

Success factors which help gain new customers in sales campaigns

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Abstract

Customers have the highest importance in any organization, particularly in Business-to-Business (B2B) context, due to high complexity of the selling process and huge costs of products or services involved. Besides, the available spectrum of customers is relatively less in industrial selling. Hence in the long term view, it is of prime importance to gain and retain customers. Various factors affect the process of selling products or services such as the organization's environment, salesperson behaviour, selling process specific factors, technology utilised and so on. Consequently, this project aims at identifying factors affecting the marketing campaign executed by companies to gain new customers. By virtue of an extensive literature study, suitable factor levels for the identified factors are suggested (i.e. success factors). The findings indicate that market factors (organizational, environmental and stakeholders) are prerequisites for other factors to positively affect the marketing campaign. The personal selling process consists of a series of steps. Research reveals that the success of each step depends on the condition that the preceding step is a success. By employing the success factors and technology suggested in this project, the quality of marketing campaign and the probability of a sale can be increased along with high sales performance by salespeople.

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List of abbreviations

CRM	Customer Relationship Management
B2B	Business to Business
B2C	Business to Consumer
NAM	National Account Management
QFD	Quality Function Deployment
SQL	Structured Query Language
SEO	Search Engine Optimization
PPC	Pay Per Click

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1 Introduction

The guiding philosophy of marketing and sales departments in an organization today is to achieve personal, organizational and societal objectives by adding sustainable value to the customer's business and ultimately become the vendor or company of preference (Smith and Colgate, 2007, p. 8) The way that salespeople and sales managers understand, prepare for, and accomplish their jobs is being changed irrevocably by evolutionary and revolutionary forces. Salespeople are now independent of sales managers and are increasingly moving away from "selling" and turning towards "serving as customer consultants" and business partners (Anderson, 1996, p. 17).

1.1 Background of the project

The buying processes and transactions between buyers and sellers in a B2B context is turning to be very complex. It involves personal selling by informing customers and persuading them to buy by describing the value and benefits of the product or service to the customer. The competitiveness of product has also increased due to many competitors offering largely homogeneous products. Therefore, the effectiveness of the sales department and the salesperson is critical to the success of the organization. This calls for research work to improve sales effectiveness. (Dwyer et al., 2000, p. 151).

Further, the buyer-seller relationships are being affected in terms of behavioural, technological, and managerial forces (as shown in Table 1) and significantly changing how sales functions will be carried, prompting increased research (Anderson, 1996, p. 18).

Table 1. Forces impacting personal selling and sales management (Anderson, 1996, p. 18)

Behavioural Forces	Technological Forces	Managerial Forces
<ul style="list-style-type: none">• Rising Customer Expectations• Expanding Power of Giant Retailers• Globalization of Markets	<ul style="list-style-type: none">• Sales Force Automation• Virtual Sales Offices• Electronic Sales Channels	<ul style="list-style-type: none">• Outsourcing of Sales Functions• Blending of Sales and Marketing• Certification of Salespeople and Sales Managers

In addition to the need to make sales department and salespeople effective, there is a necessity to bridge the gap between sales methods and sales performance of salespeople with the success of the project. This gap is reflected by the lack of studies in the area of success measurement of sales campaigns. Some of the concerns in sales literature are discussed below.

Dubinsky (1981) describes 84 selling techniques used in each step of sales campaign but doesn't evaluate their effectiveness. Sales performance is measured by Behrman and Perreault (1982) with the help of a self-report scale developed and evaluated based on the responses of 200 salespersons and 42 managers from five major industrial firms. These performance measurements however do not relate sales success. It must be noted that sales performance determination methods must be understood by sales personnel so that the evaluation against these standards is accepted by them (Adkins, 1979, p. 207). Further, Anderson and Narus (1995, p. 75) suggest that companies must be able to understand what customers value (through market sensing and other market-oriented activities) and factors affecting the selling process to be able to create value relevant for their customers. By customising products according to its value to specific customers, firms perform better and exhort additional revenue (Anderson and Narus, 1995, p. 76). Adkins (1979) defines a framework for evaluation of salesmen success that encompasses both "efforts expended" and "results attained" by measuring controllable factors that affect the sales process. Even though the impact of controllable factors affecting sales person success is recognized, limited research has been directed towards factors uncontrollable by salesmen. In addition, only a few studies have looked at the sales manager level of the organization, even though there has been considerable international research in management styles and culture (Tixier, 1994).

Therefore, to fill these gaps in literature and to link the sales performance of a salesperson and sales organization with the success of the sales project, the identification of success factors is necessary.

1.2 Research questions

As determined in chapter 1.1, the main objective of this research is to improve the sales process resulting from marketing campaigns in B2B context through identification of factors affecting the success of selling. Further, the next goal is to evaluate the factors identified and determine favourable factor levels which help gain new customers in a project or campaign

management. Likewise, the firm must retain acquired customers through employment of Customer Relationship Management (CRM) (Nettleton, 2014, p. 195). A brief study of this topic is discussed in this project work.

To define the research questions, the following aspects are considered here.

- The selling process in B2B context involves complicated personal selling methods and relationships. Theories and models are developed to make selling efficient.
- The marketing campaigns are one-time projects executed by companies to gain new customers and increase their sales. There is limited theory on this topic and research already available is deficient to come to any conclusions
- The research dwells on all kinds of factors, both internal and external, that affect this process. They are studied in detail.

Based on the aspects considered, the following research questions are formulated to get an answer for the research problem: *What are the success factors which help gain new customers in sales campaigns?*

- What are the existing selling processes, methods and strategies?
- What are the factors that affect the personal selling process in a project or marketing campaign?
- How can the identified factors be adopted to increase the success rate of the selling process?
- Which tools and resources can aid the process of capturing and retaining customers for firms in B2B marketing?

1.3 Project structure

The study is divided into five chapters. First one gives a general overview of the project followed by second chapter on literature review. Third chapter deals with identification of success factors, which is used to develop a model in fourth chapter. Finally, the project work is concluded in the fifth chapter with certain implications and limitations of the research.

2 Literature review

In a company, after a product or a service development, the sales and marketing department usually take control of the operations and decision making (Leslie and Holloway, 2006,

pp. 5–6). The success of a product/service depends largely on the success of sales force in selling (Ahearne et al., 2010, p. 764). From these statements, it can be concluded that the personal selling process and salespeople are crucial members for the success of marketing campaigns.

Thus, in this chapter a review of sales management and marketing campaigns is performed. Consequently, the reason for B2B focus is explained. It is followed by personal selling methodology practised in B2B marketing. Next, the types of salespeople involved in the selling process are studied and their classification as successful or unsuccessful salespeople, crucial for the understanding of sales performance, is examined.

2.1 Sales management and marketing campaigns

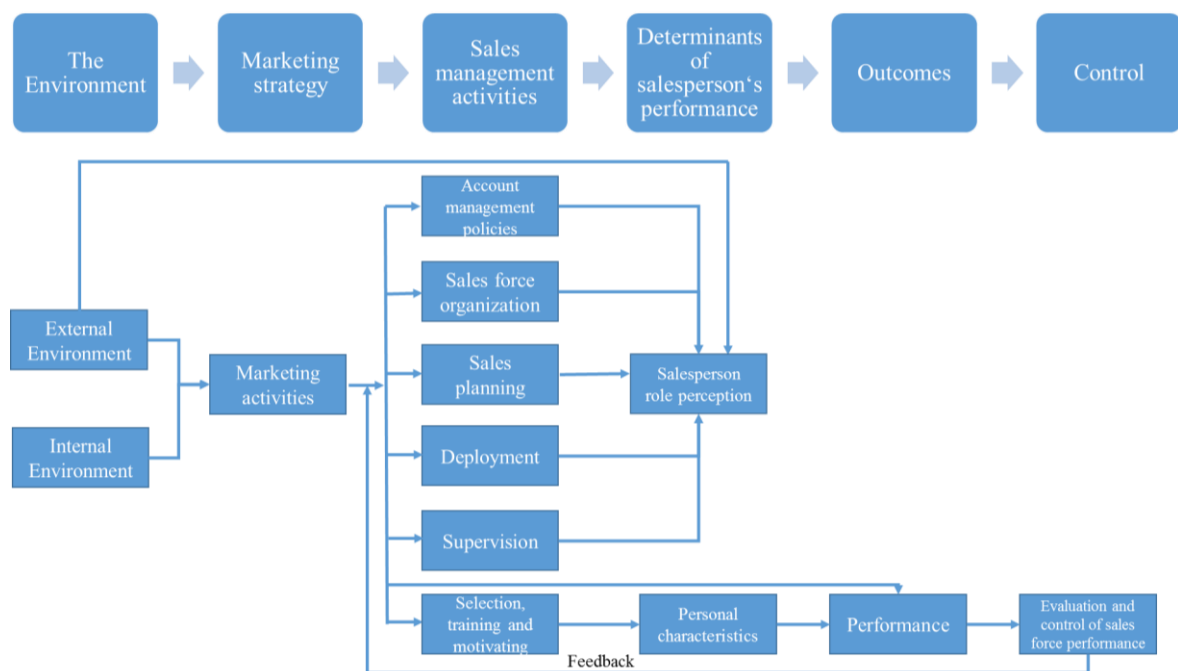


Figure 1. Sales management process (Churchill et al., 2000, p. 12)

From the entire sales management theory, this project will focus on the sales force organization, sales deployment methods and the factors affecting their performance i.e. the implementation of sales program as shown in Figure 1.

The sales management process involves three interrelated sets of decisions (Churchill et al., 2000, p. 11):

1. Formulation of sales program
2. Implementation of sales program
3. Evaluation and control of sales program

This sales program to gain new customers is a marketing campaign. It is defined as a series of steps that includes promotion and sale of a product by salespeople through different sales channels. It comprises of all the actions right from determining a prospective customer to closing the sale (Pride and Ferrell, 2003, pp. 434–444). They are considered as projects, where a group of people are dedicated to a specific purpose or objective. Projects are generally large, unique, involve high risk and have to be completed in a certain period of time with a certain amount of money and at a defined performance level (Tuman, 1988, p. 655).

Sales persons are at the forefront of this process: generating leads, determining opportunities and closing the sale (Szymanski, 1988, p. 64). It is necessary for project managers and marketers in an organization to keep track of the project and have an ongoing surveillance of the project. But in order to track the progress, the success of the project must be determined and defined (Tuman, 1988, p. 680). Therefore, it is an additional reason to carry out this project work and determine the success factors of selling process.

2.2 Comparison of B2B and B2C selling process

Grewal et al. (2002, p. 303) describes a matrix to differentiate transactional and relational selling in B2B and B2C context as shown in Figure 2.

Cell 1: In transactional selling, the primary function of sales person is to help customers find the appropriate merchandise and complete the transaction. In case of B2C context, the customers are also consumers. They use visual media like internet or television to find and learn about the product and its price. Then they visit the store, where the in-store salesperson guides them towards the merchandise and completes the transaction. (Grewal et al., 2002, p. 304).

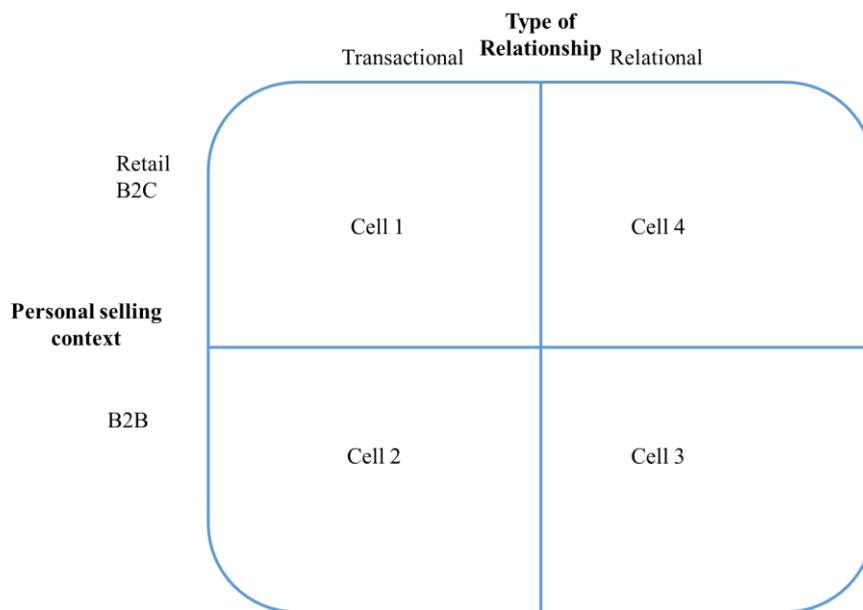


Figure 2. Personal selling matrix (Grewal et al., 2002, p. 303)

Cell 2: Transactional selling in a B2B context is very similar to the B2C setting. The salesperson processes the order by locating the product, either physically or electronically. Internet technologies have revolutionized the market and the ease with which a business customer can procure online has been drastically increased. (Grewal et al., 2002, p. 304).

Cell 3: Relational selling in a B2B context is the case relevant to personal selling. In the past decade some focus has been directed into personal selling and customer relationship management. It involves providing products as solutions to current or future problems of customers. This creates a strong value-added relationship and enables the firm to retain customers and increase their loyalty towards the firm. (Grewal et al., 2002, p. 304).

Several authors have investigated and found that relational selling models are more appropriate than transactional models (Beverland and Lockshin, 2003; Grönroos, 1997). In relational selling, the sales process is also consultative in nature. The sales person (1) helps customers comprehend their problems, issues and opportunities (2) provides customers better solutions and (3) acts within his firm to promote and gather resources for their customers (Grewal et al., 2002, p. 303). Such consultative behaviours substantially increase the value provided to the customer through selling process. Thus, this is the most important process setting demanding extensive research work. Hence, the project work will concentrate on B2B relational selling process.

Cell 4: Relational selling in B2C is similar to that in a B2B setting, but not as important or as effective as relationships with customers in B2B setting. However, Grewal et al. (2002,

p. 304) suggest the need for loyal customers due to their lifetime value. To support the researchers, it could be said that the new and innovative ways of marketing through internet can be an invaluable tool to develop relationship with consumers in B2C.

2.3 Selling processes and techniques

According to Churchill et al. (2000, p. 51), the selling process in B2B is divided into six steps namely,

1. Prospecting the customers
2. Opening the relationship
3. Qualifying the prospect
4. Presenting the sales message
5. Closing the sale
6. Servicing the account

Although the selling process consists of only six distinct steps, the activities involved in each step can vary widely depending on the type of salesperson and his position in the company. Likewise, Pride and Ferrell (2003, p. 490) described elements of personal selling process, similar to the one described by Churchill et al. (2000, p. 51). These two processes seem to dominate early literature from 1970s and have been widely accepted by researchers all over the world. After describing the steps, this chapter considers dimensions of change in selling process to verify the validity of studying old literature for a dynamic process like personal selling.

2.3.1 Prospecting

According to Jolson (1988, p. 191), prospecting involves search for leads to identify potential customers. It is followed by systematic ranking of the identified leads in order to qualify them. Jolson and Wotruba (1992, p. 60) introduce the concept of suspect and prospect. Suspects are individuals or organizations discerned as possible buyers by the salesperson whereas prospects are individuals or organizations selected for contact based on facts and without any ambiguity about their need and ability to buy.

Unlike B2C selling, where prospecting involves house to house door-knocking, in B2B selling the target market is very narrowly defined and the job of the salesperson is to identify customers within this target segment. The prospecting effort also depends to some extent on

the industry where the salesperson works. Products that require a lot of aftersales service to guarantee customer satisfaction are one of the examples (Churchill et al., 2000, pp. 51–52).

2.3.2 Opening the relationship

The sales representative does two important jobs to open a relationship with a prospective customer:

1. Determine the person within the buyer's organization, who has the authority or highest influence in making purchasing decisions.
2. Obtain information needed to qualify the prospect as a potential customer.

When the product is simple and inexpensive, salespersons deal entirely with the purchasing department. For technically complex and expensive products, the salespersons try to open a relationship by seeking appointments with the decision makers at various departments and functional levels. (Churchill et al., 2000, pp. 52–53).

2.3.3 Qualifying the prospect

Jolson (1988, p. 191) says that qualified prospects are organizations or individuals with needs and desires that can be fulfilled by the salesperson's products or services. It involves an objective and realistic judgement of the probability of making a successful sale with the prospect (Churchill et al., 2000, p. 53).

Salespeople classify leads into two categories: "tight leads" and "loose leads". Tight leads are considered to be high probability prospects whereas loose leads are poorly qualified prospects with a low chance of buying the product or service. A firm manages and controls the amount of loose and tight leads by manipulating its lead generation program. (Jolson, 1988, p. 192)

It also includes answering a few important questions regarding the prospect (Churchill et al., 2000, p. 53):

1. Does the prospect have a need for a product or service?
2. Does the prospect exhibit a willingness or readiness to buy?
3. Does the prospect have the ability to buy?
4. Will the sale be profitable?

Based on the results of this analysis, the customers are ranked. Some firms also limit a certain order size to avoid very small customers and improve sales efficiency.

2.3.4 Presenting the sales message

This step involves transmitting information about the product or service and convincing the prospect to become a customer. It includes making a presentation for the customer and providing the relevant information based on their needs and desires. However, it is a very difficult process. Most salespersons are aggressive and run down competitors. Sometimes, they have inadequate knowledge of the client's businesses and their products and deliver poor presentations. The presentation also depends on the complexity of the product sold. For simple products, the presentation is highly standardized and for highly technical products, the salespersons deliver a personalized presentation according to the customer's needs. (Churchill et al., 2000, pp. 53–54).

2.3.5 Closing the sale

Closing the sale refers to obtaining the final agreement to purchase and signing the contract. The task of the salesperson during this step is to persuade the customer to make a decision. As the time it takes to close the sale increases, the risk of losing the sale increases and the profit from the sale reduces. Hence, it is absolutely necessary for the salesperson to close the sale as early as possible. (Churchill et al., 2000, pp. 54–55).

There are several factors that can go wrong between agreement of purchase (also called as soft circle) and signing the sales contract. Some of them are:

- The person in charge for buying might stop picking up calls and avoid the salesperson's personal visits.
- The decision maker could quit, be fired or be transferred to another city and the sales process has to start all over again.
- Target company could enter into a process of takeover and all pending contracts could be suspended indefinitely.
- The Company might go bankrupt.
- The selling firm might stop making the product or providing the service and only inform the salesperson after he agrees a new deal with a customer

Therefore, salespersons are trained to close the sale as early as possible and avoid the risk of losing the contract.

2.3.6 Servicing the account

Many types of services are provided to a customer after a sale to ensure customer satisfaction and repeat business. It ensures customer loyalty and long term relationship with a customer. Hence, the main role of salesperson in this phase is to make sure no problems exist with quality, delivery of goods and customer billing. When such services are not provided by the selling firm, the customer turns unhappy, feels ignored and stops buying from the salesperson. In fact, sale of related products and services offer more revenue and higher profit margins than the original equipment. Therefore, the firm's relationship strategy decides the extent of aftersales service. (Churchill et al., 2000, p. 55)

2.3.7 Changes in the process over the years

Jones et al. (2005, p. 105) compared research work in sales management over fifty years old with current research and found that the dimensions of change of selling process have remained constant over time. Hence, study of old literature to identify success factors is justified. The most mentioned changes are a rising number of products and services, saturation of existing markets and tendency towards automation of sales management (Jones et al., 2005, p. 105).

A few dimensions of change affecting salesforce as given by Jones et al. (2005, pp. 106–109) are explained.

- *Customers:* Customers' expectations are increasing while the salesperson knowledge and other dimensions remain constant. This leads to poor sales efficiency and danger of obsolescence of the salesforce. (Jones et al., 2005, p. 106).
- *Salesperson Knowledge:* Background information has been traditionally collected through first sales call. But in today's environment random calling will make a poor first impression and will likely fail to penetrate the account. Hence, there is a need to selectively use sales calls based on the selling situation information needed and information complexity. (Jones et al., 2005, p. 106).
- *Speed of response:* Due to increase in communications technology and capacity to transfer information quickly, customers expect that salespeople will be faster and quicker in their jobs. However, due to a large customer base, it is overwhelming for salespeople to reply in a satisfactory manner. (Brown et al., 2005, p. 107).
- *Breadth of communication:* The salesperson must develop the ability of an orchestrator, appealing to the executives and technical experts in the organization to assist in selling products or services (Jones et al., 2005, p. 107).

- *Depth of communication*: Salespeople need to better understand lines of power and high context communication in order to sell in today's business environment (Jones et al., 2005, p. 108)
- *Customization*: Customization requires additional work to be done by the salesperson in the form of gathering and transferring information from the buyer to the people inside the firm (Jones et al., 2005, p. 108)
- *Technology*: It is one of the biggest and everlasting problem of salespeople. Even when a firm introduces a new technology to be used in the sales process, the result is lacklustre since technology adoption by salespeople is usually slow and causes losses to the firm (Jones et al., 2005, p. 109).
- *Ethical and legal environment*: Salespeople must be careful about the arguments they place to their customers due to increasing legal restrictions and standards regarding accurate information (Jones et al., 2005, p. 109).

2.4 Types of sales personnel

A salesperson's activities vary widely across industries and across firms for the personal selling process. It is probably the reason behind different research activities producing different results. Therefore researchers have worked on identifying the various sales activities and classifying them into different selling jobs, as summarised in Table 2 (Churchill et al., 2000, p. 50; McMurry, 1961, p. 114; Moncrief III, 1986, pp. 266–268).

Table 2. Comparison of B2B sales jobs

Moncrief III, 1986	Churchill et al., 2000	McMurry, 1961
Missionary	Missionary	Missionary
Trade servicer	Trade servicer	Delivery
Trade seller	Technical	Order taker
Order taker	New business	Technical
Institutional seller		Create demand
Residual		

Moncrief III (1986) researched on the topic and analysed 121 selling activities in detail. He then grouped them into 6 categories called clusters. The clusters are similar to the four salesperson roles described by Churchill et al. (2000, p. 50). They are explained below.

- *Trade seller:* The primary responsibility of the salesforce is to increase business from present customers by providing them with promotional assistance. E.g. selling of a product to a distributor.
- *Missionary seller:* The responsibility of a missionary seller is to provide personal selling assistance and as a result increase the business from present customers. They do not take orders from customers directly but try to convince them of the firm's product.
- *Technical seller:* These salespeople engage themselves by providing technical and engineering assistance. E.g. An engineer from Rolls Royce calling Airbus to provide jet engine information is engaged in technical selling.
- *New business seller:* The sales force's primary activity involves the responsibility of obtaining business from new customers.

2.5 Successful and unsuccessful salespeople classification

This chapter explains the differences between successful and unsuccessful salespeople and the classification methods employed to differentiate them. It should be clearly understood that this is just a classification of salespeople into two groups with the help of information obtained from relevant literature. A detailed list of factors that make salespeople successful are explained in chapter 3.

2.5.1 Based on salespeople's evaluation of customers

According to Szymanski (1990, p. 163) salespeople try to evaluate and classify the likely purchasers of a product or service using evaluation cues stored in their memory. These cues differ from salesperson to salesperson. The study found that both successful and unsuccessful salespeople had approximately the same number of cues for classifying customers but the difference lay in the distribution of importance weights. It is described that selling is a conditional process and hence mistakes in classification at the prospecting stage will lead to poor sales performance and can't be compensated at later stages (Szymanski, 1990, p. 164). Novices might give importance to surface cues which seem to be highly relevant but have no real significance to the objective of the salesperson (Fiske et al., 1983, p. 393).

2.5.2 Based on salespeople's experience and success

Another criterion for classification is experience and success. Successful salespersons rely on their experience and past success, which makes them more confident in future decisions. They are highly selective in choosing their clients and dedicate resources only to those whom they classify as "promising". It can be deduced from this fact that successful salespeople are unlikely to be as desperate for sales as their unsuccessful counterparts (Szymanski, 1990, p. 166). Consequently, the criteria for classification of customers into a particular category is also potentially stiffer for successful salespeople than for unsuccessful salespeople.

2.5.3 Based on sales manager's perspective

Salespersons not only evaluate themselves, they are also evaluated by others within and outside the firm. Often more than not, sales managers evaluate the performance of salespeople and classify them as successful or unsuccessful based on what shows up in their summary reports of quantitative data. However, it is very difficult to evaluate in this manner since many salespeople operate across organizational boundaries and much of their effort is out of the view of the company. (Behrman and Perreault, 1982, p. 356).

As a solution, Benton and Ivancevich (1978, p. 87) propose a method of evaluation known as "Behaviourally Anchored Rating Scale" to classify salespeople and determine an individual salesperson's contribution towards sales success.

3 Identification of success factors

Since selling is a complex activity, it seems logical that there exist certain factors that lead to increased sales success (Predmore and Bonnice, 1994, p. 55). These critical success factors can be defined as a set of skills, behaviours or tasks that positively influence sales performance. There has been extensive research in this area and many researchers have observed that presence of critical factors ensures successful competitive performance by a firm in the market. (Bisp et al., 1998; Boynton and Zmud, 1984; Dwyer et al., 2000; Leidecker and Bruno, 1984).

Further empirical research (Beswick and Cravens, 1977, p. 137; Cravens et al., 1972, p. 32; LaForge and Cravens, 1985, p. 186; Ryans and Weinberg, 1979, p. 454) consistently suggest the notion that the variation in sales organization effectiveness is explained by three forces namely, environmental, organizational, and salesperson factors. These factors will be studied

in detail in this chapter along with behavioural and psychological factors, selling process specific factors, CRM factors and technological factors.

3.1 Proposed model for success factors in marketing campaigns

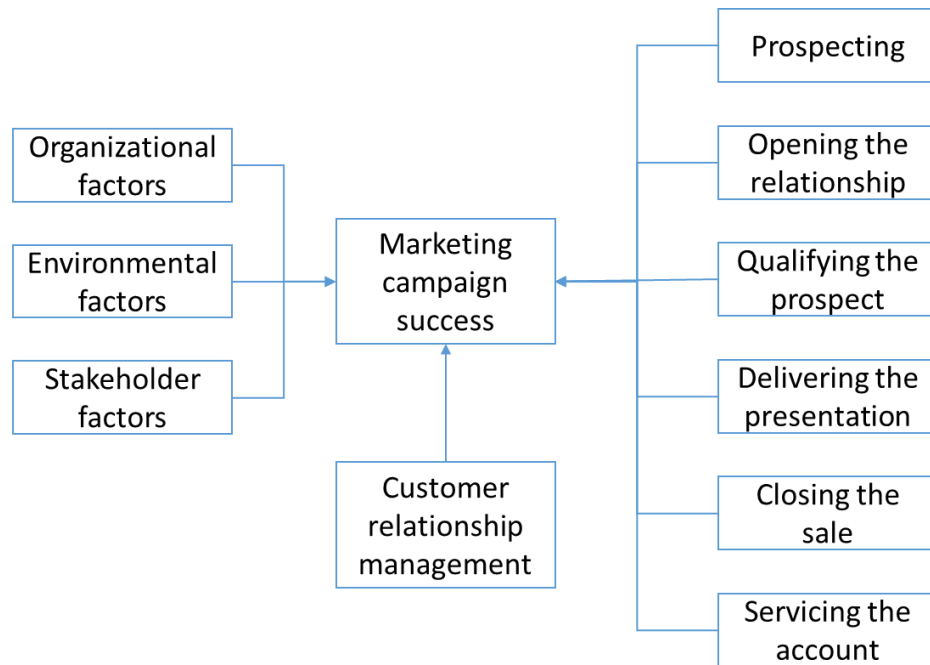


Figure 3. Proposed model for success factors in marketing campaigns (own depiction)

Based on the literature review done in chapter 2, the project proposes various factors that could possibly affect success of a marketing campaign. In the proposed model (Figure 3), all the factors have positive relationship with the objective of sales success. Then, each of the proposed factors are studied in detail in the rest of the project work in order to prove or disprove their relationship with the sales campaign success. Finally, a comprehensive model is generated which explains the success factors involved and serves as a guideline to all sales managers and representatives.

3.2 Organization related factors

The policies, resources and talents of an organization make up an important part of selling environment and sales success. Top management, sales managers and salespeople have an influence over these organizational factors which affect the ultimate success of the selling process. According to Churchill et al. (2000, p. 21), the organizational factors comprise of (1) Managerial factors (2) Human resources (3) Financial resources and (4) Service capabilities. In addition, urgency of the project is classified as a factor related to a project by

Belassi and Tukel (1996, p. 144). It is grouped under organizational category in this research, since an organization encompasses the entire range of project activities.

3.2.1 Managerial factors

Successful selling begins with top management goals and objectives. Sales managers work towards achieving these goals and objectives. A well-defined mission together with top management values and beliefs will lead to strong corporate culture development. Also, the managers must have prior knowledge and experience in management to perform the marketing campaign within the constraints and gain new customers. Moreover, managers need to direct the sales force and allocate the limited resources judiciously to serve potential customers and prospects. (Churchill et al., 2000, pp. 20–21).

Projects mainly fail due to managerial factors such as improper focus of management system, wrong rewarding of action and lack of communication (Belassi and Tukel, 1996, p. 142).

3.2.2 Human resources

Modern sales process requires highly qualified personnel to perform the sales campaign and obtain customers. The sales firm loses potential revenue in the rapidly growing market if it does not have qualified personnel. The losses are aggravated by the fact that it is difficult to recruit highly qualified personnel in a short period of time (Churchill et al., 2000, pp. 21–22).

3.2.3 Financial resources

The financial health of the firm affects many aspects of its customer relationship programme. It can either expand or constrain the potential target market, marketing budget as well as the salesforce dedicated to the task. Sometimes, the companies are forced to take measures such as mergers to obtain crucial financial resources for the project. (Churchill et al., 2000, p. 22). The notion is supported by Bruton and Rubanik (2002, p. 557), who say that financial resources play a major role in the success of a firm and all its activities including its sales and marketing campaign.

3.2.4 Service capabilities

Good service makes it difficult for the competitors to target customers and make them switch, even if the competitors have price advantages (Churchill et al., 2000, p. 22).

Similarly, Lai (2004, p. 386) focusses on resource based view, which deals with the theory that competitive advantages of a firm are derived from its resources and capabilities..

3.2.5 Urgency of the project

When a project is executed within a functional department, the urgency of a project becomes a critical factor for the project's success. Belassi and Tukel (1996, p. 149) add that usually in an organization, functional projects have low priority within the functional department unless they are regarded as urgent, which reflects the commitment of the organizational members. Therefore, project urgency should be correctly identified and communicated in order to complete the project successfully in time.

3.3 Environmental factors

Environmental factors are by definition beyond the control of the selling organization and the sales force. If the company is huge in terms of employees and revenue, they try to influence the environment in ways like political lobbying, etc. However, in general environmental factors remain static and salespeople must adapt their strategies to fit the environment.

3.3.1 Environmental diversity (customers and competitors)

Environmental diversity refers to the amount of similarity or dissimilarity existing in the market in terms of potential customers. If the dissimilarity is high in the market, the needs and preferences are also correspondingly high (Achrol and Stern, 1988, p. 38). To tackle this problem consider complexity in market as consisting of simple pieces added together (Simon, 1991, p. 473). For example, organizational long-term customers have relatively stable needs and the uncertainty associated with them is very low. This information can be used to gain new customers or even better, new categories with special needs.

3.3.2 Environmental concentration

This factor refers to the situation where the market or output resources are concentrated in the hands of a few or many organizations. The environmental concentration is also a measure of the uncertainty in the market, which indirectly affects decision making (Achrol and Stern, 1988, p. 38). Pfeffer (1972, p. 389) suggests that when there is very little environmental concentration, uncertainty is low because the action of an individual firm will have no consequence on other firms. This indirectly affects marketing campaign when the company

doesn't have enough influence in the market to acquire resources necessary for selling process.

3.3.3 Socio-cultural factor

Cultural and social factors affect an organization based on its intercultural aspects and globalization levels. The values of the society influence the way in which new products or services are marketed, especially in small business companies and entrepreneurial beliefs (Hayton and Cacciotti, 2013, p. 708). When there is a difference between the ethics of the sales person and customer, it leads to a stressful situation and may affect firm's performance in gaining new customers. Therefore, culture should be conceptualized and operationalized in marketing to avoid conflicts in cross-cultural selling (Soares et al., 2007, p. 277).

3.3.4 Political factor

There are a variety of laws governing businesses and personal selling process. They reflect a society's values and culture. Hence there can be a lot of variance in laws and politics between different geographical environments requiring varying practices to abide them (Churchill et al., 2000, pp. 14–16; Dubinsky, 1999, pp. 11–12). To cope with such regional variances, the salesforce must specialize in laws relating to location of the customer to be able to sell effectively.

3.3.5 Resource availability

It refers to the availability of raw materials and energy needed to produce, position, promote and price a product or service in the market (Kornai, 1979, p. 803). In case of a shortage of resources, the firm loses key accounts and loyal customers who are sensitive. In new product development projects, the time-to market lengthens and the morale of the team goes down (Cooper and Edgett, 2003, pp. 50–51). Hence, the marketing team needs to continuously adapt to external factors and execute campaign in an agile manner.

3.4 Stakeholder factors

Stakeholder is defined as an individual or a group of individuals who try to influence or are influenced by the execution of the project i.e. marketing campaign (Darnall et al., 2010, p. 1074; Hofmann and Lehner, 2001, p. 58). Stakeholders can be either internal or external to the organization and thus demand a separate chapter in this report to explain their influences and effects on project execution. According to Darnall et al. (2010, p. 1074), stakeholders are of two types: *Primary stakeholders* have a direct economic stake in the

organization (internal stakeholders) and affect the value chain process. This includes people from top management to the final customer. *Secondary stakeholders* are those who are not involved directly in the firm's economic value chain but are concerned and affected by the actions of the firm. For e.g. environmental activists.

Stakeholders help to define the goal of a sales campaign conducted by a firm. With respect to secondary stakeholders, it is the smaller firms which are affected by it. For e.g. environmental activists might complain about damage caused to the environment due to the firm's actions. Hence secondary stakeholder pressure is more on small business firms. The salespeople of a small company need to understand their stakeholders and try to satisfy them as much as possible to avoid future conflicts (Darnall et al., 2010, p. 1076).

Hofmann and Lehner (2001, p. 59) developed the concept of Requirements Engineering to seamlessly derive the needs from the stakeholders and deliver the project output as per their wishes.

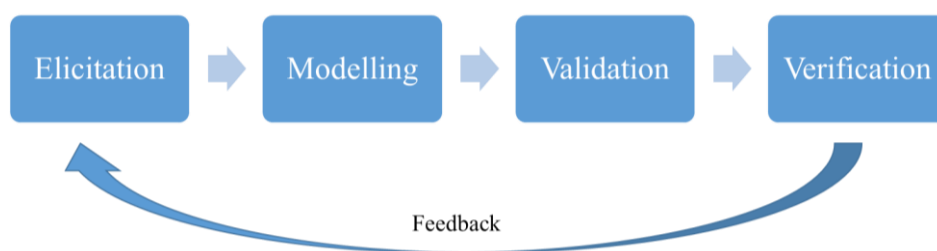


Figure 4. Requirements engineering process (own depiction)

As shown in Figure 4, this process includes four separate but related activities namely, elicitation, modelling, validation and verification (Hofmann and Lehner, 2001, p. 59). Elicitation is the process of analysing documents and interviewing stakeholders in the form of workshops or focus groups. (Hofmann and Lehner, 2001, p. 59). Modelling describes perceived solutions with respect to an application domain through formal, semi-formal or informal notions. There are a lot of modelling methods developed to make the requirements precise such as Quality Function Deployment (QFD), Repertory grids, etc. Further, sometimes prototypes are also developed and presented to the stakeholders for a direct experience and to establish a closer link between the models, the customers' viewpoint and business goals. (Hofmann and Lehner, 2001, p. 59). Validation and verification refers to the feedback given by the stakeholders after being presented with the possible basic solution based on the interpretation of their requirements. (Hofmann and Lehner, 2001, p. 59). The process however does not end with this step. The elicitation step is revisited continuously

through the project to make sure the requirements reflect the priorities of the stakeholder (Hofmann, 2013, p. 227).

3.5 Behavioural and psychological factors

Behavioural and psychological factors refer to those factors that affect a campaign due to responses by either a salesperson or a customer to external stimuli through favourable or unfavourable behaviour. For instance, it could be behavioural responses of customers for customer satisfaction. Behaviour is a conditional outcome and hence can be manipulated by providing the right stimuli to get the desired result. (Athanassopoulos et al., 2001, pp. 688–691).

Several authors have investigated these factors relating to motivation, sales coaching, trust, etc. (Hawes and Rich, 1998; Weitz et al., 1986). They can be broadly classified as seller side or buyer side factors based on whom they affect in the selling process. They are explained below.

3.5.1 Factors affecting selling side

Selling side factors are those factors that affect the salesperson and sales manager in a firm. Based on the literature (Keck et al., 1995; Weitz et al., 1986), three selling side factors namely, motivation, sales coaching, attribution style and control systems are developed.

Motivation: Motivation of sales force is a crucial factor that affects the amount of effort expended for performing the sales activities. It further depends on factors such as extrinsic rewards, peer recognition, office delegation, goal oriented management and career preference. (Keck et al., 1995, p. 17).

- *Extrinsic rewards:* It refers to a tangible or physical award given to the campaign management team for a certain accomplishment. Rewarding is the end result of a process done out of motivation. (Keck et al., 1995, pp. 21–22).
- *Need for peer recognition:* Keck et al. (1995, p. 23) mention that a need for recognition is a driving force to successfully complete a sale and gain a new customer.
- *Willingness to delegate:* Salespeople are happy and perform their task effectively when a sales manager delegates some of his work to the subordinates. This task

conveys a message of trust by the sales manager on the salesforce, which leads to better sales performance. (Keck et al., 1995, p. 22).

- *Goal-oriented management:* According to Keck et al. (1995, p. 28), it refers to target oriented approach by salespeople to achieve their objectives. It involves a numbered centred goal setting method to quantify targets.
- *Career preference:* The salespeople who have a liking towards a certain industry will have higher motivation to perform and increase sales, if they get a chance to work in their preferred industry. (Keck et al., 1995, p. 22).

Sales coaching: It is defined as the coaching of individuals to reach ever-increasing levels of performance. It is hugely important in today's fast paced environment and marketplace, in which firms cannot afford to have incompetent sales personnel. Ineffective salespeople lead to low customer satisfaction, poor retention and downward revenue. Sales coaching is subdivided into three categories: supervisory feedback, role modelling, and salesperson trust in manager. (Hawes and Rich, 1998).

- *Supervisory feedback:* This factor is based on the logic that when a salesperson is rewarded or appreciated for his good behaviour, he is more likely to repeat that behaviour and help the firm in selling process (Hawes and Rich, 1998, p. 57). Podsakoff (1982, p. 76) found that positive, contingent feedback is linked with good job performance while negative feedback was linked with negative job satisfaction.
- *Role Modelling:* Sales managers or sales coach try to be a role model by executing best practices. If the salespeople hold the coach in high regard, then they try to emulate the leader for the benefit of the organization (Hawes and Rich, 1998, p. 58).
- *Salesperson trust in manager:* When the salesforce trusts the manager and top management team, they are likely to work towards the goal of the organization with higher motivation. When the manager is honest and listens to his team members, two-way communication and feedback is possible, which leads to a healthy working environment. (Hawes and Rich, 1998, p. 59).

Attribution style: Attribution theory explained by Dubinsky et al. (1989, p. 9) assumes that individuals try to identify causes of others' behaviour and attempt to react to that behaviour based upon their interpretation. Based on this theory he suggested that sales managers will try to identify the causes of salesperson's performance and react to that performance by giving rewards, punishments, etc. Further, Kelley (1973, p. 107) explains that individuals (i.e. salespersons) also have an inherent need to assign causality of events to certain

behaviour. The attribution of behaviour can be to the individual's own traits, a particular situation or a combination of both traits and situation. Thus, the type of attribution done by salesperson and sales manager affects the future sales performance.

Control systems: They refer to a set of procedures in an organization to monitor, conduct and evaluate its employees. In campaign management, the control systems can be either behaviour based or outcome based. Outcome based control system hold salespeople responsible for the results they produce and doesn't consider the methods and procedures used to achieve the task. In contrast, behaviour based control system controls and directs the activities necessary for success instead of concentrating on the results produced. Most companies use a combination of the two control systems with focus on either outcome or behaviour. (Ahearne et al., 2010, p. 767).

Ahearne et al. (2010, pp. 767–772) propose that experienced salesperson under outcome based control will flourish and use their beliefs to act and produce results. Similarly, salespeople under behaviour based system will have an incentive to follow the firm's directives and allocate their efforts for various products in the firm pushing the focal product according to the firm's recommendations.

3.5.2 Factors affecting buying side

Buying side factors are those that affect the buyers in a B2B context. Factors affecting the customer's behaviour and psychology are emotional contagion, inspirational appeal, threat, promise for specific action, informal interaction, and surprises/gifts.

Emotional contagion: Customer's emotion is influenced by the emotions that the marketing team displays. According to Hatfield et al. (1994, p. 153), emotional contagion is defined as the inclination of humans to automatically mimic and synchronize movements, expressions and postures with those of another person, who is trying to communicate to the listener and hence converge emotionally. Based on this concept, it can be concluded that customer's tend to continuously mimic the salesperson's emotions during interaction. When a customer perceives a salesperson as having good knowledge and is concerned about the customer, he is likely to connect and consider the salesperson's message as positive and complete the sale successfully (Echchakoui, 2016, p. 58).

Inspirational appeal: Inspirational appeal refers to the process of attaching emotional relevance or arousing enthusiasm, sometimes independent of product performance in order to achieve positive affective response from the customer and complete the sale. It could be

an idea or objective that the customer and the company share. (McFarland et al., 2006, p. 105).

Threat: They are defined as the communication of negative effects in case of failure to buy the product or service from the firm. If the theory is correct then the customer will be forced to think about the negative effects of not using the product and consider buying the product. (McFarland et al., 2006, p. 105)

Promise for specific action in future: This factor involves making promises of rewards or benefits to the customer based on a specific action in future. It could be in the form of a loyalty program to increase customer retention. (McFarland et al., 2006, p. 105).

Informal interaction: Here, the salesperson develops an informal relationship with the customer and tries to make deals in an informal manner. Research in this area is scarce, with only a few articles published in B2C context and none in B2B context. In B2C, the term stealth marketing is used to define deception, intrusion and exploitation of customers through social interaction to sell products or services. (Martin and Smith, 2008, p. 46)

Surprises/Gifts: The practice of giving gifts to industrial buyers depends on two factors: the value of the gift and the status of the buyer (prospect or customer). It is considered more ethical and appropriate to give gifts of low value to existing customers, since they are interpreted more as a reward for past business than to obtain future sale. There is a possibility of misconception of gift as bribe, when it is of high value and given to a prospect. Therefore, if it is to be used as a success factor for obtaining new customers, gifts to prospects should be of low value. However, it is advisable to provide gifts after a sale is confirmed with the buyer. Only then, it conveys the appreciation of the buyer by the selling firm. It could be in the form of a birthday present, a free family dinner at a restaurant for the decision maker's wedding anniversary, etc. To make this a success, the data about the influential people in a company is required. (Trawick et al., 1989, pp. 34–36).

3.5.3 Model for behavioural and psychological factors

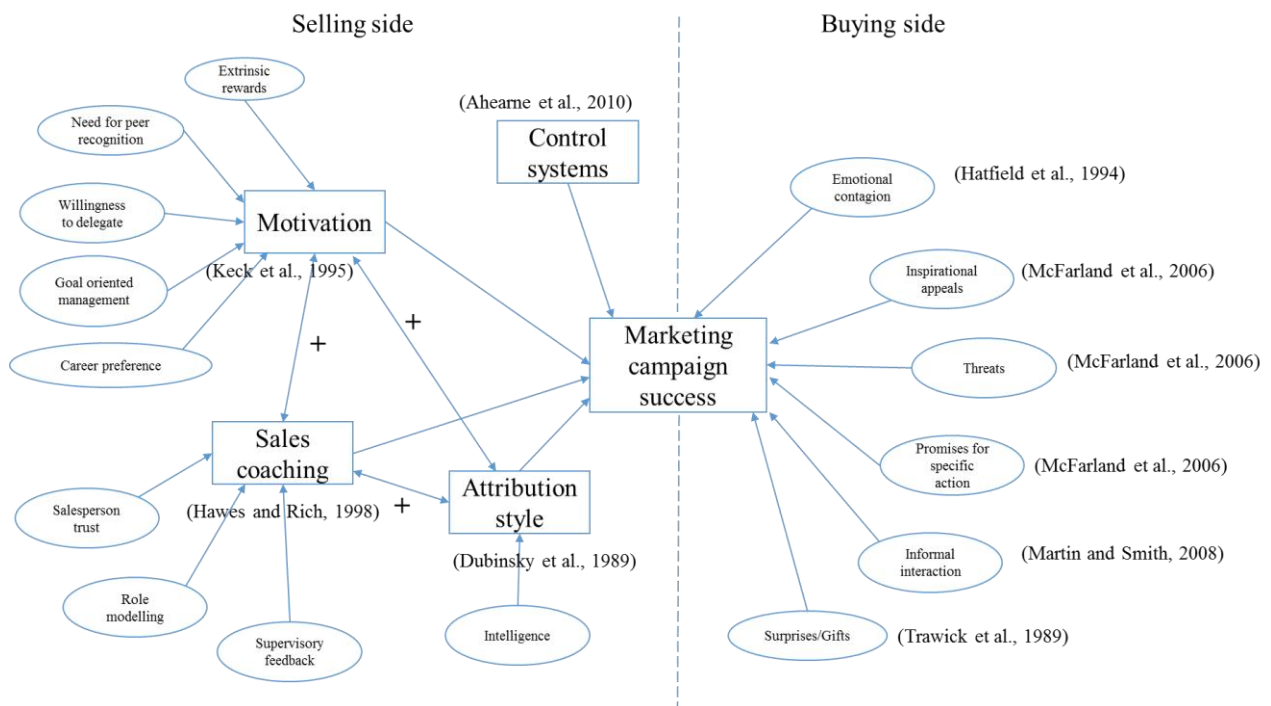


Figure 5. Model for behavioural and psychological factors (own depiction)

Based on the literature, a model for behavioural and psychological factors is proposed in Figure 5. Motivation, sales coaching and attribution style are positively related to each other. Since, motivation depends on goal oriented management and preference of sales career, it is positively related to attribution style (i.e. if motivation is high, it will lead to intrinsic attribution and search for answers to better perform the sales campaign the next time). Similarly, when salespeople are well trained through supervisory feedback and role modelling, they will be highly motivated and have positive attribution style. On the other hand, buying side depends on a list of six factors which are independent of each other.

3.6 Selling process success factors

3.6.1 Success factors in prospecting

When considering success factors in B2B selling, the most prominent and highly researched factor is prospecting. It's considered as a critical success factor since it's almost always the first step in the selling process. If the prospecting for customers is unsuccessful, it affects all the consecutive steps leading to a campaign failure or an unsatisfied customer. (Jolson and Wotruba, 1992, p. 59).

Prospecting further depends on several factors which determine the success of the selling process as a whole. Based on literature survey, the factors identified are classified as role congruence, personal observation, popularity in the community, telemarketing and domain knowledge. They are explained in detail below.

Role congruence: Riordan et al. (1977, p. 532) describe the concept of role congruence and character similarity. Both customer and salesperson assume the role of each other and interact during the first stage of prospecting. Depending upon their conception of how well the role was fulfilled, the salesperson decides to classify the prospect as a potential customer and the customer decides on whether to buy the product or not.

Personal observation: It refers to the act of observing the prospect and asking direct question to assess his interest. According to Hite and Bellizzi (1985, p. 22), it is the most important and widely used prospecting technique by both industrial and consumer salespeople.

Popularity in the community: It is the process of being popular and well known in the industry either through company brand or having visible accounts. Based on the survey conducted by Hite and Bellizzi (1985, p. 20) of 170 salespeople from industrial and consumer sector, it was evident that salespeople push to achieve this even though it is not easy to affect the brand and popularity in a short period of time.

Domain Knowledge: According to Jolson and Wotruba (1992, p. 61), the prospects are classified as company-initiated leads, prospect-initiated leads and salesperson-initiated leads. When a salesperson initiates leads, the prospecting process depends on the domain knowledge of the salesperson. Therefore, to increase the quality of prospecting, the educational qualification and knowledge of employees plays a critical role.

Telemarketing: Telemarketing is one of the factors which can either be a success factor or a failure factor for selling process depending on the type of usage. Moncrief et al. (1989, p. 2) explained this with the help of a chart (Figure 6) between two dimensions namely, contact necessity and selling complexity. They conclude that telemarketing is useful for products where face-to-face contact is not necessary.

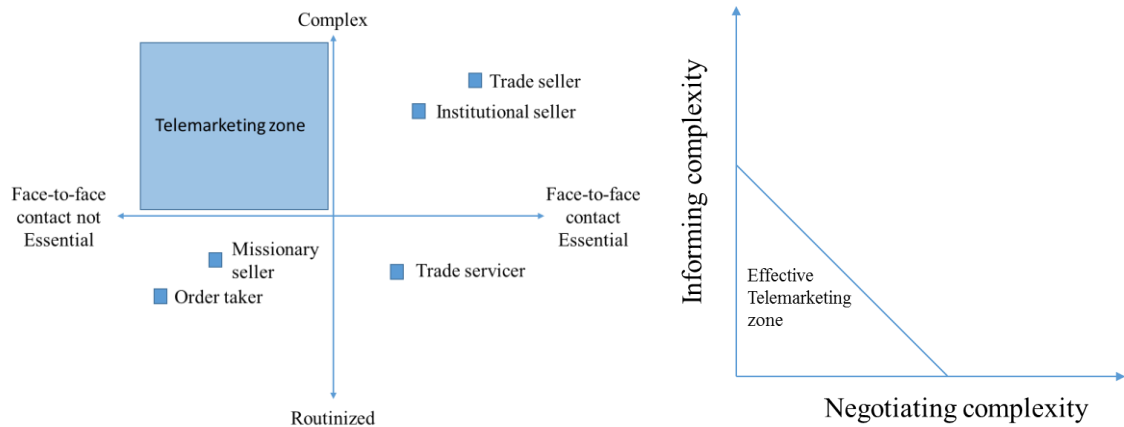


Figure 6. Need for telemarketing (Brown and Brucker, 1987, p. 186; Moncrief et al., 1989, p. 2)

Majority of authors have concentrated research on Telemarketing in B2B rather than B2C context. This gives us an insight that telemarketing could be more useful and prominent in B2B than B2C. A summary of various research on telemarketing is provided in the Table 3.

Table 3. Review of telemarketing literature

Author	Context	Key points
(Brown and Brucker, 1987)	B2B	<ul style="list-style-type: none"> Explains the purposes of telemarketing as Informing, Negotiating and Fulfilling. Informing is the offer to solve the customers' problems. Negotiating refers to clarifying the customer's problem and the determination of the extent to which it can be solved.
(Wyman, 1990)	B2C	<ul style="list-style-type: none"> Telemarketing is classified as reactive and proactive Telemarketing. Attributes that play an important role are reputation of a calling company, courteousness of the salesperson and the interest of a customer on the product.
(Maulana and Nurulfirdausi, 2015)	B2C	<ul style="list-style-type: none"> Customer behaviour is segmented into Permissive, Apathetic, and Aggressive. Permissive and apathetic customers try to answer or ignore a Telemarketing call,

		whereas aggressive customers try to avoid it any cost.
(Marshall and Vredenburg, 1988)	B2B	<ul style="list-style-type: none"> • Firms benefitting from telemarketing carefully plan, manage and implement telemarketing plans. • Successful firms have exclusive representatives, pay them bonus and provide them special office facilities.
(Voorhees and Coppett, 1983)	B2B	<ul style="list-style-type: none"> • Various uses of telemarketing in B2B context are discussed: sales lead qualification, selling to marginal accounts, new product information dissemination, customer inquiry, complaint handling and product research.
(Coppett and Voorhees, 1985)	B2B/B2C	<ul style="list-style-type: none"> • Telemarketing is a method to reduce rising sales costs. • Explains about its uses such as account management, sales support and customer service.
(Cardozo and Shipp, 1987, 1987)	B2B	<ul style="list-style-type: none"> • Telemarketing is the process of systematic and continuous calling by dedicated persons rather than episodic use of telephone by salespeople.

It can be understood from the above table that the demography of the customers and their behaviour is important in B2C context (Wyman, 1990, pp. 38–40).

In contrast to B2C, the focus in B2B is on the salesperson. It details the interaction process and divides it into three steps namely, informing, negotiating and fulfilling. Informing involves searching for customer problems and offering to solve them. Negotiating describes the interaction with the customer to determine the exact needs and the extent to which it can be solved. Fulfilling is executing the project and providing solutions. (Brown and Brucker, 1987, p. 186).

From the gathered literature it is proposed that telemarketing can be used in both B2B and B2C markets but for different purposes. In B2C, the success of telemarketing depends

mainly on the demographics of the customer and the interest in the product or service. Hence, it is a cheap alternative to door-to-door sales. In B2B marketing, it is used as a prospecting tool to scan the population and determine the interest of the customer. The focus is on salesperson, whose interaction process with the customer is well-thought and scripted in order to determine leads.

3.6.2 Success factors in opening the relationship

Opening relationship with a prospect involves choosing the right customer touch point to approach the prospect and providing value as per his requirements. Customer touch points are defined as the channels through which a firm approaches a customer. They can be in the form of internet, email, direct mail, telemarketing operations, advertising and kiosks. (Chen and Popovich, 2003, p. 672). The success factors are explained below.

Appropriate channel strategy: Payne and Frow (2004) suggest different channel strategies and their fit for different market segments targeted by the company by leveraging information of channel members and channel options available. They investigate various channels such as mono-channel provider strategy, customer segment channel strategy, graduated account management strategy and integrated channel strategy. Finally, they recommend to use integrated channel strategy which involves utilising the full range of commercially viable channels to serve customers based on their needs.

Direct approach techniques: The most significant techniques summarised by Hite and Bellizzi (1985) in order of importance were consumer-benefit approach, curiosity approach, question approach and complement approach. Both industrial and consumer salespeople found these techniques to be key to open a relationship with a customer. Customer-benefit approach refers to the salesperson discussing the benefits of the product and measuring the interest of the customer. Curiosity approach deals with appealing to the curiosity of the prospect by offering a benefit. Question approach involves opening the conversation with a question whereas a complement approach uses complementary phrases to praise and appreciate the customer to gain a meeting with the prospect. (Hite and Bellizzi, 1985, p. 24).

Customer touchpoint chain: This factor forces the marketing team to think in terms of customer touchpoints to determine which touchpoint will have the greatest impact on the customer and how will it affect the customer perception. Clatworthy (2011, p. 16) suggests that service encounters occur when a person interacts with a touchpoint. Therefore, thinking around touchpoints similar to a service blueprint can help develop the relationship with a

customer. Extending this concept further, Hogan et al. (2004, p. 48) developed a customer experience touchpoint chain to approach and open the relationship with the customer.

Team selling: When the product is complex, the individual salesperson is replaced by a team. A conceptualization of selling teams was offered by Moon and Armstrong (1994), who describe a framework for two types of selling teams: core teams and selling centres. Here, the interactions between the buyer and seller are supported by a large number of people from within the organization on both sides (Moon and Armstrong, 1994, pp. 17–23).

Some of the literature refers to team selling as National account management (NAM) or selling centre, as in the case of Cardozo and Shipp (1987). NAM usually combines sales and service or technical representation to provide high level of customer service to high revenue-generating customers with complex service needs. NAM is usually found in conjunction with other selling methods since the high cost of national account management is not justified for all customers. (Cardozo and Shipp, 1987, p. 25). A review of related literature is given in Table 4.

Table 4. Review of team selling literature

Author	Term used	Key points
(Hutt et al., 1985)	Selling centre	<ul style="list-style-type: none"> Organizational selling centre consists of members from the organization who are involved in initiating and maintaining customer relationships. Participants assume various roles in organization selling centre.
(Barrett, 1986)	National account marketing	<ul style="list-style-type: none"> The firm's 80% revenue is generated by 20% of the customers Special attention to a group of customers through NAM to improve communication and coordination.
(Spekman and Johnston, 1986)	Selling centre	<ul style="list-style-type: none"> Individuals from the organization with an aim of coordinating the overall market program. Relationship becomes the primary objective along with managing the problems of the selling centre.

(Cardozo and Shipp, 1987)	National account management	<ul style="list-style-type: none"> • Increasing costs and changing customer requirements call for change in selling methods. • An adaption of current selling methods and roles is suggested.
(Cespedes et al., 1989)	Selling team	<ul style="list-style-type: none"> • Consists of three types of teamwork situations: (1) Joint effort by all team members. (2) National account managers coordinate with field sales reps. (3) District sales managers take care of important accounts across districts but performance is evaluated intra-district.
(Moon and Armstrong, 1994)	Selling team	<ul style="list-style-type: none"> • Develops two types of teams: core teams and selling teams. • Core teams develop sales strategy for the customer whereas selling team consists of individuals from the selling side involved in the transaction.

3.6.3 Success factors in qualifying the prospect

Qualifying a sales lead is the process of effectively and efficiently analysing the prospects to determine their feasibility and profitability for a future sale of a product or service (Jolson, 1988, p. 189). Three success factors are identified for this step, which are explained below.

Prospect classification: Jolson (1988, p. 191) considers qualification as an arbitrary continuum consisting of six different stages to sell from “ready to buy the product” to “non-existent needs”. By qualifying, we obtain quantitative information about the customer and can proceed further to deliver the sales message. The classification is depicted in the form of a flowchart in the Figure 7.

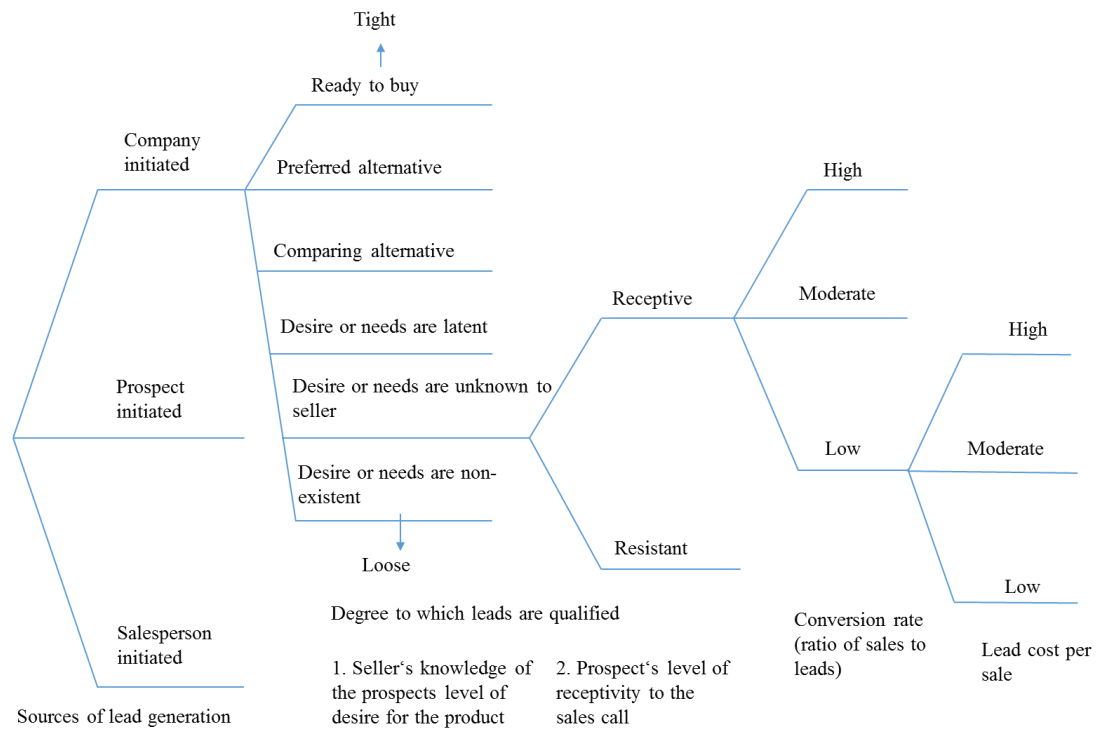


Figure 7. Prospect classification flow chart (Jolson, 1988, p. 190)

First column in the model describes the major types of lead generation sources followed by prospect classification in the second column. The prospect is classified based on the seller knowledge of the customer and the prospect's receptivity to the salesperson. Metrics such as conversion rate and lead cost per sale are measured, which help the firm to optimise its prospect qualification and avoid unprofitable and expensive leads over time. Jolson (1988, pp. 190–193).

Use of databases: A database is used to store a large amount of information on the firm's products, services, competitors and customers. This database is especially used by the marketing and sales department to obtain useful information and qualify the prospects. van Doren and Stickney (1990, pp. 201–202) suggest a database divided with the functionalities: marketing and sales, communications and processing, retrieving information and maintenance, tracking and feedback.

Experience effect: This is one of the most obvious success factor for qualifying the prospect. As a salesperson gains experience and works in the industry for a long time, his ability to judge a sales lead intuitively increases. Therefore, experienced salespeople are recommended to lead a marketing campaign and guide all the other members in their team. Jolson (1988, p. 196) found that cost/output ratio falls dramatically as experience of a salesperson increases.

3.6.4 Success factors in presenting the sales message

A sales presentation is the place where salesperson's efforts unfold, exchange of information occurs and buyer starts thinking to buy. The rapid changes in selling environment during a presentation, pressure to succeed and emphasis on relationship-oriented selling make the interaction a key process to finally make a sale. (Johlke, 2006, p. 78). But a prerequisite for sales presentation is prior knowledge of the customers and their business, customer's trust on the salesperson and adaptability to the requirements of the customers (Cicala et al., 2012, p. 83). Three major factors affecting presentations are detailed below.

Sales-specific presentation skills: Johlke (2006, p. 311) hypothesised a model in his study that consisted of sales specific success factors such as active listening, adaptive selling, handling customer objections, closing sales in a presentation, negotiating with customers and prospects, etc. To test his hypothesis, he collected data by surveying 236 B2B salespeople with the help of a questionnaire. He concluded that the most significant skills were adaptive behaviour and ability to close a sales presentation.

Adaptive selling is defined as the adjustment of sales behaviour simultaneously during an interaction with a potential customer based on the perceived information gained during a selling situation (Weitz et al., 1986, p. 174). According to Weitz et al. (1986, p. 176), adaptive selling is dependent on the motivation to practice it due to several reasons: a) the degree of intrinsic reward orientation of salespeople b) the inclination of salespeople to attribute a sales success to sales strategy and c) the degree of capability of a salesperson to practice adaptive selling. Spiro and Weitz (1990, pp. 63–64) propose four factors affecting adaptive selling method. The factors identified are useful in determining adaptive selling potential of inexperienced salespeople.

- *Androgyny*: In sales context, it relates to selection of a specific interaction pattern suitable to a situation. Hence, androgynous salespeople are flexible in sales interactions and likely to practice adaptive selling. (Spiro and Weitz, 1990, p. 63).
- *Locus of control*: Rotter (1966, p. 1) describes locus of control as a behaviour, in which a person attributes the reason for a reward or reinforcement to one's own behaviour (internal control) or unpredictable factors such as luck and fate (external control). The level to which salespeople have internal locus of control is associated with ability to practice adaptive selling.
- *Empathy*: For salespeople, it specifically refers to the degree of perspective talking, empathetic concern and social self-confidence. Perspective talking involves

knowledge that different customers have different needs and adapting conversation according to customer needs (Spiro and Weitz, 1990, p. 63).

- *Self-monitoring*: Degree to which salespeople adapt to situations and their ability to do so is defined by self-monitoring. Hence, self-monitoring is positively related to adaptive selling (Spiro and Weitz, 1990, p. 63).

Communication constructs: Communication constructs are based on the communication style, which is defined as the way in which a person verbally interacts and conveys meaning to a receiver. It also depends on the way, the receiver takes the message, filters and understands it (Norton, 1978, p. 99). Norton (1978, p. 100) identified ten sub constructs for communication style. The constructs are contentious, friendly, open, dominant, dramatic, attentive, precise, animated, relaxed and impression-leaving. Dion and Notarantonio (1992, p. 63) based their research on these constructs and concluded that if the salesperson was precise and friendly in his communication style, the selling was effective than other dimensions.

Voice characteristics: An exploratory study by Peterson (1995) revealed that voice characteristics are critical for effectiveness of sales presentations. Though this study was done in the B2C sector, it is proposed that it can be extended to B2B context as well, since the effect of voice on human beings is same regardless of any industry. It was found that rate of speaking, average pause of duration and fundamental frequency contour were significantly related to output sales performance (Peterson, 1995, p. 1).

3.6.5 Success factors in closing the sale

Closing techniques are one of the most popular topics among trade magazines but not much attention has been paid by academicians on this issue. Practitioners believe that good closing techniques will help them to uncover hidden objections, overcome customer inertia, determine whether more time needs to be invested on the prospect and ascertain the buying stage of customers (Hawes et al., 1996, p. 350). Both direct and indirect persuasion factors are explained below.

Direct persuasion factor: The direct close involves asking the customers to buy the product by stating the benefits and offering discounts to persuade the customer. Some of the techniques found successful by salespeople as determined by Hite and Bellizzi (1985, p. 28) are listed below.

- *Direct close*: This closing technique deals with asking for order from customers in a straight forward manner without any delay after the presentation. (Hite and Bellizzi, 1985, pp. 27–28).
- *Summary close*: Here, the salesperson summarises the benefits once again after the sales presentation and induces the buying decision (Hite and Bellizzi, 1985, p. 28).
- *Single obstacle close*: Salesperson asks the customer for this feedback regarding concerns about the product and eliminates the obstacles (usually one) before closing the sale (Hite and Bellizzi, 1985, pp. 27–28).
- *Assumption close*: In this method, the salesperson assumes that the prospect is ready to buy the product and hence focusses on the details such as transaction method and delivery (Hite and Bellizzi, 1985, pp. 27–28).
- *Choice close*: Also known as either-or close is a variation of the assumption close. Instead of discussing the details of the order, the salesperson asks the customer, which of the two variations of the product the customer would prefer (Hite and Bellizzi, 1985, p. 28). The either-or close has an added advantage of asking for a decision to be made, even though the salesperson assumes a sale (Hawes et al., 1996, p. 351).

Indirect persuasion factor (trust): Due to the overwhelming amount of information that competes for attention of a buyer, the buyers try to avoid the effort of thinking and instead choose to make decision based on the salesperson cues and selling context. Therefore, in such circumstances salespeople may be perceived as manipulative if they try to persuade the customer directly to buy the product. The customers view this as a restriction of their freedom. Hawes et al. (1996) considered the impact of selling techniques on trust for a sample of 238 purchasing executives. The results revealed that a “no-close” condition resulted in highest level of trust. It is suggested that usage of closing techniques increases the immediate sales probability, but doesn’t ensure long term commitment.

3.6.6 Success factors in servicing the account

The service level of a firm depends on the performance of its salespeople who serve a customer after sale. The success factors aim at effectively managing the customer-contact employees to ensure that the quality of service is maintained after sale. Hence, it is a very important step of personal selling. (Hartline and Ferrell, 1996, pp. 52–54).

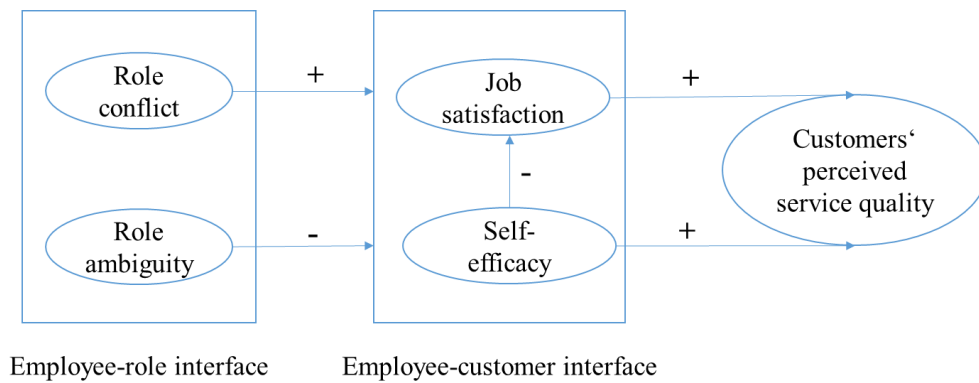


Figure 8. Factors affecting customer service (Hartline and Ferrell, 1996, p. 54)

Hartline and Ferrell (1996) investigate the effect of factors role conflict, role ambiguity, job satisfaction, self-efficacy and adaptability on customers' perceived service quality. As shown in Figure 8, it was concluded that employee self-efficacy and job satisfaction had a positive effect on perceived service quality, with self-efficacy having higher influence than job satisfaction and affecting job satisfaction negatively. In employee-role interface, role ambiguity as expected had a negative relationship with all the three factors in employee-customer interface. However surprisingly, role conflict increased self-efficacy of a salesperson. These factors and their relationships are explained below.

Employee self-efficacy: Self-efficacy is defined as the employee's confidence in his or her ability to perform a given task. As it increases, employees learn to cope with different challenges. Therefore, employees who have strong self-efficacy are more likely to service the customers better. (Hartline and Ferrell, 1996, p. 54).

Employee job satisfaction: It is a state of pleasure resulting from appraisal for a successful completion of a job either by employee himself or herself or other superiors. The higher the satisfaction of the employee, the higher is his performance leading to customer satisfaction. (Hartline and Ferrell, 1996, p. 54).

Employee role ambiguity: The employee gets frustrated due to lack of information and does his job without satisfaction. Therefore, role ambiguity indirectly affects customer service. (Hartline and Ferrell, 1996, p. 55).

Employee role conflict: Role conflict is defined as the conflict within the job set of an employee, such that performing a job will conflict with another. When a role conflict is high, the job satisfaction of an employee is low but the self-efficacy is high since employees learn to cope with conflicting demands. (Hartline and Ferrell, 1996, p. 55, 60).

3.7 Customer relationship management

Customer relationship management (CRM) is defined as a business strategy that targets to implement value-creating relationships with its customers on a long term basis using IT technology to manage the customer database and satisfy customer needs. (Garrido-Moreno and Padilla-Meléndez, 2011, p. 438) .

CRM is an extension of the final step “Servicing the account” in the personal selling process. After the sale is completed, the firm cannot relax and concentrate on finding the next customer. To retain customers, a lot of companies are investing in CRM systems and incorporating sales force automation (SFA), data warehousing, data mining and other IT tools (Speier and Venkatesh, 2002, p. 98). However, there has been a high failure rate in CRM implementation in the past (Garrido-Moreno and Padilla-Meléndez, 2011, p. 437). Therefore, there is a need to determine the factors affecting CRM success, which in turn affects the sales success of an organization.

Gathering all the information from literature survey, an integrated framework of success factors for CRM is proposed. The model (Figure 9) consists of four customer side factors and four selling side factors which affect CRM success, that in turn affect customer satisfaction, customer retention and ultimately sales growth for a firm. In the proposed model all the factors individually need to be at a positive level to affect the sales growth in a positive manner.

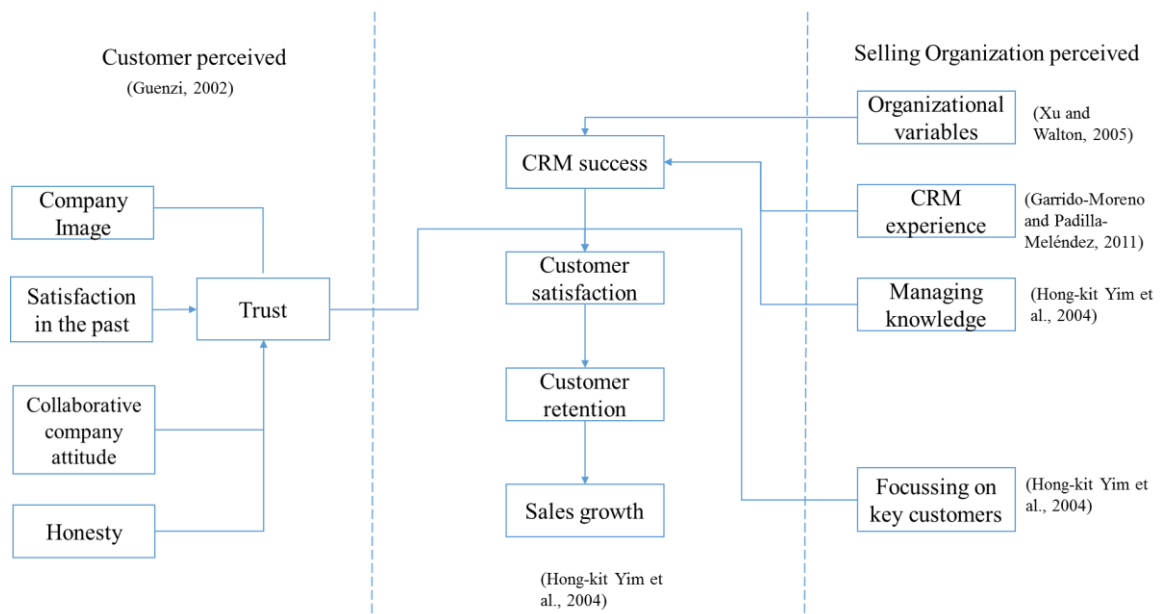


Figure 9. Model for factors affecting CRM (own depiction)

3.7.1 Customer perceived factors

Company image: It refers to the brand equity of the company which affects the buying perception of the customer. This factor is positively related to trust on the company by the customer (Guenzi, 2002, p. 767).

Satisfaction in the past: Guenzi (2002, p. 766) identified satisfaction in the past as an antecedent to trust. It relates to the previous sales encounters and salesperson meetings that influence the decision making capability of the customer.

Collaborative company attitude: It is an organizational variable as perceived by the customer. Similar to the factor “satisfaction in the past”, the collaborative attitude of a company is highly rated by a customer in terms of generating trust. (Guenzi, 2002, p. 766).

Honesty: This factor is defined as the salesperson honesty as perceived by the customer. Along with honesty, salesperson benevolence is also mentioned as a widely considered antecedent for trust on the company. (Guenzi, 2002, p. 753).

3.7.2 Selling organization perceived factors

Organizational variables: They deal with aspects like resource allocation, staff management and the organization structure (Garrido-Moreno and Padilla-Meléndez, 2011, p. 439). For an effective CRM, organizational structure needs to be transformed to have a synergy between technology, people and processes (Xu and Walton, 2005, p. 968).

CRM experience: Since implementing CRM requires a substantial change in the organization, it is necessary and useful to have experience related to implementation of CRM (Garrido-Moreno and Padilla-Meléndez, 2011, p. 439).

Managing knowledge: This factor deals with management of customer information and transformation to knowledge. When the salespeople have this information, they are better equipped to approach a customer with confidence and satisfy his needs leading to a long term relationship. (Hong-kit Yim et al., 2004, p. 267).

Focussing on key customers: It is one of the important factors affecting CRM in any organization. Based on the interactions with customer, their lifetime value is calculated. This is used to achieve deep customer relationships and gain profitable customers. (Hong-kit Yim et al., 2004, p. 267).

3.8 Technology factors

Advent of information technology in recent years has revolutionised marketing and sales management in companies. With large amount of data and the corresponding information technology available, companies are striving to extract useful information in order to gain competitive advantage and support organizational decisions (Shaw et al., 2001, p. 127). The research (e.g. Jayaram et al., 2015; Shaw et al., 2001; Sultan, 2011) reveals various technological factors affecting marketing campaigns.

3.8.1 Sales management technology

In general, sales management software is used automate the conventional processes performed manually by managers such as sales lead scoring, motivating team and keeping track of sales performance (Duncan and Elkan, 2015, p. 1751). Usually, such software make use of cloud computing technology to provide service. Since the data is stored at a different location as compared to the company, it helps companies satisfy legal requirements with respect to customer data (Sultan, 2011, p. 273). A good example of a sales management software is “Salesforce”, which follows “Software as a Service” business model (Ma, 2007, p. 702).

3.8.2 Knowledge management and data mining technology

Knowledge management is the iterative process of discovery and management of huge marketing data enabled through data mining techniques (Shaw et al., 2001, p. 130). Shaw et al. (2001, p. 133) identify three application areas for data mining and knowledge management as (1) customer profiling, (2) deviation analysis and (3) trend analysis. Customer profiling deals with developing a model for a customer to be used for making strategies in marketing campaigns. This information could be used to compute customer lifetime values during prospecting and eventually determine the overall marketing campaign success or failure. Deviation analysis involves detection of deviation in customer behaviour and taking corrective action in time to avoid losing the customer. Trend analysis deals with identification of patterns over a period of time. These knowledge management and data mining techniques are performed through software such as SQL, R-programming, SAS and Tableau.

3.8.3 Website design and web analytics

Tonkin et al. (2011, p. 24) advocate the concept of performance marketing and online marketing. They advise that a website is key to sales success and recommend that every

business organization regardless of B2B or B2C must have a website, brand and story that is visible to the entire world. Moreover, technologies such as Search Engine Marketing (SEO) and Pay Per Click (PPC) can be used. The data collected from websites such as the average duration of a visit and number of visits by a particular user is applied in prospecting step of the selling process to determine a potential customer. Thus usage of such technologies reduces the effort of sales personnel and overall cost while predicting with a certain probability.

4 Comprehensive model for success factors in marketing campaigns

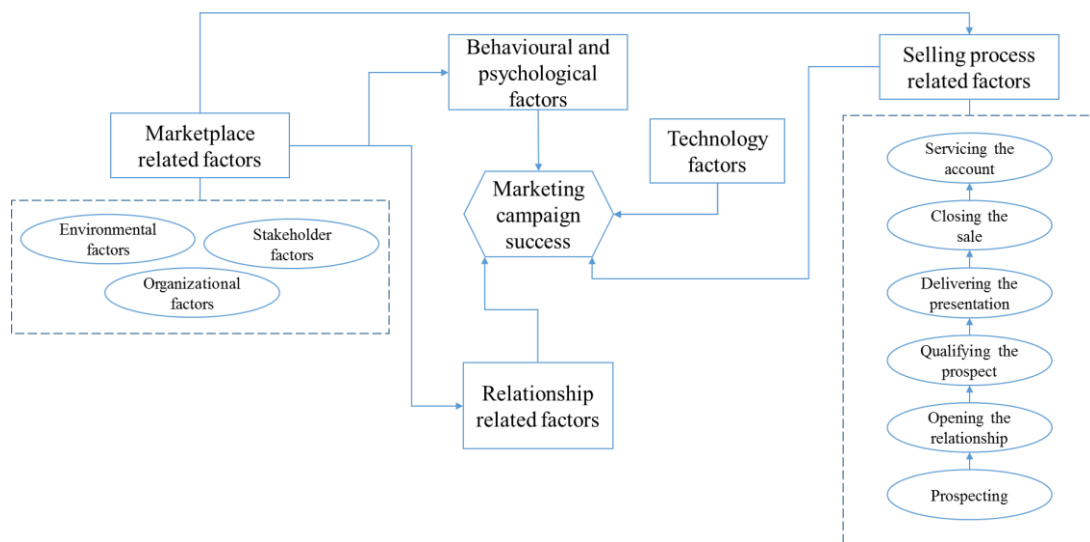


Figure 10. Success factors model of a marketing campaign (own depiction)

Figure 10 shows the comprehensive model for success factors in marketing campaigns. The factors proposed in the Figure 3 at the beginning of the project work were found out to be positively related to marketing campaign success. Additionally, behavioural and psychological factors were added to the framework when compared to the previous model. However, every factor was not found to be equally important. Factors related to environment, stakeholders and organization exhibited similar characteristics and were found to be at a higher level when compared project objectives (Wit, 1988, p. 167). Hence they were grouped under the cluster name “marketplace related factors”. They act as prerequisites for any campaign success and affect all the remaining factors in the framework.

Considering selling process related factors, it was determined that consecutive factors depend on the previous step in the sales process (Jolson and Wotruba, 1992, p. 59). As a result, all the factors were ordered sequentially according to the selling step they affected

unlike the previously proposed model, where individual steps were assumed to be totally independent of each other. The research work also revealed that behavioural and psychological factors affected sales management in a major way with factors like motivation, sales coaching, trust, etc. The term “customer relationship management” was replaced with “Relationship related factors” in the final framework, which included factors such as trust and customer satisfaction (Guenzi, 2002, p. 767).

Therefore to summarize, marketplace related factors were found out to be prerequisites for success of other factors. Factors: behavioural and psychological, relationship-related, technology-related and selling process-related were directly associated with marketing campaign success. Moreover, the factors inside selling process cluster were sequential in their order of relation and it was established that if any of the stepwise factors in the chain failed, the project failed.

5 Conclusion and recommendation

5.1 Conclusion

This project work attempts to highlight the success factors and map the relationship between them in order to better understand the process and solve the mysteries related to personal selling campaigns. Hence a comprehensive study of the success factors was done through literature review and a model to represent their relationships was generated. The factors studied are all found to be effective and affect marketing campaign at various degrees either directly or indirectly.

The organization-related factors, environment-related factors and stakeholder factors are grouped in the cluster marketplace factors, which is a prerequisite for other factors to positively affect the project. Environmental diversity as well as concentration seem to increase the uncertainty in decision making of the selling firm due to a large number of choices and methods in which the product could be sold. In addition, they also reduce the influence a company has on the market. Similarly, the top management support is a major criterion in organizational related factors. Finally, stakeholders are identified as a critical part of any project and continuous contact with them to collect the requirements is a factor promoting success of marketing campaigns

Based on the study of behavioural and psychological factors, it is evident that both salespeople and customers are affected by it and they play a part in the final outcome.

Stemming from the review of literature, motivated salesmen are found to work effectively and perform their job tasks on time. Attribution style and control systems influence the methods used by salespeople in selling process and the freedom provided by the organization to perform the same. On the buying side, factors seem to be more complementary in nature. They attract the customers by appealing to their excitement needs such as gifts, enhanced service, discounts in future, etc.

Each step of the personal selling process is found to have specific factors that impact sales success. Prospecting step illustrates the importance of role congruence between the salesperson and prospect for classifying the potential of a customer after their interaction. Opening a relationship with a prospect is affected by the channels used for communication by the selling firm and the touch points targeted. Based on the information from these steps, qualifying a prospect is ascertained to be most successful when the sales team uses databases and information technology. However, delivering a sales presentation is considered to be an art consisting of general communication factors as well as sales specific factors. Similar to delivering a presentation, closing a sale is also dependent on the persuasion ability of a sales representative. Finally, servicing an account is dependent on the job role and motivational level of an employee. It is seen that motivated employees seem to provide a better quality of service after sale.

Retaining the customers is important for the long term success of a company. To aid this process, CRM and technology are determined as useful factors. Technology is used for activities such as sales management, data collection, analysis, etc.

5.2 Implications on managers

The selling process and the related success factors discussed in this report have considerable contributions to sales management with respect to selling effectiveness. Based on the research done regarding salespeople classification, it is clear that effective and ineffective salespeople weigh the same classification cues differently to classify sales leads (Szymanski, 1990). Sales managers could improve the performance of unsuccessful salespeople by learning cues from the successful salespeople and providing necessary training to improve sales efficiency. In addition, when sales managers classify the sales personnel as either successful or unsuccessful, it would be accurate and precise when they take a holistic approach and consider all information available rather than just basing their decision on the number of customers earned by the salesperson.

Top management approval and support is necessary for every activity and sales is no exception. For instance, a sales team must be formed at the beginning of every campaign and regular meetings must be held with the top management to report progress and obtain feedback. Forming sales teams helps to train the salespeople in a particular field thoroughly, who could be reused in future for similar campaigns. Similarly, elicitation process must be carried out throughout the project through focus groups, emails, etc. Therefore, best practice would be to allocate fifteen percent of project effort to marketplace factors, maintain good relationship and prioritize requirements (Hofmann and Lehner, 2001, p. 65). When considering environmental factors, resource availability is a major factor to develop a product and market it. Even though it may seem slightly counter intuitive, sales personnel must try to demarket a product till the resources are available.

Behavioural and psychological factors reveal that they affect a salesperson selling style which ultimately affects the sales performance. Motivational factors such as extrinsic rewards, need for peer recognition, willingness to delegate, can be analysed by sales managers by varying each factor and obtaining the best level for each on a short term and long term basis. Rewards for a short period of time might increase motivation of salespeople in the short term but reduce the job satisfaction in the long term if no more rewards are offered. Moreover, sales managers should provide positive feedback whenever possible to motivate the employees and empower salespeople to give them confidence that they are doing the job as expected. Control system factors by Ahearne et al. (2010) inform managers that they should evaluate the salespeople on both behaviour and outcome based systems depending on the salesperson experience. It is suggested that for an experienced salesperson, outcome based control is better since it allows him to express his creativity and produce results needed. Whereas inexperienced salespeople will benefit from behaviour based control system.

The results of success factors in prospecting step indicate that role congruence plays a crucial part in prospecting success. To take full advantage of role congruence, sales managers must carefully train their employees to not send any negative cues while interacting with prospects. Also, managers need to hire employees with prior domain knowledge so that effort required to integrate them in the organization is low and performance is high right from the beginning of their job tenure.

Factors in opening the relationship indicate that the channel and method of approach to a prospect is critical in determining the success of a selling process. In service industry, a

service blueprint is extremely helpful to determine the most effective customer touch point. Qualifying a prospect research suggests that managers in sales and marketing need to have access to databases of customer information. In special cases, managers could also consider purchasing market research data in order to qualify prospects. Research work by Johlke (2006) confirms the importance of sales presentation as a key construct to make a sale. One way to tackle negotiations and handle objections regarding the product is to provide salesperson with customer data and review of previous customer interactions to predict customer type and prepare the presentation accordingly. As Dion and Notarantonio (1992) suggest, the concept of blending could be practised by sales representatives during a presentation. Results for research in the step closing of a sale confirm that closing can be performed in a variety of successful ways. Managers must insist salespeople to try to sell using trust as a persuasion factor because the prospect might be annoyed when the salesperson tries to force a sale. Servicing an account after sale is all about maintaining the employees motivated and satisfied in their job. To solve this problem, the managers themselves must be committed to the task of improving service quality continuously. Another aspect that could improve service quality is clarification of role ambiguity.

Extending the concept of servicing the account after sale, review of customer relationship management seems to suggest that it is a critical step to maintain customers and revenue to a firm. Hence to promote CRM orientation among sales employees, it is necessary to educate, create awareness and increase involvement of employees in decision making. In addition, the company must be in constant touch with the customers in order to improve the customer perception and trust on the selling organization. It can be done through regular meetings, technical support and maintenance for the product or service sold to the customer. By this, the customer has a channel to immediately raise his concerns and gives the selling firm the opportunity to correct its mistakes and gain the trust of the customer. During recruitment of sales employees, managers must look at factors such as customer orientation, reward orientation and sales aptitude.

To quickly obtain information from computer systems and execute sales decisions, managers must consider recruiting employees with IT background in the sales department. Alternatively, the sales managers can undergo training in the form of one day workshops to update their IT knowledge.

5.3 Limitations and directions for future research

The study of success factors in marketing campaigns is based on conclusions drawn from a wide variety of research work in industrial sales context focussing on different aspects of campaigns. The industries dealt with are also quite different. However, the summarizations in this research are generalized in order to be industry neutral. This leads to elimination of information regarding importance of success factors, which are specifically important in certain industries and less important in other. In order to extract this information, future research could deal with industry specific work such as electronics and communication, information technology, etc.

Even though the research on success factors such as marketplace, buying side behaviour, sales presentation, CRM and sales technology are based on latest research performed in the twenty-first century, the majority of factors in each step of the selling process are from research that was done in late 1980s to 1990s. It is possible that the conclusions derived from these studies are outdated in the current marketing scenario and no longer hold true. Therefore, to avoid such a risk, there is a need for concentration on changes in the selling process from twentieth century to twenty-first century. By integrating the results of this project work with the research on changes in the selling process, the credibility of this project could be increased and the results could be applied with more confidence by sales managers.

Considering the literature on behavioural and psychological factors affecting customers, it could be said that there is a lack of quality research work particularly in the area of informal interactions and the practice of gift giving. One reason behind it could be the secrecy involved in such activities and the perceived unethical behaviour of influencing decision making authorities by providing benefits that are not product or service related. This calls for future research in this direction and the effectiveness of such activities in B2B selling context. To collect the information needed, the research work could deal with anonymous questionnaires that deal exclusively with the informal side of selling process and how effective is it considered in the industry. To obtain realistic results, the study could be directed on employees of the buying firm rather than the selling organization.

Training is suggested as a solution to most of the problems with salespeople in sales management literature. The aim of this is to increase the knowledge of sales team to perform better in the future. However, before jumping to coaching as a solution to every problem, it must be examined whether the impact of coaching varies across salesperson career stage, across industries, across cultures, etc. This knowledge will help the management plan

training for salespeople for whom it is most effective and reduce the overall cost of training by excluding irrelevant employees.

CRM is a developing field and its role is not yet fully understood for marketing campaigns. In particular, the role of suppliers and supply chain partners in CRM needs further research. This will help to determine the impact of CRM on the supply chain strategies. In addition, carrying out research based on case studies of companies, who have successfully implemented CRM will benefit other companies that are interested in CRM to increase customer satisfaction and customer loyalty.

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Honorary Declaration

I hereby declare that I personally have completed the present scientific work. The ideas obtained from other direct or indirect sources have been indicated clearly. This work has neither been submitted to any other course or exam authority, nor has previously been published.

Hamburg, 16th March 2016

A handwritten signature in blue ink, reading "Tunaid Kekana..". The signature is written in a cursive style with a double dot at the end.

