**TAKING THE IRE OUT OF AN IRATE CUSTOMER**

**TEACHING NOTE**

**Critical Incident Overview**

This critical incident is a decision case in which a newly hired sales manager is faced with an angry buyer, anxious to vent his frustration at her company, and in particular her new boss. Potentially exacerbating the angry confrontation, the sales manager is unaware of any incident or action taken by her boss that predicated the buyer’s outburst. She encounters two buyers in the first meeting with her distributor, each with distinct attitudes and personalities. While she had expected to introduce herself, build relationships with the key players, and review upcoming orders, she is verbally accosted at the onset of her meeting. The buyers displayed very different demeanors: one is angry, aggressive and accusatory; the other is open and conciliatory. She must decide how to approach this volatile situation in order to salvage the long-term relationship, as well as future sales.

This critical incident is primarily geared towards a Professional Selling, Advanced Professional Selling, Organizational Buyer Behavior or Sales Management class.

**Research Methods**

This critical incident was written based on extensive field research, including communications with the customer and seller, as well as a visit to the manufacturer and distributor. The names of the individuals, the company and the buyers have been disguised to preserve anonymity.

**Learning Objectives**

The learning objectives of this critical incident are for students to:

1. Evaluate buyer style utilizing the social style matrix.
2. Apply adaptive selling skills to an emotionally charged conflict.
3. Discuss the role of gender in sales interactions and conflict resolution.
4. Explore options to resolve this conflict, understand the steps needed to mitigate the conflict and use the opportunity to strengthen the business relationship.
5. Analyze potential issues and conflicts in the salesperson’s role as boundary spanner between the firm and the customer.

**Questions**

This critical incident describes a challenge to the smooth management of the buyer-seller relationship. It also offers additional layers of complexity by introducing a potential conflict between the seller and her supervisor in regards to issues of trust, communication and organizational support (Bradford and Weitz, 2009), as well as gender differences between buyer and seller.

1. Based on the social style matrix, which of the four types (analyticals, drivers, amiables or expressives) would you attribute to Tom? Phil?
2. Drawing on your knowledge of the social styles you have identified, how would you try to mitigate or diffuse the current situation? How will you adapt your selling behavior?
3. What impact do you think gender differences had on this situation?
4. How do you think you can salvage this relationship?
5. How should Kate deal with her supervisor? How will her role as a boundary spanner influence her actions?

**Answers to Questions**

1. Based on the social style matrix, which of the four types (analyticals, drivers, amiables or expressives) would you attribute to Tom? Phil?

A common basis for interpreting social styles or communication behaviors when buyers and sellers interact is the social style matrix developed by David Merrill and Roger Reid (1981). This is useful tool when reviewing adaptive selling behavior, in particular when emphasizing to students the importance of selling to a buyer in the way in which best suits the buyer’s needs. This critical incident clearly highlights the two dimensions of social styles: assertiveness and responsiveness. It provides a rich discussion of the social styles, since rather than rigid abstract concepts; this scenario provides the reality of ambiguity in defining communication styles.

***Analyticals*** – Students rarely identify either Tom or Phil as an analytical, a personality type both low in assertiveness and responsiveness. However, a review of this personality type is appropriate, since it sets the stage for additional discussion. The instructor can query the class as to how their answers to question #2 might change if one of the principle characters in this scenario was indeed perceived to be an analytical.

***Drivers* –** Most students will describe Tom as a driver, high in assertiveness and low in responsiveness. A driver tends to take control, is primarily concerned with results, rather than personal relationships, and is quick to make a decision or form an opinion about a business relationship.

***Amiables* –** Phil is most often identified as the amiable, high in responsiveness and low in assertiveness. Students form this opinion based largely on the original warmth he showed towards Kate and his acute state of embarrassment at his colleague’s outburst.

***Expressives*** **-** Some students will argue that Tom is an expressive due to his forceful, animated opening salvo and his high assertiveness level. In addition, he places a high emphasis on controlling the situation, exerting his power over the relationship and perhaps not enough attention to the specific details of the ‘exclusive distribution’ agreement.

1. Drawing on your knowledge of the social styles you have identified, how would you try to mitigate or diffuse the current situation? How will you adapt your selling behavior?

In order to assess this situation accurately, it would be appropriate to ask your students to identify Kate’s personality type. In order to drill down into the complexities of the different relationships, and the adaptations and versatility Kate must draw upon, it is useful to start with defining her personality type. Interestingly, students may neglect to consider the communication or personality style of the seller, which enables the instructor to lead a discussion into the importance of defining both the potential conflicts and/or common ground in the interaction between different social styles.

Kate is often described as either a driver or an expressive, high in assertiveness, but students are often unsure about her level of responsiveness. Those who feel she is a driver cite her tendency to be very businesslike and her preference for a quick resolution to the current conflict; however, others feel her focus on personal relationships may indicate she is more of an expressive.

The adaptations of selling behavior will generate a rich discussion, since there are so many variables to the dynamics described in the critical incident, and equally as many ways in which to approach this selling situation. The overriding goal of adaptive selling is to improve communications with the buyer by adjusting one’s behavior to ‘adapt’ to the buyer’s communication style. The critical dimensions of social styles, assertiveness and responsiveness, are clearly an integral component of each of the personalities in this critical incident. Tom is a dominate character who has displayed strong convictions and purposely provoked Kate. Phil, on the other hand, seems warm and approachable and would likely score high on the responsiveness scale. The key to Kate’s successful handling of this scenario will be both her ability to assess and classify both Tom’s and Phil’s social style, as well as her versatility in adjusting her own behavior to meet the needs of her buyers.

Some suggested courses of action might include:

***Tom as a driver***: The seller needs to acknowledge the need for immediate action and acknowledgement of the source of conflict. She could try to diffuse his anger by soliciting specific details of the previous commitment made by her supervisor, carefully probing in a non-judgmental way to determine the facts as perceived by Tom.

***Tom as an expressive***: The seller should acknowledge the highly emotive state that Tom portrays, expressing both empathy and concern for the current breakdown in communication, by encouraging Tom to vent his frustrations.

***Phil as an amiable***: The seller should appeal to Phil as an amiable, playing on their personal relationship and appealing to him to act as a mitigating influence in this emotionally charged atmosphere.

1. What impact do you think gender differences had on this situation?

Recent research has explored gender differences in communication styles, relationship outcomes and the interface of buyer and seller (McQuiston and Morris, 2009; Boles, Wood and Johnson, 2003; Wood, Johnson, Boles and Barksdale, 2012). The trend towards relationship selling as opposed to transactional selling has been cited as a positive development for the female seller since a communal, consensus –building skill set is often associated with the stereotypical female gender role.

This critical incident posits a rather stark contrast between Tom and Phil, the male buyers and Kate, the female seller. The aggressive and overt threat of violence in this scenario, while not directed at the female seller directly, certainly ramped up the anxiety in the conflict. Some students do not recognize this interaction as a gender issue, and suggest it was rather one of power and dominance. This offers an interesting segue into a discussion of whether Tom would have been as forceful in his “threat” if the seller had been male. Most students feel that Tom would have not been so aggressive in tone or actions, thereby reinforcing, rather than negating, the role that gender did in fact play.

One additional discussion that can be developed from this scenario is the role that Phil played in the outcome of the conflict. In reaction to Tom’s overly aggressive demeanor, Phil, who was classified as high on the responsiveness scale and likely found Tom’s behavior towards Kate offensive, became quite conciliatory and acted as a mediator between Kate and Phil.

1. How do you think you can salvage this relationship?

Regardless of the specific adaptation students choose to employ, there are certain steps that the seller should take:

* Offering a sincere apology for the misunderstanding is clearly warranted;
* Allowing the buyer to clearly articulate their complaint (the facts as the buyer perceives them), and where appropriate probing to uncover details and underlying emotions;
* Many students are tempted to offer excuses (such as “it was my boss’s fault”), but often times, that only encourages the buyer, rather the emphasis should be on solving the issue at hand;
* Solicit input from the buyer as to how he/she would envision an appropriate resolution;
* Once the source of conflict has been clearly delineated, the seller must then commit to a course of action, whether it is to further investigate the complaint or propose a resolution (Manning, Ahearne and Reece, 2012);
* The overriding goal should be to resolve the current conflict, recover from the gap between expectations and service, and move the relationship forward. If done successfully, the relationship may in fact be strengthened.

1. How should Kate deal with her supervisor? How will her role as a boundary spanner influence her actions?

Kate was confronted with a perceived breach of trust between her company and her buyer; but was unaware of the previous relationship and commitments made. Some students feel that she was remiss in her preparation for the meeting with her distributor by not delving into the previous relationship and personalities involved, while other feel that her supervisor was remiss by not clarifying the history.

Kate should approach her supervisor with a clear and objective overview of the interaction, and then ask her supervisor to brief her on his perspective. Having only heard one side of the dispute, she was not in a position to judge the validity of the claim made by Tom at YewGrow. Students often fail to drill deeper into a situation, neglecting to consider that full knowledge of the situation are a prerequisite for making the right decision. It is an interesting addition to the class discussion to ask students what Kate should do if she finds that Tom was in fact right, that a verbal commitment had been made by her supervisor, who then chose to not honor the agreement in pursuit of the greater sales volume that could be realized from CalWest.

The seller’s role as a boundary spanner, working to both represent the interests of her company to the buyer and to championing the buyer’s concerns to the company, also encompasses the relationships within the firm. Research has indicated that one of the key constructs in an effective buyer-seller relationship is not only the trust between buyer and seller, but between seller and the seller’s supervisor (Chakrabarty, Brown and Widing, 2013).

**General Discussion**

This critical incident has been designed for use in undergraduate Professional Selling, Advanced Professional Selling, Organization Buyer Behavior or Sales Management classes. The critical incident is brief enough to be read and discussed in class. The instructor should act as a facilitator in this discussion in order to clarify the issues and conflicts and the ambiguity of the roles of the key characters.

**Epilogue**

At the meeting, Kate immediately apologized for the confusion, confessed her ignorance of the arrangement, allowed Tom to clarify his understanding of the exclusivity in explicit detail, and promised to investigate and report back to him within a week with a proposed resolution. Through this process, Tom became calmer and somewhat mollified. Having been caught unaware of a previous commitment, and certainly uninformed of the history, she felt she had no ability to offer a resolution on the spot. She was able to employ Phil as an ally, appealing to his predilection for conflict avoidance as an amiable personality.

Whether or not there was an actual commitment to an exclusive distribution agreement was never determined. When Kate delved into the history of the relationship between her firm and that of the buyer, she found that there was no written contract, nor were they any other records that indicated contractual obligations. Kate’s supervisor denied any such promise, and Tom continued to maintain such an arrangement had been made by the supervisor. However, the supervisor had indeed initiated a distributor agreement with CalWest, an action that was not rescinded. Kate offered a compromise resolution by discounting the current season's pricing to YewGrow, one to which Tom ultimately agreed. Kate continued to deal directly with Phil, and had no further interaction with Tom.

Ironically, a few months later, CalWest withdrew from its business relationship when it came to light that the heaters were potentially damaging vegetable and horticultural plants due to high levels of ethylene produced through the indirect heating technology. YewGrow’s customers did not experience the same side effects since they were primarily growing nursery stock, a hardier species not susceptible to that type of damage. YewGrow continued its relationship with Kate and remained one of her largest customers.

**Relevant Theory and Literature**

The adaptive selling behavior model in selling situations was first proposed by Barton Weitz in 1981, and has since been widely accepted as a key determinant of sales success. Further, many texts incorporate a discussion on the use of the social style matrix (Merrill and Reid, 1981). The context of this critical incident is rooted in the management of a conflict between buyer and seller, another construct with a rich stream of research (Bradford and Weitz, 2009; Chakrabarty et al, 2013).

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