Onboarding Salespeople: Socialization Approaches

Phillip Wiseman, Michael Ahearne, Zachary Hall, and Seshadri Tirunillai

Abstract

The effective training of salespeople is crucial to a firm's success; there is arguably no more critical type of training than a salesperson's onboarding. In this study, the authors leverage a natural field experiment in which a firm's newly hired salespeople can undergo onboarding through either a decentralized program or a centralized program to examine the relative impact of each program. Drawing on organizational socialization theory, the authors consider whether an onboarding program that incorporates both individualized and institutionalized socialization tactics (the decentralized program) can develop salespeople into higher performers by encouraging them to take a more innovative and adaptive approach to different facets of the sales role. The findings reveal that salespeople who underwent the decentralized program achieved approximately 23.5% higher sales performance than those who underwent the centralized program. The performance benefits of the decentralized program were amplified for salespeople whose managers had a narrower span of control. In addition, these performance benefits were appreciable for those salespeople transitioning from another job but negligible for those transitioning from school. A scenario-based experiment enriches the field experiment's findings by showing evidence of the theorized mechanism underlying the sales performance benefits observed: the fostering of an innovative role orientation.

Keywords

sales training, onboarding, organizational socialization, sales force management, span of control

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How to effectively train salespeople has consistently been an important question for firms. According to the Association for Talent Development (2016), the average organization spends almost $1 million each year on sales training, with the average expenditure on a salesperson approximately 20% greater than that for employees in all other roles. Despite the magnitude of the investment many firms make in sales training, criticism regarding the effectiveness of training investments continues to mount (Lassk et al. 2012).

Onboarding (commonly called "organizational socialization" by academics), a particularly critical type of training, refers to the systematic approach firms take to assimilate new hires and bring them up to a suitable level of productivity as quickly as possible (Bauer 2015). With workers moving from one organization to another with greater frequency (Bauer et al. 2007), the effective design of onboarding programs has gained substantial importance. In addition, as advances in digital technologies enable the delivery of richer training content remotely, firms are increasingly interested in how to effectively shift away from centralized onboarding and toward

decentralized onboarding. In sales, there are also distinct benefits to maximizing the potential of each new hire while minimizing time spent outside of the field.

In partnership with the Sales Management Association, we conducted a survey documenting the onboarding practices of sales organizations. The survey featured 157 respondents, representing a mix of salespeople, sales managers, and other relevant managers from a wide range of industries (for additional survey details, see Web Appendix A). Of respondents who have been with their firm long enough to comment on its expected trends, 49% indicated that the proportion of centralized

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onboarding is expected to decrease in the future. In addition, 61% of all respondents indicated that their firm's onboarding program took place either exclusively in a centralized location (e.g., corporate headquarters) or a decentralized location (e.g., a salesperson's workplace) (33% and 28%, respectively).

Recent sales literature calls for further research on sales training (Lassk et al. 2012). However, a limited number of studies have considered factors related to salesperson onboarding, and to the best of our knowledge, no prior study has considered the implications of onboarding salespeople through centralized or decentralized programs. Considering this, we ask the following questions: (1) Can decentralized programs onboard salespeople more effectively than centralized programs? (2) What impact does the type of work-role transition being undertaken by a newly hired salesperson or a sales manager's capacity to support their salespeople have on the relative effectiveness of these onboarding programs?

Drawing primarily on organizational socialization theory, which examines the role of different socialization tactics in fostering a more innovative role orientation in newcomers (Jones 1986; Van Maanen and Schein 1979), we consider the performance implications of onboarding through programs that vary in their use of socialization tactics. Organizational socialization theory provides a lens through which to view a centralized onboarding program as one that employs institutionalized socialization tactics (referred to as an "institutionalized program") and a decentralized onboarding program as one that combines individualized and institutionalized socialization tactics (referred to as an "individualized-institutionalized program"). Given the dynamic nature of the sales role, we predict that an individualized-institutionalized program will lead to better performance, in part because it influences the degree to which a salesperson takes on an innovative role orientation.

Through two studies, we investigate how salesperson performance is impacted by two common onboarding programs: one that uses only institutionalized socialization tactics and one that combines individualized and institutionalized socialization tactics (for a visual depiction of our conceptual framework and its connection to Studies 1 and 2, see Figure 1). In Study 1, we investigate the effectiveness of these two onboarding programs in the context of a natural field experiment carried out by a firm. This firm gave its newly hired salespeople the option to undergo onboarding either as part of a group at a centralized training facility (an institutionalized program) or as an individual within their respective sales districts (an individualized-institutionalized program). We address selection issues associated with this empirical setting through the application of econometric techniques. In Study 2, a scenario-based experiment in which we exposed participants to different socialization tactics and gave them a sales-relevant task to perform, we provide evidence in support of our theorized mechanism: the extent to which a salesperson takes on an innovative role orientation.

This research contributes to both the theory and practice of sales force training and socialization in several ways. First, we examine the relative effectiveness of onboarding salespeople

through programs that vary in terms of the context in which they are delivered and the role of the manager. In doing so, we build on recent research on sales training that examines the benefits of providing different types of training content to salespeople and directing training to a portion of the sales force (e.g., Atefi et al. 2018; Kumar, Sunder, and Leone 2014; Singh, Sen, and Borle 2022). In our field study, we find that undergoing an individualized-institutionalized program (compared with participating in an institutionalized program) leads to 23.5% higher sales performance (an approximate increase of $8,900 in monthly sales volume). In support of the importance of a manager's bandwidth to develop salespeople, we find that this performance differential grows to 29.6% (an approximate increase of $12,300 in monthly sales volume) when a sales manager's span of control narrows (2 SDs below the mean) and shrinks to 11.3% (a statistically nonsignificant effect) when their span of control widens (2 SDs above the mean). In support of the importance of a salesperson's work-role transition, we find that the performance differential shrinks to 9% (a statistically nonsignificant effect) for new hires transitioning from school but remains at around a 23% lift for new hires transitioning from another job.

Second, we extend research on onboarding programs by examining the effect of a program that combines individualized and institutionalized socialization tactics. Organizational socialization researchers have long expressed a desire to understand how firms can realize the benefits of both types of socialization tactics within their formal efforts at socialization (Allen and Meyer 1990; Ashforth and Saks 1996). Through both our field study and lab study, we provide evidence of the performance benefits of integrating both individualized and institutionalized socialization tactics within an onboarding program. In a recent review of the organizational socialization literature, Allen et al. (2017) note the dearth of experimental or quasi-experimental designs and call for such research. Our multitimethod approach aims to help address this call.

Third, we build on extant theory in organizational socialization by identifying a role (sales) that benefits from a relative increase in exposure to individualized socialization tactics during onboarding. The organizational socialization literature generally supports the value of institutionalized socialization tactics over individualized socialization tactics for new hires, emphasizing their benefits in fostering a stronger sense of connection and commitment to the firm (Allen 2006; Ashforth, Sluss, and Saks 2007; Bauer et al. 2007). However, these studies have examined the effects of different socialization tactics without consideration for characteristic differences in jobs, often using samples that feature a diverse set of employees in various functions. In this regard, our findings show that the effect of socialization tactics can vary based on a newcomer's job characteristics and that a relative increase in exposure to individualized socialization tactics may be particularly beneficial for customer-facing roles that require greater innovativeness and adaptability.

Fourth, we contribute to the interactionist perspective in organizational socialization research (e.g., Ashforth, Sluss, and Saks 2007; Kim, Cable, and Kim 2005; Menguc, Han,
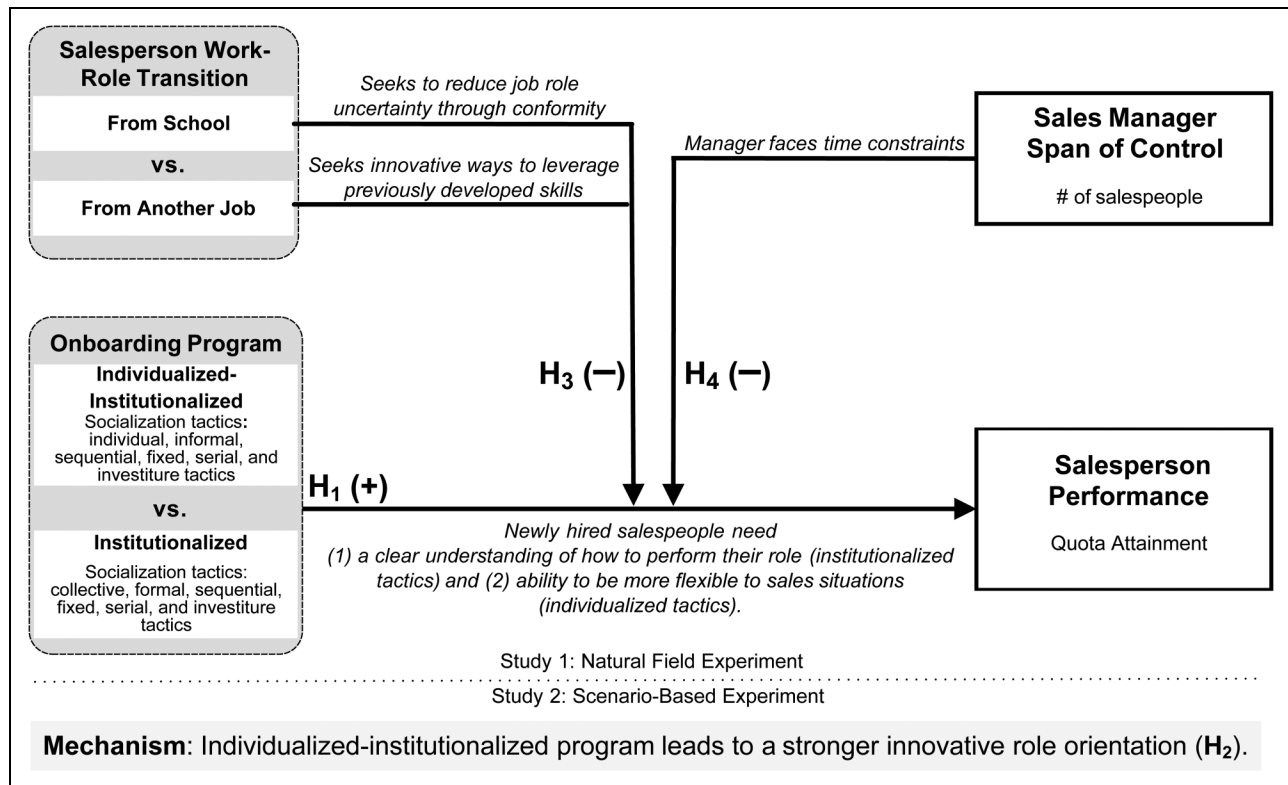
Figure 1. Conceptual framework of the relative effectiveness of salesperson onboarding programs.

and Auh 2007) by identifying both an individual- and a manager-level factor that influence how a newcomer responds to different onboarding programs. Specifically, we identify a salesperson's work-role transition (from school or another job) and a sales manager's capacity to support their salespeople (via their span of control) as factors that influence the efficacy of different onboarding programs in varied ways.

In the following section, we review research on organizational socialization. Next, we present the main theoretical basis of our research and develop our hypotheses. Subsequently, we present our empirical setting and discuss our identification strategy. We then present our results, assess robustness, and conduct a post hoc analysis. Finally, we conclude with a discussion of the research's implications, limitations, and some promising opportunities for future research.

Theoretical Background

Organizational Socialization Approaches

Organizational socialization research can be broadly divided into three areas of focus (for an overview of relevant empirical research in these areas, see Table 1; for a broader review, see Web Appendix B): the organization-initiated perspective, the proactive perspective, and the interactionist perspective. These three perspectives differ in terms of their focus on the implications of (1) the firm's directed efforts to integrate newcomers into the role (the organization-initiated perspective), (2) a newcomer's self-directed efforts to integrate into the role (the proactive perspective), and (3) the interaction of both types of efforts

(the interactionist perspective). Web Appendix B provides additional details on these three perspectives.

The interactionist perspective generally supports the benefits of both organizationally initiated socialization tactics and proactive socialization tactics (Ashforth, Sluss, and Saks 2007; Bauer et al. 2007). In consideration of this perspective, we probe the influence of two relevant moderating factors: the work-role transition undertaken by newly hired salespeople and the span of control of the sales manager. Work-role transition is defined as any shift in an individual's employment status or any major change in an individual's job content. Within this definition, we focus on two important types of work-role transitions within the organizational socialization literature (Bauer et al. 2007). Namely, we consider whether a newly hired salesperson is transitioning from school or another job (termed "from school" and "from another job" in our conceptual framework). Span of control is defined as the number of subordinates a supervisor is responsible for overseeing (Jones 2010). These moderators enable us to consider the implications of factors that influence both how and to what extent salespeople engage in proactive socialization tactics within the context of organization-initiated socialization tactics.

Organizational Socialization Tactics and Role Orientations

Within Van Maanen and Schein's (1979) model of socialization, socialization tactics have several dimensions, with each

Table 1. Overview of Relevant Empirical Organizational Socialization Research.

Authors (Year)	Sales Context	Studies Onboarding Through Formal Programs	Studies Efficacy of an Onboarding Program Combining Individualized and Institutionalized Socialization Tactics	Includes Experiment	Moderators of Organizational Socialization Effects	Studies Temporal Dynamics of Organizational Socialization
Organization-Initiated Socialization Perspective						
Allen and Meyer (1990)						✓
Ashforth and Saks (1996)						✓
Grant and Bush (1996)	✓					
Barksdale et al. (2003)	✓					
Cable, Gino, and Staats (2013)		✓		Field and lab experiments		
Proactive Socialization Perspective						
Dubinsky et al. (1986)	✓					
Ostroff and Kozlowski (1992)						✓
Morrison (1993)						✓
Interactionist Socialization Perspective						
Kim, Cable, and Kim (2005)					Newcomer factors	
Ashforth, Sluss, and Saks (2007)						
Bauer et al. (2007)[a]					Methodological factors	
Menguc, Han, and Auh (2007)	✓					
Peltokorpi et al. (2022)					Newcomer factors	
Our Research	✓	✓	✓	Field and lab experiments	Newcomer and manager factors	✓

[a]Meta-analysis.

dimension represented by two tactics conceptualized as opposing ends of a continuum (Allen and Meyer 1990; Jones 1986). Socialization tactics can be collective (vs. individual), formal (vs. informal), sequential (vs. random), fixed (vs. variable), serial (vs. disjunctive), and investiture (vs. divestiture)—with the former of each pair being classified as an institutionalized (vs. individualized) socialization tactic (Allen and Meyer 1990; Jones 1986).

Institutionalized socialization tactics encourage more of a custodial role orientation, and individualized socialization tactics encourage more of an innovative role orientation (Allen and Meyer 1990; Ashforth and Saks 1996; Jones 1986). Exposure to different organization-initiated socialization tactics can lead newcomers to adopt (to varying degrees) either a custodial role orientation or an innovative role orientation, with the two representing ends of a continuum (Allen and Meyer 1990; Van Maanen and Schein 1979). An innovative role orientation leads a newcomer to challenge the status quo to a degree and is associated with creativity and adaptiveness (i.e., the tendency to develop their own approaches to one or more aspects of the role), whereas a custodial role orientation leads a newcomer to accept role norms and preset approaches (Allen and Meyer 1986; Jones 1986; Van Maanen and Schein 1979).

Research in management and industrial-organizational psychology examining socialization tactics has connected institutionalized tactics with some desirable outcomes, including greater perceptions of person–organization fit, greater value congruence, greater job performance, and lower turnover (Allen 2006; Ashforth, Sluss, and Saks 2007; Bauer et al. 2007; Cable and Parsons 2001). In the sales literature, Grant and Bush (1996) find support for the role of institutionalized socialization tactics in fostering greater organizational value congruence in newcomers. Menguc, Han, and Auh (2007) consider the role of socialization tactics for newly hired salespeople in a collectivist culture and find that those institutionalized socialization tactics related to social aspects are positively associated with performance through greater task clarity.

Nevertheless, it remains unclear to what extent a firm should use both individualized and institutionalized socialization tactics within onboarding if the goal is to develop salespeople into high performers. Research has linked individualized (vs. institutionalized) socialization tactics to more innovative (vs. custodial) role orientations. Still, it remains undecided on the degree to which a more innovative role orientation may be a desirable outcome for specific industries, organizations, or roles (Ashforth and Saks 1996; Bauer et al. 2007).

Hypothesis Development

Onboarding Programs, Socialization Tactics, and Performance

Onboarding programs are designed to help newcomers learn the norms and values of the firm and gain a base of knowledge and skills that will enable them to perform in their role early on (Bauer 2015). These programs are composed of different socialization tactic dimensions, each of which can vary in the degree to which it manifests as either an individualized or institutionalized socialization tactic (Allen and Meyer 1990; Jones 1986). The extent to which a newcomer takes on an innovative (or custodial) role orientation depends on their exposure to individualized (or institutionalized) socialization tactics (Cable and Parsons 2001; Jones 1986).

Individualized socialization tactics are designed to allow newcomers to take on a more differentiated response to their socialization (i.e., take on more of an innovative role orientation) (Ashforth and Saks 1996; Jones 1986). These types of socialization tactics confer performance benefits by creating conditions that encourage newcomers to adapt or develop new (and, in some cases, improved) ways of performing one or more aspects of their role (Van Maanen and Schein 1979). In other words, an innovative role orientation encourages greater adaptability and creativity on the part of a newcomer in relation to one or more aspects of their role. For example, in a retail setting, a salesperson may develop methods for determining when it is most effective to immediately engage a customer (a behavior often prescribed to salespeople by the firm) or when it is best to make their willingness to assist the customer known more subtly, allowing the customer to acclimate to the environment and maintain a desired degree of control. However, too great an emphasis on individualized socialization tactics can create a highly uncertain and stressful environment for a newcomer, leading to a rejection of the firm's values and norms (Van Maanen and Schein 1979).

Institutionalized socialization tactics are designed to reduce a newcomer's uncertainty related to the transition being made, encourage acceptance of the firm's values, and promote a uniform adoption of the norms associated with the newcomer's role (i.e., take on more of a custodial role orientation) (Jones 1986; Van Maanen and Schein 1979). These types of socialization tactics confer performance benefits through a clearer understanding of how to perform the role in a manner aligned with the firm's expectations and by reducing stress related to integrating into the firm's fabric (Jones 1986; Van Maanen and Schein 1979). However, too great an emphasis on institutionalized socialization tactics can place an upper bound on a newcomer's performance by limiting the degree to which they are motivated to find innovative ways of improving their performance (Ashforth and Saks 1996; Baker 1989). For example, a salesperson's efforts to conform to how their firm broadly profiles and prescribes sales tactics for each of its customer profiles may fail to account for idiosyncratic characteristics of the customers in a salesperson's local market or impede that salesperson's ability to apply their knowledge and experience, resulting in suboptimal sales outcomes.

An individualized-institutionalized program provides newly hired salespeople with a suitable degree of role clarity while fostering a stronger innovative role orientation than an institutionalized program is capable of. Given the nonroutine nature of the sales role and the relatively high level of uncertainty associated with customer interactions, salespeople need to be capable of adaptability and creativity (Dubinsky et al. 1986; Walker,

Churchill, and Ford 1975), capabilities that are more strongly promoted by an innovative role orientation. These capabilities enable a salesperson to approach the varying needs of customers more responsively and effectively (Sujan, Weitz, and Kumar 1994). Thus,

H_1: An individualized-institutionalized onboarding program (vs. an institutionalized onboarding program) has a greater positive influence on a salesperson's performance.

H_2: The increased performance exhibited by a salesperson who completes an individualized-institutionalized onboarding program (vs. an institutionalized onboarding program) is mediated by a stronger innovative role orientation.

The Moderating Role of a Salesperson's Work-Role Transition

The period when a new salesperson first enters a firm is rife with uncertainty (Cable and Parsons 2001). Newcomers transitioning from school (e.g., recent graduates) are likely to view their new role with a greater level of uncertainty than those transitioning from another job because it represents a more substantial transition, wrought with fewer familiar challenges (Bauer et al. 2007). This type of newcomer is likely to engage to a greater extent in efforts intended to reduce the discomfort felt because of this uncertainty, including greater efforts to conform to norms (Cable and Parsons 2001; Kim, Cable, and Kim 2005). We contend that in the presence of an onboarding program that contains both individualized and institutionalized socialization tactics, a newcomer transitioning from school will engage in efforts to conform to a greater degree than a newcomer transitioning from another job. In doing so, those newcomers transitioning from school will limit their performance potential.

Newcomers transitioning from another job may have developed ways of performing tasks in their prior roles that can lead to performance difficulties when pressured to adapt to their current employer's way of performing similar tasks (Bauer et al. 2007). As individuals become more established in their chosen professions, they seek ways to use the skills they have acquired in more innovative ways to pursue superior performance (Cron 1984). In this regard, the skills that a newcomer transitioning from another job has previously obtained can allow them to develop more effective ways of performing aspects of their new job. We contend that exposure to an individualized-institutionalized program will encourage a newly hired salesperson to integrate skills and knowledge from their old role into their new role because it promotes a greater degree of innovation. Conversely, exposure to an institutionalized program will discourage a newly hired salesperson's efforts to integrate skills and knowledge from their old role into their new role because it promotes a greater degree of conformity. Thus,

H_3: The positive influence of an individualized-institutionalized onboarding program (vs. an institutionalized onboarding

program) on a salesperson's performance is weaker for those transitioning from school than for those transitioning from another job.

The Moderating Role of a Sales Manager's Span of Control

A sales manager's ability to coach salespeople and effectively respond to their errors will be constrained by their span of control or the number of salespeople for whom they are responsible (Jones 2010). This is expected to be relatively more important for salespeople participating in an onboarding program that contains both individualized and institutionalized socialization tactics (compared with one that contains only institutionalized socialization tactics) because of the stronger innovative role orientation that this type of program is theorized to encourage. Although individualized socialization tactics may allow newcomers to become more exemplary performers through greater flexibility and opportunities for experimentation (Ostroff and Kozlowski 1992), this flexibility can lead to higher incidences of errors and adverse outcomes (Ashforth and Saks 1996). A narrower span of control should thus allow sales managers to manage more conscientiously the expression of an innovative role orientation for a newly hired salesperson, promoting the development of those behaviors and capabilities deemed beneficial.

Early in salespeople's tenure, proactive behaviors are also likely to play a critical role in understanding how to perform the tasks associated with their roles and other aspects of organizational life (Ashforth, Sluss, and Saks 2007; Menguc, Han, and Auh 2007). Obtaining this type of information is critical to developing work-related competencies (Morrison 1993; Ostroff and Kozlowski 1992), and newcomers often try to obtain this type of information from their managers (Morrison 1993). We contend that a salesperson who has undergone onboarding through an individualized-institutionalized program (compared with a salesperson who has undergone an institutionalized program) is more likely to seek out information from their sales manager, given the individualized nature of their onboarding and the manager's heightened involvement. However, the sales manager's capacity to engage in related interactions will limit the extent to which salespeople can obtain the desired information. Thus,

H_4: The positive influence of an individualized-institutionalized onboarding program (vs. an institutionalized onboarding program) on a salesperson's performance weakens when their sales manager's span of control is wider.

Study 1: Natural Field Experiment

The research setting for Study 1 is a national furniture retail chain in the United States that has stores in multiple sales districts across the nation. The firm's offerings all fall under a single product category, and each store has a single department. One district sales manager oversees each district, and each store

in a district is staffed by the retailer's salespeople. Salespeople are scheduled to work across multiple stores within a sales district as needed and are generally scheduled to work in a store on their own. The firm's salespeople sell to consumers on an individual basis (not in teams).

During the period under study, the focal firm began to offer a decentralized onboarding program (i.e., the individualized-institutionalized program) as an alternative to the centralized onboarding program (i.e., the institutionalized program) already in place. Salespeople could participate in either of the two onboarding programs. We exploit this choice of the salesperson along with the geographical proximity of each salesperson to their designated regional training center as a source of exogenous variation to estimate the sales performance effect of the individualized-institutionalized program in relation to the institutionalized program.

Overview of the Firm's Onboarding Programs

Decentralized onboarding (i.e., the individualized-institutionalized program) took place in the district's stores. Only one newly hired salesperson was assigned to a given store at a time. The process involved interactions with the district sales manager, interactions with an experienced salesperson working in the store that the newly hired salesperson was assigned to, exposure to hands-on learning experiences, and the use of digital content. Centralized onboarding (i.e., the institutionalized program) was administered by instructors in regional training centers to groups of salespeople through classroom-based and hands-on learning experiences (e.g., role-plays, sales interactions with real customers). Hands-on learning experiences were carried out in a larger "showroom-style" store within the regional training centers. Salespeople who went through onboarding at a regional training center were reimbursed for travel and other basic expenses incurred and were housed in a nearby hotel as needed. Both onboarding programs were intended to run for the same amount of time (two weeks). Web Appendix C provides additional details on the firm's onboarding process and both programs.

An assessment of the characteristics of the firm's onboarding programs leads us to view the decentralized program (i.e., the individualized-institutionalized program) as consisting of a combination of individualized and institutionalized socialization tactics, whereas the centralized program (i.e., the institutionalized program) consists of only institutionalized tactics (outlined in Figure 1). Web Appendix C defines all six socialization tactic dimensions and identifies how each onboarding program is positioned relative to the institutionalized and individualized socialization tactic associated with each dimension.

Data and Measures

The study period spans 19 months and includes salespeople hired during the first 11 months of this window of time, which captures the period in which the firm began giving its newly hired salespeople the option to undergo onboarding through either an institutionalized program or an individualized-institutionalized program.

We use salesperson-time observations for the first nine months of each new hire's tenure with the firm. This duration aligns with the focal firm's position on how long it takes a salesperson to reach a suitable level of productivity. Specifically, we consider the performance of each newly hired salesperson in month 2 through month 9 of their tenure. A newly hired salesperson's first month entails an initial in-store observational period, followed by participation in one of the two onboarding programs.

Overall, we examine 2,608 salesperson-time observations for 326 salespeople hired after the firm began to offer both types of onboarding programs.[1] Each salesperson works in one of 44 sales districts, with each sales district averaging eight stores overseen by the district's sales manager. Salespeople work across multiple stores within a sales district, with efforts made to schedule them in stores that are in closer proximity to their homes. Of the 326 salespeople included in the study, 185 underwent the institutionalized program. The data for this study came from the firm's information systems (unless stated otherwise).

Salesperson performance. We measure salesperson performance as the actual sales volume (in dollars) of salesperson i in month t divided by the quota (in dollars) set for salesperson i in month t. This ratio includes both sales made before quota is achieved and sales made after quota is achieved (i.e., bonus-eligible sales). Proportion of quota attained has been commonly employed as a measure of salesperson performance within the sales literature (Ahearne et al. 2010; Boichuk et al. 2019; Patil and Syam 2018). Quota attainment and other relative referent measures of salesperson performance are viewed as suitable in empirical settings where differences in contextual factors (e.g., territory differences, differences in economic conditions, differences in competitive intensity) present a threat to an examination of factors that vary by salesperson (Bolander et al. 2021). The sales volume of salespeople in brick-and-mortar stores (such as our empirical setting) is likely to vary substantially due to factors beyond the salesperson's control, such as store footprint and geographical location. Such external factors tend to limit the overall sales achieved by a salesperson. The quota-based measure for sales performance is well-suited for assessing the performance of newly hired salespeople because the firm's quota-setting method accounts for these geographical variations regardless of factors such as a salesperson's past experience or tenure with the firm.

In our context, the firm pays its salespeople a base salary covering the general living expenses in their local labor market; however, a large portion of the pay is variable. Commissions are the same across all sales districts and are paid on all sales made by a salesperson. In addition, the firm provides a bonus to salespeople who achieve their quota in

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[1] We focus on salespeople who did not leave the firm during their first nine months to capture the effects of interest more effectively (turnover in the first nine months of employment was 13%). We confirm through an additional analysis that our main results hold when we include salespeople who left during their first nine months of employment.

the form of a percentage paid out on their total sales volume for the corresponding period. The firm assigns salespeople monthly quotas through a data-driven process that involves both personnel at the corporate level and district sales managers. At the corporate level, the firm assigns a given sales district's monthly quota based on district-specific factors, such as sales history, intensity of competition, and economic conditions. Personnel at the corporate level work with district sales managers to further calibrate their district's monthly quota and then determine how the agreed-on quota will be allocated to the stores in that district. Quotas among salespeople are then set based on the stores, hours, and days they are scheduled to work in.

Onboarding program type. We measure onboarding program type as a dummy that takes the value of 1 if the newly hired salesperson underwent the individualized-institutionalized program and 0 if they underwent the institutionalized program.

Work-role transition. We measure work-role transition as a categorical variable that takes a value of 0 if the newly hired salesperson is transitioning from another job, 1 if the newly hired salesperson is transitioning from school, and 2 if there is insufficient information to assign a value (i.e., we treat 2 as a missing value). We use data collected online for this purpose.[2]

Span of control. Following extant research in marketing (e.g., Krafft 1999), we measure a manager's span of control as the total number of salespeople (both new hires and incumbents) who report to a manager. In this context, each salesperson reports to a single district sales manager who oversees each salesperson employed within the related sales district. Consequently, span of control is the sum of the total number of salespeople in a given district in month $t-1$.

Control variables. We control for a set of factors that may influence a newly hired salesperson's onboarding decision and performance. In our model, we measure peer turnover as the count of a given salesperson's peers in their sales district who leave, up to month $t-1$, divided by the total number of peers they had in month $t-1$. Extant research has shown the influence of peer turnover on an employee's self-esteem, performance, and likelihood of quitting (Brockner, Davy, and Carter 1985; Sunder et al. 2017). A shift in a sales manager's span of control due to turnover will also likely have a qualitatively different influence on a salesperson's performance. We measure tenure as the number of months a salesperson has been employed by the firm.

The next set of control variables captures factors related to the sales district that temporally precede the hiring of a given salesperson and, in two cases, temporally precede the onboarding policy change. They include prehire district turnover, preintervention newly hired salesperson performance, and preintervention sales manager district performance. To capture systematic differences among new hires, we also include salesperson-level control variables that are fixed before hiring. They include past sales experience (in years), hire age, gender, and minority status.[3] Table 2 reports correlations and descriptive statistics for these variables, and we provide descriptions of all our variable operationalizations in the Web Appendix (Table W.C.2).

Identification Strategy

Given that the main aim of this study is to examine whether it is more effective to onboard salespeople through the individualized-institutionalized program or the institutionalized program, it is critical to estimate the causal effect of each onboarding program relative to the other. A simplified model, regressing salesperson performance on onboarding program type, could lead to an inconsistent and biased estimate of the effect because a salesperson's assignment and participation in one of the two types of onboarding programs is endogenous. A salesperson's tendency to self-select into a given onboarding program could be a possible source of endogeneity. The assignment could also be influenced by the salesperson's perceptions of the relative value of each program, in both the short and long term. Further, salesperson characteristics, attitudes, or values could be correlated with the onboarding program assignments.

Another potential source of endogeneity stems from the influence a sales manager possesses over the salesperson's selection of either of the two onboarding programs. District sales managers could influence a newly hired salesperson's onboarding decision due to their attitudes toward onboarding and their overall management style. More details on these issues can be found in Web Appendix D.

Here, we outline the features of the identification strategy used for the main analysis. We provide a general overview of the empirical strategies used to address identification and assess robustness in Web Appendix E (Table W.E.1). To address endogeneity issues, we need to be able to separate the exogenous variation in onboarding program type from the endogenous variation in it. We use a control function approach (Petrin and Train 2010; Rutz and Watson 2019; Wooldridge 2015), which addresses our endogeneity concerns through the derivation of a proxy variable that conditions on the part of onboarding program type that is correlated with the error term in our model of salesperson performance (Equation 1). In Web Appendix E, we detail our application of the control function, further expand our

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[2] We used data collected from LinkedIn to assign one of the three values of this categorical variable to a given salesperson. We assigned a value of 0 or 1 to profiles that contained both educational information and employment information (including an entry confirming that a given salesperson was employed by the firm). We assigned a value of 2 to cases in which educational information or employment information was not available or a profile could not be found; we treated these cases as missing.

[3] To avoid losing salesperson observations related to missing values for past sales experience and hire age contained in the data, we replace the missing values with the overall averages calculated for these variables.

Table 2. Summary Statistics and Correlations (Study 1).

Variables	1	2	3	4	5	6	7	8	9	10	11	12	13	14
1. Salesperson performance	1.00													
2. Individualized-institutionalized program	.02	1.00												
3. Work-role transition (from another job)	.02	.04*	1.00											
4. Work-role transition (from school)	-.03	-.03	-.28*	1.00										
5. Span of control	-.06*	-.07*	-.01	.03	1.00									
6. Preintervention newly hired salesperson performance	.00	-.16*	-.06*	-.06*	.19*	1.00								
7. Preintervention sales manager district performance	-.00	.07*	-.05*	-.01	.30*	-.11*	1.00							
8. Prehire sales district turnover	-.04	.04*	-.02	.00	-.01	.06*	-.23*	1.00						
9. Peer turnover	-.02	-.02	-.04	.07*	.07*	.10*	-.22*	.15*	1.00					
10. Tenure	.06*	.00	.00	.00	.20*	-.00	.00	-.00	.53*	1.00				
11. Past sales experience	.02	.01	.22*	-.30*	-.02	.06*	-.04*	.03	.02	-.00	1.00			
12. Hire age	.02	.14*	.18*	-.41*	-.05*	.02	-.02	.08*	.03	-.00	.59*	1.00		
13. Gender	.07*	.03	.05*	-.05*	-.05*	.01	.02	-.09*	-.01	-.00	.09*	-.00	1.00	
14. Minority status	-.04*	-.16*	-.02	-.01	-.03	.00	-.01	.13*	-.00	.00	-.00	-.01	-.01	1.00
Descriptive Statistics														
M	.97	.43	.35	.13	19.85	.84	.83	.03	.06	5.50	3.33	30.15	.64	.23
SD	.36	.49	.48	.34	6.69	.11	.12	.05	.07	2.29	4.29	8.33	.48	.42

*$p < .05$.

Table 3. Relative Effectiveness of Onboarding Programs and Moderating Factors (Study 1).

	Dependent Variable: Salesperson Performance		
	(1)	**(2)**	**Test of Hypotheses**
Main Variables of Interest			
Individualized-institutionalized program	.2064*	.2057*	H$_1$
	(.0982)	(.0996)	
Work-role transition	−.0114	.0349	
(from school contrasted with from another job)	(.0461)	(.0465)	
Span of control	−.0053*	−.0020	
	(.0024)	(.0021)	
Individualized-institutionalized program × work-role transition		−.1230*	H$_3$
(from school contrasted with from another job)		(.0585)	
Individualized-institutionalized program × span of control		−.0066*	H$_4$
		(.0031)	
Control Variables			
Preintervention newly hired salesperson performance	.2696†	.2657†	
	(.1465)	(.1400)	
Preintervention sales district performance	.0128	−.0276	
	(.1379)	(.1244)	
Prehire sales district turnover	−.3285	−.3247	
	(.3156)	(.2956)	
Peer turnover	−.3353†	−.3541*	
	(.2004)	(.1797)	
Tenure	.0227**	.0225**	
	(.0078)	(.0074)	
Past sales experience	.0035	.0034	
	(.0036)	(.0035)	
Hire age	−.0011	−.0011	
	(.0015)	(.0015)	
Male	.0407*	.0416*	
	(.0190)	(.0182)	
Minority status	−.0096	−.0106	
	(.0269)	(.0271)	
Generalized residual	−.1277*	−.1151*	
	(.0561)	(.0543)	
Regional training center fixed effects	Yes	Yes	
Calendar time fixed effects	Yes	Yes	
Observations	2,608	2,608	
Adj. R^2	.0505	.0563	

$^\dagger p < .10.$
$^* p < .05.$
$^{**} p < .01.$
Notes: Bootstrapped cluster-robust standard errors are in parentheses. Listed models include a mean-centered span-of-control measure.

arguments in support of both the relevance criterion and exclusion restriction for our required instrument, and explain the purpose of several key control variables in relation to our identification strategy.

The use of the control function approach requires at least one suitable instrument (Petrin and Train 2010; Rutz and Watson 2019; Wooldridge 2015). We argue that the distance between a sales district's headquarters and its regional training center is a suitable instrument for our purposes. We measure it as the distance (in miles) required to drive between the newly

hired salesperson's district headquarters and the corresponding regional training center. To establish that driving distance is a suitable instrument, we need to establish that it meets both the relevance criterion and exclusion restriction (for detailed arguments, see Web Appendix E). To briefly argue in support of relevance, the farther away a designated regional training center is from a salesperson's district, the less likely a salesperson will participate in the institutionalized program due to the greater perceived cost of going there for the onboarding period. In some cases, this distance could be substantial, requiring
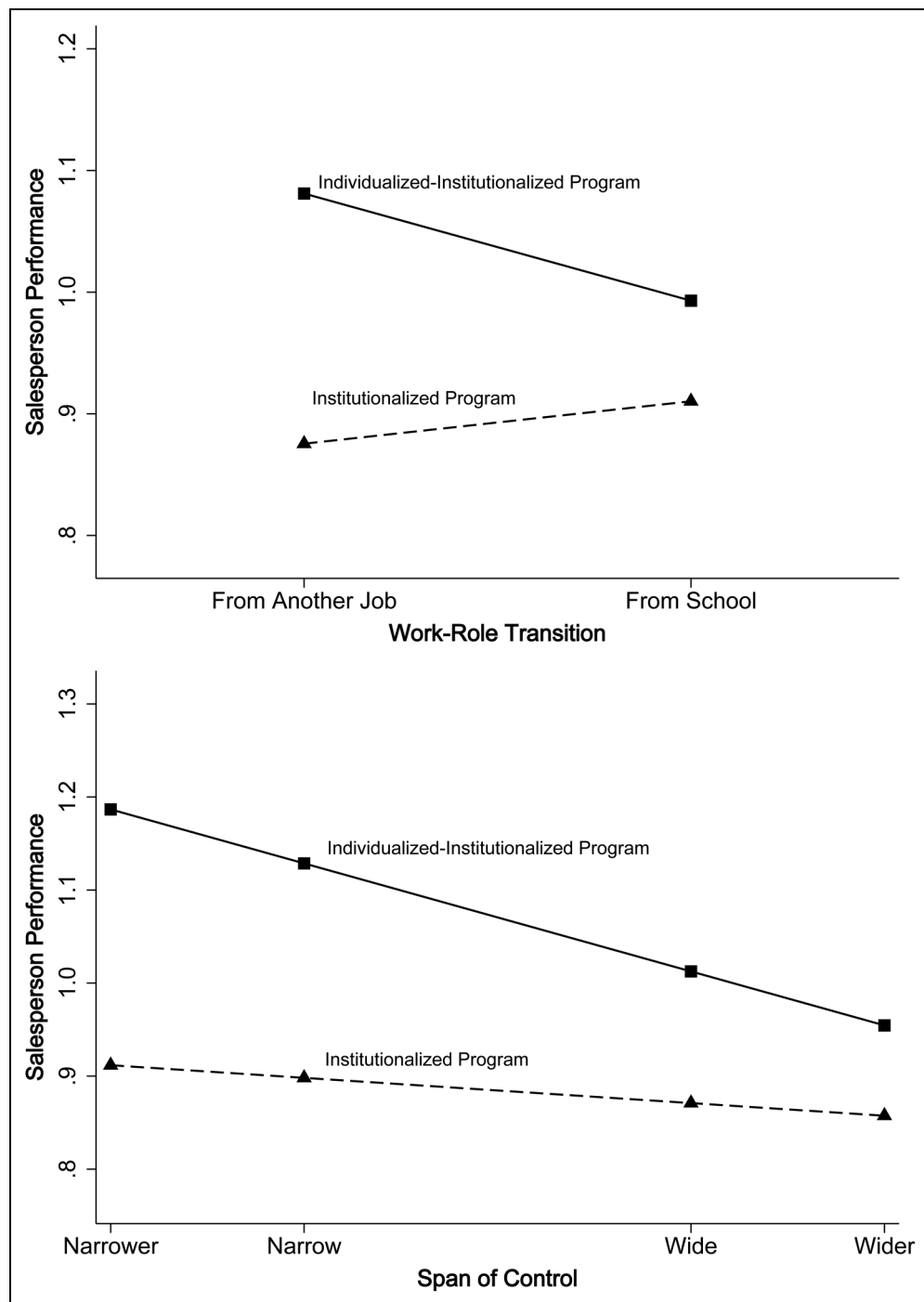
Figure 2. Interaction plots for onboarding program type, work-role transition, and span of control (Study 1).
Notes: "Narrower," "Narrow," "Wide," and "Wider" capture −2 SD, −1 SD, +1 SD, and +2 SD from the mean of span of control, respectively.

several hours to traverse in a motor vehicle. To briefly argue in support of exclusion, factors such as a salesperson's ability and motivation should not be related to the geographic location of where they live and work. Furthermore, there is no reason to believe that the distance between a salesperson's sales district and that district's designated regional training center is related to the factors mentioned previously. This position seems

reasonable when you consider that the firm previously onboarded salespeople at its regional training centers.

Although we expect our instrumental variable of driving distance to meet both the relevance criterion and exclusion restriction, we include additional controls intended to account for the sales manager's influence and the salesperson's selection (for additional details, see Web Appendix E). In this regard, we

account for the possibility that our instrumental variable is independent of salesperson performance, conditional on a set of additional covariates (Angrist and Pischke 2009; Imbens 2014).

Model Specification and Testing

We use the following specification to test H_1:

$$
\begin{aligned}
y_{ijt} = \ &\beta_0 + \beta_1 r_{ijt} + \ \beta_2 OnboardingProgramType_i \\
&+ \beta_3 WorkRoleTransition_i \\
&+ \beta_4 SpanofControl_{ijt-1} + \beta_5 X_{ijt} + \beta_6 X_{ij} \qquad (1) \\
&+ \beta_7 RegionalTrainCenterB_j \\
&+ \beta_8 RegionalTrainCenterC_j + \delta_t + \varepsilon_{ijt},
\end{aligned}
$$

where the dependent variable y_{ijt} is salesperson i's performance in district j in month t (or the sales volume of salesperson i in district j in month t divided by their quota); r_{ijt} represents the generalized residual, which conditions on the part of OnboardingProgramType that is correlated with the error term and is calculated as outlined in Web Appendix E; OnboardingProgramType represents whether salesperson i was onboarded through either the firm's individualized-institutionalized program ($=1$) or its institutionalized program ($=0$); WorkRoleTransition represents whether salesperson i is transitioning into the role from either school or another job; and SpanofControl represents the district sales manager's span of control in month $t-1$ in district j for salesperson i. Moreover, X_{ijt} captures the time-variant control variables (i.e., tenure, peer turnover, and prehire sales district turnover), and X_{ij} captures the time-invariant control variables (i.e., preintervention newly hired salesperson performance, preintervention sales manager district performance, past sales experience, hire age, gender, and minority status).

We also include dummy variables to account for important unobserved factors associated with a given regional training center (and the region it covers) that may be related to participation in each onboarding program and salesperson performance. RegionalTrainCenterB represents whether a sales district j sends its newly hired salespeople to regional training center "B" (denoted by a value of 1) or to one of the other regional training centers (denoted by a value of 0); RegionalTrainCenterC represents whether a sales district j sends its newly hired salespeople to regional training center "C" (denoted by a value of 1) or to one of the other regional training centers (denoted by a value of 0). Finally, we include calendar-time dummies (δ_t) for each period (i.e., month) to account for time-specific factors that could be common across salespeople in the firm, as well as aggregate trends that may confound one or more of the relationships of interest. Because our sample comprises salespeople who vary in terms of which month they were hired, we can estimate both calendar-time fixed effects and salesperson tenure and separately identify the related parameters.

We estimate the model using ordinary least squares with statistical inference based on bootstrapped cluster-robust standard errors, accounting for clustering at the level of the sales district. Clustering at the level of the sales district follows recommendations to cluster over the highest level of aggregation for which it is reasonable to assume that the regressors or errors are correlated (Angrist and Pischke 2009; Cameron and Miller 2015).

To test H_3 and H_4, we interact the OnboardingProgramType variable in our model with the WorkRoleTransition and SpanofControl variables, respectively.

Results

We present the results of our estimation of the salesperson performance models in Table 3 and present graphical depictions of the two-way interactions in Figure 2. We provide the results of the first-stage probit regression in Web Appendix E (Table W.E.2), noting here that the parameter estimate for our instrumental variable is highly significant ($Z = 3.50$, $p < .001$), suggesting that our instrument is not weak.[4] The statistical significance of the parameter estimated for the generalized residual supports a rejection of the null hypothesis that OnboardingProgramType is exogenous ($\beta = -.1277$, $p < .05$), which provides some evidence supporting the importance of addressing endogeneity in our analysis (Wooldridge 2015).

As Model 1 shows, we find that an individualized-institutionalized program has a greater positive influence on salesperson performance than an institutionalized program does ($\beta = .2064$, $p < .05$), in support of H_1. The estimated effect is equivalent to about a 23.5% higher level of sales performance ($\hat{y}_{ind-inst} = 1.084$; $\hat{y}_{inst} = .878$). Studies comparing a training program for customer-facing employees (e.g., salespeople and customer service representatives) with the absence of that program have found positive effects on performance metrics, ranging from approximately 10% (De Grip and Sauermann 2012) to approximately 47% (Frayne and Geringer 2000). Studies comparing one version of a training program for customer-facing employees to another version of that program have found positive effects on performance metrics, ranging from approximately 18% (Cable, Gino, and Staats 2013) to approximately 35% (Luo et al. 2021). In addition, a recent study by Singh, Sen, and Borle (2022) finds that a one-unit increase in the number of online training modules taken in a month by a salesperson is equal to about a 12.9% increase in sales of the firm's nonfocal products in that same month. Based on the derivation of the effect size of training programs from recent studies in related areas, we

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[4] Testing for instrument strength within the economics and marketing literatures commonly follows a rule-of-thumb cutoff proposed in the work of Staiger and Stock (1997), which identifies an instrument as weak if its first-stage F-statistic is below 10. We follow this approach by estimating our first-stage equation as a linear regression and then using the effective first-stage F-statistic of Montiel-Olea and Pflueger (2013), which is robust to heteroskedasticity, autocorrelation, and clustering. The effective F-statistic for our instrument is above the suggested cutoff of 10 ($F_{effective} = 11.86$), further suggesting that our instrument is not weak.
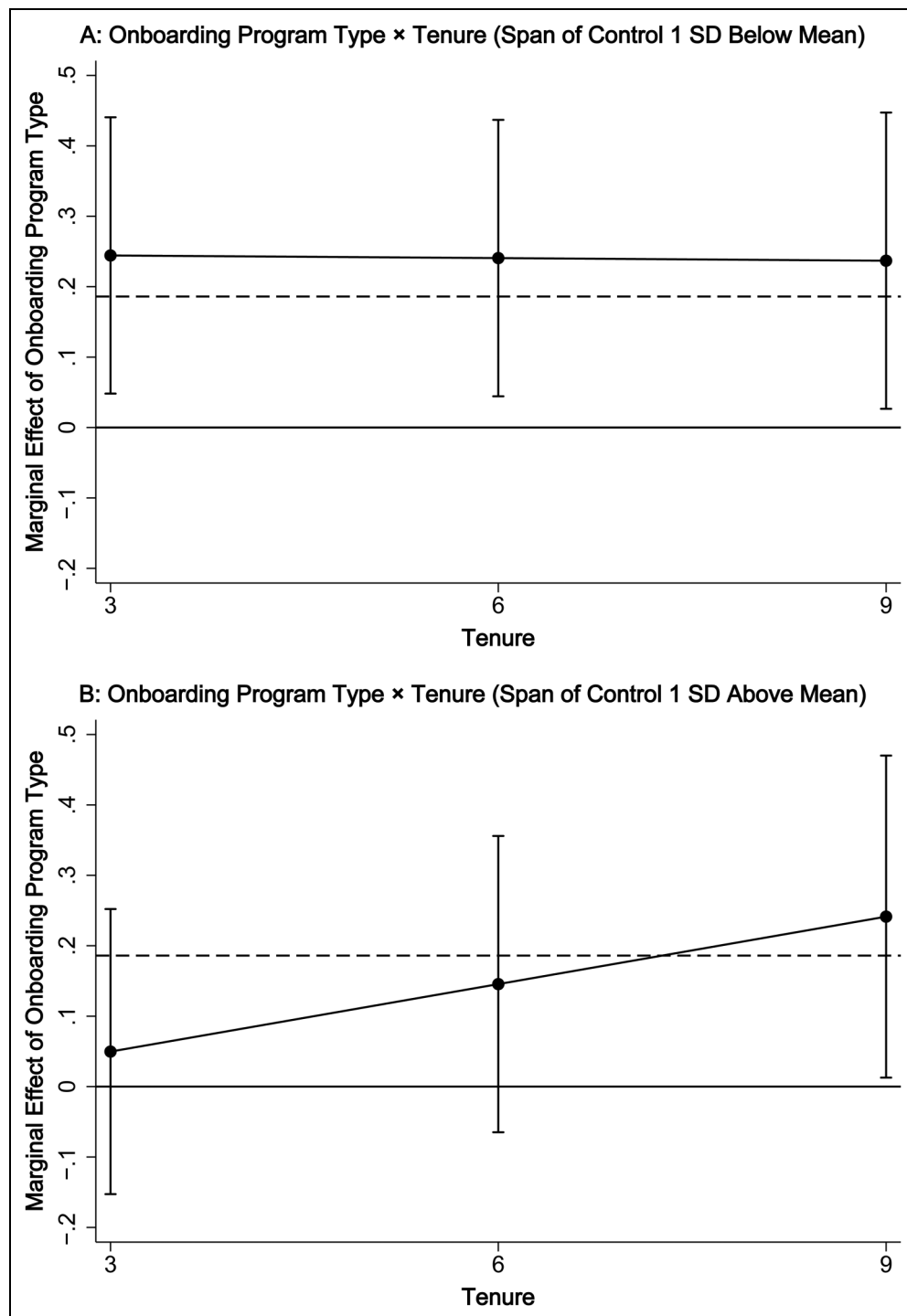
Figure 3. Marginal effects of onboarding program type (individualized-institutionalized vs. institutionalized) at different values of span of control and salesperson tenure (Study 1).

Notes: The y-axis is the change in proportion of quota attained measured as the relative effect of the individualized-institutionalized program compared with the institutionalized program at the given value of span of control and tenure. The vertical lines represent 95% confidence intervals. The dashed line represents the relative effect of the individualized-institutionalized program compared with the institutionalized program (taken at the average).

conclude that the effect we find is in line with results from prior work.

As Model 2 shows, we find that the positive influence of an individualized-institutionalized (vs. institutionalized) program is negatively moderated by work-role transition ($\beta = -.1230$, $p < .05$), in support of H_3. Probing the interaction further, we find that an individualized-institutionalized (vs. institutionalized) program has a positive influence on performance for salespeople transitioning from another job ($\beta = .2056$, $p < .05$) but does not have an influence on performance for salespeople

transitioning from school ($\beta = .0827$, $p > .4$). We also find that the positive influence of an individualized-institutionalized (vs. institutionalized) program is negatively moderated by the increased width of a manager's span of control ($\beta = -.0066$, $p < .05$), in support of H_4. Probing the interaction further, we find that an individualized-institutionalized (vs. institutionalized) program has a greater positive influence on performance at 1 SD below the mean for span of control ($\beta = .2305$, $p < .05$) but does not have an influence on performance at 1 SD above the mean for span of control ($\beta = .1415$, $p > .15$).

Robustness Assessments

To assess the robustness of our results, we conducted a series of additional analyses (for a general overview, see Table W.E.1 in Web Appendix E). We summarize the issues addressed, steps taken, and findings in this section (for full results and additional details, see Web Appendix F).

To address the possibility that systematic differences in retention between salespeople who underwent each onboarding program could be related to performance, we estimate our main models using the full sample of 375 newly hired salespeople, which includes 49 salespeople who quit during the first nine months with the firm. The results are similar to those in our main models (for details, see Web Appendix F, Table W.F.1). To address the possibility that a salesperson's past performance or a sales district's past performance influences a salesperson's performance (i.e., momentum at either level), we estimate our main models with the addition of both a lagged individual performance variable and a lagged sales district performance variable. Again, the results are similar to those in our main models (for details, see Web Appendix F, Table W.F.2). In addition, we estimate a multilevel model with random intercepts at the level of the salesperson to assess robustness to salesperson-level heterogeneity. The results are similar to those in our main models (for details, see Web Appendix F. Table W.F.3).

We also conducted two analyses at the sales district level intended to corroborate our finding that an individualized-institutionalized program (compared with an institutionalized program) has a greater positive influence on sales performance while addressing endogeneity concerns through alternative means. These include a Gaussian copula approach and an instrumental variable approach using two-stage least squares. For both these analyses, we find that the direction of the main effect is the same as that obtained in our main analysis and is statistically significant (for details, see Web Appendix F, Tables W.F.4 and W.F.5).

Post Hoc Analysis

Our main analysis supports the enhanced impact of a narrower span of control for salespeople who are onboarded through the individualized-institutionalized program (compared with the institutionalized program). However, this analysis does not tell us how quickly these benefits are realized. Understanding the rate at which benefits are realized is critical in sales where slower rates of salesperson development mean lost revenue for the firm. To investigate this, we extend Equation 1 to include an interaction of the OnboardingProgramType, SpanofControl, and Tenure variables, while accounting for all corresponding lower-order interaction terms. The results are presented in Web Appendix G and Table W.G.1. We find a significant three-way interaction of onboarding program type, tenure, and manager span of control ($\beta = .0024$, $p < .01$), providing motivation to explore this dynamic further. In Figure 3, we plot the marginal effects of onboarding program type when span of control is either wider (27, or ~1 SD below the mean) or narrower (13, or ~1 SD above the mean) and at different values of tenure. Panel A suggests that the sustained benefit of the individualized-institutionalized program for a salesperson whose manager has a narrower span of control is realized early on and sustained over time. Panel B suggests that the benefit of the individualized-institutionalized program for a salesperson whose manager has a wider span of control is realized later in their tenure.

Study 2: Scenario-Based Experiment

The primary aim of Study 2 was to provide evidence in support of the theorized mechanism of innovative role orientation (H_2). Study 2 achieved this by randomly assigning participants to read one of two sales onboarding scenarios designed to emphasize different socialization tactics present in the two programs associated with our field study and then asking participants to complete a sales-relevant alternative uses task (AUT). The AUT assessed two outcomes (i.e., cognitive flexibility and idea novelty) that are reflective of the adoption of a more innovative role orientation. To elaborate, salespeople who have adopted an innovative (vs. custodial) role orientation should be more motivated to think diversely about problems and seek creative solutions. Thus, both greater cognitive flexibility and idea novelty can serve as indicators that a salesperson has adopted a more innovative role orientation—and we expected that participants assigned to the individualized-institutionalized onboarding scenario (vs. the institutionalized-only scenario) would exhibit greater cognitive flexibility and idea novelty.

Overview of Experimental Procedure

We recruited 177 participants (49% female; years of work experience: M = 15.67, SD = 9.76) from Amazon Mechanical Turk to participate in exchange for $1.50. The study used a two-cell (onboarding program: individualized-institutionalized socialization tactics vs. institutionalized socialization tactics only) between-subjects design.

Participants randomly assigned to the individualized-institutionalized socialization tactics condition read about a scenario in which their sales training contained a mix of individualized (i.e., the individual and the informal tactics) and institutionalized (i.e., the fixed and serial tactics) socialization tactics. Participants randomly assigned to the institutionalized socialization tactics condition read about a scenario in which their sales training contained only institutionalized

socialization tactics (i.e., the collective, formal, fixed, and serial tactics). To assess the effect of both conditions on cognitive flexibility and idea novelty, participants completed an AUT, which was framed as part of their onboarding program. The task was motivated by communicating to participants that the firm (or the sales manager's stores, depending on the assigned condition) had an overstock of glass jars, and the firm (or the sales manager, depending on the assigned condition) wanted their help coming up with different uses for a glass jar that could be highlighted when interacting with customers, so as to increase the amount of product sold. Further detail on the experimental procedure, the content associated with each condition, and other administrative details can be found in Web Appendix H.

Results

To analyze the results of the AUT, four research assistants blind to experimental conditions reviewed the uses listed by participants and categorized them into one of ten categories (for additional details on this procedure and relevant descriptive statistics, see Web Appendix H).

To assess cognitive flexibility (the first of our two indicators of an innovative role orientation), we counted the number of categories associated with a given respondent's listed uses (Lu, Akinola, and Mason 2017; Tadmor, Galinksy, and Maddux 2012). A one-way analysis of variance conducted on the number of categories showed the predicted significant effect of onboarding program type on cognitive flexibility ($F(1, 175) = 7.89$, $p < .01$): Participants in the "individualized-institutionalized socialization tactics" condition generated uses from a greater number of categories ($M = 4.03$, $SD = 1.04$) than did participants in the "institutionalized socialization tactics only" condition ($M = 3.59$, $SD = 1.07$).

To assess idea novelty (the second of our two indicators of an innovative role orientation), we calculated the proportion of total uses that each category accounted for and subtracted each of those values from 1. These values served as category novelty scores. We then assigned each use a novelty value that corresponded to the novelty of the category to which it belonged. Thus, a use with a novelty score closer to 1 should be interpreted as more novel. The novelty scores for the individual uses were then averaged at the participant-level to arrive at a novelty score for each participant. A one-way analysis of variance conducted on participant novelty scores showed the predicted significant main effect of onboarding program type on novelty ($F(1, 175) = 5.47$, $p < .05$): participants in the "individualized-institutionalized socialization tactics" condition generated uses that were higher in novelty ($M = .818$, $SD = .025$) than the uses generated by participants in the "institutionalized socialization tactics only" condition ($M = .809$, $SD = .022$).

Taken together, the effects found for cognitive flexibility and idea novelty suggest that an onboarding program containing a mix of individualized and institutionalized socialization tactics produces a stronger innovative role orientation than one containing only institutionalized socialization tactics. These results provide

support for the mechanism proposed in H$_2$. In Web Appendix H, we discuss measures used to rule out alternative accounts of effects.

General Discussion

Across two studies, we examined whether an onboarding program that integrates individualized and institutionalized socialization tactics can drive higher performance through a stronger innovative role orientation than a program consisting of only institutionalized socialization tactics. We list the key takeaways and follow these up with discussion.

The main theoretical implications of the article are as follows:

1. Encouraging more of an innovative role orientation by incorporating some individualized socialization tactics into an onboarding program is especially beneficial for salespeople, given the value of innovativeness within the sales role.
2. Combining individualized and institutionalized socialization tactics within an onboarding program encourages newly hired salespeople to approach their role more innovatively, but not to a degree where this becomes detrimental. This shift in approach is particularly the case (and carries greater benefits) for individuals coming from another job (compared with those coming from school).
3. Shifting a sales manager's span of control influences the relative effectiveness of onboarding programs in different ways depending on the socialization tactics featured in the related onboarding programs.

The key managerial takeaways of this article are as follows:

1. Onboarding salespeople through a decentralized program can lead to better performance outcomes than what would be obtained by onboarding those salespeople through a centralized program.
2. Onboarding salespeople through a decentralized program is more impactful when sales managers have the appropriate bandwidth (e.g., a narrower span control) to support the early development of their salespeople.
3. Onboarding salespeople through a decentralized program is more impactful for those firms that primarily hire individuals transitioning from another job (as opposed to hiring recent graduates).

Theoretical Implications

First, we contribute to the organizational socialization and sales force socialization literature streams by providing evidence for the positive influence of incorporating individualized socialization tactics into onboarding programs offered to newly hired salespeople. Extant research within the domain of organizational socialization has considered the potential benefits of

institutionalized socialization tactics in terms of factors such as greater newcomer adjustment, greater organizational commitment, greater person–organization fit, greater job performance, and lower turnover (Allen 2006; Bauer et al. 2007; Cable and Parsons 2001). However, several scholars, in support of Van Maanen and Schein's (1979) theorizing on the influence of different types of socialization tactics on role orientations, reason that a focus on institutionalized socialization tactics may carry a cost by reducing the role innovativeness of newcomers (Allen and Meyer 1990; Baker 1989; Jones 1986), particularly in certain kinds of contexts where innovativeness and adaptability are important. Our research suggests that there are organizational contexts in which encouraging an innovative role orientation to a greater degree is desirable, such as when innovativeness is especially desirable.

Second, from the perspective of research on onboarding programs, our work provides evidence that a program that combines individualized and institutionalized socialization tactics can produce a stronger innovative role orientation than one that features only institutionalized socialization tactics, resulting in higher sales performance. Organizational socialization researchers have expressed a desire to understand how the benefits of both individualized and institutionalized socialization can be harnessed within a firm's programmatic socialization efforts (Allen and Meyer 1990; Ashforth and Saks 1996). However, whether a combination of these tactics would lead to better or worse performance outcomes had not been previously documented. In this regard, one could imagine some ways that combining these tactics in an onboarding program would lead to less desirable outcomes. For instance, the institutionalized socialization tactics within the program might dominate the individualized tactics, leading a newcomer to take on a custodial role orientation to such a degree that they are unwilling to recognize or capitalize on novel opportunities to perform their role more effectively. Our finding that a combination of individualized and institutionalized socialization tactics leads to a more innovative role orientation and higher levels of sales performance suggests that an onboarding program that combines both types of tactics may lead newcomers to take an approach termed "creative individualism" by Schein (1988). In other words, an approach in which an individual seeks out innovative ideas and methods that respect the pivotal values and norms of the organization (Schein 1988). Our results also suggest that this may be the case to a greater degree for those individuals who come into their new role with prior professional experience and less uncertainty regarding organizational life.

Third, we connect the span of control and sales force socialization literature streams by providing evidence that the span of control of a newly hired salesperson's manager influences the relative effectiveness of onboarding programs in different ways depending on the socialization tactics used. Dubinsky et al. (1986) argue that the successful assimilation of salespeople into a firm is a crucial responsibility of sales managers. Plank et al. (2018) point to a lack of research examining the impact of span of control on sales management practice. Our research provides an empirical test of the position held by

Dubinsky et al. by identifying span of control as a factor that influences the impact of the type of onboarding program a salesperson undergoes.

Managerial Implications

Our findings point to the value of an onboarding program that combines both individualized and institutionalized socialization tactics (i.e., the individualized-institutionalized program) over a program that contains only institutionalized socialization tactics (i.e., the institutionalized program). These two types of onboarding programs can be viewed as aligned with what are commonly referred to as decentralized and centralized onboarding programs. In this regard, our research provides evidence that decentralized onboarding programs can deliver results superior to those obtained through centralized onboarding programs.

Our findings should encourage firms to think about how to onboard newly hired salespeople in consideration of the extent to which sales managers can be involved early in a salesperson's tenure. While digitally supported onboarding programs delivered in the workplace (i.e., decentralized programs) may offer more cost savings than onboarding programs delivered in specialized training centers (i.e., centralized programs), our findings suggest that firms ensure that sales managers tasked with onboarding their salespeople have the resources (e.g., time) to be appropriately involved in the process. A too-wide span of control or too many time constraints brought on by sales managers' other activities can lead salespeople onboarded through a decentralized onboarding program to fall short of their potential. In addition, it is particularly critical for sales managers to have the appropriate bandwidth to be involved in the first few months of tenure of a salesperson who underwent a decentralized onboarding program, given the accelerated ramp-up and higher levels of potential that can then be achieved. In industries with relatively high levels of salesperson turnover, effectively setting the span of control of sales managers may be a critical consideration, given the value of obtaining a suitable return faster on new hires under such conditions.

Our findings also encourage managers to think about how to onboard newly hired salespeople in relation to each salesperson's background. Salespeople transitioning into professional life after finishing school may not benefit from being onboarded through a decentralized program. In contrast, those transitioning from another job may benefit substantially from being onboarded through such a program. This finding highlights the value of onboarding through a decentralized program for a firm that primarily hires experienced salespeople (e.g., poaches them from rival firms).

Ecological Value and Its Connection to This Research's Design

Our examination of the relative efficacy of two onboarding programs that vary in their use of individualized and institutionalized socialization tactics was motivated by the importance of providing sales organizations with insight into the relative

efficacy of what are commonly termed centralized and decentralized onboarding programs. We look at these onboarding programs through the lens of organizational socialization theory to offer insight into why one program might be more effective than the other. To align Study 2's design with the main elements of the centralized onboarding program used by the focal firm in Study 1, we employed a form of a formal socialization tactic (i.e., a corporate training center that a salesperson travels to) with features that fully include, but arguably go beyond, the definition of a formal socialization tactic. In a recent editorial in the *Journal of Marketing*, Van Heerde et al. (2021) discuss the importance of connecting research to questions of importance to marketing stakeholders. One way to support this aim is to design research to maximize its impact on the relevant marketing stakeholders' viewpoints and actions (Van Heerde et al. 2021). For this research, managers with decision-making authority related to salesperson learning and development represent our key marketing stakeholders. Providing insights to these stakeholders on whether firms can successfully move away from centralized onboarding programs physically removed from where salespeople work represents one of our main objectives. For these reasons, it was important to ensure that our research design (across both studies) included a centralized onboarding program that closely matched our key stakeholders' reality.

Limitations and Future Research Directions

This research has several limitations, which should provide some promising directions for future research. Although we theorize that the positive effect of an individualized-institutionalized program (relative to an institutionalized program) results from the development of a stronger innovative role orientation, we are not able to formally test a full mediation model in our studies due to data limitations and scope constraints. Consistent with the notion that an innovative role orientation can increase sales performance, extant research does find that a salesperson's motivation to alter and improve the direction of their sales efforts in consideration of the characteristics of a specific sales situation is positively associated with sales performance (e.g., Franke and Park 2006; Sujan, Weitz, and Kumar 1994). For a subset of salespeople, we were able to assess whether each onboarding program is differentially associated with a relevant construct, adaptive selling (details in Web Appendix G). This result suggests that the individualized-institutionalized program is probably associated with adaptive selling.

Beyond the combinations of individualized and institutionalized socialization tactics we examine in this research, there may be other combinations that can produce favorable outcomes for salespeople. This could be an avenue for future research. Further research could also delve into additional mechanisms related to the impact of these types of onboarding programs on salesperson performance and investigate their impact on outcomes other than performance.

Our sample for Study 2 allows us to generalize the effect of an individualized-institutionalized onboarding program on a newcomer's innovative role orientation beyond experienced salespeople. While these findings offer practical insights for researchers and managers interested in onboarding programs for customer-facing employees, it would be valuable for future research to replicate Study 2's results using experienced salespeople.

As the first study within the marketing literature to examine the relative efficacy of individualized-institutionalized and institutionalized onboarding programs, the magnitude of the effect size we find should not be viewed as the end of the discussion on how big of a performance lift an individualized-institutionalized program (relative to an institutionalized program) can provide. The relative effect we found is for those salespeople for whom our instrument determines assignment into each onboarding program (i.e., it is a local average treatment effect). In addition, the relative effect size found for the individualized-institutionalized program (compared with the institutionalized program) is likely to vary depending on several factors, including the type of salesperson being onboarded, the degree of collaboration associated with the sales role, the primary responsibilities of the sales manager, the type of product being sold, and so on. Future research should consider how factors (such as those noted previously) moderate the relative effect size associated with these onboarding programs. In our context, the observed effects are moderated by a sales manager's span of control and a salesperson's work-role transition, hinting at the value of exploring the performance implications of other salesperson- and sales manager–related factors in the future.

Another limitation of this study is that we were unable to employ multiple measures of salesperson performance. Given the nature of any firm's sales-quota-setting method (including the input of human beings in both its design and implementation), the degree to which the sales quotas set by a firm reflect the true sales potential of that firm's territories (or stores) can be called into question to some degree. The method of sales quota setting used by the firm examined in Study 1 is based on a rigorous and data-driven method that bolsters our confidence in the associated findings. It would be valuable for future research to study the relative efficacy of institutionalized and individualized-institutionalized onboarding programs using additional measures of salesperson performance (e.g., sales volume). Doing so would broaden our understanding of the relative effect size associated with these onboarding programs.

To provide some preliminary insight into whether some salespeople select into the onboarding program that is the best fit for themselves when given a choice, we use a discrete choice switching regression, following Ghosh and John (2009) (the details of this analysis can be found in Web Appendix G).[5] The results of this analysis suggest there could be some positive selection into the institutionalized program (which our identification strategy enables us to address). In this regard, additional research should ascertain whether institutionalized programs are more beneficial or attractive to a subsegment of salespeople (including some with higher ability).

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Associate Editor

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Declaration of Conflicting Interests

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