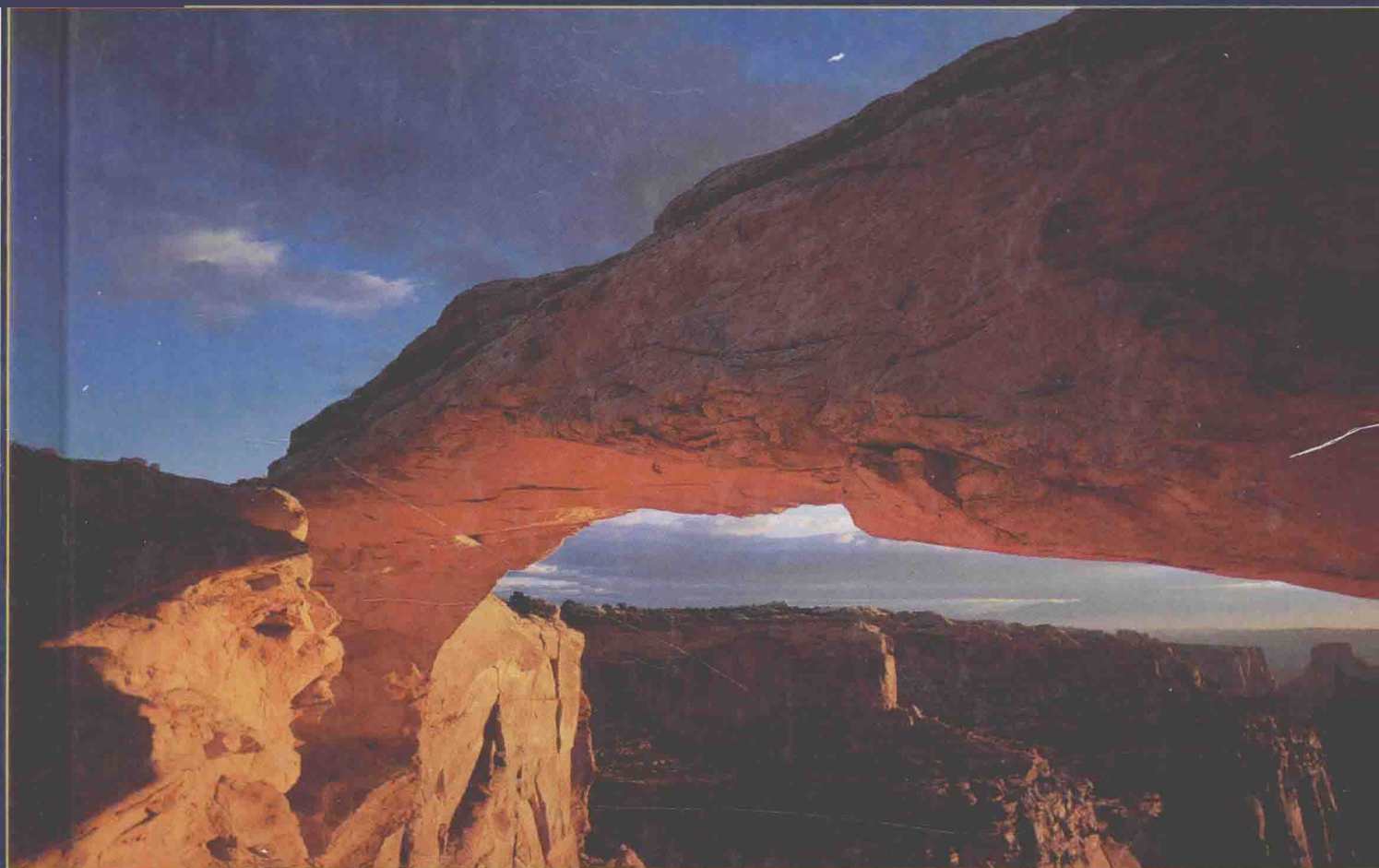


Sales Force Management



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Fifth Edition

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Preface

For the first 70 years of this century, the practice of sales management resembled the practice of medicine by tribal witch doctors. Sales managers had to rely on large doses of folklore, tradition, intuition, and personal experience in deciding how to motivate and direct the performance of their sales forces. Few firms did any research to better understand the motives and behaviors of their own salespeople. And sales managers got little information or guidance from marketing academicians. There was scant published theory and even less empirical research concerning the variables that influence one salesperson to perform better than another.

Fortunately, the situation began to change about 25 years ago. Since the early 1970s, an increasing volume of relatively sophisticated and informative research has focused on understanding why salespeople behave as they do and identifying factors critical to their performance. Today, nearly every issue of the major academic marketing journals contains at least one article of direct relevance to sales management; and one such journal is dedicated to theory and research in sales management and personal selling. Thus, substantial evidence has accumulated about the impact of different variables on a salesperson's job behavior and performance, namely:

1. Personal characteristics.
2. Aptitude.
3. Skill levels.
4. Role perception.
5. Motivation.
6. Environmental and organizational variables.

The sales manager who is familiar with this growing research evidence and best understands how these factors affect a salesperson's behavior has an advantage in planning and directing that behavior toward desired ends and in evaluating the results produced.

WHY WE WROTE THIS BOOK

Although the body of theory and research relevant for improving sales management practice grew dramatically throughout the 1970s, students of sales management had no single source to turn to for a detailed summary and analysis of that research and its implications. The textbooks of the time either failed to keep pace with the advancing knowledge or dealt with the emerging findings in a piecemeal fashion. Thus, our primary purpose in writing the first edition of this text in 1981 was to offer students a thorough, up-to-date, and integrated overview of the accumulated theory and research evidence relevant to sales management, plus the most recent practices and techniques employed by managers in the “real world.”

We realize, though, that simply providing a compendium of theories and research findings would not only be deady dull, but it would also do little to help students understand how a sales manager might perform his or her job most effectively. A second purpose for writing this book, then, was to emphasize the link between the determinants of sales performance on the one hand and the actions that sales managers can take to direct, influence, and control that performance on the other. We believe this objective was all the more important because of our—and our students’—dissatisfaction with existing texts. Many of them lacked structures that organized the discipline in the logical sequence of activities that managers engage in. Thus, some books discussed planning issues at several different places throughout the text, or dealt with evaluation and control before talking about implementation issues, or discussed implementation issues before examining questions of strategy. Unfortunately, some texts still suffer from this same shortcoming.

THE STRUCTURE OF THIS BOOK

We developed a framework that views the spectrum of sales managers’ activities as focusing on three interrelated, sequential processes, each of which influences the various determinants of salesperson performance:

1. **The formulation of a strategic sales program.** This involves organizing and planning the company’s overall personal selling efforts and integrating these efforts with the other elements of the firm’s marketing strategy.
2. **The implementation of the sales program.** This includes selecting appropriate sales personnel and designing and implementing policies and procedures that will direct their efforts toward the desired objectives.
3. **The evaluation and control of sales force performance.** This involves developing procedures for monitoring and evaluating sales force performance so adjustments can be made to either the sales program or its implementation when performance is unsatisfactory.

The structure of this book reflects this framework. The first chapter introduces the subject with an overview of the duties and responsibilities of sales managers and how these activities relate to these three processes. Chapter 1 also outlines in detail the content of the rest of the book, which is divided into three sections corresponding to the three processes:

- **Part I—Chapters 3 through 8**—looks at the major decisions involved in designing a strategic sales program. This section examines the fit between the external environment, the firm's marketing strategy, and its strategic sales program. It also deals with the formulation of account management policies, ways of organizing the sales force, and methods for estimating demand, designing sales territories, and setting quotas.
- **Part II—Chapters 9 through 15**—addresses issues involved in implementing the sales program. An overview of the determinants of sales performance is presented and the salesperson's role perceptions are discussed. Part II then examines decisions involving the recruitment and selection of sales personnel, sales training, motivation, and the design of compensation and incentive programs.
- **Part III—Chapters 16 through 18**—discusses techniques for monitoring and controlling sales force behavior and performance. It examines various approaches for conducting a sales analysis, costs analysis, and behavior analysis.

INTENDED AUDIENCE FOR THIS BOOK

This book is designed for use in an introductory course in sales management at either the advanced undergraduate or graduate level. It is also designed to complement a variety of teaching approaches. Instructors who primarily emphasize the lecture-discussion approach will find ample material for either a one-quarter or a one-semester course in the chapters and end-of-chapter discussion questions. For those who prefer case-oriented instruction, we have included 29 cases. Twenty-five of the cases can be found at the end of the three sections since they primarily emphasize the issues discussed in the sections. Five of the cases are more encompassing. They contain a variety of issues and can be found in a final section after the epilog. The epilog integrates the discussion and serves as an overall summary of the book's contents.

CHANGES AND ADDITIONS TO THE FIFTH EDITION

Those who have used the earlier editions of this text should find the above discussion very familiar. We have adhered to the admonition, "if it ain't broke, don't fix it." But while we have preserved the basic organization and other fea-

tures of the book that have proved popular and useful in the past, we have also made many changes and additions to incorporate recent advances in sales management research and practice and to make it an even more effective aid to learning. For example, there is increased emphasis on international issues. The emphasis is manifested both in terms of the conceptual discussion as well as the examples used to illustrate the points.

Another major change involves ethics, which is given much more prominence in this edition. In addition to a section discussing ethical philosophies and frameworks for viewing ethical choices in Chapter 3, ethical scenarios that students are asked to analyze have been added to the other chapters where appropriate. This organization resolves the problems of how to treat the topic of ethics. It is difficult to treat it early because students do not yet have the technical sophistication to appreciate alternative ways to approach ethical problems nor even the ethical issues involved. Treating the conceptual foundations early in the book and then interweaving ethical dilemmas with managerial issues allows students to more readily appreciate the social consequences of proceeding in particular ways.

Some changes made for the fourth edition that were well received are given even greater emphasis in this edition. For example, the practice of beginning each chapter with an introductory scenario, which involves students in the issues, has been continued with many new scenarios. We have also tried to simplify the writing style and shorten the text when possible. Still more Thorny Issues—ethical dilemmas or emerging problems for which there are as yet no clear-cut or generally accepted solutions—have been added to each chapter. The Thorny Issues allow students to come to grips with some of the more difficult issues facing modern sales managers and to apply the concepts they have just learned. The end-of-chapter discussion questions have been upgraded to provide more meaningful vehicles for student exercises or class discussions. Several chapters contain application questions for computer analysis. Moreover, we have added experiential applications to the end of each chapter. These applications provide students the opportunity to work on relevant projects. The combination of changes has produced a manuscript that is much more user friendly and interesting than previous versions.

There has also been a major revision of the cases. Almost one-fourth of the cases are new. Further, several of the old cases have been revised and updated. Ten of the cases are now available on computer disc. The computerized cases also have been reworked so students can perform more sophisticated analyses.

In addition, all the chapters have been subjected to thorough scrutiny and rewrite. There has been a major updating of examples, for instance. There are many more in-text examples than were found in the fourth edition, and the examples are as up-to-date as possible. These changes help the book reflect the current practice of sales management. The discussion in some chapters has been expanded and in others it has been streamlined, always with the intention of making it as clear as possible.

ACKNOWLEDGMENTS

A book like this is never the work of a single author or even a small group of authors; rather, there are many people and institutions whose contributions need to be acknowledged. We wish to thank the many scholars and sales managers who have labored so diligently over the last 25 years to move the study of sales management out of the dark ages and into the mainstream of marketing thought. We would also like to acknowledge the special contributions of the Marketing Science Institute, which supported much of the recent research, and especially Steve Greyser, Alden Clayton, and Diane Schmalensee for their willingness to commit MSI's energies and resources to the study of sales management before it became a fashionable topic. Their visionary interest helped produce the critical mass of effort necessary to move the study of the topic forward.

Academicians—even those in marketing—are sometimes not very customer-oriented, particularly when it comes to writing textbooks. We have made a concerted effort to avoid such a heresy. Consequently, we offer special thanks to the more than 60 professors who responded to our questionnaire about their attitudes toward the previous editions of this book. The information they provided was very helpful in our effort to make the fifth edition a more useful tool for teaching and learning.

A number of unexciting, but nevertheless critical, tasks are associated with the production of a book such as this. The following students all made significant contributions to the competent completion of these tasks: Beth Bubon, Katherine Cheney, Kevin Dowd, Mary Flanagan, Jerry Fritz, Kelly Granholm, Joseph Kuester, Greg Martin, Geoffrey Marlow, Erika Matulich, Thomas Miller, William Murphy, Laura Roehre, Karen Ryan, and Ravi Sohi. Also, Jonlee Andrews not only prepared new test questions, but she also reviewed and classroom-tested many of the new cases. We gratefully acknowledge their efforts. We also thank our many students over the years for their comments and suggestions. The book is better because of their insights.

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We hope we haven't forgotten anyone, and we apologize to those whose suggestions we failed to implement. Needless to say, we assume full responsibility for any errors or omissions in this book.

Janet Christopher typed the major part of the manuscript and the Instructor's Manual, and her willingness to operate under tight deadlines and the quality of her output are sincerely appreciated.

Finally, we wish to thank our families, and each of their many members, for their encouragement and support while this book was being written. It is with love we dedicate it to them.

Gilbert A. Churchill, Jr.
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Orville C. Walker, Jr.



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