

SALES MANAGEMENT  
ANALYSIS AND DECISION MAKING

# 销售管理 分析与决策

[第6版]

Thomas N. Ingram  
Raymond W. LaForge  
Ramon A. Avila 著  
Charles H. Schwepker Jr.  
Michael R. Williams



北京大学出版社  
PEKING UNIVERSITY PRESS

营销学精选教材·英文影印版

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Ingram, LaForge, Avila, Schwepker, Williams

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## 出版者说明

进入 21 世纪,市场营销科学在中国开始向纵深发展,一方面,广大营销学者继续追踪国际学术界在市场营销研究前沿的探索 and 深化,另一方面,学者们也在致力于发展对中国现实更具解释力的营销理论,并且在这两个方面,都取得了非常实质性的进步和成果。营销学是一门应用科学,随着社会和经济的发展,许多新问题、新现象不断出现,新的营销理论和观点也纷纷出现,国内外学术界的研究兴趣点也就相应发生变化。在中国,营销现实日渐变得丰富多样,理论研究逐步规范化和科学化,高等院校的教学内容和方式也随之发生了很大变化,教师和学生都不再满足于 20 世纪 80 年代引进的一批偏重管理学的“营销学理论”教科书。营销学科在中国的日渐成熟和发展,迫切要求具有更高学术水平和更强现实指导能力的教科书,不但能够带给学生最前沿、最深刻的学术思想和从事研究的科学方法,而且教给学生在实际工作中进行正确决策的科学指导。

基于此,北京大学出版社引进出版了《营销学精选教材》系列丛书(本丛书包括影印版和翻译版,个别影印版有局部删节),在选择这些书的过程中,我们得到了北京大学光华管理学院郭贤达老师,西安交通大学管理学院庄贵军老师,武汉大学经济管理学院汪涛老师,大连理工大学管理学院董大海老师,中国人民大学商学院李先国老师等学者的真诚帮助,在此,对他们表示最诚挚的感谢!我们希望这些书带给广大读者的是对营销科学的兴趣和激情,是深刻的学术思想和科学的研究方法,是从事营销实际工作时最好用的工具,同时也是广大教师和学生最好用的教科书。

《营销学精选教材》是一个开放的系列,根据现实情况的发展和需要,我们还会陆续引进其他品种,在此,诚邀各位专家学者热情推荐优秀的营销学图书(em@pup.pku.edu.cn)。此外,真诚欢迎广大读者在使用过程中对我们的图书提出宝贵的意见和建议。

北京大学出版社  
经济与管理图书事业部  
2005 年 12 月

20 世纪 80 年代,市场营销学开始在我国迅速传播和发展。80 年代以来,设立该专业或开设市场营销学课程的高等院校数量显著增多,研究工作亦有显著的进展。尤其是 90 年代以来,随着中国市场化改革进程的加快,社会急需大量的受过专业训练的营销人才,更是推动了我国高等院校中市场营销专业教育的迅猛发展。自此以后,市场营销学可以说是基本上实现了在我国的启蒙和普及。

随着第一阶段启蒙和普及目标的实现,当前国内对于市场营销的研究和教育开始向两个方向发展:其一就是对当前国际学术界在市场营销研究前沿的追踪和深化;其二就是结合国内市场环境的特点和经济发展的需要,实现市场营销理论的本土化,发展对中国现实更有解释力的市场营销理论。我想,这两个方向会在相当长一段时间内影响国内市场营销学的研究和教育。

营销研究的转型必然要求营销知识的传播机构,主要包括高等教育机构以及出版机构,也要做相应调整。以出版为例,在 20 世纪营销知识的传播和普及中,出版机构扮演着非常重要的角色。实际上,正是菲利普·科特勒博士的《营销管理》教材的引入(我印象中最早的版本是科学技术文献出版社出版的第 6 版)奠定了国内营销研究的学科基础,而该书从第 6 版直到第 11 版的先后引入,也见证了国内市场营销学科快速发展的历程。可以说,在国内其他领域,还很少看见一本教材会对一个学科的教学和研究能产生如此巨大和广泛的影响。然而,从另一个角度,这也许同样暴露出当前国内营销知识传播中所面临着的尴尬境地:如果说一门学科可以只用一本教科书来概括,至少说明我们对这个学科的理解和解说还缺乏足够的甚至是必要的张力和活力。

首先,按照美国市场营销学会会刊主编瓦格纳·卡马库拉的观点,市场营销学是在管理学、行为科学(心理学和社会学)和定量分析(数学和计量经济学)这三门较成熟学科的基础之上发展起来的独立学科。因此,市场营销学之中有三个侧重:侧重于管理学的叫做“市场营销学理论”,侧重行为科学的称为“消费者行为学”,而侧重营销方法论以及由此延伸出的定量分析手段的则是“市场营销科学”。所以,在市场营销的知识体系中,科特勒博士的《营销管理》只是涉及市场营销理论部分(我个人认为,本书只是营销学的入门读物,对于研究生以上层次并不适用),而营销科学(研究方法)以及消费者行为理论却没有得到同样的重视。

其次,不可否认,科特勒博士的《营销管理》确实是一本非常好的教材,他为市场营销学构建了一个较为全面的分析框架,但是他更强调一个完善的理论体系的勾勒,强调对众家之言的兼容并包,对该体系中的很多主题,却缺乏更详细的扩展和讨论。例如,渠道策略和价格策略是该书公认的薄弱章节。

最后,有些新的营销理论和观点,由于研究视角和范式的不同,很难被该书兼容,因而得不到全面的体现,如服务营销、关系营销以及组织市场营销等。

因此,也许除了科特勒,我们还应该再看点别的。

所以,我们迫切需要更加丰富和高质量的市场营销出版物。

北京大学出版社所引进出版的《营销学精选教材》则很好地顺应了这一要求。目前入选该套丛书的著作已经从最初的三本增加到八本。这是一个开放性的书系,以后还将根据需要,陆续引进其他的品种,欢迎各位专家学者的推荐。

这些入选著作有一些共同特点:其一,这些作者均系出名门,具有深厚的理论素养,在各自领域中均为蜚声世界的大家。其二,虽然这些著作都具有极强的学术价值,但全然不是“书斋的学问”。由于这些作者在理论研究之余,均具有丰富的咨询和实践经验,这就决定了这些著作不会耽于说教、“语言无味,面目可憎”,而是深入浅出,令人耳目一新。

一般说来,一本好的营销学教材应该具备如下的重要特点:首先,一本好书应根植于对某一领域的实际研究,而许多书籍只是给学生提供了一个基于抽象的理论基础上的简单的提纲。另外,一本好书应该让学生和营销实践者们很容易看懂,并能在其指导下制定成功的策略,为此,好的教材应列举大量的相关案例,分析具有创造性的策略并结合实际进行评述。而很多书籍要么在论述时缺乏丰富的案例,要么在分析时缺乏理论的深度。

而在这两方面,该套丛书均表现出优秀教材的素质:大度、深刻且平易近人,相信它不仅对于市场营销理论的研究和学习,而且对于营销实务的操作和实践,都是极好的指南。

江涛

武汉大学市场营销系教授

2005年10月于珞珈山



# 关于本书

## 适用对象

本教材适用于本科生、研究生、MBA 的销售管理课程。

## 内容简介

本书介绍了销售管理发展趋势和相关问题的最新信息,有助于帮助学生奠定深厚的理论基础,学习 21 世纪所需的各种创新性技巧。模块化的内容设计,有助于教师根据具体需要安排教学。

## 作者简介

Thomas N. Ingram 科罗拉多州立大学(Colorado State University)的营销系主任和教授。是销售与营销主管国际协会(Sales and Marketing Executives International, SMEI)所设营销教育家年度奖项的获得者之一。他还是 Mu Kappa Tau 全国营销荣誉学会所设销售学杰出学术贡献奖的第一位获得者,并多次获得大学授予的优秀教学奖。

Raymond W. LaForge 路易斯维尔大学(University of Louisville)的营销学 Brown—Forman 冠名教授。他是《营销学教育评论》(*the Marketing Education Review*)的创始人,并为该杂志担任了 8 年编辑,现任执行主编。

Ramon A. Avila 鲍尔州立大学的营销学优秀教授。

Charles H. Schwepker Jr., 中密苏里州立大学(Central Missouri State University)的营销学教授。

Michael R. Williams 伊利诺伊州立大学(Illinois State University)的营销学副教授。在成功地从事学术和研究工作的同时,他还从二十多年的工业品销售、销售管理和营销研究工作中积累了丰富的实践经验。

## 本版特色

第 6 版将最新的销售管理研究和优秀销售组织的最佳真实实践结合在一起。教材继续强调针对不同消费者群体使用不同销售战略的重要性,同时也一如既往地注重整合公司、营销和销售战略。全书以销售管理决策者的观点讨论各个主题。

**全新的开篇案例:**所有模块的开头都会有一个开篇简介,其中一般会介绍一个最新的、真实的公司案例,指出模块中将会讨论的重点,为教材的讨论打好基础,并引发读者的兴趣。

**案例:**教材中包括许多或长或短的案例。每一模块末尾的短篇案例都非常适合作为布置书面作业、鼓励课堂讨论和角色扮演练习之用。篇幅较长的案例是进行全面的分析或团体演讲的最佳素材。

**角色扮演:**每个模块中的“道德困境”、案例中的“角色扮演”,使读者可以置身于现实复杂的道德和销售管理情境中。

**模块末尾的应用练习:**对每一模块末尾的应用练习,第 6 版进行了全部更新。许多练习要求使用 Internet,学生非常乐于参与其中。

## 简要目录

模块 1——变化中的销售管理世界

第一部分：描述个人销售职能

模块 2——个人销售概述

附录 2：销售职业

第二部分：确定销售职能的战略角色

模块 3——组织战略和销售职能

模块 4——销售的组织结构和销售队伍部署

附录 4：进行预测

第三部分：建立销售人员队伍

模块 5——销售队伍的人员补充：招聘与人员选择

模块 6——销售队伍的持续发展：销售人员培训

第四部分：指导销售队伍

模块 7——销售管理、领导与监督

模块 8——激励与奖励机制管理

第五部分：确定销售队伍的有效性与工作绩效

模块 9——评估组织的有效性

模块 10——评估销售人员的工作绩效

案例

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注释

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## 教辅产品

教师资源光盘(包括教师指导手册、习题库、测试软件 ExamView 和 PowerPoint 幻灯片)



# P R E F A C E

Our objective in writing the sixth edition of *Sales Management: Analysis and Decision Making* was to continue to present comprehensive and rigorous coverage of contemporary sales management in a readable, interesting, and challenging manner. Findings from recent sales management research are blended with examples of current sales management practice into an effective pedagogical format. Topics are covered from the perspective of a sales management decision maker. This decision-making perspective is accomplished through a modular format that typically consists of discussing basic concepts, identifying critical decision areas, and presenting analytical approaches for improved sales management decision making. Company examples from the contemporary business world are used throughout the text to supplement module discussion.

## **STRENGTHS OF THIS EDITION**

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The sixth edition of *Sales Management: Analysis and Decision Making* has several important strengths. The authors teach sales management courses and interact with sales managers and sales management professors on a regular basis. These interactions with practicing professionals and students ensure that the text covers the appropriate sales management topics and employs effective pedagogy. This new edition continues what has been effective in previous editions, but contains changes that improve content and pedagogy. The key strengths of the sixth edition include:

- The 10 modules and paperback format from the previous edition are maintained. This makes it easy for professors to cover the text in a semester or quarter, and still have sufficient time to use active learning exercises throughout the course. All of the important sales management topics are addressed and students can purchase the text for much less than a typical hardcover sales management book.
- All new Opening Vignettes are used to introduce each module. These vignettes generate student interest by presenting examples of current sales management practice in leading firms.
- Revised "Sales Management in the 21st Century" boxes and new sales executives have been added in our Sales Executive Panel.
- The introduction of an important trend—the move from an administrative to an entrepreneurial perspective—has been introduced in Module 1. The turbulent environment facing most sales organizations requires that sales managers act more as entrepreneurs and less as administrators to be successful.
- New or expanded coverage of important topics such as customer relationship management (CRM); outsourcing the salesforce; and key differences among sales leadership, management, and supervisory activities can be found throughout the text.
- Role-play exercises for Ethical Dilemmas and the short cases are included at the end of each module. These role plays give professors the opportunity to involve students actively in exploring complex ethical and sales management situations.
- New or updated exercises in the Building Sales Management Skills section can now be found at the end of each module. Many of these exercises require the use of the Internet, but all involve students actively in the learning process.

## LEVEL AND ORGANIZATION

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This text was written for the undergraduate student enrolled in a one-semester or one-quarter sales management class. However, it is sufficiently rigorous to be used at the MBA level.

A sales management model is used to present coverage in a logical sequence. The text is organized into five parts to correspond with the five stages in the sales management model.

Part One, "Describing the Personal Selling Function," is designed to provide students with an understanding of personal selling prior to addressing specific sales management areas. We devote one module at the beginning of the text to this topic.

Part Two, "Defining the Strategic Role of the Sales Function," consists of two modules; one discusses important relationships between personal selling and organizational strategies at the corporate, business, marketing, and sales levels. This module focuses on how strategic decisions at different organizational levels affect sales management decisions and personal selling practices.

The second module in this part investigates alternative sales organization structures and examines analytical methods for determining salesforce size, territory design, and the allocation of selling effort.

Part Three, "Developing the Salesforce," changes the focus from organizational topics to people topics. The two modules in this part cover the critical decision areas in the recruitment and selection of salespeople and in training salespeople once they have been hired.

Part Four, "Directing the Salesforce" continues the people orientation by discussing the leadership, management, and supervisory activities necessary for successful sales management and examining important areas of salesforce motivation and reward systems.

Part Five, "Determining Salesforce Effectiveness and Performance," concludes the sales management process by addressing evaluation and control procedures. Differences in evaluating the effectiveness of the sales organization and the performance of salespeople are highlighted and covered in separate modules.

## PEDAGOGY

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The following pedagogical format is used for each module to facilitate the learning process.

**Learning Objectives.** Specific learning objectives for the module are stated in behavioral terms so that students will know what they should be able to do after the module has been covered.

**Opening Vignettes.** All modules are introduced by an opening vignette that typically consists of a recent, real-world company example addressing many of the key points to be discussed in the module. These opening vignettes are intended to generate student interest in the topics to be covered and to illustrate the practicality of the module coverage.

**Key Words.** Key words are highlighted in bold type throughout each module and summarized in list form at the end of the module to alert students to their importance.

**Boxed Inserts.** Each module contains two boxed inserts titled "Sales Management in the 21st Century." The comments in these boxes are provided by members of our Sales Executive Panel and were made specifically for our text.

**Figure Captions.** Most figures in the text include a summarizing caption designed to make the figure understandable without reference to the module discussion.

**Module Summaries.** A module summary recaps the key points covered in the module by restating and answering questions presented in the learning objectives at the beginning of the module.

**Developing Sales Management Knowledge.** Ten discussion questions are presented at the end of each module to review key concepts covered in the module. Some of the questions require students to summarize what has been covered, while others are designed to be more thought-provoking and extend beyond module coverage.

**Building Sales Management Skills.** Application exercises are supplied for each module, requiring students to apply what has been learned in the module to a specific sales management situation. Many of the application exercises require data analysis. Many modules also have an Internet exercise to get students involved with the latest technology. Role plays are also included in most modules.

**Making Sales Management Decisions.** Each module concludes with two short cases. Most of these cases represent realistic and interesting sales management situations. Several require data analysis. Most are designed so that students can role play their solutions.

## CASES

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The book contains a mixture of short, medium, and long cases. The 18 short cases at the end of modules can be used as a basis for class discussion, short written assignments, or role plays. The longer cases are more appropriate for detailed analysis and class discussions or presentations by individuals or student groups. The longer cases are located at the end of the book.

## SUPPLEMENTS

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### Instructor's Resource CD (IRCD)

The Instructor's Resource CD delivers all the traditional instructor support materials in one handy place: a CD. Electronic files are included on the CD for the complete Instructor's Manual, Test Bank, computerized Test Bank and computerized Test Bank software (ExamView), and chapter-by-chapter PowerPoint presentation files that can be used to enhance in-class lectures.

- **Instructor's Manual**

The Instructor's Manual for the sixth edition of *Sales Management: Analysis and Decision Making* contains many helpful teaching suggestions and solutions to text exercises to help instructors successfully integrate all the materials offered with this text into their class. Each module includes the following materials designed to meet the instructor's needs.

- Learning objectives
- Module outline and summary
- Ideas for student involvement
- Possible answers to review sections in the text, Developing Sales Management Knowledge and Building Sales Management Skills
- Ideas for how to incorporate the role play exercises found in the text into the classroom setting, as well as suggestions for conducting the Role Plays

The Instructor's Manual files are located on the IRCD in Microsoft Word 2000 format.

- **Test Bank**

The revised and updated Test Bank includes a variety of multiple choice and true/false questions, which emphasize the important concepts presented in each



chapter. The Test Bank questions vary in levels of difficulty so that each instructor can tailor his/her testing to meet his/her specific needs. The Test Bank files are located on the IRCD in Microsoft Word 2000 format.

- **ExamView (Computerized) Test Bank**

The Test Bank is also available on the IRCD in computerized format (ExamView), allowing instructors to select problems at random by level of difficulty or type, customize or add test questions, and scramble questions to create up to 99 versions of the same test. This software is available in DOS, Mac, or Windows formats.

- **PowerPoint Presentation Slides**

Created by an expert in the field of sales, Scott Inks of Ball State University, this package brings classroom lectures and discussions to life with the Microsoft PowerPoint 2000 presentation tool. Extremely professor-friendly and organized by chapter, these chapter-by-chapter presentations outline chapter content. The eye-appealing and easy-to-read slides are, in this new edition, tailored specifically to the *Sales Management* text from the Ingram author team. The PowerPoint presentation slides are available on the IRCD in Microsoft 2000 format and as downloadable files on the text support site (<http://ingram-sales.swlearning.com>).

## Web site

Visit the text web site at <http://ingram-sales.swlearning.com> to find instructor's support materials as well as study resources that will help students practice and apply the concepts they have learned in class.

- **Student Resources**

- Online quizzes for each chapter are available on the web site for those students who would like additional study materials. After each quiz is submitted, automatic feedback tells the students how they scored and what the correct answers are to the questions they missed. Students are then able to email their results directly to their instructor if desired.
- Crossword quizzing of glossary terms and definitions arranged by chapter is also available for extra review of key terms found in the text.
- Students can download the PowerPoint presentation slides from the web site.

- **Instructor Resources**

- Downloadable Instructor's Manual files are available in Microsoft Word 2000 format and Adobe Acrobat format.
- Downloadable PowerPoint presentation files are available in Microsoft PowerPoint 2000 format.

## Brand-New Videos!

A brand-new video package has been professionally filmed and produced specifically for this text. The authors and a team of experienced selling educators have developed a series of videos illustrating the concepts and skills of professional selling and management aspects of professional selling including coaching, sales training, motivation, and evaluating performance. Each video has been carefully developed to *accurately* and *effectively* demonstrate and teach specific concepts. Experienced actors provide clear examples and an off-camera spokesperson provides narrative explanation and reinforcement and asks a variety of teaching-related questions for students to consider and answer.

## ACKNOWLEDGMENTS

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Scott A. Inks, *Ball State University*

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