to grow the business sits with the sales organisation, which needs to increase their sales effectiveness continually.

A second important factor was the growing competitiveness experienced within the marketplaces. Globalisation has increased competitive intensity, and this led participant 2 to observe:

“it is very important because, if we have effective working sales people, we are in successful in the future.”

Efficiency is not enough, and effectiveness is the priority.

Participant one identified that the competitive intensity and the evolving world of business have introduced:

“a focus on strategic procurement.”

This focus on strategic procurement emphasises the growing importance of effective sales activities and processes. One respondent (participant eight) said there was a sub-level of detail concerning this globalisation and competitive intensity, arguing there are instances where efficiency is critical and other cases where effectiveness is key.

“it is product specific, for commodity products efficiency is important, for differentiated product effectiveness is more key to the attainment of corporate goals.” Participant eight

The interviews identified themes that have benefited from previous research. The topics of globalisation and rise in competitive intensity have been identified as relevant to sales effectiveness (Cravens et al. 2006; Blocker et al. 2012; Bonney et al. 2014) but remain an area of interest and concern to sales leaders.
exploring ways to meet their objectives. The professionalisation of procurement has added pressure to the sales organisation, requiring sales organisations to improve their selling effectiveness (Ryals & Rogers 2006; Küster & Canales 2008). The importance of recognising where efficiency is sufficient is less researched (Vilela et al. 2010), and research suggests efficiency is a hygiene factor required for effectiveness (Moutot & Bascoul 2008).

4.2.4 Role of Culture in Salesforce effectiveness

This section discusses the interview responses on culture in the context of developing a benchmarking tool to improve sales performance, including organisational culture, country culture, and the balance between global and local practices.

On the topic of organisational culture, the first sub-theme identified relates to the status of the sales organisation within the business. Four participants argued the relevance of the sales organisation varies. In their experience, sales were not identified as an important facet of the firm, with participant seven summarising this as:

“sales are seen as a necessary evil my organisation; the good salespeople get the business culture but does the business understand what it sales organisation does and in particular see the value it creates?” (P7)

The idea that members of the sales organisation buy into the organisation’s culture was identified by participant four, who suggested engagement by the sales organisation of the company culture added to the effectiveness of the sales activities. Participants six and eight spoke of how a hierarchical culture in the organisation affects sales effectiveness. With his experience working on three continents, participant eight said deference and diffidence on the part of the salespeople limited their effectiveness. Participant six explained the hierarchical nature could be counter-productive, as it reduces empowerment of the salespeople to make decisions with and for the customer.

“It is prestigious to be a manager, to take managerial decisions and take care of the biggest customers but that’s not we supposed to do.” (P6).
Other respondents identified the importance of having a culture of accountability within the sales organisations to match the need for sales performance. Participant one suggested the organisation will benefit from a keen focus on execution:

“there is a link between organisational culture and the need to be more focused on execution and holding people to account.” (P1)

This focus on execution was expanded by participant one, identifying the need to cultivate a cohesive team culture, supported by incentive schemes that straddle individual and collective sales activities, and sales teams led by great sales managers with a culture of coaching to improve performance. Participant three identified:

“an organisation where we don’t do any coaching never achieves any leading performances.” (P3)

The overarching issue most participants raised when discussing organisation culture versus country culture centred on the concept of change. Participants discussed the dilemma of introducing global changes in the absence of a local perception of the need for change.

“Using standardised global processes presents the problem of how do you reinvent the process for the country when there is no real perception of the problem or need for change.” (P7)

Others highlighted the need to build local flexibility into global processes to engender greater engagement. Participant one highlighted:

“there are different ways to skin the cat.” (P1)

This could be interpreted as the existence of multiple approaches to achieve the desired outcome. Participant two expanded on this, putting forward the need for flexibility in front of the customer and firmly identifying with the concept that sales are a local activity:

“our business is a local business, and so you cannot figure out that globally because in Africa you have entirely different things to Austria.” (P2)
Other participants supported this view. Participant eight suggested global processes must be locally compatible, and participant five summed up the consensus that global best practice applied locally is the best way forward:

“you cannot plug and play every solution that is generated around the world. You can take global learnings and apply them to your local environment, and in some instances, there is minimal tailoring required to make it fit, adapting global best practice to local markets is hugely beneficial.” (P5)

The data suggests culture is a significant factor that influences sales force effectiveness. This supports literature on sales force effectiveness, benchmarking, and best practice (Küster & Canales 2008; Castro & Frazzon 2017; Francis & Holloway 2007; Dursun & Kilic 2010). The participants also highlighted applying global processes and practices to individual countries should ensure local requirements are considered (DeCarlo et al. 1999; Bloom & Van Reenen 2010). Overall, the data suggest a consensus across the participants that standardised processes with a facility for localisation is possible.

4.2.5 Factors Affecting Sales Effectiveness

As the aim of the research project was to establish a programme of sales performance improvement utilising sales effectiveness processes and the benchmarking tool, the interviewees provided their perceptions relating to inhibitors of sales effectiveness and the importance of market conditions. The literature review identified no specific research on the impact of either factor. The researcher recognised the capacity to take on board additional activities, such as benchmarking, might be limited. Therefore, early identification of marginal activities that could be reduced, delegated, or deleted can improve the likelihood of the research project, supporting the business objectives.

4.2.5.1 Factors inhibiting Sales Effectiveness

Participants identified several factors that inhibit sales effectiveness. The first was extraneous tasks, specifically conducting duties and activities beyond the core functions of the sales organisation. Participant three described these activities
as “parasite jobs.” The extent to which salespeople either voluntarily or involuntarily complete extraneous activities can be context dependent. Participant three described an example relating to customer service issues outside the role of the salesperson but which the salesperson acts upon in the interest of customer satisfaction. Participant five emphasised:

“It is taking the salesperson away from their core function and dealing with issues that affect their customers, but it impacts the ability to work on the business that they need to work on.” (P5)

Interviewees argued the need to prioritise and to meet productivity demands could be inhibitors of sales effectiveness. Participant seven contended this ability to prioritise is symptomatic of issues around targets and focusing on the right growth opportunities. Participant eight expanded on highlighting the capacity to prioritise, especially for sales managers, emphasising the risk of short-term focus, using an example of managing new business acquisition:

“the tendency of the sales managers is to focus on the transactions which we are trying to close right now, for me, is making sure you put your time in earlier in the sales process, making sure your guys are not chasing wild geese.” (P8)

Participant two supported this view, identifying that sales effectiveness is also about efficient use of time and, in particular, highlighted administration activities as being an inhibitor:

“Sales people should not waste time with things that don’t bring some effect on the customer side; to fill out reports sometimes wastes time because the salesperson should be with the customer.” (P2)

Participant one suggested the effort involved in meeting increasingly high productivity targets reduces sales effectiveness due to ongoing reduction of resources, which results in sales people having larger territories, thereby limiting the time spent with customers and reducing the opportunity to sell.
4.2.5.2 Market Conditions affect on sales effectiveness

The interest in market conditions was relevant, as the case study organisation predominantly operates in declining markets. Therefore, it was important to understand the participants’ perceptions of the importance of market conditions.

This section discusses interview responses about market conditions. Market conditions describe the perceptions of whether the market is growing and demand is increasing. By merely keeping track of the market growth, the company could achieve its goals. A declining market is typified by a reducing customer base and a softening of demand, which results in fewer opportunities to grow the business and may limit the organisation’s ability to reach its goals. Differing views exist around the importance of market conditions. One respondent (participant six) suggested high performing sales people may be in more demand in a growing economy, heightening the risk of competitors enticing them away, resulting in the need to recruit and develop a new salesperson quickly to maintain team performance. Two respondents (participants three and five) suggested flexibility and adaptability of the sales manager are necessary when adjusting to changes in market conditions. Participant three focused on the sales manager’s need to adapt and realign activities as market conditions change:

“the world is changing by quickly now to have to redesign, realign according to what’s happening externally on the market, on the customer side.” (P3)

Similarly, participant five focused on the readiness to adapt to market conditions; adversity in the marketplace requires constant reappraisal, prioritising, and revising activities to adapt.

Some interviewees suggested market conditions are peripheral to sales effectiveness processes, arguing the processes are key to improving sales performance; therefore, the way things are done should be constant, regardless of the marketplace claiming that high sales performance is not dependent on favourable market conditions:

“having a bad economic situation does not prevent it. I had a general manager say, when the weather's fine and the wind is fair, things are just a whole lot easier, and that’s definitely true, you know; small niggly problems just disappear
when things are going well, and they tend to manifest more when things aren’t
going so well. That sort of stuff does make a difference in terms of building a high-
performing sales organisation. The critical thing though is good sales managers will
build a high performing team regardless of the market condition.” (P1)
Participants argued adverse economic situations give sales managers the ability to
identify performance improvement opportunities, explaining gaps in processes and
performance have greater visibility in challenging market conditions. This was
developed further by participant 7, suggesting there are multiple variables in a
marketplace; therefore, various adaptations of activities and processes may be
necessary on a detailed level:

“I think there are a lot of situational variables around this because one of the
key aspects here is the maturity of the product. If you are in a market-led
environment where the product is new and innovative, then the desire for
success within an organisation and the sales people is much higher and,
therefore, the requisite need for a well-based sales organisation that are
very much achieving and striving for high efficiency and high performance.
Conversely, where the product is in the mature phase, we potentially can just
adapt our organisation. I wouldn’t suggest for a second it doesn’t still need
to be high performance. I just think it needs to be focused differently and to
deal with the different needs that come from selling and managing sales
within a mature product environment. It’s very, very different depending on
the precise situation.” (P7)

The interviews conducted have shown that improving sales performance
requires clarity on the activities and tasks that the sales organisation undertakes to
improve performance. The outcomes of research question two offer processes to
focus on to avoid dilution of the improvements that a benchmarking activity
provided. The interviews also showed most respondents recognised that market
conditions are peripheral when taking a process-based improvement programme.
The interviews emphasised the importance of identifying the correct processes to
improve that would result in improved performance, irrespective of the market
conditions, supporting the literature on both business process management and
market conditions (Lee & Dale 1998; Lyus et al. 2011; Viio & Grönroos 2014).
4.2.6 Summary of findings: Research question 1

Research question one focused on interpreting the understanding of salesforce effectiveness, its importance, and how it can be measured. It provided insight into the role of culture, market conditions, and inhibitors of sales force effectiveness, which may influence the transferability of a sales performance improvement programme.

The interviews indicate the respondents have a broad view of what sales force effectiveness could be, which aligned with the literature. There was a high level of agreement that using sales effectiveness processes would contribute to improving sales performance. On measuring sales effectiveness, the interviews were dominated by financial performance measures, such as profitability and volume growth, which aligns with the literature. The importance of sales force effectiveness recognised the need to improve and adapt partially through external factors, such as globalisation and increasing competitive intensity, but also to meet organisational objectives.

For a global sales improvement programme to succeed, the interviewees were asked for their perceptions of culture, inhibitors of sales force effectiveness, and market conditions. The literature has provided insight in relation to business processes, benchmarking, and the importance of culture; therefore, the insights provided by the participants could be used to develop a benchmarking programme.

Culture has been identified in the literature as affecting sales effectiveness and in adjacent topics concerning benchmarking and business processes. The interviews identified the need for global best practices to possess the flexibility to allow local adaptation to improve sales performance in individual country marketplaces. The participants’ experiences of the concerning inhibitors of sales force effectiveness provided a good understanding of the status quo, and the insights provided could be noted for consideration during the development and implementation of a benchmarking tool. The interviews have shown most respondents viewed market conditions as having little impact on sales process improvements, with participant’s arguing that doing the right things well can have a positive impact on sales performance, irrespective of the market conditions. Again,
these perceptions and thinking are relevant to the development and implementation of a benchmarking tool.

### 4.3 Research Phase 1 - Findings of Research Question 2: Which Sales Effectiveness Processes could be included In a Tool to Improve Sales Performance?

Following the analysis and discussion of research question one, analysis of the interviews continued, with the focus moving to answering research question two. To understand which sales force effectiveness processes could be identified as common across the eight country sales organisations, the interviews explored the perceptions of the chief sales officers in four subordinate categories. These categories aligned to the literature review, focusing on leading, developing, managing, and organising sales teams. Table 4.4 below shows the subordinate categories, the units of meaning coded for each category, and the number of interviews that contributed to each category. The subordinate category focusing on developing the sales team, including coaching and developing knowledge and skills of the sales team, dominated the interview responses.

<table>
<thead>
<tr>
<th>Interview questions</th>
<th>Research Question</th>
<th>Phase 4 Superordinate Theme</th>
<th>Phase 4 Code definitions</th>
<th>Phase 3 Subordinate Categories</th>
<th>Phase 3 Code definitions</th>
<th>Units of meaning coded</th>
<th>Interviews Coded</th>
</tr>
</thead>
<tbody>
<tr>
<td>3,4,7</td>
<td>2</td>
<td>Sales Effectiveness Processes</td>
<td>Factors that drive sales force effectiveness</td>
<td>Developing the Sales Team Processes</td>
<td>Parent code for Developing the Sales Team Processes</td>
<td>103</td>
<td>8</td>
</tr>
<tr>
<td>3,4,7</td>
<td>2</td>
<td>Sales Effectiveness Processes</td>
<td>Factors that drive sales force effectiveness</td>
<td>Leading the Sales Team Processes</td>
<td>Parent code for Leading the Sales Team Processes</td>
<td>28</td>
<td>5</td>
</tr>
<tr>
<td>3,4,7</td>
<td>2</td>
<td>Sales Effectiveness Processes</td>
<td>Factors that drive sales force effectiveness</td>
<td>Managing the Sales Team Processes</td>
<td>Parent code for Managing the Sales Team Processes</td>
<td>35</td>
<td>6</td>
</tr>
<tr>
<td>3,4,7</td>
<td>2</td>
<td>Sales Effectiveness Processes</td>
<td>Factors that drive sales force effectiveness</td>
<td>Organising the Sales Team Processes</td>
<td>Parent code for Organising the Sales Team Processes</td>
<td>18</td>
<td>7</td>
</tr>
</tbody>
</table>

*Table 4-4 Subordinate Categories for Sales Effectiveness Processes*
4.3.1 Developing the Sales Team

The literature on building the capability of the sales team encompasses developing a salesperson’s knowledge and skills to improve their capability through training, knowledge transfer, and coaching. The interviews have shown that all chief sales officers recognise the importance of developing the capability of their sales organisations.

Several interviewees identified industry knowledge and the salesperson’s knowledge of their own and their customer’s business as a driver of sales force effectiveness. The need for improving the capability of the salespeople results from the emergence of knowledgeable and professional procurement personnel, combined with the challenges that operating in the information age present to the salesperson:

“...global trends as being the biggest driver around sales effectiveness, the availability of information on the Internet and sophisticated and professional procurement teams puts the salesperson at a real disadvantage in terms of negotiation or differentiating their offering.” (P1)

These challenges result in the need to improve the capability of the salesperson, and to achieve this, interviewees identified the provision of training and education was necessary. Participant seven identified the need to assess current skills formally to ensure salespeople maximise the effectiveness of the training. Several interviewees identified the use of formal training programmes as an appropriate method of skill development. Participant 7 talked of the need for individualised training assessments and plans for each salesperson to ensure skill development activities are focused and relevant to the individual.

“... Needs to be a formal capability assessment of the individual sales guy in terms of what are his strengths and weaknesses, where are his opportunities to develop and we saw that the programme in terms of training or capability building does require an individual level. I think that’s a real key because we don’t often have a blank sheet to work with, were inheriting existing people with different levels of experience.” (P7)

Other interviewees offered several additional skill areas where capability development is needed, such as planning, developing business knowledge on the
company, customer insights, and the competitive environment (participants one, three, five). Participant two referenced the use of top performers as an exemplar or a mentor, who could feedback into structured and informal learning activities to improve sales performance.

The experiences of the chief sales officers also indicated the critical role coaching plays in improving sales performance. All interviewees offered coaching as a sales improvement process. Participant eight provided insight that an effective coaching process enhances the professionalism and effectiveness of the salespeople to address challenging selling environments. Participants identified that regular and intensive coaching is an essential activity in sales and management. Coaching is an active engagement with the salesperson, both formal in-house sessions and during customer visits, where the sales manager is a keen observer of performance, gives constructive feedback, encourages and guides and considers the salesperson on a holistic fashion. This suggests coaching is not just focused on performance results but also on the well-being of each team member.

“Spend time with the salespeople, go to the customer with them and have a look how behaviour is on the customer site in order to give them feedback. It goes further than only coaching on the selling process. You can coach of the business itself on different things, behaviour, how happy he is in the company.” (P2)

This view was supported by another participant, who identified coaching meant being close to your people, not just focusing on the sales performance but also their needs (participant four). Participant six summarised coaching by the sales manager is the process to enable salespeople to improve their sales performance and develop personally:

“the sales manager must coach people in the sales team on personal development in order to increase their performance... You need to have regular feedbacks, coaching connected to the salesperson performance and for personal development.” (P6)

The interviews identified that developing the capabilities of the sales team contributes to improving sales performance. This supports the literature, showing the need to enhance knowledge and skills improves capability previously shown to improve sales effectiveness (Wachner et al. 2009). Training and education provision
was identified as a common process for improving sales performance, which aligns with previous studies (Boehle 2010; Cron et al. 2005; Pettijohn & Taylor 2009). In the view of participant five, who identified attending training was not sufficient, the salesperson must:

“put the learning into practice and produce a body evidence to prove that ...the training is being utilised and delivering improved sales performance.” (P5)

Coaching was identified as an activity that sales managers undertake to build the capability of a salesperson. The interviewees identified that a formal coaching process, involving in-house and customer visits, would improve sales performance. (Carter 2006; Onyemah 2009). The identification by participant 2 of the use of role models and mentors aligns with the literature (Hartmann et al. 2013) and presents a possible element of maturity for a benchmarking of coaching processes. The processes of building capability of the sales team and coaching have commonality across all countries based on the interview responses, confirming the opportunity for transferable sales processes exists. Capability development processes can be interpreted as topics to be included in a benchmarking tool for sales effectiveness processes.

4.3.2 Managing the Sales Team

The literature describes the active management of the sales team as being a key driver in sales force effectiveness. The processes involved in managing the sales team are numerous, and the interviewees reflected this in their responses. The dominant categories related to monitoring performance, performance plans, and appraisals.

When considering performance appraisals, the participants focused only on the tools and procedures used to ensure the desired outcome of achieving targets and quotas is reached. Participant seven described the quarterly appraisal cycle and presented this as an example for assessing and adjusting performance objectives and plans regularly through periodic interactions.
“... High-quality interactions from senior sales managers to sales manager, from sales manager to salesperson on a quarterly cycle when the performance plan is assessed and discussed, and new planning is undertaken.” (P7).

Although the findings from the interviews led to a good understanding of the status quo of the process of appraisals, the interviewees offered no insight into the direct contribution that appraisals may make to sales effectiveness. Therefore, the process of appraisal could be of interest in a benchmarking tool, and this would be considered in research phase 2.

Performance monitoring proved to be a broad topic for the respondents. Several participants identified the need for clear financial targets, whereas other participants focused on planning and preparation. Participant two identified the need to ensure salespeople manage their time effectively and prepare well for customer visits to achieve those targets:

“the sales people should be very focused on preparing visits and have good time management... The differentiation between high performing and standard is a high performing team spends more time on preparation of visits.” (P2)

This view on planning was echoed by participant eight:

it is all back to the plan if you don’t get the planning right the rest of it won’t make any sense.” (P8)

Participant four identified the need for adaptability by the sales manager when monitoring and managing performance, determining the needs of each salesperson and incorporating the salesperson’s preferences for engagement when reviewing performance. Several respondents identified this monitoring behaviour by the sales manager must be both in-house and out in the field, with the salesperson meeting the customers, for the sales manager to appreciate the performance of the salesperson. Other interviews contextualised this monitoring in the field as crucial to help salespeople prioritise their activities:

“the focus has moved of late into what activities will lead to the best value as the company and where we should focus our time, and it’s been difficult to bring people to the understanding that not every opportunity is [equal].” (P5)

In the category of managing the sales team, the interviewees recognise the importance of performance appraisals as contributing to sales force effectiveness
as acknowledged in the literature (DeNisi & Pritchard 2006), and the interviews have shown there is clarity on the process of conducting performance appraisals. However, it did not develop any new insight, nor did the interviews provide any new knowledge concerning appraisals and their associated benefits in improving sales performance previously identified in the literature (Risher 2003; Silver et al. 2006). Similarly, sales compensation programmes were absent from the interviews, despite it being a much-researched topic (Küster & Canales 2008; Krafft et al. 2012; Rouziès et al. 2009).

Interviewees focused on monitoring a salesperson’s activities. This included discussions around the measurement of outcomes and behaviour controls (Anderson & Oliver 1987; Wang et al. 2012). Behaviours including planning and customer visits were identified as contributing to sales force effectiveness (Murphy & Li 2012). Interviewees highlighted that setting goals and targets contributed to sales force effectiveness, and some participants identified the need to generate agreement between the organisation and the salesperson on the targets (Franco-Santos & Bourne 2008).

In summary, in the category of managing the sales team, the interviews established several process areas that could improve sales force effectiveness. These process areas would be considered further in research phase 2.

4.3.3 Leading the Sales Team

The third category established through the interviews related to leading the sales team. The interviews established two themes, what the sales leader does or should do to improve sales performance and how the sales leader should motivate their team.

Participants identified having a psychological insight is an important attribute of a good sales manager. This insight requires the sales manager to be able to read people and decipher how to bring out the best in them, and accordingly, take a tailored approach to managing each member of the team. Participant three described having such insights is beneficial to understanding the heart and mind of each salesperson.
“You need to find the right angle to engage the people, find a discussion, find the right wording to explain.” (P3)

Having the appropriate sales strategy was identified as being beneficial to sales force effectiveness. Participant five identified that having a local sales strategy indicates:

“why we are here and what we try to achieve.” (P5)

This idea of having a local sales strategy was identified as important to help sales teams develop their plans and activities to meet the performance goals. The need for sales manager planning was proposed as being the key analytical and organisational skill that drives sales effectiveness.

“It’s all back to the plan; if you don’t get the plan right, the rest won’t make any sense. The critical elements of success need to be clearly defined for sales organisation is expected to do, and you get together right at the beginning with the strategy.” (P8).

Several interviewees highlighted the need for sales managers to be able to navigate the organisation, suggesting effective sales teams are supported by sales managers who can span the boundaries between the functions within the organisation. This boundary spanning nature not only seeks to address customer related issues but is a three-way dynamic among sales, the customer, and the organisation. Participant five cited the ideal as a three-way dynamic involving the salesperson, through engaging with the customer, accumulating insight and knowledge the market, bringing this information back to the functions of the organisation that can respond accordingly by creating appropriate and competitive offers that are attractive to the customer and contribute to growing sales.

The second theme within leading the sales team focused on motivation. Interviews identified motivating the sales team was a necessary activity to improve sales performance. However, the interviewees identified there is a delicate balance between motivation and de-motivation that the sales manager must walk:

“the sales manager has to push for sure; he has to motivate he has to take what is not good and try and help the salesperson improve. This is very dangerous because of the sales manager is continuously saying ‘you are not doing a good job you are
not doing this the activities are not good’ ... This is not the correct way and the effectiveness; they will not obtain it.” (P4)

Participant four identified focusing on areas to improve can be demotivational for the salesperson, reducing sales effectiveness. Participant five depicted the role of the sales manager is to inspire through role modelling and a sense of enthusiasm to build the right environment for the salespeople to be motivated. Through the creation of the appropriate internal and external environments, participant five argues that, to improve sales performance, a sales manager must enable a salesperson’s self-motivation, rather than undertake activities that may motivate them:

“you cannot motivate people; you can activate them to motivate themselves. You have to awaken the flaming side, so to speak... Somebody who understands what the people are going through. It is the ability to inspire to create a need to perform.”

(P5)

The interviews identified themes that exist in the literature. While no interviewee directly referenced leadership styles, some interviews recognised the sales manager could influence the salesperson’s confidence (Román & Iacobucci 2010), which can affect the outcome of sales activities, influencing sales performance (Chakrabarty et al. 2014). One interviewee indirectly referenced empowerment of salespeople contributes to sales effectiveness as identified in the literature (Ahearne et al. 2005). The interviews identified that having a sales strategy and communicating it contributes to sales effectiveness (Zoltners et al. 2008). The interviews focused on a broad range of topics concerning leadership, which could suggest a gap in understanding of the skills and capability required for an effective sales manager; this gap is echoed in the literature (Deeter-Schmelz et al. 2008).

The interviews offered no definition of what motivation could be but recognised factors that affect the motivation of a salesperson are individualistic (Vlachos et al. 2010). While all interviewees recognised a motivated salesperson is more likely to succeed, which improves sales performance, there was no reference to topics researched, such as sales compensation (Krafft et al. 2012) and leadership
style (Wang et al. 2012). However, the interviewees identify that creating the right environment for motivation to occur could influence sales force effectiveness.

While there are no processes defined in this category of leading the sales team, it remains a topic of interest to carry into research phase 2, to allow the action research cycles to review the findings and potentially frame sales effectiveness processes that reflect the leadership activities of the sales managers.

4.3.4 Organising the sales team

The final category identified in research question two, concerning what sales effectiveness processes could be used in a benchmarking tool, focused on organising the sales team. The emergent theme related to the salesperson’s role, regarding clarity and competence.

The interviewees put forward desirable competencies for a high performing salesperson. The first was business acumen, reflecting the changes in the marketplace, the growing professionalism of procurement departments, and recognising that previously sales was focused on relationship building, rather than creating value through a solid business benefit rationale:

“people have got by on their ability to build relationships, and I have seen that coming less and less effective as far as being a salesperson is concerned. Where we need to go, you need to be able to build connections with people, and more importantly, you need to add value to their business and to do that you need to understand their business.” (P1)

A desirable behavioural competency was resilience. The interviews described the attitude and characteristics of resilient salespeople to improve sales effectiveness.

“An internal drive where they do not need validation from other people, they can take rejection easily but are motivated by a strong, high-performance focus around the delivery of results.” (P1)

The small number of responses relating to the competencies required of a high performing salesperson are expanded when considered in conjunction with role clarity. Several interviewees identified, to improve sales performance, the sales managers must clearly set out each salesperson’s particular area of responsibility
(Miao & Evans 2013). This role clarity was identified as important not only to benefit existing sales teams but also to support effective recruitment of new sales personnel (Lounsbury et al. 2014).

“*The sales manager must have a clear picture of what he wants, which skills he wants.*” (P2)

Another interviewee expanded on this:

“*if I think of building a sales team, I think the first step is around recruitment, to check out the role profile and being really clear on attitude, not just skills.*” (P1)

The interviewee continued to highlight the need for clearly defined boundaries, clearly defined roles, as reducing ambiguity around the salesperson’s responsibilities could be a powerful driver of sales force effectiveness (Carbonell & Rodriguez-Escudero 2013). Where there is a lack of clarity, sales performance is reduced in some ways; even the ability to hold a salesperson accountable is diminished, and it can cause salespeople to become unsure of what they can and cannot do (Onyemah 2008).

In summary, in the category of managing the sales team, the interviews established several processes that could improve sales force effectiveness, including organisational design and role clarity. These process areas would be considered further in research phase 2.

### 4.3.5 Summary Research question 2

Research question 2 intended to identify sales effectiveness processes that could be used in a benchmarking tool to improve sales performance. NVivo was used to code the interviews. This analysis identified categories relating to sales effectiveness processes used to present the data and findings.

The first category was on developing the sales team, and the analysis showed building the knowledge and skills of the sales team through training was both meaningful and transferable. The interviews identified the need for individual training plans. They presented the concept of salespeople creating a body of evidence to demonstrate the ongoing application of training received. The
interviews identified coaching, not just as an ideal but also an important process to improve sales performance.

The second category related to managing the sales team. It identified that a target setting process was desirable. It recognised that an appraisal process related to sales effectiveness. Contrary to the literature review, no mention was made of sales compensation as a contributor to sales effectiveness.

The third category developed related to leading the sales team. Interviews discussed several topics, including sales strategy, planning, role modelling, and motivation. However, little was offered in the interviews on these subjects in relation to identifying a specific process to benchmark.

The final category related to organising the sales teams. The interviews identified several benchmarkable sales effectiveness processes relating to role design and recruitment.

The analysis of the interviews identified several processes that relate to multiple countries. Therefore, the research project can advance to research phase 2 with these findings.

4.3.6 **Summary research phase 1**

Research phase 1 used eight interviews of chief sales officers to answer research questions 1 & 2. The findings were analysed using NVivo, and superordinate themes were developed for each research question.

Research question 1 identified that sales effectiveness was essential to improving sales performance. Culture was highlighted as a theme that could affect creating and implementing a benchmarking tool (research phase 2). The interviews confirmed sales effectiveness could be measured; however, the precise measure remained clouded. The findings also identified sales effectiveness processes could improve sales performance, irrespective of market conditions.

Research question 2 examined the perceptions of the interviewees to discover what sales effectiveness processes could improve sales performance through a benchmarking assessment. The findings suggested several processes for
benchmarking and identified common sales effectiveness processes relevant to multiple countries. These findings are further applied in research phase 2.

4.4 RESEARCH PHASE 2- FINDINGS OF RESEARCH QUESTION 3: HOW CAN A BENCHMARKING TOOL FOR SALES EFFECTIVENESS PROCESSES BE USED TO IMPLEMENT AND IMPROVE SALES PERFORMANCE IN MULTIPLE COUNTRIES?

Research question three examine the creation and implementation of a benchmarking tool. The research was conducted in two action research cycles. The first action research cycle investigated the creation of the benchmarking tool using a search conference approach (Emery & Purser 1996). The search conference participants were regional process owners (Lee & Dale 1998) appointed by the case study organisation using the selection criteria detailed in chapter 3.4.4.1. The second action research cycle focused on implementing the benchmarking tool. The findings are presented in two parts; each part relates to an action research cycle.

4.4.1 Action research cycle one: creating the benchmarking tool

Research questions one and two provided input for the development of the tool. Research question one provided insight on the importance of sales force effectiveness, the need to measure it, and the factors to consider when creating a benchmarking programme. Research question two provided input for the sales force effectiveness processes considered for inclusion in the benchmarking tool. Inputs included processes and the process descriptors.

The search conference held several plenary and group sessions to identify the requirements to create a benchmarking tool:

- Methodology for conducting the benchmarking assessment
- Identification of maturity levels and their definitions
- Development of a measure of sales force effectiveness
- Development of the benchmarking tool with processes, process definitions and maturity levels (Vlahovic et al. 2010)
4.4.1.1 **Development of a benchmarking methodology**

The search conference developed a benchmarking methodology by facilitating group work. The group examined the literature on types of benchmarking and identified the appropriate approach was a blended type, consisting of internal benchmarking and international benchmarking (Camp 1995; Watson 1993). This blended approach of international and internal benchmarking reflected the research problem of improving sales performance. In reaching this decision, the participants reviewed existing external benchmarking tools (Blackdot.com.au 2010; Sales Leadership Council 2008), and based on their perceptions of benchmarking and best practice, an internal approach was an appropriate starting point. The concept of international benchmarking was assumed by the participants, given their understanding of the research problem.

The search conference developed a cyclical methodology for conducting a benchmarking review. This methodology commenced with benchmarking of sales force effectiveness processes to provide outputs based on the benchmarking of the current state of the processes within the country. Having identified the current condition of the sales force effectiveness processes, the countries could develop action plans to improve selected processes. The methodology would include a regular review of the progress of the improvements action plans; this would be conducted by the RPO with the country’s sales team. Sales performance would be measured, and countries would undertake further benchmarking annually to reflect the intention to improve sales performance continually. Figure 4.2 shows the methodology used as part of the communication of the benchmarking methodology to participating countries.
Country Review Methodology

A country review is conducted, in-country, by a team drawn from the country/RBU and members of the global SFE programme team in order to:

- Establish the current benchmark against the defined SFE processes to determine the current maturity level
- Agree the target maturity level, and develop an action plan to reach that level within the plan period
- To do this, the team will use a structured methodology.
- Participants will include: RPO, Members of sales leadership team including: Key Account Management, Applications Selling & Small Customers and the global SFE lead

- Quarterly Follow ups:
  - Led by RPO with local sales management team to review progress

![Diagram of benchmarking methodology phases](image)

Figure 4-2 Country Benchmarking Methodology
(Source: Case Study Organisation)

The methodology for benchmarking adopted for the case study aligns with the literature for conducting benchmarking. Common elements of the benchmarking methodology have been identified as conducting the benchmarking, analysis of results, identification of gaps and solutions, implementation of action plans, and a further benchmark (Kyrö 2004; Yasin 2002). The participants additionally identified that countries would require further insight into the programme and a communication pack should be developed. As part of this communication pack, the participants developed an outline of a typical benchmarking review. Figure 4.3 below shows the typical benchmarking review phases. There are four phases: setup, review, implement, and repeat. This added level of detail was seen to improve engagement with the countries to enable a productive and efficient benchmarking review.
A typical benchmarking review will run as follows:

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2</th>
<th>Phase 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set up</td>
<td>Conduct review</td>
<td>Implement</td>
</tr>
<tr>
<td>Benchmark</td>
<td>Identify</td>
<td>Plan</td>
</tr>
<tr>
<td>2 Weeks before review</td>
<td>Country review</td>
<td>Quarterly follow up</td>
</tr>
<tr>
<td>Teleconference, led by the global SFE lead with local sales management team: Review of current environment Overview of review process Preparation requirements</td>
<td>Days 1 &amp; Day 2 AM Review of Customer Management activities &amp; processes utilising the Road Map: Development of action plans. Day 2 PM Meeting with Sales management team to agree target maturity level &amp; key recommendations. Review Team finalises recommendations. Review Team presents recommendation to Country management team and agree action plan.</td>
<td>Led by RPO with local sales management team to review: Current progress Reporting of KPIs Implementation of action plans</td>
</tr>
</tbody>
</table>

*Figure 4-3 The 4 Phases of a county benchmarking review*

(Source: Case Study Organisation)

The search conference established a methodology for conducting a benchmarking assessment using a staged process developed from the literature (Kyrö 2004).

**4.4.1.2 Defining maturity levels**

The literature identified the importance of maturity levels in benchmarking, and participants of the search conference were briefed on this topic prior to developing specific maturity levels for the benchmarking programme. The participants developed a four-level maturity model. This included naming each maturity level and defining the meaning of each level. The four levels were labelled: foundation, standard, advanced, and leading, and the definitions for each level are seen in table 4.5.
<table>
<thead>
<tr>
<th>Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>The way that business is done is defined locally and does not fulfil the requirements for the standard level.</td>
</tr>
<tr>
<td>Standard</td>
<td>The way the business is done is fit for purpose and meets the group’s requirements for good practice.</td>
</tr>
<tr>
<td>Advanced</td>
<td>The way the business is done exceeds the requirements of good practice and meets best practice within the group</td>
</tr>
<tr>
<td>Leading</td>
<td>We take best practice from external to the group and innovate to be amongst the best.</td>
</tr>
</tbody>
</table>

*Table 4-5 Maturity level definitions*

Development of maturity levels is a fundamental element of a benchmarking tool (McCormack et al. 2009). The maturity levels provide clear sequential steps to enable differing process requirements to be defined and assessed for each maturity level (McCormack et al. 2009). To progress to the next maturity level, the participants agreed the requirements of the previous level of maturity had to be fully met (Lockamy & McCormack 2004; Ranjbarfard 2016; Vlahovic et al. 2010).

### 4.4.1.3 Measuring sales force effectiveness

The need to measure sales force effectiveness was required by the case study organisation. The participants developed a single key performance measure during the search conference. Multiple measures were considered; for example, a suggested measure was revenue performance compared to the target set. This type of measure is typical to organisations and has been previously investigated (Evans et al. 2012). The search conference identified that this kind of measure was not appropriate, as there are numerous variables within it, such as the skill in setting and agreeing on sales organisation targets.
The search conference identified a new measure of sales force effectiveness. This measure aimed to reduce the variability of the previous measure of sales force effectiveness. The measure is defined as revenue growth compared to the market growth as a percentage. Revenue growth is the difference between total revenue achieved in two periods for example, the last financial year and the current fiscal year. To achieve a measure, this growth percentage will be compared to the national statistics of each country provided by their government agencies. Each participant was tasked to identify the government statistics for the country at a later date. For example, as the case study organisation operated in the industrial sector, meaning most customers it sold to were involved in manufacturing. In the United Kingdom, the government statistic that can be used would be the industrial production statistics. The statistics would show the growth or decline of the market in which the case study organisation operated for each country.

This approach to measuring sales force effectiveness would provide an effective indicator of performance in both growing and declining markets across the globe, using the principle that sales force effectiveness would be achieved in growth markets when the countries’ revenues grew at a faster percentage rate than the marketplace. Conversely, for markets decreasing in size, the rate of the organisation’s revenue attrition would be slower than the speed of decline of the market. The details of the measure are shown in figure 4.4. This measure was adopted as the measure of sales force effectiveness for the benchmarking programme.
4.4.1.4 Development of the benchmarking tool

To develop the benchmarking tool, the search conference used the literature review, the findings of research phase 1, and examples of externally developed benchmarking tools (Blackdot.com.au 2010; Sales Leadership Council 2008). The participants adopted a structured approach to the development, commencing with a review of the existing material, identification and agreement of processes to be included in the benchmarking tool, development of the process descriptors for each process, a review and feedback session, adjustments to the process descriptors, and the assignment of maturity levels followed by a final review.

The benchmarking tool development utilised the findings of research phase 1 in creating the benchmarking processes and process descriptors. Figure 4.5 shows the mapping of research phase 1 findings (on the left-hand side) to the finalised sales force effectiveness processes included in the benchmarking tool (on the right-hand side).
Figure 4-5 Mapping of findings to sales force effectiveness benchmarking processes
The findings of research phase 1 developed into a sales force effectiveness process (for example, coaching into the benchmarking coaching process) or a process descriptor (for instance, the using role models became a process descriptor in the sales effectiveness process of onboarding). The complete benchmarking tool including maturity levels, processes, and process descriptors, is presented in Appendix 8.4.1.

Developing the benchmarking tool identified 17 salesforce effectiveness processes with 169 process descriptors aligned into four maturity levels. The participants identified a single tool with 17 processes could be perceived as unwieldy and potentially daunting for the countries being benchmarked. Therefore, the participants grew the processes into three broad themes. Processes relating to topics, such as strategy and organisational design, were grouped in a theme named design. Processes related to people, such as recruitment and coaching, were grouped into a theme named develop, and processes relating to managing the sales activities were consolidated into a theme named drive. Figure 4.6 shows the processes grouped into the three themes.

![Figure 4-6 SFE Process grouping into themes](image-url)
Figure 4.7 shows the sales force effectiveness process of coaching, which is described below to demonstrate how the tool functions.

<table>
<thead>
<tr>
<th>Process Area</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Assessed</td>
<td>Foundation</td>
<td>No assessment made either because, not yet done, or not applicable, or information not available</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>Not Standard</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Salespeople undertake a capability assessment with their coach on an annual basis and agree performance and development requirements. This is reviewed and adjusted, as needed on a quarterly basis.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All levels of staff agree on the ABC Pro definition of coaching and embrace it as a positive opportunity to improve their professional performance. Staff proactively request and receive coaching as part of their day-to-day role.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Coaches target 3-5 hours of coaching (formal and informal) per coachee per month</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All coaches are required to complete the Lindo Pro coaching module and achieve certification within six months of attending the workshop.</td>
</tr>
<tr>
<td>Advanced</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All ABC Pro certified coaches are subject to re-certification within 24 months to ensure minimum standards are maintained.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales managers are certified as coaches before assuming the manager role.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>We employ coaching at every level of sales management to continually improve managers’ business, leadership, and coaching skills.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Coaches devise coaching strategies that are based on demonstrated coach strengths and development needs, to the extent specified in the coachee’s role profile.</td>
</tr>
<tr>
<td>Leading</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>High Performing coaches are leveraged to support the development of other coaches and/or provide supplementary coaching to other individuals.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Managers prioritise coaching effort towards salespeople with the greatest potential for improvement (coaching for performance) and towards those whom they must want to retain (coaching for retention).</td>
</tr>
</tbody>
</table>

Figure 4.7 Coaching Process extract from a benchmarking assessment

(Source: Case Study Organisation)

The header shows the process area. The left-hand side shows the maturity levels from foundation to leading. The centre shows the individual process descriptors for each maturity level. To complete the benchmarking, the country sales team uses the column on the right-hand side to answer yes (the default is no) to any of the process descriptors. In this instance, the country has demonstrated they meet all the process descriptors for the standard maturity level and one of the process descriptors for the advanced level of maturity. The methodology of conducting the benchmarking tool identified that, unless all process descriptors within a maturity level are met, the country’s maturity level is not improved. Therefore, the tool calculates that, for this process, the maturity level of the country is standard. The tool signifies this by an “S” in the top right-hand corner.

When reviewing a sales force effectiveness process in the benchmarking tool, the country must demonstrate through testimony or documentation that they fully comply with each of the process descriptors to which they have answered yes. The process descriptors that are marked “no” can then be used by the country to guide
the development of action plans to improve business process maturity to improve sales performance.

4.4.1.5  Summary of action research cycle one

The benchmarking tool was developed in the search conference based on the Vlahovic model (Vlahovic et al. 2010). It used the detailed process descriptors for each sales effectiveness process derived from research phase 1, complete with maturity levels (McCormack et al. 2009; Robinson et al. 2006). The benchmarking methodology builds on the existing methodology (Kyrö 2004). The tool adopts the principles of the need to meet all process descriptors in a maturity level to achieve that level of process maturity (Ranjbarfard 2016). A measure of salesforce effectiveness was developed for use with the benchmarking programme.

4.4.2  Action research cycle 2

Benchmarking of sales force effectiveness processes was completed in 11 countries in 2011. The pilot was conducted in Australia, resulting in confirmation of the applicability of the benchmarking methodology, the sales force effectiveness processes, and the operation of the tool. This led to minor changes to process descriptors to improve the understandability of the tool for non-native speakers. An improvement to the methodology was identified and implemented.

To aid business analysis of maturity levels and to identify process improvement opportunities easily across multiple countries, a numeric value was assigned to each maturity level. This numerical scale was a simple replacement of maturity level name descriptors with a numerical equivalent. Table 4.6 shows the maturity level and numerical value. The principles of the maturity levels remained unchanged.

<table>
<thead>
<tr>
<th>Maturity Level Name</th>
<th>Numerical Value of the Maturity Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>1.0</td>
</tr>
<tr>
<td>Standard</td>
<td>2.0</td>
</tr>
<tr>
<td>Advanced</td>
<td>3.0</td>
</tr>
<tr>
<td>Leading</td>
<td>4.0</td>
</tr>
</tbody>
</table>

Table 4-6 Maturity Level numerical values
Apart from this change, there were no substantive changes to the programme, and the pilot results are included in the 11 countries benchmarked.

The benchmarking was conducted using the methodology developed in action research cycle 1.

The purpose of the study was not to evaluate the results of any benchmarking assessment but to create and implement the benchmarking tool. However, to demonstrate both implementation and methodology, the results of the benchmarking are detailed in figure 4.7. The table shows the maturity level of each process for each country. Also, it shows the global average for each process and process group.

As an example of the application of benchmarking results, the process of coaching, a dominant-subordinate category in the interviews conducted in research phase 1, was included in the benchmarking tool. 10 benchmarked countries were assessed as foundational (numeric score of 1.0) in this process. Therefore, all ten countries must improve their coaching processes through the development and implementation of targeted action plans to improve sales performance.

The presentation of results in this manner would enable countries to identify processes to improve and potentially allow the identification of advanced process practice in other countries, which could be utilised to transfer the knowledge of that best practice between countries.
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<tbody>
<tr>
<td><strong>1 Competitive Situation Analysis</strong></td>
<td>2.4</td>
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<td>4.0</td>
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<td><strong>2 Forecast</strong></td>
<td>2.6</td>
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<td><strong>3 Sales &amp; Operations Planning</strong></td>
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<td><strong>4 Sales Organization Design</strong></td>
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<td><strong>5 Sales-Related Issues</strong></td>
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<td><strong>6 Salesperson's Performance Plan</strong></td>
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<tr>
<td><strong>7 Territory Allocation</strong></td>
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**Table 4-7 Benchmarking results by process**
4.4.2.1 Summary action research cycle 2

The benchmarking tool was piloted in Australia, and a further 10 benchmarking assessments were conducted in 2011. The benchmarking assessments provided the countries with an opportunity to assess their sales effectiveness processes qualitatively in a rigorous manner using the methodology developed in action research cycle 1.

The benchmarking tool and the methodology were successfully implemented in the case study organisation, and initial results showed a wide variation in process maturity across the processes in all 11 countries. The tool demonstrated its usefulness in providing each country with a clear direction relating to opportunities to develop their sales effectiveness processes to improve sales performance.

4.5 Summary Chapter 4

This chapter has presented the findings in response to the three research questions. It has shown the application of knowledge generated in research phase 1 through the creation and implementation of the benchmarking tool relating to sales force effectiveness processes. The next chapter presents the conclusions of the research project, including its limitations and opportunities for further studies.
5 CHAPTER 5: CONCLUSIONS

This study has investigated the processes of salesforce effectiveness and the subsequent creation of a benchmarking tool for improving sales performance through business process management. It has aimed to identify transferable sales effectiveness processes in a multinational corporation and how these processes can be assessed and performance enhanced. This chapter concludes the research process by presenting the concluding findings and the contributions to knowledge and practice. It identifies the limitations of the study and makes recommendations for further studies. Figure 5.1 shows the overview of the chapter.

![Figure 5.1 Overview of Chapter]
5.1 CONCLUDING THE FINDINGS

The research problem provided by the sponsoring organisation focused on the need to improve sales performance in multiple countries within the organisation in a systematic way. A review of the literature identified several gaps in knowledge concerning the understanding and definition of sales force effectiveness; it also uncovered shortcomings in measuring sales force effectiveness and, of particular importance to the case study organisation, numerous salesforce effectiveness processes that had a positive impact on sales performance. However, it was not possible to identify which sales effectiveness processes were the most effective, which created a gap in the knowledge around sales force effectiveness processes. The literature review offered insight into the transferability of sales effectiveness processes between countries and identified benchmarking as a potential methodology to use in a programme to improve sales performance. Following the review of the literature, three research questions were identified to address the research problem:

4) Are sales force effectiveness processes transferable across countries sales teams within an MNC?

5) Which sales force effectiveness processes could be included in a tool to improve sales performance?

6) How can a benchmarking tool for sales effectiveness processes be used to implement and improve sales performance in multiple countries?

To answer the research questions, a case study method was used with primary data collected in two research phases. The first research phase centred on answering research questions one and two. It used semi-structured interviews of chief sales officers employed by the sponsoring organisation to understand their perceptions of sales force effectiveness, how it can be measured, and how it could be applied in multiple countries. The interviews gathered insights on which sales force effectiveness processes could be identified for use in a sales improvement programme. The primary data collected in this research phase was analysed using an interpretive phenomenological approach, and the findings were applied in research phase 2. The second research phase used an action research approach
comprising two action research cycles. The first research cycle applied the findings from research phase 1 in developing a benchmarking tool for sales effectiveness processes, along with developing the methodology for conducting benchmarking in countries using a search conference methodology to create the benchmarking tool. In action research cycle two, the benchmarking tool was piloted and subsequently implemented in ten countries during the investigation period. The findings of research phase 2 were analysed to answer research question three.

5.1.1 Research question one

Research question one collected primary data through interviews with chief sales officers based in eight countries. The findings of the research are broadly in line with the literature. The interviews established that sales force effectiveness is relevant to the case study organisation, and sales force effectiveness processes could be used to develop a benchmarking tool for use in multiple countries to improve sales performance. Financial measures dominated the interviewee's views on measuring sales force effectiveness; this would be understandable, given the nature of the sales roles within an organisation. The measures identified align fully with the existing literature.

The interviews also identified that culture plays a vital role in ensuring the transferability of sales force effectiveness processes across countries. Again, this aligned with the literature on sales force effectiveness, benchmarking, and best practice. The research concluded that market conditions (economies that are growing or shrinking) would have minimal impact on the effectiveness of the sales processes; therefore, a programme to improve sales force effectiveness processes could be a method to improve sales performance. Finally, the interviews identified inhibitors to sales force effectiveness that would need to be considered in developing a programme to improve sales performance.

The study reached the conclusion that sales force effectiveness processes are transferable from one country to another. Therefore, research question one has been answered in the simple form, and importantly, the research showed there
were several considerations, such as culture, that needed to be considered in developing a benchmarking approach to improving sales performance.

5.1.2 Research question two

The second part of the 1st research phase was the identification of sales effectiveness processes that could be used in a benchmarking tool. Using primary data collected in interviews, the study established there were several sales force effectiveness processes common to multiple countries. The identification of these common processes supports the research ambition for identifying processes that are transferable across multiple countries.

The processes most commonly identified in the interviews related to processes of building the capability of the sales team. This theme of capability development was typified through the identification of processes concerning training coaching and building the knowledge and skills of the salespeople. Overall, the processes identified in the research phase matched the existing literature with two exceptions of particular note, given that the research was conducted in the field of sales. The first exception was that no mention was made of sales compensation as a sales force effectiveness process. This omission was contrary to the literature, where previous studies have shown sales is a role that attaches a high-value to remuneration and reward. The other exception was the process of appraisals. Appraisals have been examined in both the sales field and other adjacent fields, such as human resource management. The findings showed the chief sales officers recognised the value of having an efficient appraisal process but did not indicate that conducting appraisals contributed to improving sales performance.

The analysis of the primary data relating to the research question identified several sales force effectiveness processes that could be used to improve sales performance, thereby answering research question two. These processes were applied in the research phase 2 to develop the content of the benchmarking tool.
5.1.3 Research question three

To answer research question three, the study used two action research cycles. The first action research cycle focused on developing the benchmarking tool. It used a search conference methodology (Schafft & Greenwood 2003), which is a minor methodology within the action research discipline. The research cycle developed a method for conducting benchmarking assessments in a consistent manner in multiple countries. An effective research methodology was previously identified as a key step in efficient benchmarking (Vlahovic et al. 2010). Also, the maturity levels for each process were developed. This approach utilised existing maturity models, which were adapted for use in the case study organisation (Ranjbarfard 2016). The search conference also developed a new measure of sales force effectiveness having reviewed previous models.

The major focus of this research cycle was the development of sales force effectiveness processes and their process descriptors for use in the benchmarking tool. These processes and detailed process descriptors were developed from the findings of research phase 1, particularly, research question two, with the review of external benchmarking models and the existing literature. The benchmarking tool comprised 17 sales force effectiveness processes, each with several detailed process descriptors aligned to a maturity level, to enable countries to be benchmarked on their sales force effectiveness processes.

The second action research cycle focused on implementing the benchmarking tool. A pilot of the tool was conducted to assess the tool and the benchmarking methodology. After the successful completion of a pilot that resulted in some improvements to a few process descriptors within the tool, ten countries across six continents were benchmarked to validate the benchmarking tool and its role in improving sales performance. The benchmarking tool provided countries with the ability to address their process maturity across the 17 sales force effectiveness processes and identify where improvement was required to meet their overall objective to improve sales performance.

Research question three was fully answered through the creation of a benchmarking tool and associated methodology of implementation, which was tested in 11 countries in total. The benchmarking of sales force effectiveness
processes was established as a method to improve sales performance within the case study organisation.

5.2 CONTRIBUTION TO KNOWLEDGE AND PRACTICE

The DBA thesis is a doctoral-level dissertation with core features in common with the PhD thesis, but also has elements that reflect the more practice-based and applied research nature of the DBA. While the essential characteristic of the PhD is the contribution to new knowledge, the DBA should also provide new insights. This new knowledge can be its contribution to the improvement and enhancement of a current professional or organisational practice (Ruggeri-Stevens et al. 2001).

1.1.1 Contribution to knowledge

This work contributes to existing knowledge in several ways. This study offers insight into the topic of sales force effectiveness, its processes, and its role in improving sales performance within a multinational corporation. It contributes to research methodology; furthermore, it contributes to studies involving multiple countries. Second, it adds to the body of knowledge concerning sales force effectiveness.

5.2.1.1 Contribution to methodology

The research adds to the body of literature that utilised a case study approach to sales research. Utilisation of case studies is relatively rare in sales research. Only 2.6% of sales related journal articles published over a 29-year period utilised a case study methodology, and less than 10% of these were international studies (Asare et al. 2012). This limited use of case studies in sales research is perhaps surprising, given that sales studies produce much more detailed information than what is available through statistical analysis (Yin 2009). Also, using IPA as a research methodology remains an infrequently used approach, despite being recognised as a useful and efficient methodology for research of this nature (Smith 2011)
Qualitative studies remain a rarity within sales research, considering only 44 studies out of 738 are identified as qualitative in the top 15 sales research journals (Williams & Plouffe 2007). The study seeks to demonstrate the usefulness of qualitative research within the sales discipline, as it provides a richness of data and narrative, which not only answer the research question but also provide insights for future studies. The insight gained from qualitative research provides more depth of knowledge to build and test theories using quantitative methods.

The research contributes to the body of knowledge concerning the use of action research to investigate business problems (Coghlan 2011), and it adds to the limited knowledge of search conferences as an action research approach (Emery & Purser 1996; Schafft & Greenwood 2003).

The study contributes to knowledge by providing research that goes beyond geographic boundaries, as is called for in 2011 (Baldauf & Lee 2011). It addresses a gap in the knowledge of multicountry sales research, as the majority of previous multiple country studies are focused solely on Europe (Rouziès et al. 2003; Baldauf et al. 2001a; Piercy et al. 2011). The research contributes to the need for more international sales research (Javalgi et al. 2011).

5.2.1.2 Contribution to sales force effectiveness

This work contributes to existing knowledge of sales force effectiveness, which has been identified as having received little attention in previous sales and marketing research (Zallocco et al. 2009; Küster & Canales 2011). Through the creation and implementation of the benchmarking tool, the study adds to knowledge concerning business process management (Lee & Dale 1998), benchmarking (Kyrö 2004; Yasin 2002), and levels of maturity for business processes (Skrinjar et al. 2006; Van Looy et al. 2011). It has applied the concept of best practice and good practice to its maturity models, contributing to the knowledge on best practice and good practice (Camp 1995; Francis & Holloway 2007; Jarrar & Zairi 2000).

The study answers the call for further research on the drivers of sales force effectiveness (Zoltners et al. 2008) and sales manager effectiveness, which has been
described as limited (Deeter-Schmelz et al. 2002; Murphy & Li 2012; Küster & Canales 2008). Sales force effectiveness is a broad topic, and a high amount of sales research on individual variables has been completed. Examples of sales force effectiveness drivers include: motivation (Weitz et al. 1986; Walker et al. 1977), organisational structure (Zoltners et al. 2008), Compensation (Menguc & Barker 2003), performance monitoring (Murphy & Li 2012), performance appraisals (DeNisi & Pritchard 2006), and sales leadership (Deeter-Schmelz et al. 2008). However, little research has been performed using an open question of which sales force effectiveness drivers should be adopted in multiple countries.

The research confirmed that building salesperson capability through coaching, training, and education remain priority areas. This confirmed previous findings (Deeter-Schmelz et al. 2002; Rich 1998; Cron & DeCarlo 2006). One unanticipated finding was that compensation was not identified explicitly as a driver of sales force effectiveness, contrary to previous findings (Rouziès et al. 2009; Krafft et al. 2012). Monitoring the sales force has been identified as a driver of sales force effectiveness (Murphy & Li 2012; Piercy et al. 1997), as well as performance appraisals (Muczyk & Gable 1987; Risher 2003). However, in this study, the contribution to knowledge is not focused on the process of monitoring and appraisals with the salesperson; it is with the sales managers, who need to focus on effective planning and target setting, using constructive and relevant feedback to drive sales force effectiveness.

The study confirmed the need for cultural awareness when applying global sales management practices to multiple countries (DeCarlo et al. 1999). Despite the importance placed on national culture (Javalgi et al. 2011), the research contradicted the importance of national culture and identified organisational culture as the predominant cultural moderator of sales force effectiveness.

The study confirms previous findings, regarding the measurement of sales force effectiveness as being related to financial measures (Cravens et al. 1992; Plank & Reid 1994; Walker et al. 1977; Deeter-Schmelz et al. 2002). Also, findings confirm customer satisfaction can be measured through sales force effectiveness (Piercy et al. 1997) and through intercompany benchmarking (Churchill et al. 2000).
Finally, the study contributes to knowledge through the establishment of a new measure of sales force effectiveness.

5.2.2 Contribution to practice

The DBA should provide new knowledge, but this new knowledge can be its contribution to the improvement and enhancement of current professional or organisational practice (Fink 2006). The research study made a direct and tangible contribution to organisational practice within the sponsoring company.

The study contributed in two ways: knowledge transfer and a global sales performance improvement programme.

The knowledge transfer within the sponsoring company was developed through the use of white papers and blogs concerning topics of sales effectiveness, including the role of the sales manager in building a high-performance team. Knowledge was also created concerning business processes, maturity levels, and their role in improving sales performance. Knowledge transfer was affected through engagement of regional process owners and countries on the topic of sales force effectiveness processes and using the benchmarking tool.

The major contribution to practice was the development of the benchmarking tool. The benchmarking tool applied knowledge created from the research process and the knowledge provided by a range of experience practitioners to create a benchmarking tool that can provide country sales organisations with a clear roadmap of their process maturity and how to improve their process maturity for individual processes through the provision of detailed process descriptors. Developing the tool and its methodology enables the organisation to conduct routine assessments of sales effectiveness processes initially, as shown in this study led by the researcher, but with the potential to utilise the tool and methodology to conduct self-assessments in countries to maintain focus on improving sales force effectiveness to improve sales performance.

The results of benchmarking also contributed to business practice in two ways. First, the results, when combined with secondary data, can allow the organisation to identify globally defined areas of improvement. An example of this could be considering the market position of each country, defined as either emerging or mature, to understand the relevance of various salesforce effectiveness processes or to identify specific
programmes. An example of this is shown in Table 5.1

<table>
<thead>
<tr>
<th>Process Area</th>
<th>Design</th>
<th>Develop</th>
<th>Drive</th>
<th>Total</th>
<th>Market Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>2.2</td>
<td>1.6</td>
<td>1.6</td>
<td>1.8</td>
<td>Emerging</td>
</tr>
<tr>
<td>Process</td>
<td>2.5</td>
<td>1.8</td>
<td>2.1</td>
<td>2.1</td>
<td>Mature</td>
</tr>
</tbody>
</table>

Table 5.1 Example process analysis

In this example, the average process maturity values for each of the three process groupings are compared to market type. The disparity between the process maturity of emerging markets and mature markets is clear to see, and this insight may help strategists and country sales teams prioritise their activities to achieve their business goals.

Being able to analyse the process maturity of each country or cluster countries by different variables, such as market type, enables the case study organisation to gather a different perspective of performance and the contribution to sales performance. Another example of how the analysis of business process maturity could contribute to business practice is through examining individual process areas to identify significant clusters of countries that have common areas of good practice that could be shared or common areas of improvement that could be worked on jointly. Table 5.2 presents another example of how the tool contributes to organisational practice. Here, it shows a single process and is compared across several countries. This low level of business process maturity for this
process in multiple countries would not have been previously visible and provides insights to the organisation when considering what actions to take.

<table>
<thead>
<tr>
<th>SFE Process</th>
<th>Coaching</th>
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<tbody>
<tr>
<td>Country A</td>
<td>1.0</td>
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<tr>
<td>Country B</td>
<td>1.0</td>
</tr>
<tr>
<td>Country C</td>
<td>1.0</td>
</tr>
<tr>
<td>Country D</td>
<td>1.0</td>
</tr>
<tr>
<td>Country E</td>
<td>1.0</td>
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<tr>
<td>Country F</td>
<td>2.0</td>
</tr>
<tr>
<td>Country G</td>
<td>1.0</td>
</tr>
<tr>
<td>Country H</td>
<td>1.0</td>
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<tr>
<td>Country I</td>
<td>1.0</td>
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<tr>
<td>Country J</td>
<td>1.0</td>
</tr>
<tr>
<td>Country K</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Table 5.2 Example of single process analysis

These types of insights would not be possible without the benchmarking of sales effectiveness processes, and this is how the research contributes to organisational practice in improving sales performance.

Finally, the research contributes the provision of a clear methodology of how to establish a benchmarking programme within an organisation.

5.3 LIMITATIONS OF THE STUDY

The study possessed several limitations identified throughout the research process. For research phase 1, the size of the sample can be regarded as small. However, other qualitative studies within the sales discipline have had similar sample sizes. The small sample size limits the generalisation of results obtained. However, the case study design and data analysis undertaken provide robust
results. The thesis discussed sample selection to provide a clear understanding of how the sample size was achieved.

Undertaking a qualitative study provides limitations, concerning validity and reliability. Through a recognised methodology and utilisation of advanced software to conduct the analysis, the study has demonstrated the appropriate level of rigour, utilising standard procedures to mitigate against bias. A further limitation concerns the use of semi-structured interviews when questions are used in interview studies. The research can be limited by the respondents’ answers. During the analysis of the interviews, a previously well-researched topic of sales compensation as a process of sales force effectiveness was not referenced by any of the participants. This could be interpreted as a weakness of the interview process as opposed to it not being important in improving sales performance. Therefore, there is a potential that the respondents failed to provide honest responses. Given the existing relationship between the researcher and the participants and because the topics were not contentious, as the results were presented anonymously and did not reflect on their individual performance, concerns about the accuracy of responses are not regarded as an issue for the study.

Action research is not usually intended to achieve generalizable results. However, the study intended to identify sales force effectiveness processes related to improving sales performance that can be transferred to other settings along with the benchmarking methodology, and within the case study organisation, the benchmarking tool and its processes are generalizable.

The responses from the participant countries may or may not reflect on other countries within the participating company or other sales organisations. However, the findings could be regarded as representative of the case organisation and, possibly, representative of other chief sales officers within different sales organisations.

A further limitation was the predefined research problem offered by the participating organisation. By definition, the research problem defined, in part, the research aims and the research questions. Mitigation against this limitation was achieved through undertaking qualitative research using semi-structured interviews, which enabled open questions to be used to gather rich and wide-
ranging data on sales force effectiveness and a process of action research to create a sales process benchmarking tool.

In common with most studies, the standard hygiene limitations of time, budget, and access to participants existed throughout the research period.

5.4 **FURTHER RESEARCH**

This study has created several opportunities for further research. These are presented in two main themes, the first on sales force effectiveness and its processes and the second on benchmarking and research methods.

5.4.1 **Future research on sales force effectiveness and its processes**

The study focused on sales force effectiveness processes relating to the sales manager’s activities. Further research could be conducted on the operations of the salesperson, in particular, on the topics of business development, focusing on the process of selling and account management, considering the processes involved in maintaining and developing customer relationships. Further work must be done to establish the effectiveness of the sales manager in creating sales force effectiveness. It is recommended that further research is undertaken on the findings of this study, utilising a quantitative study, involving sales managers and salespeople across multiple organisations to identify additional processes relevant to the sales manager that could be benchmarked and improved. This could provide new research into the attributes and skills required by the sales manager. This will not only build on the current study, but it would look to advance knowledge that has not been examined for 25 years (Butler & Reese 1991).

Further research on the actions to be taken by sales managers to engender the creation of salesperson motivation might have a substantial impact on practitioner activities. Motivation was identified as an important factor in the current research, supporting previous research (Weitz et al. 1986; Murphy & Li 2012).
Research is still needed to identify the relative importance and potency of the sales effectiveness processes. This is relevant, as many of the previous studies have focused on one or two drivers of sales force effectiveness.

The study identified training was insufficient when it comprised merely attending a course. The study identified that a complete experience is required by trainees to maximise the effectiveness of the sales training. Therefore, more research on the effectiveness of sales training, incorporating elements, such as reflective practice and work-based learning, is desirable, as well as the potential benefits of the trainees assembling a body of evidence to demonstrate the application of knowledge.

The study identified one constraint of sales force effectiveness was inter-organisational relationships. Through the review of the literature, it appears there have been no previous studies of the sales organisation inter-organisation effectiveness. As a sales force does not operate in isolation, a study of this nature could not only identify any evidence of this being a constraint but also establish a new study area within sales force effectiveness.

Considerably more work must be done within the sales discipline to determine how global systems and processes are implemented by the multinational corporations, including the consideration of country organisational culture and national culture as moderators of the expected benefits of implementation. Research into multinational sales organisations remains limited, but with ongoing globalisation and its associated desire for standardisation of processes and organisations, this area is a current topic of interest.

The present study suggests there is an association between the sales manager and sales force effectiveness, which is moderated by culture. While this aligns with previous findings (Murphy & Li 2012), a more detailed qualitative study of the sales manager role in sales force effectiveness across multiple countries will provide additional knowledge and interest through establishing how a broad range of sales force effectiveness drivers are affected by the culture within different countries.

The current study participants were all male; it may be worthwhile to undertake the study with female chief sales officers. This will not only build on this
work, but it will also build the body of knowledge concerning gender in sales (Pierry et al. 2002; Embry et al. 2008; Liu et al. 2001).

5.4.2 Further research on benchmarking and research methods

Further research can be conducted on the tool created in this study. This further research could consider additional countries within the case study organisation. A longitudinal study of the countries involved in the initial benchmarking could be beneficial to understand if the focus on sales force effectiveness processes improves sales performance over time.

The research focused on research led assessments of sales processes using a benchmarking tool to test the resilience of the tool, and its methodology research can be conducted by taking a self-assessment approach, allowing countries to access the tool and the method to establish the effectiveness of the benchmarking process as a transferable tool.

Further research can be undertaken concerning the maturity levels of the sales force business processes to confirm or develop the correct assignment of the detailed process descriptors to each maturity level.

The benchmarking approach took an internal/international approach giving rise to the potential of designing and implementing a tool that incorporates external, as well as internal, best practice. Further research could be undertaken to establish a tool that provides external benchmarking opportunities across industries to develop a new understanding of sales effectiveness best practice.

To contribute to the debate around best practice versus good practice, research can be undertaken on the findings of this study to identify if the effort to achieve best practice in a process contributes in a significant manner to improved sales performance or whether achieving good practice in all processes benchmarked contributes to improving sales performance.

Further research can be conducted on the outcomes of the benchmarking tool in terms of the data it provides and how that is used by an organisation to develop programmes and activities to improve performance.

The methodology used to create the benchmarking tool, namely the search conference, is an under-researched area of action research. Further studies relating
to business problems can be undertaken using this methodology to build a body of knowledge concerning its validity and effectiveness.

5.5 SUMMARY

This chapter has concluded the main elements of the research and the thesis. It demonstrated the findings in response to the research questions and the contribution to both knowledge and practice. Also, it has discussed the limitations of the research and the opportunities for future research. The next chapter is the final part of the DBA thesis, which discusses the learning journey of the researcher through reflective practice.
6 CHAPTER 6: REFLECTION OF A DBA

6.1 INTRODUCTION

The previous chapter completed the research study undertaken as part of the DBA. This chapter reflects on my progression throughout the period of the DBA study. The thesis represents the culmination of the journey undertaken so far. The completion of the doctoral programme has utilised both the skills and knowledge gained during the study period, including the guided learning phase of the DBA programme and the previous existing practitioner knowledge of the research area. This knowledge was gained from experience and previous formal and informal training.

6.2 REFLECTIVE PRACTICE

The review of professional and personal development through reflective practice is an important part of both learning and personal development. A professional doctorate, such as a DBA, is a way of recognising professional practice. The programme of study undertaken consisted of three parts. The first part was a prerequisite of having a recognised Master’s degree. The second part consisted of two major stages. Part 2-Stage one consisted of guided learning with multiple assignments. The guided learning elements included the research methods, the research proposal, a study of reflective practice, and training in publication and dissemination. The guided learning stage provided my first exposure to the role of reflective practice in both learning and personal development. Before approval to proceed to the second phase, assessments were completed. Part 2- Stage Two consisted of undertaking the research project and writing the thesis, followed by an examination of the thesis through both presentation and Viva. Also, to the description of the research study, the DBA thesis requires the inclusion of a section on reflective practice.

Reflective practice is a process of learning and development (Moon 2001). This process is typified around learning from experiences gained and through
experiences as they occur (Mezirow 1981; Boyd & Fales 1983). For learning professionals, Schön put forward the concept of the reflective practitioner in 1983 (Schön 1983). The concept included two elements: reflection on action (post action) and reflection in action (at the moment). Reflection on action is a conscious process to review, describe, analyse, and evaluate the action with the intent to learn and change the practitioner’s on-going activities. Reflection in action is seen as being the examination of decisions and experiences as things happen to shape their responses to the event. Multiple models support learning through reflection. These include Borton’s model, emphasising reflection for future action (Borton 1970), and Gibbs reflective cycle, which introduced the concept of reflection being a cyclical process (Gibbs 1988). Cowan identified the reflective process as a series of connected spirals, reflective practice taking place in three loops—pre-activity reflection to prepare for the experience, trying it out and reflection-in-action to highlight learning within the experience, and then reflection-on-action to look back on the experience and identify future goals (Cowan 1998). The Experiential Learning Cycle is positioned as a process to enable the development of new concepts and knowledge through the reflection on new experiences (Kolb 1984). Kolb’s experiential learning style theory is typically represented by a four-stage learning cycle of Concrete Experience - Reflective Observation - Abstract Conceptualization - Active Experimentation. "Learning is the process whereby knowledge is created through the transformation of experience” (Kolb 1984, p. 38).

Each model is regarded as being multi-disciplined, so there is no prescription as to selecting a standard model for business research. Moreover, when you reflect on this, it becomes clear that considering the variety of models and their application to support the individual learner in their progression to becoming a reflective practitioner is part of the reflective process. A starting point for reflection was identifying which model to utilise for reflection. My natural preference was Cowan’s (1998) model of creativity reflection, reflection in action, and reflection on actions.
6.2.1 Reflection before Action

The completion of my Master’s degree in sales management in 2006 created a sense of achievement and formal confirmation that it was possible to undertake postgraduate study. The journey of the Master’s degree created a desire to undertake further research. Having established an interest in undertaking research, I wanted to build on my knowledge as a practitioner of sales and marketing within numerous organisations, which included small-medium enterprises and global blue-chip companies. Knowledge creation originates from research and experience, and as a practitioner, it is possible to undertake studies in an unstructured approach. I identified a desire to undertake research in a more structured and rigorous way.

Reflecting on the possible direction I could take included the evaluation of the two choices for advanced research: The PhD or the professional doctorate, such as a doctorate in business administration. Ruggeri discussed and compared the PhD and the DBA (Ruggeri-Stevens et al. 2001). My personal preferences were influenced by the interpretation that the PhD and the DBA have a core similarity around planning and carrying out research that contributes to knowledge and practice. The DBA focuses the contribution to the work of the practitioner in business and the implementation of the findings within the workplace. The PhD focuses on making an original contribution to knowledge in their topic (Ruggeri-
Stevens et al. 2001). Professional doctorates are done with the intention to apply the knowledge discovered in the research project to the workplace to stimulate and drive improvements (Fink 2006).

The DBA, when measured by outcome, can be perceived as a smaller thesis in comparison to the PhD. However, the DBA under the professional doctorates offers guided learning in the first stage before research proposal approval. The guided learning was advantageous to an inexperienced practitioner of research, such as myself. As both the PhD and the DBA undertake a substantive research project and are examined through Thesis and Viva, the addition of guided learning in the first stage became a differentiator. When reviewing these factors in conjunction with the potential professional benefit to the individual and the opportunity to improve practice in the workplace through a rigorous research process, the professional doctorate approach became a more attractive route.

A final consideration in undertaking a research project of high academic standards and rigour was the DBA focuses on real business problems, commonly addressed with research that features small sample sizes (Asare et al. 2012) and should result in implementable findings within the organisation (Ruggeri-Stevens et al. 2001). As any research would most likely be in business with the intention of making improvements in organisational practice, the small sample size required for a DBA and the practical focus, as opposed to theoretical focus, became the deciding factor in selecting a research degree path. DBA research is both theoretical and practical, and the DBA thesis is recognised to be at the same level as a PhD regarding effort, rigour, and contribution to knowledge, supervision, and assessment.

6.2.2 Reflection in Action
The identification of a research problem, recognising that a DBA would focus on real business issues addressed through rigorous and detailed academic research, was achieved quickly. The research problem outlined in Chapter 1 was a real business issue. The research problem coincided with my appointment to a new role
within the corporate offices of the company. The role focused on addressing sales force effectiveness issues across the company, and in particular, it focused on improving the performance of sales within those countries within the group that contributed the most significant amounts of operating profit for the group. The bringing together of a research problem in the field of interest to the practitioner was a positive experience.

The secondary research and the primary research were completed by the end of 2010. However, at that time, the global economy was still experiencing significant fluctuations following the economic downturn two years previously. The completion of the research phase negatively affected the doctoral study as the company greatly increased demand for implementation of the knowledge to deliver real-time benefits, resulting in spending a significant amount of time abroad executing the programmes I derived from the research project. Moreover, this severely affected the progress of the doctoral study. Ultimately, the implementation of knowledge gained through the research project took until the end of 2013. It was only at that point that I could return my focus to completing the doctoral programme.

The most significant changes identified as being part of the DBA experience to my working practice were twofold. The first was the introduction of a reflective journal approach. Previously, note taking in a business sense was the date, the time, and the action, and notebooks were never retained. The conscious skill I developed during the DBA programme was around note taking; I began to include the why, the what, the how, and the when, and the reflections. I started to reflect on what I thought might happen before a decision and upon the outcome of decisions. This reflection helps me to contribute more and to take a less tactical and immediate response to issues and plans.

The second was around dissemination, uncovering the realisation that knowledge is only useful when shared. During the doctoral programme, I presented at three research conferences, one practitioner conference, and I successfully submitted a paper to the International Journal of Retail & Distribution. Being asked to present was a positive experience for me, and the interaction in conferences reinforced the benefit of knowledge transfer. It was confidence building to find the
paper was on the required reading list of the University of Manchester’s marketing courses.

The speed at which the company adopted the DBA research was a positive experience. In summary, the DBA has enabled me to learn new skills in research processes, driving action from research, and importantly, has led me to appreciate the role of reflective practice and critical thinking.

6.2.3 Reflection on Actions

As previously discussed, many of the outcomes of the DBA have been utilised in programmes of development within the company. However, there remain many areas of sales effectiveness and sales management yet to be understood. The intention is to continue to study these areas through the application of critical thinking, research methodology, and the reflective practice skills the DBA programme has given me.

This work adds to a small number of studies on the topic of the sales performance and the benchmarking sales force effectiveness, which will bring new knowledge to be reviewed, researched, and potentially applied. I feel dissemination remains a significant part of the value of the DBA programme; therefore, I will investigate opportunities to disseminate further the knowledge gained through the research on sales effectiveness, benchmarking, and business process management to encourage other organisations to improve their sales performance.

6.2.4 Conclusion and Action plan for future Personal Development

The DBA has been an interesting journey, which has challenged me throughout its duration, as well as developed my capabilities in both learning and implementing knowledge. I intend to continue to study the field of Sales Effectiveness. One of the major changes has been that my understanding of SFE has developed beyond a single organisation and culture, and as the topic of sales performance remains relevant to many organisations, I recognise this thesis presents a starting point to advance this area of study with practitioners and researchers and it offers opportunities to test and refine the use of processes to improve sales performance.


Cron, W.L., Marshall, G.W. & Singh, J., 2005. Salesperson selection, training, and development:
Trends, implications, and research opportunities. *Journal of Personal Selling & Sales Management*.


McCormack, K.P. et al., 2009. A global investigation of key turning points in business process


Morelli, G., 2009. Organisational capabilities for enhancing the sales quotas development process outcomes for pharmaceutical sales forces.


Oliver, R.L. & Anderson, E., 1994. An empirical test of the consequences of behavior-and outcome-


Thomé, A.M.T. et al., 2012. Sales and operations planning and the firm performance. International


8 APPENDICES

8.1 UPR16

FORM UPR16
Research Ethics Review Checklist

Please include this completed form as an appendix to your thesis (see the Postgraduate Research Student Handbook for more information)

<table>
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<th>Postgraduate Research Student (PGRS) Information</th>
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<tr>
<td>Department: PBS</td>
<td>First Supervisor: Dr V Anderson</td>
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Title of Thesis: Development of a Benchmarking Tool to Improve Sales Performance in a Multi-National Corporation

Thesis Word Count: 46550

(excluding ancillary data)

If you are unsure about any of the following, please contact the local representative on your Faculty Ethics Committee for advice. Please note that it is your responsibility to follow the University’s Ethics Policy and any relevant University, academic or professional guidelines in the conduct of your study.

Although the Ethics Committee may have given your study a favourable opinion, the final responsibility for the ethical conduct of this work lies with the researcher(s).

UKRI/O Finished Research Checklist:

(If you would like to know more about the checklist, please see your Faculty or Departmental Ethics Committee rep or see the online version of the full checklist at http://www.ukri.org/what-we-do/code-of-practice-for-research)

a) Have all of your research and findings been reported accurately, honestly and within a reasonable time frame?

b) Have all contributions to knowledge been acknowledged?

c) Have you complied with all agreements relating to intellectual property, publication and authorship?

d) Has your research data been retained in a secure and accessible form and will it remain so for the required duration?

e) Does your research comply with all legal, ethical, and contractual requirements?

Candidate Statement:

I have considered the ethical dimensions of the above named research project, and have successfully obtained the necessary ethical approval(s).

Ethical review number(s) from Faculty Ethics Committee (or from NRES/SCREC): PBS FEC 032 (241003)

If you have not submitted your work for ethical review, and/or you have answered ‘No’ to one or more of questions a) to e), please explain below why this is so:


8.2 Dissemination

DBA Part 2 Stage 1


DBA Part 2 Stage 2


8.3 Research Phase 1 (Interviews)

8.3.1 Open coding of interviews
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### Influence of Market Conditions

**Parent code for Influence of market conditions on sales performance:** 12, 8

### Activities for a Manager to Build a High Performing Sales Team

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### Drivers of Sales Effectiveness

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### 8.3.3 Interview Analysis Superordinate Themes

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Transcripts are provided to demonstrate data capture and transcription. Further Transcripts are available along with the original voice interviews held in an MP3 format.

Jeremy Noad: Thank you for agreeing to take part in this research project. It's a research study into the drivers of sales management effectiveness as part of a course with the University of Portsmouth. The answers you give are anonymous both relating to you and your company. The overall results of the research will be available if you require. The completed research originals will be scanned and stored electronically for a period of five years and then destroyed. The interview will be recorded and transcribed. A copy of the interview transcription will be sent to you for review and commentary prior to inclusion in the research study. Are you happy with that?

Respondent: Absolutely.

Jeremy Noad: Okay, thank you. What in your opinion is meant by the term 'sales effectiveness'?

Respondent: That’s actually quite difficult when you’ve got certain people in the room isn’t it but I think the interesting part here is what you define by sales. Is it existing business, is it new business, is it the total package and is it purely the sales force because a lot of these things we see the terms as being interchangeable, marketing and sales, that’s one thing. So, if I can get technical, where are we focusing?

Jeremy Noad: I think we’re focusing very much on the activities that we employ sales people to do.

Respondent: Okay. Taking a general view of sales then, sales effectiveness to me is the ability of a sales person to identify what activities he needs to be busy with in order to understand his customers and what they do, how can he identify the needs that those customers would have, what he has that satisfies those needs and matches that with what he can offer and then communicates that to the customer in a way that the customer believes they are getting value from that interaction or relationship and then the delivery of those offers into that customer that the value that was perceived is actually achieved.

Jeremy Noad: From a sales management perspective what do we think those things are that a sales manager should focus on to get the most effective sales people?

Respondent: Let’s start at the basic bottom end, decent training are the building blocks, knowledge of the business that you service, knowledge of your business, the company you work for, an understanding of what the offers are, the ability to communicate the message that needs to be communicated, the ability to influence, all of those basic building blocks. So, it’s the development of that individual multiplied by the number of individuals going out into the field to deliver on those solutions so that the baseline is the education and the experience required to be an effective sales person and then within that is the development of the person from a basic sales person to a higher level of knowledge and understanding of what value can be and in a way getting the sales person’s creativity working and helping them to feed good new ideas into the process, information coming out of the market place and it’s not just related to what value we add to the customer, in many respects the customer adds value back. New developments in an industry sector is an example. How do we make sure that we’re positioned to service those markets? How do we actually put the infrastructure in if it’s a long term investment. Early warning
gives you a lot of information so it’s a two way street in terms of that. So, personnel development. It's skills development specifically delivering the targets that we're looking for in terms of sales, profitability, volume growth and getting the sales people to enjoy what they do. There's a motivational factor here. My personal belief is that you can't actually motivate people, you can activate them to motivate themselves. You have to awaken the flame inside so-to-speak. And support. Often there's the need to be backed up, the need for guidance so there's a whole lot of facets to the management portion of it and there's also a sales manager needs to understand the people that he manages; different people need to be managed in different ways. I suppose you can soft soap and compliment people to death and they don't react to that, that's the wrong approach. Some people need to be driven by stick, chased, pushed and to me sales and sales management is more about the psychology of people than it is about the what. It's more the softer side, in my opinion.

Jeremy Noad: How would you measure sales effectiveness?

Respondent: Many different ways and obviously you talk about numbers, targets are set, actions are implemented, results are achieved. You want to be focusing your resources on the right things at the right times to deliver the best potential results. Activity is one thing, noise is another. Our company specifically has a number of issues that they're dealing with at the moment where it's taking the sales person away from their core function and they're dealing with issues that affect their customers but it impacts on their ability to work the business that they need to work. If you took a normal eight-hour day right now we're probably spending in excess of 50% of that day sorting out things that don't fall under our responsibility but in terms of measuring effectiveness it's the numbers. We also have a fair amount of growth activity so in terms of facilitating specific initiatives to drive specific growth objectives we use a number of tools to manage that. In terms of the training elements we've had a number of training courses in the past where the training has been done, the knowledge transfer has been relatively good but the implementation and the practice of that knowledge transfer hasn't been monitored and assessed adequately and at the time the knowledge gained is probably 5% of what was initially transferred but in terms of understanding what they're doing and measuring what they're doing and their effectiveness in that, the tools that we have now it's more linked into tandem calling and coaching on the job. It's visual subjective assessments largely. The training elements which we're busy with now, which is relatively new to our company from a sales perspective, it's probably a five year programme split into all the various modules as you know but what we've found is the mentality has been it's treated as a training course and then if it's a flavour of the month and it loses its momentum and you've been on the training, you've got the tee-shirt for the training part of it you've never had to implement or prove the benefit of the training we've seen within our sales people that there's been an apathy to adopt this and as a result we haven't seen the benefit of the training in practice and that process will be revisited now and it's the coaching element that will bring that back into focus but within that it's the ability to utilise the tools. To me assessing the activity of a sales person is, the activity is one thing, if you want to manage and measure those activities you can't just look at the numbers because the numbers are purely the result of those activities. As an example, if the customer was going to buy from you anyway how do you gauge whether that sales person was effective in getting it or if we weren't going to get the business and that person was very affective you'd only see it in the numbers. What we've found is that the actual assessment is actually coming through the coaching process where you would be assessing what the customer's
experience is based on what the sales person’s interactions were. In addition to that the programme that we’re revisiting now and refreshing, the tools that are going to be utilised in the sales core planning, the business planning etc. will now be reviewed and assessed on a much more regular basis through the coaching process. The sales person is going to have to produce a body of evidence to prove that what they’ve done with the training and the knowledge transfer is actually being utilised and delivering what it was supposed to deliver. I’m very much a proponent of on-the-job assessments and that type of measuring. In terms of specific other measures, we’ve got various other targets, not necessarily quantitative in nature. We’ve got individual development plans for each sales employee and we make the employee responsible for driving those plans. We facilitate the activities that are listed on those plans but it’s up to the employee to get their development pushed in the direction that they want it done. These plans cover the existing job and the next two year aiming point.

Jeremy Noad: Why would you see sales effectiveness being important for a business?

Respondent: To me the sales force is the glue of the organisation that I work in. It’s the only real end-to-end voice of the customer, it’s the main problem solver, the way that we’ve been working for the past five years and in many respects it’s the only formal relationship that we have. Sales people are seen as the face of the company and in many respects when you’ve got enabling functions like your call centre, your customer service back office etc if they’re not delivering the quality of service that they need to deliver it’s generally the sales person that has to pick up that issue and sort it out. Now in many respects you generate or garner customer loyalty when you have had poor service, the customer brings it to your attention or you pick it up yourself and you resolve and sort it out effectively and quickly to their satisfaction. Generally, you’ll find that that customer will be loyal to you, as long as you don’t repeat that process in the very near future. Effective sales people generate effective results. To me that’s a one to one ratio, in fact it’s probably an exponential ratio and people buy from people. Now a call centre, which is our main order taking entity, you’re talking to a person on the other end of the line but it’s not a person in the sense of a true face and what we’ve found is that face to face seems to be very effective in our environment to get the customer to understand what we’re about and what we’ve found is that face to face seems to be very effective in our environment to get the customer to know and want to feel and want to experience and then we also serve as the conduit to addressing any issues outside on the services side in terms of servicing the customer.

Jeremy Noad: What are the elements - five or ten things - that you would expect a high performing sales manager to do with their team or to focus on having in a team to drive sales effectiveness?

Respondent: They’ve got to have a purpose why are we doing this, so to me you start off with your sales strategy, generally it’s derived from the overall company high level strategies but within local strategies you’ve also got your own issues, what you are trying to achieve, the other things. Number one it’s to create the reason for why we are here and what we are trying to achieve, so it’s your local strategies, the goals and objectives of that strategy and the action plans that come out of that. The next thing would probably be how do we deliver
on those strategies and what are the benchmarks that we have to strive for, what are the relevant efficiencies, activities that we’re going to be busy with etc.? The delivery of those strategies is very much dependent on the amount of effort and coordination that the sales people are able to input into it. The motivation of the staff, as I said before, I believe you create the environment in which the staff can motivate themselves but purpose and drive and passion; I like to think of it more as you need to be an inspirer rather than a motivator but a practical inspirer. Somebody who understands what the people are going through, must have done it yourself more than likely to prove that you’ve earned your stripes, you’ve been through the school of hard knocks so-to-speak and you’ve learned to deal with the challenges that we face. I think I’m probably on number four or five by now, but it’s focus on the right things, so we need to identify the priorities that we have, we need to identify the activities that we’re going to be working on to achieve those goals that are set and we have to make them feel part of the team that collectively will strive and achieve the company objectives. Again the commitment of their team and within that any resourcing and balancing that’s required and support, that has to be assessed as well. The disciplines that are required in terms of commitment, delivery and effort. It’s useless spending eight hours a day walking around with a clipboard and a piece of blank paper. I’d rather they worked two hours a day effectively and deliver a lot more than eight hours of doing nothing. I’m not advocating that they work short days but I am saying let’s get effective. The other thing is that in the past we’ve been a bit loose on the activities that the employees would be involved in and the focus has moved of late into what activities will lead to the best value add for the company and where should we focus our time and it’s been difficult I think to bring the people to the understanding that not every opportunity you need to spend that much time on.

Jeremy Noad: And how do the sales managers work on that particular topic in terms of prioritising with the sales people?

Respondent: We generally work from the top down so we set the overall strategy, we then cascade that into the smaller teams. I’m sitting now with seven sales areas within my organisation and each of those will have between three and four sales teams who will cascade that down to individual sales managers who have their direct reportees and they will develop their own localised plan in order to deliver on the overall picture. It aggregates up and then you see whether or not... Now the way I work is generally to say we have a benchmark which would be your sales budget for the coming year and it’s by product, by area in all the detail that you want but it’s purely a reference point for the way that we work. We believe that there’s a marketplace and we’ve got the market sectors that we have chosen to play in and we have the offers that support those market sectors and it’s a defined value proposition into that. Now it’s what’s out there that’s important. So you’ve got your existing base, you’ve got some new opposition accounts that you can take, you’ve got some new start-ups, you’ve got all these various opportunities, how do you bring your base load and your new business in a generic sense such that you either meet or exceed that budget target and we like to break it down to the lowest, smallest team and let them develop their plans against that and then it feeds back up where we come back together as a team to understand what that’s going to deliver.

Jeremy Noad: And what role do you see your sales manager playing in helping a sales person priorities out of all the tasks and activities they could do what’s the best in terms of driving sales effectiveness?
Respondent: The analysis of what we do and how we do it. We’ve tended in the past to leave them to do what they think is right because in the past we had large market shares, we had very high pricing so we were doing well from an accounting/financial perspective but that creates space for opposition entrants to come and cherry pick out of your portfolio, that erosion reduces your profitability, it reduces your top line and the resultant failure of your performance it’s very evident that the activities we were busy with didn’t deliver the goods. To a large extent we would dictate. The change in the activities and the core planning and what the sales people deal with on each call it’s been a focus on what are the objectives for the call, what is the agenda and what do you need to take with you to the call in order for it to be effective and it’s been that focus that you don’t get to plan on your own and do what you want, in other words you run your diary and no one else will see it, it’s now more of a case of let’s understand what we’re trying to achieve, let’s understand how you’re going to achieve that, let’s get it down to core planning level daily and see whether or not what you’re doing and how you’re doing it is achieving the goals that you’ve set for yourself and it’s that planning process that’s been brought in and the coaching element, the tandem calling because what we’ve seen is the guys on site at the customer interface allowing the sales person to do his thing we’ve picked up a number of areas where we haven’t necessarily been as effective as we would have liked to have been. It’s probably the planning side of it that’s been the dramatic change.

Jeremy Noad: What elements or activities can a sales manager impact on to increase sales effectiveness across the organisation or their team?

Respondent: If I was looking at my own experience the voice of the customer is something that we’ve not ensured is in our company, we’ve tended to say what is it we do, how do we do it and take that to the marketplace and give it to them. We are saying the customers have needs, what they are looking for is a voice and that needs to be heard in the organisation so what we do is tailored to them not the customer tailored to us.

Jeremy Noad: So additionally as to the voice of the customer, what sort of activity can a sales manager do?

Respondent: In terms of leading we affect the overall company strategy in a big way because we’re the only source of real information from the marketplace in terms of industry developments, new investment etc. and with the economies being as we have had we’re desperate to find what’s happening in the short, medium and long term in order to position for that because everybody is scrambling for every little morsel of business that’s out there for the right reasons. We’ve been very interactive with our marketing department to ensure that the product and service offers that we offer the business that we target suits what their needs are and addresses what their challenges are and without the voice of the sales person influencing what the product management and business managers were doing I don’t believe we would have had the solutions that we have on the table right now in place. The other thing is also that the service side of things is driven by efficiencies and in many respects. I mean we do a lot of large deliveries of very heavy goods and services and from a distribution efficiency perspective you would want one customer as close as possible to your distribution point taking the full load on that vehicle and it driving back and dropping off the same kind of load to the guy next door because then you’re utilising your vehicles as efficiently as you can. In many of our instances our customers do not order and do not want that type of delivery service and it’s getting those functions
to understand how they impact our customers because it’s only the customer that pays the salaries nowhere else and the minute we can get them to understand that we’ve found that there’s a fair amount of interest and cooperation in delivering on the promises that we make for the right reasons and it’s not just an efficiency perspective. In terms of safety in many ways we are able to express to our services function, a typical example is a driver on a truck. We deliver into our customer’s sites and in many instances the customer sites were not safe. The driver tends not to be able to communicate that well with the customer because the customer doesn’t respect the driver per se, I mean he's just a driver, so it's our job to ensure that what the customers have as a platform for us to deliver to is safe and its just various facets that come in. In terms of financial, human resources we've played a number of roles in getting them to understand how they need to facilitate what we do every day. A typical thing on human resources, they don't understand what the sales function is and what we do so we brought them on-board to understand our day to day, what our frustrations are and how we're dealing and in effect they are now busy restructuring what they offer us as a service and support function so that it makes it easier for us to do our jobs.

Jeremy Noad: So to have an effective sales manager, to have an effective sales team things such as recruitment, selection and bringing people on-board you see as being important topics?

Respondent: They are all important, some are just more important than others. Another thing that's come in here is in South Africa the terminology is transformation. We've had previously advantaged people, the so-called white people and we had previously disadvantage, so-called non-white people and the intent is to redress the wrongs. Now in effect it's not the exact same process as what we had before where white people were advantaged and non-whites were disadvantaged but it has had the effect that you need to make sure that the source of previously disadvantaged people suit the roles that we do have when we do have vacancies and sales functionality and what we do and deliver on human resources would simply go to agencies and say we have a need for a sales person and unfortunately the calibre, the experience, the knowledge of the people that were found in industry didn't come anywhere near to what our needs in our organisation were so we battled to find suitable people to fill up the pipeline of skills and capacity in the sales function. We've created development programmes which we now have, we have learnerships for our retail centres, we are busy developing a sales learnership whereby we get grants from the government and it supports us and we simply have a responsibility to develop, train and provide employment too for a period of 12 months and there are certain benefits that come back, credits that you get for that service but it creates the ability for us to bring in a pool of suitable candidates that we can use in permanent staff. There are various benefits in that sense but it's just the interactions that we have had and it sounds like it should be a day to day thing, it's not just sales but it's the education of what we do that has made the difference and I think it's what we do and how customers experience what we do for them feeds back into the organisation, to me that's the biggest influence that we have.

Jeremy Noad: How would a sales manager influence your sales cycle or your pipeline?

Respondent: Creativity is one thing where need identification as example. In many instances customers don’t necessarily know what they need from us and the knowledge of various people in sales organisations enables us to identify potential opportunities, develop those opportunities with the customers,
feed that information back into our marketing departments, our production facilities etc. enables you to develop a product and service offer which comes back into the sales function and we go and discuss that with the customer in various ways such that they can believe and start to believe that we have a solution for one of the things that they might not even have seen as a need on their site. It’s creativity and PSO development. It’s information about market development as well, dynamic sectors and typically now if you talk about platinum palladium, the so called platinum group metals, at a point in time it was the main focus point because of the amount of income revenue that was being derived by the local platinum mining fraternity but the lifespan of those group metals is finite so if you don’t gear up for what you’re going to replace that income with you’re going to run into trouble and generally speaking it’s the applications knowledge that we have and how that feeds back into the organisation to gear up for what we want to offer short, medium and long term.

Jeremy Noad: If you said you had a high performing sales team and I said what do you mean, how would you describe a high performing sales team?

Respondent: Straight off they’re delivering above expectation and that’s not just the numbers, they’re having fun, they’re energised, they want to come to work, the customer satisfaction index is high, we’re ahead of the game in terms of what we’re offering and where we are offering and why we are offering, the market share has grown, innovation, I think those are the things that come to mind.

Jeremy Noad: In terms of the sales team how would you describe a high performing sales manager? So excluding all the good stuff that the team is producing.

Respondent: He/she is a leader, a thinker, high levels of drive and passion about what they do, because they display those characteristics people tend to align themselves with that, they relate to that, they want to copy that in any way or form. What we’ve found in many instances, where I’ve seen in my own experience with my sales managers is guys that are doing well and they impart that to their teams that the individuals in their teams tend to do well and it’s that ability to inspire, to create a need to perform.

Jeremy Noad: If you had a choice between a number of different things where would you see having a high performing sales team sit?

Respondent: Are we referring now to location?

Jeremy Noad: No, would you see having a high performing sales team the number one most important thing you could have or is it number 17 on a list of things you’d want as a business?

Respondent: It’s right near the top.

Jeremy Noad: How near?

Respondent: A high performing sales team is not number one because I think the business needs effective leadership at the top, they need to be able to cascade that down through the organisation but I would definitely put it in the top three.

Jeremy Noad: Why would you think it would be in the top three?
Respondent: In many respects I think sales drives thinking in the company. Sales doesn't have a finger in every pie within the company but sales affects very part in the company and in many respects as I said before it's the glue that holds the company together and we're here for the customer, that's the only reason why there's a business and it's the link to the relationship and the ability to service that customer on behalf of the organisation. I think it was Bill Gates that said if there was one department that they were to save if they were to downsize Microsoft it would be the sales function and I agree with that but I do believe that you need to have that strong leadership at the top corporate wise because there are other things that sales don't necessarily deal with or are aware of and those need to be addressed at the higher level and we form part of that strategy but I do believe it's one of the main functional areas.

Jeremy Noad: You have a model where you have contracted customers, what roles does a sales manager do in looking after your contracted customers as opposed to new business activities?

Respondent: We have an odd model for our sales managers where they own accounts directly as well as the reportees to them. So, they have their own patch and have the team that reports to them as well and generally the sales managers own the higher value accounts, the more complex accounts and these would all be contracted. The rule is that if you're a gases customer internally we have our own rule here, about 50,000 rand per annum spend and they would be contracted but in terms of the contracting and owning the contracts, contract management we have a system from an administrative perspective, we have got pricing responsibilities and cycle pricing adjustments, you have got the timeline of the contract - five years, three years, whatever - so the contract renewal responsibilities and there are prompts that come out within a certain timeline to give you enough to work on the customer in terms of ensuring that those processes are completed. But the contract management side of things it's right through the structure, the larger ones tend to be at the top.

Jeremy Noad: You have a number of sales managers within your organisation, are there any common weaknesses you think in your sales managers that you think those would impact how effective we are?

Respondent: I'm not sure if it's a weakness but what I have seen is that we tend to side on the customer side when issues or challenges come to the fore. There's a difference between the customer's always right and the customer is king. The customer is not always right, however, you need to ensure that the customer believes you have his best interest at heart and in some instances you have to be firm with the customer and sometimes you have to swallow your pride and take it on the chin.

Jeremy Noad: If you had to think about three things that you'd want your managers of your sales teams to do better what would they be?

Respondent: Focus on the right activities and doing the right things in those activities and spending the right amount of time on the relevant activities.

Jeremy Noad: So going into a little bit more detail, what would you think those critical activities may be?

Respondent: Taking the current programme that we're looking at first and foremost you can't ignore your current base, so it's understanding your critical accounts within your portfolio and ensuring that what things are happening in those
portfolios are what they need to be. In many respects it's a maintain but within that existing base there are also opportunities that do come out of that.

Jeremy Noad: So going back to the sales manager as a manager rather than a super sales guy or girl, if you think about things they could improve on for the greater good of their sales team in terms of to build them into a better performing team what would they be?

Respondent: Focus on the tools.

Jeremy Noad: Is it your sales process?

Respondent: Correct, yes, because the tools enable you to focus where you're going to spend your energy and your time and ensure that that process is applied by the sales people that report to them. Its knowledge transfer in the sense that they've been there, they've done that and the junior people need to learn from those skills and experience and motivation in the general sense because times are tough, the guys are working hard.

Jeremy Noad: If we focus on our sales process, our motivation and your energy and time is that sufficient to give you a high performing sales team or is there something else a sales manager should be looking at?

Respondent: Development.

Jeremy Noad: Of?

Respondent: Experience, training needs, various skills. The other thing is that people need to know that they have a future and I think the personal development plan is probably one of the major things that gives a person the feeling that there is a role for me to play now and in the future and that your behaviours and your activities and your efforts will be rewarded and recognised, so definitely.

Jeremy Noad: What are the marginal things that a sales manager has to do that don't really impact on the effectiveness of his sales team?

Respondent: There's a fair amount of admin that's involved with these guys, there's a fair amount of political noise that gets filtered through, I suppose that doesn't necessarily impact on the outputs of the sales people. We have various programmes, like we've got a community involvement programme now where in effect the company sponsors community programmes where we can make a difference in people's lives in their communities and their environment. A typical thing you would take an orphanage, it may be a bit run down, lack of resources and funds and you would take a sales team and they would adopt this home for a period of a year and they would make a contribution in terms of time and effort, maybe paint the place out, put up curtains, buy a television set and install it, typical things like that to make the peoples' lives a bit better. They're marginal things but they make a massive difference into the person's sense of wellbeing and his contribution to the process.

Jeremy Noad: If you would get rid of three things on a sales manager's agenda what would they be or not necessarily their agenda but their activity list?

Respondent: In a generic sense or in my current examples?
Jeremy Noad: In a generic sense. You're saying I'm looking for an ideal thing where the sales managers focus on making the sales team the most effective high performing they can do, this is the 957 things that a sales manager could be doing, what are the three you'd get rid of first?

Respondent: Definitely the admin side of things. In my mind we need to get systems and processes in place where re-work is taken out completely. We're relying on numerous human inputs and unfortunately those inputs potentially because we're human people make mistakes and this leads to a lot of noise that comes through. So, admin related things - leave forms, sick notes, what-what-what. I wish I could eliminate it but I can't and that's traffic. It's unbelievable what we are having to deal with now with the way that the road infrastructure is and the amount of vehicles that are on the road but if you could sort out time wasting in the general sense that would probably be the biggest single contributor to the effectiveness in that way.

Jeremy Noad: How does culture influence the building of a high performance sales team?

Respondent: I'm a proponent of diversity, we generally don't have a lot of it but I like flavour and my experience has been that the male/female thing, gender we've got a number of ladies in our sales team and I generally find that they're pretty good with the difficult customers. In our country there's a fair amount of respect that's automatically paid to ladies, which the guy won't necessarily get, but they're also pretty good at understanding people better than guys are, that's the one thing. What we battle with within our country is probably the thing tolerance but when you understand the different dimensions of the people and how they add their unique value into a process, multiple sources and viewpoints on an issue, using that intellectual horse power generally gives you pretty good solutions to the challenge and I like that.

Jeremy Noad: And in terms of an organisational culture, does that impact positively or negatively on having a high performing sales team?

Respondent: Absolutely. We had a very vibrant culture, you felt like your voice was being heard, it didn't matter where the forum was or what the platform was and you felt like you could make a contribution and over time there's been a number of senior management changes and the culture changed to one of directing. In other words don't think just go and do, I'll tell you what to do, your contribution is valid in the execution and implementation not in the contribution and the value add prior to the instruction. Your kind of felt like you were a number and as a result you lost the spark, so without any shadow of a doubt the culture influences output. If you feel valued and if you feel like you are making a contribution and it's recognised, you come back for more.

Jeremy Noad: How do market conditions influence your ambition to build a high performing sales team?

Respondent: Building a high performance sales team can be expensive because you're investing, whether it's time, whether it's financial, whether it's infrastructure capacity wise and economic circumstances for the last three years have been difficult but what we always say is when the going gets tough the tough come up with good ideas and it's pulled a lot of things together where we weren't doing things right and it's crystallised where those areas are and it's shown why it's not working right and I think when the good times were going, in other words there were plenty of orders flowing in, it didn't matter how shoddy your service was or your processes or your communication or your whatever you made profit targets anyway. When it becomes tight it highlights
areas in your business that are not right and I think that that's been a benefit of what we've dealt with. What it's meant is that you've got to be more selective in what you go for, you've got to prepare better and you've got to know what you're doing in terms of how you're going to add value to the customer.

Jeremy Noad: What elements of an organisation's individual country culture influence the use of standardised global sales processes and systems?

Respondent: What we've found is that you can't plug and play every solution that's generated around the world. Our people are different, our mind-sets are different in many respects and tailoring of what you have is normally the norm. The one thing that I like about the global developments is that there's been a lot of collective intellect put into these things and you can take those learnings and apply them to your local environment and in some instances there's very little tailoring that's required to make it fit but as a rule I haven't seen one unit that you'd simply plug and play per se. But, the benefit of the global picture means that you've probably got best practice globally applied locally and I think that's hugely beneficial.

Jeremy Noad: Thank you very much for you time.
## 8.4 **Research Phase 2 (Action Research)**

### 8.4.1 Benchmarking Tool

#### 8.4.1.1 Benchmarking Tool Processes “Design”

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Competitive Situation Analysis</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td></td>
<td>There is a complete national picture of the market size with a clear understanding of competitors share.</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>In addition to Foundation, it is communicated and understood by the sales teams and annual sales goals reflect the competitive situation.</td>
</tr>
<tr>
<td>Advanced</td>
<td></td>
<td>There is a complete picture of the market size and opportunity for each sales territory, with a clear understanding of competitor share and there is a competitor management process in place.</td>
</tr>
<tr>
<td>Leading</td>
<td></td>
<td>Competitor products and new product introductions are communicated across the organisation to inform of development of future PSOs and for the identification of the most appropriate ABC PSO to meet or exceed competitor offers.</td>
</tr>
<tr>
<td><strong>Forecasting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td></td>
<td>Not Standard</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>Annual sales forecasts are assembled utilising sales history, marketing plans for all product groups (including hardgoods, applications, etc.) covering all market segments, planned growth campaigns in period, price management activities and planned tender activities.</td>
</tr>
<tr>
<td>Advanced</td>
<td></td>
<td>In addition to Standard, the weighted value of opportunities (based on probability of win) within the sales pipeline and inputs from portfolio reviews of customers (£10,000+) accounts are used.</td>
</tr>
<tr>
<td>Leading</td>
<td></td>
<td>A rolling 5-year sales plan (including key financial information) is in place and updated annually to assess current performance vs plan.</td>
</tr>
<tr>
<td><strong>Sales &amp; Operations Planning</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td></td>
<td>Not Standard</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>There is an annual plan for demand, based on expected sales volumes.</td>
</tr>
<tr>
<td>Advanced</td>
<td></td>
<td>There is a rolling 24-month outlook for demand, based on expected sales volumes, updated quarterly.</td>
</tr>
<tr>
<td>Excess capacity and stock shortages are advised through an early warning system and sales focus is adjusted accordingly.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leading</td>
<td></td>
<td>Fully dynamic system support, done on a monthly basis. Linking with all opportunities held at each phase of the CRM system using weighted likelihoods of success.</td>
</tr>
<tr>
<td><strong>Sales Organisation Design</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td></td>
<td>Not Standard</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>There is a clear organisational structure with each functional role within the sales organisation, having a role profile (position /job description) e.g. account manager/account representative, application sales engineer, key account manager etc. aligned to key activities and the sales process.</td>
</tr>
<tr>
<td>Customers' historical revenue is used as the basis to determine the appropriate channel and resource allocation.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Advanced
The sales specialists and application sales engineers are aligned to defined market segments with sales resources allocated by market size and opportunity.

Product and/or market Sales Specialist(s) is/are utilised to deliver sales strategy for key growth areas.

### Leading
Investment in sales resource is based on financial requirements per sales FTE e.g. revenue, revenue growth, profitability etc.

Divisions, functions, sales channels and territories are aligned so that our customers say we are easy to buy from.

Divisions, functions, sales channels and territories are aligned so that our sales people would say we are easy to sell for.

Application sales engineers have a clear commercial responsibility and financial targets through sales of products and services. Applications sales engineers have clearly defined relationships and accountabilities with sales representatives to identify opportunities for applications.

for highly complex projects, specialist project manager resource is used to support the operationalisation of the solution.

### Process Maturity Level

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sales Strategy</strong></td>
<td><strong>Foundation</strong></td>
<td>Sales functions understand what we sell? To whom we sell? How we sell and how that translates into revenue and profit for ABC?</td>
</tr>
<tr>
<td></td>
<td><strong>Standard</strong></td>
<td>There is a clear vision and strategy for the sales organisation, aligned with country and regional business strategies. The sales force understand the strategy and the part it plays in executing strategy.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is widespread adoption of the ABC Pro Sales Process.</td>
</tr>
<tr>
<td></td>
<td><strong>Advanced</strong></td>
<td>There are clear industry segments &amp; customer segments that the sales organisation is targeting to deliver the strategy.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales strategy is documented (mid to long term; typically, 3 -5 years) and actions are formally planned to implement short term activities.</td>
</tr>
<tr>
<td></td>
<td><strong>Leading</strong></td>
<td>There is a clear vision and strategy for the sales organisation, aligned with country and regional business strategies. Sales objectives are defined for each sales channel. The sales channel teams understand the overall strategy and individual channel strategies and the part they play in executing strategy.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ABC Pro Sales Process effectiveness is measured against performance at all levels of the sales organisation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There are agreed rules of engagement in place for neighbouring countries to support for selling applications with clear targets and incentives for cross-border activities.</td>
</tr>
<tr>
<td><strong>Salesperson’s Performance Plan</strong></td>
<td><strong>Foundation</strong></td>
<td>Not Standard</td>
</tr>
<tr>
<td><strong>Standard</strong></td>
<td>Performance targets are set for each individual salesperson and tracking reports are available linked to performance vs plan.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales people are rewarded on a mixture of behavioural measures and business/financial performance targets.</td>
<td></td>
</tr>
</tbody>
</table>
Performance objectives for all sales people e.g. account managers/representatives, application sales engineers, key account managers etc. and line managers are aligned with the market segment and/or ‘go-to market’ plans.

The sales force understands and commits to our goal setting methodology.

Where applicable Sales people have a clear understanding of the incentive plan and the required activities they need to undertake to be successful. They receive regular feedback on their actual performance vs. target.

Advanced
Each salesperson’s target include a portfolio target set up by product or segment mix.

A business process exists and incentives are in place to promote cooperation with internal stakeholders for supply mode changes and to achieve seamless account hand-over.

Leading
We design our sales compensation plans to attract and retain the right calibre of sales talent. The plans focus on the key objectives associated with their specific job content and provide meaningful and material rewards for over-achievement.

We incentivise key account facing staff to share qualified leads and to support execution of key account plans and objectives.

Performance targets take into account the characteristics of each sales territory (size of territory, Growth potential, Market share, specific territory strategy [protect, harvest]).

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Territory Allocation</td>
<td>Foundation</td>
<td>Customer segmentation is based on revenue and the geographic location of the customer site, supported by manual territory management processes. Account management e.g. field account management, telephone account management etc. is in place for a defined group of customers. There is a defined process for periodic realignment of customers to the most appropriate sales channel and territory.</td>
</tr>
<tr>
<td></td>
<td>Standard</td>
<td>As standard, plus a business process exists and is routinely applied for rebalancing territories, typically performed on an annual basis.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>As part of the planning process for territory allocation, time is allocated for identifying account management activities, generating new business from existing customers, generating new business from new prospective customers and acquiring competitor supplied customers within each territory portfolio.</td>
</tr>
<tr>
<td></td>
<td>Leading</td>
<td>As advanced, plus resource allocation is based on customer needs, customer value analysis and alignment with ABC’s standard and extended Product and Service Offers.</td>
</tr>
</tbody>
</table>

8.4.1.2 Benchmarking Tool Processes “Develop”

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruit &amp; Select</td>
<td>Foundation</td>
<td>Job descriptions/role profiles represent all appropriate activities required to be undertaken by the individual role holder.</td>
</tr>
<tr>
<td></td>
<td>Standard</td>
<td>Sales competencies are defined based on the strategic direction of the sales organisation and the sales processes that are in place.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Applicants are assessed, using a competency based interview which is aligned the functional competencies (as well as the leadership competencies) that are described in the role profile/job description.</td>
</tr>
</tbody>
</table>
There is a formal link between the recruitment and on-boarding process. All candidates are made aware of the investment ABC will make in terms of their professional development and the expectation ABC has of them in terms of demonstrable competencies and accreditation to the ABC Pro standards within a defined time frame e.g. 12 months for the sales process module.

Sales manager selection criteria includes coaching capability.

A predetermined set of interview questions are aligned to sales specific competencies and specific role profiles are utilised. Interviews are conducted utilising a pro forma scored assessment system.

Candidates are assessed using profiling specifically linked to ABC sales requirements (e.g. online testing).

Sales manager selection criteria includes demonstration of required behaviours in coaching.

Analysis is undertaken of the interview results of managed leavers to identify trends and lessons learnt.

The recruitment process is fully integrated into the HPO recruitment & Onboarding process.

Roles are reconfigured as and when our sales structure is changed to take into account changes in our sales strategy.

### Process Descriptors

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding</td>
<td>Foundation</td>
<td>Each new starter receives ABC Pro awareness training including familiarisation with the key ABC pro tools, during their first week of employment, to ensure alignment and integration within the sales organisation.</td>
</tr>
<tr>
<td></td>
<td>Standard</td>
<td>Each new starter undertakes a capability assessment and training needs assessment and an action plan is developed.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>There is a system in place for new starters to begin their ABC Pro development, starting with the sales process module. Participation on the sales process module should take place during the first three months of employment with a target certification date of 1 year from when their employment commenced.</td>
</tr>
<tr>
<td></td>
<td>Leading</td>
<td>There is a system in place for new starters to undertake Portfolio handover (checklist/agenda).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Targets and performance standards are agreed and documented within the first month.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Strengths and development needs against the specific role requirements, identified at the recruitment stage, are captured in the successful candidate's capability development plan.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is a fully defined on-boarding programme that provides professional capability development, as well as information on ways to integrate into our corporate culture and navigate the organisation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New starters have a defined programme of product/technical training before customer engagement.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The programme ensures new hires understand the context around their role and what successful execution of their responsibilities look like.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A full portfolio review and handover is undertaken with the line-manager and new starter.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Each new starter is allocated a short term 'buddy' and/or mentor.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The on boarding process is reviewed annually and incorporates improvement feedback from (high performing) new starters.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The on-boarding programme is tailored to the new hire’s background and development needs. This tailored programme ensures new hires are productive and successful in the shortest amount of time possible.</td>
</tr>
</tbody>
</table>

### Maturity Level

- **Foundation**
- **Standard**
- **Advanced**
- **Leading**

### Process

<table>
<thead>
<tr>
<th>Process Level</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>Not Standard</td>
<td></td>
</tr>
<tr>
<td>Standard</td>
<td>Not Standard</td>
<td></td>
</tr>
<tr>
<td>Advanced</td>
<td>Not Standard</td>
<td></td>
</tr>
<tr>
<td>Leading</td>
<td>Not Standard</td>
<td></td>
</tr>
</tbody>
</table>
### Capability development

<table>
<thead>
<tr>
<th>Capability development</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Standard</strong></td>
</tr>
<tr>
<td>We have identified the capabilities necessary to meet the current performance requirements and each salesperson undertakes a capability development review on an annual basis.</td>
</tr>
<tr>
<td>We have an agreed plan for the rollout of ABC Pro across the sales organisation.</td>
</tr>
<tr>
<td>There is an annual plan outlining ABC Pro modules to be undertaken by the sales team.</td>
</tr>
<tr>
<td>Sales managers are certified as ABC Pro coaches.</td>
</tr>
<tr>
<td><strong>Advanced</strong></td>
</tr>
<tr>
<td>Sales people undertake the full ABC Pro syllabus in alignment with their role.</td>
</tr>
<tr>
<td>Sales managers actively coach their teams in accordance with the ABC Pro coaching tools and coaching diagnostic.</td>
</tr>
<tr>
<td>We have a clear plan for managing the ABC Pro certification process.</td>
</tr>
<tr>
<td>We have and continue to develop outstanding line sales managers who achieve desired behaviours and results from their sales teams through effective planning, coaching and leadership.</td>
</tr>
<tr>
<td>There is a continuous development programme in places for Application Sales Engineers including their attendance at seminars, trade fairs, networking functions to ensure expertise is always up to date.</td>
</tr>
<tr>
<td>ABC Pro Tech is fully integrated with the country's ABC Pro programme.</td>
</tr>
</tbody>
</table>

### Process Maturity Level

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>Not Standard</td>
<td>Salespeople undertake a capability assessment with their coach on an annual basis and agree performance and development requirements. This is reviewed and adjusted, as needed on a quarterly basis.</td>
</tr>
<tr>
<td>Standard</td>
<td>All levels of staff agree on the ABC Pro definition of coaching and embrace it as a positive opportunity to improve their professional performance. Staff proactively request and receive coaching as part of their day-to-day role.</td>
<td></td>
</tr>
<tr>
<td>Coaching</td>
<td>Coaches target 3-5 hours of coaching (formal and informal) per coachee per month.</td>
<td></td>
</tr>
<tr>
<td>All coaches are required to complete the ABC Pro coaching module and achieve certification within six months of attending the workshop.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced</td>
<td>Coaching time is a planned activity and is guided by a documented coaching plan with is tailored to the coachee.</td>
<td></td>
</tr>
<tr>
<td>All ABC Pro certified coaches are subject to re-certification within 24 months to ensure minimum standards are maintained.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales managers are certified as coaches before assuming the manager role.</td>
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<td></td>
</tr>
<tr>
<td>We employ coaching at every level of sales management to continually improve managers' business, leadership, and coaching skills.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coaches devise coaching strategies that are based on demonstrated coachee strengths and development needs, to the extent specified in the coachee's role profile.</td>
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</tr>
</tbody>
</table>
High Performing coaches are leveraged to support the development of other coaches and/or provide supplementary coaching to other individuals. Managers prioritise coaching effort towards salespeople with the greatest potential for improvement (coaching for performance) and towards those whom we most want to retain (coaching for retention).

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Talent Management</strong></td>
<td><strong>Leading</strong></td>
<td>We keep a list of sales staff we think can perform at more senior levels and we take the appropriate measures to ensure we keep those with the greatest potential.</td>
</tr>
<tr>
<td></td>
<td><strong>Standard</strong></td>
<td>We have sales managers who consistently achieve their performance targets while developing and promoting talent.</td>
</tr>
<tr>
<td></td>
<td><strong>Advanced</strong></td>
<td>We identify our high performers and highest potential employees, differentiating between excellence in current role versus future potential. From on-the-job performance assessments, we have identified the individuals who can successfully progress into more senior roles.</td>
</tr>
<tr>
<td></td>
<td><strong>Leading</strong></td>
<td>Our sales people have the skills necessary to meet the current and future performance needs of the business.</td>
</tr>
<tr>
<td>Talent Management</td>
<td></td>
<td>Local resources are available to fill technical generalist roles and technical specialist roles. There is a clear talent pool and a clear development path to maintain and improve the specialist expert status.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Individuals who are identified as high performers and/or high potential have agreed IDPs which form the basis of the succession planning process. These plans are reviewed annually and ‘on-demand’ and executed based on the opportunities being considered at the time. A process is in place to routinely evaluate required vs actual resource and capability levels. Career paths are defined for all sales roles including technical specialist application segment managers and generalists and key account managers.</td>
</tr>
</tbody>
</table>

8.4.1.3 **Benchmarking Tool Processes “Drive”**

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Campaign Management</strong></td>
<td><strong>Foundation</strong></td>
<td>There is an annual campaign plan which is included within the sales forecast.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is a process for measuring success of campaign against campaign objectives.</td>
</tr>
<tr>
<td></td>
<td><strong>Standard</strong></td>
<td>There is a clear process for handling prospect information and managing the participation of all the stakeholders involved in campaign.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is a clear process to approve campaigns based on business objectives, including target segments, product and service offers which are aligned with sales and regional strategies.</td>
</tr>
<tr>
<td></td>
<td><strong>Advanced</strong></td>
<td>Campaign plans are approved based on business priorities and alignment with forecast and sales strategies.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Previous campaigns are reviewed for lessons learnt prior to approval for the new campaign.</td>
</tr>
<tr>
<td></td>
<td><strong>Leading</strong></td>
<td>Campaign pre-qualified leads which are submitted to the sales team are subsequently qualified by the account manager/representative prior to entering them as opportunities within CRM.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Campaigns are utilised to create/reinforce ABC’s position of technical leadership in segment.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Channel campaigns are aligned with the channel sales strategy with clear measures of success.</td>
</tr>
<tr>
<td>Process</td>
<td>Maturity Level</td>
<td>Process Descriptors</td>
</tr>
<tr>
<td>-------------------------</td>
<td>----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Commercial Proposition</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Process</strong></td>
<td><strong>Maturity Level</strong></td>
<td><strong>Process Descriptors</strong></td>
</tr>
<tr>
<td>Foundation</td>
<td>Not Standard</td>
<td>There are clearly defined Product and Service Offers (PSO’s) available, supported by training and marketing materials.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Standard and extended PSOs are defined and understood across the sales organisation supported by PSO marketing materials which are aligned to industry/market segments.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The PSO is known by the account manager. There are clear rules for nonstandard products and services. There is Market approval for pharmaceutical and other regulated or restricted products.</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>There are standard templates for standard contracts which are based on best commercial practice principles for contracting.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When establishing customer pricing, the customer’s credit worthiness and the agreed payment terms are taken into account.</td>
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<td></td>
<td></td>
<td>As a sales force we understand all our sales channels and promote the most appropriate channel.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Each sales function, including the sales people making up that function, have access to and fully understand the 'Delegation of Authority' (DoA) for all sales related activities e.g. pricing and contracts.</td>
</tr>
<tr>
<td>Advanced</td>
<td></td>
<td>Pricing authorisation matrix drives/is aligned with DoA and all tools are based on that.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is contract authorisation that defines what changes can be made and by whom within the legal DoA.</td>
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<tr>
<td></td>
<td></td>
<td>All written and oral offers and agreements such as Memorandum of Understanding (MoU), Letter of Intent (LOI), trial and evaluation agreements etc. are fully documented and entered in CRM with nonstandard documents referred to legal services.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A profitability calculator is available for bulk and cylinder products which can be used for all direct customers.</td>
</tr>
<tr>
<td>Leading</td>
<td></td>
<td>A formal quality assurance process is in place for creation of proposals their content and there is a process for approval of proposals.</td>
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<tr>
<td></td>
<td></td>
<td>The system supports flexibility in creation of presentation material.</td>
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<td></td>
<td>There is a process that is consistently used to recover out-of-pocket expenses incurred in developing proposals e.g. those that involve trials or significant engineering input etc.</td>
</tr>
<tr>
<td><strong>Performance Management</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Process</strong></td>
<td><strong>Maturity Level</strong></td>
<td><strong>Process Descriptors</strong></td>
</tr>
<tr>
<td>Foundation</td>
<td>Not Standard</td>
<td>A formal performance review is conducted annually.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pricing performance is included as a target measure for all sales people.</td>
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<tr>
<td></td>
<td></td>
<td>Reporting is aligned to key performance indicators for each sales function.</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>Standard business reports are available by salesperson, sales team and sales region, including customer reports, product reports and profitability analysis.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Certification in all (relevant) ABC pro modules is recorded in the performance management document and progress is reviewed at performance reviews.</td>
</tr>
<tr>
<td>Advanced</td>
<td></td>
<td>Sales people have clear annual targets and are evaluated on input activity and outputs.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A formal performance review is conducted quarterly.</td>
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<tr>
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<td></td>
<td>There is a process for automated delivery of early warning of the shortfall in any of the KPI's by salesperson, sales team and/or sales region.</td>
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<tr>
<td></td>
<td></td>
<td>We systematically examine the root causes of underperformance and develop targeted improvement initiatives.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is a process in place to manage sales people who consistently fail to achieve certified status within an agreed time scale.</td>
</tr>
</tbody>
</table>
We have identified and are able to track performance against key metrics that determine the success of our business (e.g. loyalty retention, value creation, and profit).

There is a systematic internal review of wins and losses incorporating customer feedback, with the outputs shared with the sales team.

All competitor accounts are recorded in the database and used as a source of future opportunities.

<table>
<thead>
<tr>
<th>Process</th>
<th>Maturity Level</th>
<th>Process Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Management</td>
<td>Foundation</td>
<td>Lead generation: Leads are identified through existing business contacts and occasionally through external data searches. A manual system is in place.</td>
</tr>
<tr>
<td></td>
<td>Standard</td>
<td>Lead generation: The majority of sales leads come from existing customer enquiries.</td>
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<tr>
<td></td>
<td>Standard</td>
<td>Lead qualification: A lead prioritisation process is in place.</td>
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<tr>
<td></td>
<td>Standard</td>
<td>Lead management: Prioritised leads are manually assigned to sales channels. Sales managers track lead progress by regular dialogue with sales teams.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Lead generation: Leads are identified using multiple search and business intelligence sources and tracked in a database.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Lead generation: The majority of sales leads are proactively generated using multiple search and business intelligence sources.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Lead qualification: Leads are prioritised based on alignment with target customer segments using a defined screening model or tool.</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
<td>Lead management: Actionable leads are assigned to sales channels by a systemised process. Lead progress to qualified opportunity is tracked. Sales managers receive regular reports on lead to opportunity conversion.</td>
</tr>
<tr>
<td></td>
<td>Leading</td>
<td>Lead generation: Leads are identified within given market segments, all data is stored in a specific standardised database.</td>
</tr>
<tr>
<td></td>
<td>Leading</td>
<td>Lead generation: Leads are obtained from multiple sources for each market segment (Marketing databases, industry bodies, internet alerts).</td>
</tr>
<tr>
<td></td>
<td>Leading</td>
<td>Lead qualification: A dynamic scoring model automatically assigns leads to sales channels.</td>
</tr>
<tr>
<td></td>
<td>Leading</td>
<td>Lead management: Fully integrated into the sales process with proactive escalation and activity reporting for all data recorded in “CRM” system.</td>
</tr>
</tbody>
</table>

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<tr>
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</tr>
</thead>
<tbody>
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<td>Pipeline Management</td>
<td>Foundation</td>
<td>All qualified leads are entered into the pipeline or CRM tool.</td>
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<tr>
<td></td>
<td>Standard</td>
<td>An opportunity roadmap is initiated for all opportunities that are entered into the pipeline in line with local business rules.</td>
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<tr>
<td></td>
<td>Standard</td>
<td>Opportunities are aligned with market/segment strategy.</td>
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<tr>
<td></td>
<td>Standard</td>
<td>Sales people maintain a list of qualified prospects across the Acquire stages of the sales process and take appropriate and timely actions as driven by the ABC Pro sales process tool-kit e.g. the opportunity road-map.</td>
</tr>
<tr>
<td></td>
<td>Standard</td>
<td>Pipeline stages are aligned to the ABC Pro sales phases e.g. Explore, Establish etc.</td>
</tr>
<tr>
<td></td>
<td>Standard</td>
<td>Opportunities within the pipeline are matched against ABC's standard and extended product service offers.</td>
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<tr>
<td></td>
<td>Standard</td>
<td>Each salesperson’s sales pipeline is reviewed monthly with their line manager.</td>
</tr>
<tr>
<td></td>
<td>Standard</td>
<td>Tenders are identified separately to other opportunities in the pipeline and are subject to a pre-tender approval process.</td>
</tr>
<tr>
<td><strong>Advanced</strong></td>
<td>A win/loss review process is used for all deals that exceed revenue threshold set by local business rules. The sales pipeline includes formal stage gates between the stages and opportunities are managed through each stage gate. Disqualified prospects are either 'recycled' through the previous stage to determine if anything was missed that prevented progress to the next stage or terminated if the qualification criteria cannot be met. There is visibility of the opportunity pipeline across geographies for Key Accounts. A win/loss review process is used for all deals that exceed revenue threshold set by local business rules. The process includes a detailed root cause analysis and as appropriate, generates a 'lessons learnt' case study which is shared across the sales organisation to drive higher win rates, eliminate regretted losses and minimise 'failed-to-gain' rates.</td>
<td></td>
</tr>
<tr>
<td><strong>Leading</strong></td>
<td>An objective third-party analysis of win/loss/failed-to-gain including an 'interview' of the prospective or acquired customer is undertaken to determine the drivers behind the gain, loss or 'failed-to-gain' piece of business. We ensure all CRM processes are seen by sales people as enablers, enhancing the likelihood they will 'meet or beat' their targets. The CRM system is designed and organised so as to enable clear visibility into all customers and prospects by ABC Pro phase. A system is in place to proactively monitor CRM data quality.</td>
<td></td>
</tr>
</tbody>
</table>