A CUSTOMER PERCEPTION MODEL OF RELATIONAL INTERFIRM BUYER-SELLER INTERACTION

BY

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ETHICAL DECLARATION

I declare that this thesis is wholly my own work except where I have made explicit reference to the work of others. I have read the DBA guidelines and relevant institutional regulations and hereby declare that thesis is in line with these requirements. I have discussed, agreed and complied with whatever confidentiality or anonymity terms of reference were deemed appropriate by those participating in the research and dealt appropriately with any other ethical matters arising. I have also included as Appendix A to this thesis a letter from the Waterford Institute of Technology Graduate Business School Ethics Committee confirming that they were satisfied with my pre-research application for ethical approval.

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Karen B. O'Connor   Date

DEDICATION

For Rory, my constant source of support and encouragement in learning and in life. Looking forward to our next chapter.

ACKNOWLEDGEMENTS

ABSTRACT

Increased levels of complexity in today's business world has seen a shift towards consultative sales environments where the customer evaluation of the salesperson is a key factor in success. Despite widespread acknowledgement of the important role this customer perspective plays sales performance research has traditionally focused on the salesperson perspective. While the extant literature has seen a move to a more customer orientated approach, the need still exists to better understand customer perception across the continual sales interaction.

A contextual conceptualisation of customer perceived sales performance as success in social interaction and a qualitative case study methodology to support the illumination of this phenomenon in its natural contemporary setting are presented. Perceptions of warmth and competence universally recognized as predictors of success in social interaction are proposed performance indicators and are considered through the Stereotype Content Model.

With a focus on star performers within a single organisation, the application of a multiple perspective interview design and template analysis strategy illuminates a comprehensive model of customer perception in relational interfirm buyer-seller interaction. This model highlights customer behavioural and emotive responses to perceptive warmth and competence combinations. In addition star performer behaviours and the role that their emotional and social competencies play in the generation, maintenance, balance and reinforcement of warmth and competence perception are illuminated. This makes relevant customer perception insight for the purpose of effective selection and development practice in consultative selling contexts.

The contribution of this model extends work on the Stereotype Content Model beyond its traditional transactional application. Through its application in a relational context it has illuminated the role of relationship interdependency in the reversal of the primacy warmth judgement in comparative person perception and reveals the role of emotional and social competencies as influencers of impression management specific to the unique compensation effect that exists between the dimensions of warmth and competence.

Key Words: Warmth, Competence, Stereotype Content, Person Perception, Relational, Sales Performance, Customer Orientation, Emotional and Social Competencies, Qualitative Case Study

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LIST OF ABBREVIATIONS

AS	Assertiveness
B2B	Business to Business
BIAS	Behaviours from Intergroup Affect and Stereotype
CO	Customer Orientation
CRM	Customer Relationship Management
CSR	Corporate Social Responsibility
DBA	Doctorate of Business Administration
DC	Doctoral Colloquium
EQ	Emotional Quotient
EQ-i	Emotional Quotient Inventory
ESA	Emotional Self Awareness
ESI	Emotional and Social Intelligence
FX	Flexibility
GM	General Manager
HR	Human Resources
ICT	Information and Communications Technology
IQ	Intelligence Quotient
ID	Independence
IPS	Interpersonal Skills
IPA	Interpretative Phenomenological Analysis
MSCEIT	Mayer Salovey Caruso Emotional Intelligence Test
OP	Optimism
PS	Problem Solving

QCS	Qualitative Case Study
RQ	Research Question
RT	Reality Testing
SAM	Sales Account Manager
SCM	Stereotype Content Model
SCT	Social Cognition Theory
SMP	Sales Management Practitioner
SMR	Sales Management Representative
ST	Stress Tolerance
UOA	Unit of Analysis
UOO	Unit of Observation
WIT	Waterford Institute of Technology

SECTION 1: INTRODUCTION AND DBA RESEARCH OVERVIEW

INTRODUCTION

This chapter introduces research undertaken as part of the Doctorate of Business Administration (DBA) programme in Waterford Institute of Technology (WIT). The focus of the DBA programme is the application of theoretical knowledge towards the advancement of management practice and this practitioner orientated programme comprises three key stages:

1. Research and Professional Development Workshops
2. Research Paper Series
3. Thesis and Viva

The research and professional development workshops of Stage 1 prepare the practitioner to competently conduct a piece research towards the advancement of management practice. The key phases of the research are captured and examined through a research paper series in Stage 2 and include; conceptual framework development (Paper1), research methodology development (Paper 2), research design (Paper 3), implementation of research and presentation of findings (Paper4). This document represents the thesis produced and now presented for examination through the Viva process in fulfilment of Stage 3 of the DBA.

In this the opening section of the thesis, the reader is provided with the background to and rationale for the research. This section commences with an overview of the study, the background to the research and an overview of the framework and methodology used to guide the research. In addition this chapter outlines the position of the original contribution to theory and practice towards the advancement of knowledge in a practical way. This section concludes with an outline of the thesis sections to follow.

OVERVIEW

The overarching aim of this research was to explore salesperson[1] performance from the customer perspective in consultative business to business (B2B) sales environments to inform Sales Management Practitioners (SMPs) towards effective selection and development activity as they build salesforces for sustainable sales

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[1] The term salesperson in this study reflects a Key Account Management role consistent with that of the value creator (Wotruba and Castleberry, 1993) and is distinct from more transactional uses of the term (Guenzi *et al.,* 2007). It is used interchangeably with the organisational term Sales Account Manager (SAM).

success. The specific aim in relation to the exploration of this perspective was to better understand customer perception across the relational customer/Sales Account Manager (SAM) interaction of this context. Continual interaction between customer and salesperson is core to the consultative sales context (Thull, 2005; Kauffman, 2007; Evans *et al.,* 2012). Sales performance was conceptualised as success within this interaction and the study sought to explore customer perceptions of salesperson warmth and competence given the universal role that these dimensions are supported to play as indicators of performance in social interaction. This study further sought to explore the salesperson influencers of these perceptual indicators to make relevant insight gleaned for SMP's in the direction of future activity towards the development of sustainable sales capability. Towards the achievement of these aims the study sought to explore three key research questions (RQs).

RQ1: How do customer perceptions of a salesperson as warm and competent indicate performance in consultative selling?

RQ2: How can an individual salesperson influence customer perceived performance in consultative selling contexts at a behavioural level?

RQ3: How can an individual salesperson influence customer perceived performance in consultative selling contexts at a psychological level?

With a focus on the formation of customer perceptions across the social interaction of the continual sales engagement, a social constructionist philosophy underpinned the qualitative exploration of the perceptual indicators and their salesperson influencers to inform these research questions. This qualitative approach was executed through a case study design that guided the application of a localist interview approach to data collection and template analysis technique towards the generation of findings. The background to this research will now be presented along with an overview of the conceptual and methodological frameworks used for this exploration.

BACKGROUND TO RESEARCH

The researcher is a General Manager (GM) in an Irish Information and Communications Technology (ICT) solutions provider organisation where she was formerly the Human Resources (HR) Manager. Over a twelve year period the researcher as practitioner in this context was always curious as to why some sales

account managers excelled, why others excelled in the short-term but underperformed over time and why others that on paper should have performed just didn't perform at all. The practitioner was particularly interested in sales performance at the level of the individual Sales Account Manager (SAM) as despite all things being relatively equal within the organisation (manager, reward structure, access to resources) and the external context with which they interact (economic conditions, rate of technological development, customer diversity) there were always some individuals who consistently outperformed others i.e. star performers. The practitioner was keen to understand sustainable high performance at this individual level to improve the future selection and development of SAMs. There was also significant organisational support for this research. The direct impact of sales performance on the commercial bottom line was strongly recognised in the organisation and a desire to ensure that this was future proofed for long term organisational sustainability existed. This position delineates the practitioner perspective at the point of entry to the DBA programme in early 2013 and denotes the commencement of the journey as practice based researcher. This journey progressed with an examination of the extant salesperson performance literature. An overview of this review is now provided to further outline the background to this current research.

Sales Performance Literature Overview

Personal selling and sales management have received extensive focus as sub-components of marketing research (Sheth and Sharma, 2008) and the preoccupation with salesperson performance variance within this field has spanned decades (Mayer and Greenberg, 1964; Churchill *et al.*, 1977; Churchill *et al.*, 1985; Rackman and DeVincentis, 1999; Sojka and Deeter-Schmelz, 2002). A review of the extant literature reveals two central perspectives, an extensive body of literature that positions the salesperson as central to the research and a more emergent customer orientated view of salesperson performance. These perspectives are reflective of a change in predominance from transactional to relational contexts in B2B selling, a change that has been fuelled by increased rates of technological evolution in the developed world (Thull, 2005; Kauffman, 2007; Carlson, 2016).

The extensively explored salesperson perspective places the focus firmly on the impact salesperson personal factors have on sales performance variance. Many

variables to include physical characteristics, personality traits, intelligence, and education have been considered in the search for insight with key literature reviews noting mixed and contradictory results that leave much to be desired as a source of significant explanation (Cravens and Woodruff, 1973; Szymanski and Churchill, 1990; Rozell *et al.*, 2006; Kauffman, 2007). A key development within this perspective was the consideration of personal characteristics indirectly through mediator variables. Based largely on Vroom's (1964) expectancy theory an examination of personal factors through salesperson process mediators resulted in a comprehensive model of motivation and performance in industrial selling (Churchill *et al.,* 1985). Ranked as the number one sales article of the twentieth century (Leigh, Pullins and Comer, 2001) this work has been used extensively as a conceptual basis for further sales performance research (Sojka and Deeter-Schmelz 2002; Borg and Johnston, 2013).

The sales context in the lead up to the Churchill *et al.,* (1985) model was predominantly transactional and product innovation was key to the decision to purchase. This was followed by an era where focus turned to the ability to demonstrate product 'value add' (Thull, 2005). These contextual circumstances supported the salience of salesperson motivation and aptitude to persuade in salesperson orientated research (Thull, 2005). This salesperson orientated focus transitioned from a focus on salesperson motivation to work harder to salesperson motivation and ability to work smarter. This preoccupation placed an emphasis on satisfying short-term customer needs and individual preferences through tailored communication and solutions that were within the parameters of the selling firms offering (Weitz *et al.*, 1986; Spiro and Weitz, 1990; Hallen *et al.*, 1991; Wotruba, 1991).

Today's technically charged era has seen the erosion of such transactional sales roles in B2B contexts with the internet a key enabler of transactions, product information and comparisons (Carlson, 2016). The transformational effect of rapid technological development has fuelled the evolution of the prominent B2B sales context to a more consultative one (Thull, 2005). In this transformational context purchases are less routine and there is a heightened degree of uncertainty, complexity and risk involved in the decision to purchase (Thull, 2005; Neu *et al.,* 2011). This essence of this evolved context is encapsulated by Beardsley *et al.* (2006:53) who state:

For many employees today, collaborative, complex problem solving is the essence of their work. These tacit activities- involving the exchange of information, the making of judgements and the need to draw on multifaceted forms of knowledge in exchanges with co-workers, customers and suppliers- are increasingly part of the standard model for companies in the developed world"

Success in these more relational contexts is dependent on the ability to create interpersonal bonds between supplier and customer and boundary-spanning persons are of fundamental importance in the formation of sustainable interfirm relationships (Iacobucci and Ostrom, 1996; Mavondo and Rodrigo, 2001, Narayandas and Rangan, 2004). The organisations' intent and ability are to a great extent conveyed in practice by salespeople, whose behaviors exercise considerable impact on customer interactions and their results (Price & Arnould, 1999; Palmatier, 2008). In these more complex environments the source of value creation is no longer embedded in the core organisational offering but has shifted to the relational interfaces of boundary spanning relationships (Ulaga & Chacour, 2001).

As the central relational interface with the customer, the role of the salesperson has evolved from one of order taker and maker to that of value creator (Thull, 2005; Carlson, 2016) as reflected in the partner (Weitz and Bradford, 1999), procreator (Wotruba, 1991) and trusted advisor (Neu *et al.,* 2011) sales role descriptions. Common to these descriptions is a focus on meeting the long term needs of the customer, tailoring an agnostic market offering to meet these needs, a holistic salesperson involvement from problem definition to solution implementation and a continual involvement in the performance of both the customer and the sales organisation over time. This role is illuminated by the Neu and Brown (2005:9):

"...develops an in-depth understanding of an individual customer's business; he or she collaborates with and provides unbiased recommendations to a customer on how to achieve desired outcomes from a complex system. A trusted adviser participates in both the formulation and the implementation of a solution to a customer's problem"

The evolved salesperson role has fuelled a change in sales performance thought to a more relational customer orientated perspective (Jolson, 1997; Weitz and Bradford, 1999). Key to this has been the examination of salesperson relational and consultative behaviours (Hennig-Thurau, 2000) and a notable development is the Trusted Advisor in Interfirm Interpersonal Relationships Model (Neu *et al.,* 2011). This model proposes that relationship behaviours of trusted advisors lead to improved customer decision making quality through the mediator role of customer beliefs about salesperson trust and that this quality exerts reciprocal customer behaviours that create value for the trusted advisor thus solidifying the dyadic partnership. Core to the trusted advisor in interfirm interpersonal relationships model is the customer perception of salesperson trust. It has been established that salesperson personal relationship behaviours significantly affect buyer's perceptions of salesperson trust and buyer loyalty to the relationship and that consultative task behaviours significantly affect buyer perceptions of salesperson expertise and buyer loyalty to the relationship (Newell *et al.,* 2011). The consideration of customer perception is important as the service quality literature indicates that "value lies in the eye of the beholder" (Parasuraman *et al.,* 1991; Ulaga and Chacour, 2001) and to understand sales performance in this transformational context one must understand it from the perspective of the customer.

What is not understood from these contributions is how customer perceptive evaluations of salesperson targets over the course of the continual sales interaction indicates sustainable high performance. There is a common recognition across the sales performance literature that customer interaction plays a core role as the conduit of salesperson value creation in the relational sales context (Weitz *et al.*, 1986; Crosby *et al.*, 1990; Spiro and Weitz, 1990; Hallen *et al.*, 1991; Kelley, 1992; Jolson, 1997; Park and Halloway, 2003) and yet what happens within the buyer-seller interaction remains an under researched area where a need exists to establish how better sales performance can be leveraged within this interaction (McFarland *et al.,* 2006; Weitz and Bradford, 2009; Newell *et al.,* 2011; Evans *et al.,* 2012). Such research is needed over the course of the continual sales interaction so that sales organisations can better manage their business customers (Newell *et al.,* 2011). To date the salesperson influencers of customer perception have focused on behaviours as antecedents of trust. Interaction however does not take place in an emotional vacuum and a key limitation

of extant research is that it takes an overly narrow focus on cognitive predictors (Kidwell *et al.,* 2007; Borg and Johnston, 2013).

PRACTICE RESEARCH RATIONALE

Organisations that seek sustainable sales performance in today's consultative context look to leverage difficult to replicate committed relationships as one of the last sources of competitive advantage in today's technically charged era (Day, 2000). The development of these highly loyal business partnerships contributes to a decrease in the costs associated with customer acquisition and retention (Reichheld and Aspinell, 1993). In the context of a globally turbulent economic backdrop the value add of investments is critical to the customer decision to spend and organisations who invest at this time are often concerned with improvements in business processes (Paroutis *et al.,* 2014). In consultative selling the salesperson is conductor of the orchestra in the relational interface of the boundary spanning relationship and source of value creation (Thull, 2005; Carlson, 2016). This wider contextual backdrop deems research with respect to salesperson performance in this context timely.

Despite an acknowledgement that the perception of value lies in the eye of the customer (Parasuraman *et al.,* 1991; Ulaga and Chacour, 2001) and that social interaction is a core value distribution channel in consultative selling (Weitz *et al.*, 1986; Crosby *et al.*, 1990; Spiro and Weitz, 1990; Hallen *et al.*, 1991; Kelley, 1992; Jolson, 1997; Park and Halloway, 2003) there remains a requirement to better understand how customer perceptions of salespeople are formed over the continual sales interaction (McFarland *et al.,* 2006; Weitz and Bradford, 2009; Newell *et al.,* 2011; Evans *et al.,* 2012). To address this gap this study sought to explore customer perception evaluations of salesperson targets over the continual sales interaction with a particular focus on how such perception indicates sustainable sales performance.

Increased economic pressure on SMPs to achieve more with lesser budgets (Zoltners and Lorimer, 2000) and high costs associated with selection and development errors (Churchill *et al.,* 1977; Guettler, 2009) means that effective selection and development activity is critical and knowledge to this end is invaluable to SMPs. It is therefore essential for practice that performance in the social interaction core to the consultative sales context is not only understood but can be translated for practical application in selection and development activity. To address this practice based need the research

sought to explore how star performers in these key account management roles influence the perceptual indicators through a holistic consideration of salesperson influencers that takes account of both behavioural and psychological factors.

THEORETICAL RESEARCH FRAMEWORK

With roots in Social Cognition Theory (Bandura, 1986), the Stereotype Content Model (Fiske *et al.*, 2006) and its subsequent extension through the Behaviours from Intergroup Affect and Stereotype (BIAS) Map (Fiske *et al.,* 2007) informed the conceptual framework to explore customer perceived salesperson performance, conceptualised as success in the continual sales interaction inherent to the relational context of this study (Figure 1). From this theoretical foundation, warmth and competence perceptions were identified as indicators of success across this interaction and thus of relational customer perceived performance.

CONCEPTUAL FRAMEWORK FOR THE EXPLORATION OF THE INDICATORS AND FACILITATORS OF CUSTOMER PERCEIVED PERFORMANCE IN CONSULTATIVE BUSINESS TO BUSINESS SALES CONTEXTS.

Customer Perceived Performance Indicators
Warmth and Competence Perceptions
High Warmth and High Competence
Primary Dimensions in Context (P4)

Sales Person Facilitators of Customer Perceptions
Behavioural Level- CO
Customer Orientated Behaviours of cooperative relationships (P6) and demonstration of expertise (P7)

Facilitation Mechanism
Customer Emotive Reaction to Sales person Behaviour
Admiration (P1)

Business to Business Consultative Sales Environment
Social interaction and Complexity Core to Context

Facilitation Mechanism
Customer Behaviour Reaction
Active (P2) and Passive Facilitation (P3)

Sales Person Facilitators of Customer Perceptions
Psychological Level EQ-i
Generate (P8) and Maintain Warmth (P9)
Balance (P10) and Reinforce Competence (P11)

Sales Performance Outcome
Initial Purchase
Repeat Purchase
Sustainable Performance
Reinforce Competence Judgement (P5)

Figure 1: Conceptual Framework

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To explore the salesperson influencers of these perceptual performance indicators and to give consideration to both behavioural and psychological aspects of influence, the research used Customer Orientation (CO) and Emotional and Social Intelligence (ESI) in the framework construction. A brief overview of these building blocks is presented.

Customer Orientation

In person evaluation perceivers illicit emotional responses to their perceptions of behaviours (Fiske *et al.,* 2006). The role of behaviours in relational sales performance has been well considered particularly in the realm of customer orientated behaviours pertinent to the role of consultative salesperson (Crosby *et al.,* 1990; Newell *et al.,* 2011). CO is the extent that individuals at the interface of customer interaction engage in action that is directed towards meeting the needs of customer (Saxe and Weitz, 1982). In the case of the consultative salesperson this need focus is a more relational than short term one (Wotruba, 1991). There is much tension in the literature as to the constructional nature of CO with prominent behavioural (Saxe and Weitz, 1982) and psychological (Zablah *et al.,* 2012) schools of thought evident. The intention of this research was not to reconcile such tension but to use the existing knowledge base as a behavioural lens to provide SMPs with a mechanism to access insight at a behavioural level with respect to warmth and competence as indicators of customer perceived performance. The inclusion of a psychological consideration of salesperson influencers through the ESI lens acknowledges the potential role of psychological factors, this acknowledgement however does not preclude the use of CO as a behavioural lens. Regardless of whether the construct of CO is driven behaviourally or psychologically the outcome of the orientation will ultimately manifest itself actions (Zablah *et al.,* 2012) and thus it remains a suitable lens for the behavioural consideration.

Emotional and Social Intelligence

There is a lack of attention given in the literature to affect based factors in the consideration of relational sales behaviours and performance (Kidwell *et al.,* 2007) and yet emotional facets have an inherently strong influence on customer/salesperson relationships due to the core role emotions play in the interpersonal interaction (Borg and Johnson, 2013). Emotions serve communicative and social functions by conveying information about an individual's thoughts and intentions in interactions

(Keltner and Haidt, 2001; Gohm, 2003) and emotional competencies are generally considered useful to people in professional life (Bar On 1997; Goleman 1998). To ensure a holistic approach to the consideration of salesperson influencers on customer perceptions of salesperson warmth and competence, the competency framework underpinning the Emotional Quotient (EQ) was used as a lens.

The EQ framework is considered a mixed model of emotional and social intelligence (Mayer *et al.,* 2000; Bar On, 2006) and was selected over alternative models such as the narrowly defined ability model of emotional intelligence (Mayer *et al.,* 2000) based on its theoretical, philosophical and empirical fit with this study and potential for later practical application. Its theoretical foundations date back to the early work of Darwin (1872) on the importance of emotional expression for survival in keeping with the evolutionary role of warmth and competence in person perception core to this study. References to "environment" and "outcomes one strives to achieve" in the work of Bar On (1997:15) highlights the highly subjective nature of this work and is conducive to the subjective orientation of the philosophical basis of this study. Adding further weight to the use of this lens is strong empirical support for the role of ESI as an indicator of positive social interaction when measured through the Emotional Quotient Inventory (EQ-i) versus that found for the narrow ability model measured through the Mayer Salovey Caruso Emotional Intelligence Test (MSCEIT) (Lopes *et al.*, 2004; Bar On, 2006). The operalisation of the emotional quotient framework as competencies supported to have developmental potential (Goleman, 1998; Bar On 1997, Dulewicz and Higgs, 2004) provide an opportunity to produce recommendations useful to practitioners in keeping with this practitioner orientated undertaking.

THEORETICAL RESEARCH RATIONALE

According to Social Cognition Theory (SCT), human motivation and action are extensively regulated by forethought (Bandura, 1986). This anticipatory control mechanism involves expectations that might refer to outcomes of a specific course of action (Luszczynska and Schwarzer, 2005). The presence of this anticipatory control mechanism is core to how people perceive others in that they evaluate the risks and consequences of the interaction. This is reflected in evolutionary pressures to determine if the co-specific is friend or foe (intends good or ill) and if they have the ability to enact intentions in social interaction (Fiske *et al.,* 2002). These dimensions

of evaluation are labelled by Fiske *et al.* (2002) as warmth and competence and fundamental support has been found for these two dimensions as universal indicators of person perception in social interaction (Asch, 1946; Rosenberg *et al.* 1968; Peeters, 1983; 1992; Wojciszke, 1994; Wojciszke *et al.*1998a; Fiske *et al.*, 2006). Judgements of warmth and competence have been widely supported as playing an important role in consumer perceptions of brands (Aaker *et al.,* 2010; Aaker *et al.,* 2012) and are reflected in the relational sales literature with respect to the trusted advisor role and the concept of trust. The construct of trust in the organisational domain comprises both honesty trust and ability trust, with ability trust akin to competence and honesty trust a core component of the warmth dimension (Mayer *et al.* 1995). Warmth and competence were therefore considered indicators of performance in the context of this study.

The Stereotype Content Model (SCM) proposes that warmth and competence stereotypes respectively stem from appraisals of the potential harm or benefit of the target groups goals and the degree that the group are perceived as able to effectively enact those goals. Based on a consideration of high/low appraisals on the warmth/competence dimensions, the SCM supports resultant emotional responses from the perceiver towards the evaluation target based on the four varying combinations; warm and competent, cold and incompetent, warm but incompetent and cold but competent (Fiske *et al.,* 2002). This work is then extended by the Behaviors from Intergroup Affect and Stereotypes (BIAS) Map that predicts behavioural outcomes across the four perceptive combinations of the SCM (Fiske *et al.,* 2006). This collection of works provides a comprehensive model to understand judgements about warmth and competence in person perception within social interaction (Cuddy *et al.* 2011).

The SCM and BIAS Map provide the catalyst to understand how a customer perceives a salesperson across the continual sales interaction to illuminate potential for better sales performance within the interaction. The evolutionary base of social cognition in the SCM and BIAS map frameworks make them a valuable mechanism to understand person perception across cultures (Ybarra *et al.,* 2008, Cuddy *et al.,* 2009; Cuddy *et al.,* 2011). The role of cognitive appraisal, emotions and ending behaviours are considered by this frame and thus much of the psychological system is touched. There is significant potential to generate a more lasting performance effect through the use

of this frame than that offered by just a behavioural consideration of perception formation (Aaker *et al.,* 2010).

Stereotypes by their nature are based on instantaneous evaluations (Bandura, 1986) and thus a key limitation of work in this realm to date has been the transactional nature of consideration given to the warmth and competence dimensions and the SCM and BIAS map as mechanisms to understand their role in social interaction. The applicability of this comprehensive work has therefore been limited to such scenarios and hence much occupational consideration to date has focused on transactional type applications such as hiring decisions (Masser *et al.,* 2007; King and Ahmad, 2010; Krings *et al.,* 2011). The consideration and application of the SCM and BIAS map to understand the continual social interaction of the relational consultative sales context is not only contextually important to practice but also provides valuable theory extension potential that may widen the applicability of this comprehensive and valuable extant work on person perception in to more relational fields of research. A core aspect of this consideration is the role of the primacy warmth judgement (Cacioppo *et al.,* 1997; Wojciszke *et al.*, 1998b; Ybarra *et al.*, 2001; Willis and Todorov, 2006; Fiske *et. al.*, 2006; Cuddy *et al.,* 2011). It is suggested that a reversal is possible in occupational circumstances but knowledge as to the conditions for this reversal is still in its infancy (Wojciszke and Abele, 2008; Cuddy *et al.,* 2011). Initial work in singular person perception in this area suggests that relationship interdependence may play a role (Wojciszke and Abele, 2008) and therefore a relational consideration of these universal dimensions of warmth and competence has the potential to further contribute to this lesser known perspective.

The extant literature has largely focused on the perceptive process and there is little link back to the target antecedents of this perception. Initial work on impression management has focused on downplaying as a behavioural strategy to manage the unique relationship between warmth and competence however, little is known as to how individuals manage this compensation effect (Holoien and Fiske, 2013). In a similar vein work on emotional and social intelligence in impression management has largely focused solely on the warmth dimension (Lopes *et al.,* 2004; Mayer *et al*., 2004; Bar On, 2006). To understand how warmth and competence influence success in social interaction is valuable, to understand what strategies may influence these perceptions towards success is also useful however, to fully realise this value it is also

important to understand the mechanisms to manage this behaviour (Holoien and Fiske, 2013; Durante *et al.,* 2017). The holistic consideration of the influencers of warmth and competence in this study through a qualitative exploration that goes beyond surface level results presents the opportunity to contribute to this understanding.

METHODOLOGY OVERVIEW

An Information and Communications Technology (ICT) Solution Provider was selected as a common case consultative sales organisation. The researcher identified star Sales Account Manager (SAM) performers as embedded cases within the common case to illuminate sustainable high performance within the buyer-seller interaction, the unit of analysis of the study. A case study approach was selected as it was considered appropriate to explore the "how" nature of the research questions that sought to illuminate the lived experience of the customer across the continual social interaction with their salesperson in its natural contemporary setting (Stake, 1995; Rowley, 2002; Baxter and Jack, 2008; Yin, 2014). A common case was selected due to the access opportunity to customers and multiple perspectives over time that it presented, a level of access considered vital to such case research (Kelliher, 2005). The embedded case structure was conducive to the exploration of the research questions in that it allowed cross and within case comparison of customer perception and salesperson influencers as they pertained to and between star performers, the focus of the analysis being the generation of sustainable performance within the buyer-seller interaction.

Customer perceptions of warmth and competence were conceptualised as performance indicators with warmth and competence dimensions considered universally indicative of success in social interaction (Asch, 1946; Bales, 1950; Rosenberg *et al.*, 1968; Peeters, 1983; 1992; Wojciszke, 1994; Wojciszke *et al.,* 1998a; Fiske *et al.*, 2002; 2006; 2007). Within this context sales performance is multi-dimensional (Hunter and Perreault 2006:2007; Sundarem *et al*., 2007) and requires an improved measure of salesperson performance reflective of their role as an organisational boundary spanner (Hunter and Perreault, 2007; Rocco and Bush*,* 2016; Carlson, 2016). These dimensions were applied as a measure for the selection of star SAM performers within the case organisation and were captured via a brief customer telephone survey across the entire SAM selection pool. The use of the perceptual performance indicators as performance measures was more consistent with the conceptualisation and perspective

of performance sought than the sales volume measures prevalently used (Limbu *et al.* 2016).

The customer perspective of perception formation was captured in the qualitative exploration that followed. This perspective was necessary to inform in particular the first research question as it pertained to the customer perception of salesperson warmth and competence but also to aid the development of a situated account with respect to the overall study through triangulation of perspectives. The salesperson perspective was used to inform research questions two and three as these were respectively concerned with the behavioural and psychological salesperson influencers of the customer perception evaluations. For the purpose of triangulation an engineer perspective was added as an impartial observer to the buyer-seller interaction. The role of the engineer as a specific purpose participant in the interaction created an opportunity to observe the interaction in its natural contemporary setting, without the risks posed by direct researcher observation possibly due to the researcher's position of power in the case organisation. Finally, the organisational sales management perspective offered an additional viewpoint of the buyer-seller interaction towards sustainable performance based as a macro-level observation and aided the situated account through the provision of a holistic organisational context to the account. This approach addressed a call in the literature for the missing customer perspective (Shannahan *et al.,* 2013; Mullins and Syam., 2014; Rocco and Bush., 2016), coincides with a more recent research proposal that suggests a tripartite triangulation of salesperson customer and sales manager perspectives (Carlson, 2016) and took this a step further through the addition of the technical pre-sales engineer perspective. This addition was appropriate due to the requirement to collaborate for specific technical expertise in solution selling (Miller *et al.,* 1987; Thull, 2007).

Perspectives were obtained using a localist interview approach to capture the situated participant account in keeping with the social constructionist philosophical basis of the research (Alversson, 2003). This was implemented through the use of a semi-structured interview guide and the extensive use of probes appropriate to the individual interview situation to truly establish the meaning within the participant account (Alversson, 2003). The interview guide was drawn from the propositions of the conceptual frame to ensure the study was kept in scope (Yin, 1981; Eisenhardt, 1989, Stake, 1995; Bryman, 2004) and this formed the basis of a coding structure for the

application of a template analysis design along with codes emerging from the inductive research process (Gibson and Brown, 2009). NVivo was used to transform flat description based analysis to a higher order level of interpretation (King, 2012).

ORIGINAL CONTRIUTION POTENTIAL

This study proposes to make a contribution to the person perception literature specifically with respect to the SCM (Fiske *et al.,* 2002) and associated BIAS map (Fiske *et al.,* 2006). While SCM and BIAS map have been well considered in the natural transactional context of stereotypes there is little relational consideration of this model and this has limited its applicability to more relational areas of interest. This study provides what the researcher believes is the first comprehensive consideration of the universal person perception indicators of warmth and competence through the SCM and its BIAS extension in a relational person perception context. Through this consideration it also proposes to illuminate dimension primacy in relational comparative person perception situations. Through a consideration of the salesperson influencers of warmth and competence perceptions it is hoped to better understand the role of behaviours and emotions in impression management. In this area today the focus has largely revolved around the singular dimension of warmth or behavioural strategies such as downplaying in the management of the unique compensation effect that exists between the two dimensions with understanding as to the mechanisms that underpin the implementation of such strategies for optimal results lacking.

At a practice based level the proposed contribution is a comprehensive consideration of person perception in the continual sales interaction of the relational sales context. This will be achieved through the application of the relational SCM consideration in a consultative sales organisation as a common case. Through this application of the relational SCM consideration, this study proposes to identify a model of customer perception in relational interfirm buyer-seller interaction to better understand how sales performance can be leveraged within this interaction (McFarland *et al.,* 2006; Weitz and Bradford, 2009; Newell *et al.,* 2011; Evans *et al.,* 2012). In particular it proposes to identify the primacy perception dimension in the relational consultative sales context, the emotive and behavioural responses of customers towards star performers and the influence these responses have on sales performance outcomes. To

enable SMPs to use such insight for the purpose of more effective salesperson selection and development the model will also contribute the salesperson influencers of customer warmth and competence perceptions to include both behavioural and psychological factors.

THESIS STRUCTURE

This section has provided an introduction to the research that guides the reader in to the dissertation. The second section presents the four papers of the cumulative paper series, frozen at the point they were examined and recommended under the programme. The guidelines of the DBA programme require these papers that capture the research at a particular point in time be included in the final thesis in their frozen state. The nature of the DBA process allows for continual development of the research in between these points in time and to aid the reader with the transition from one point in time to the next, each paper is prefaced to highlight changes that occurred in between. These changes occurred as a result of feedback from the examination process and continual researcher knowledge development, both in terms of subject area and research process.

The paper series concludes with the presentation of findings and the third section of the thesis picks up where the paper series finishes with a discussion of key findings in the context of the existing body of knowledge in the person perception and sales literatures. This section makes explicit the research implications for and contributions to theory and practice, the limitations of the research and the opportunities these limitations present for future research. Section three concludes with the presentation of recommendations for practitioners. The fourth and final section of the thesis captures the practitioner's reflective journey and personal development as a researcher.

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SECTION 2: CUMMULATIVE RESEARCH PAPER SERIES

PAPER 1 PREFACE

This is the first paper in a four part cumulative paper series that follows the researcher's journey through the key phases of research and focuses on the development and presentation of a conceptual framework for research to follow. This paper was initially produced in October 2014 for a Doctoral Colloquium (DC) in Waterford Institute of Technology (WIT) that served the purpose of transfer viva prior to the allocation of supervisors on the DBA programme. The initial paper was presented and recommended without changes however, the researcher subsequently considered the feedback from the examination panel that comprised Professor Jimmy Hill (National College of Ireland), Dr. Susan Whelan (WIT) and Dr. Anthony Foley (WIT) and resubmitted the paper with some changes that were reviewed and accepted. The purpose of this preface paper is to set the scene in the lead up to the DC, to highlight the consideration given to the examination feedback prior to the paper resubmission and to clarify pertinent points on review of this paper at a later stage in the research and researcher development.

To provide some practitioner based context to the journey, the researcher is a General Manager (GM) in a consultative sales environment with a background in Human Resources (HR) management. On observation of salespeople over twelve years in practice the researcher was always curious as to why some salespeople are more successful than others, why some salespeople despite coming from non-traditional backgrounds excel over those who on paper should be brilliant and why some salespeople experience some short-term success before having to move on due to non-performance over time. Despite exposure to similar conditions within an organisation why do some salespeople succeed and others don't?

Wearing a HR practitioner hat the researcher had directed activity such as new hire selection, performance management and development interventions towards the achievement of optimal and sustainable sales success. Despite the traditional focuses on education, personality, experience and motivation throughout these pursuits the results in practice generally had mixed results in keeping with those evident in prior research in the sales performance literature. The DBA process aided the researcher to take a step back from this practitioner viewpoint and to look at the phenomenon more holistically initially through the literature review and later through the enactment of

the research in itself. This reflected the insular nature of the more traditional explanations to the phenomenon of individual sales performance variation, a phenomenon where an external influence, the customer, had a significant influence on success or failure.

The process of narrowing topic refinement and conceptual framework development was not a linear one and required extensive engagement with extant literature, initially in the sales and marketing arena and later in the person perception field. Despite a lack of linearity there are a number of key points of influence that generated iterative progression in the development of the conceptual framework that was the outcome of paper 1. At the early stages of study development, with merely a general area of interest identified, engagement with the literature was very much at a broad and general level. This commenced with google scholar and library database searches of general terms such as sales performance and at a very early stage in this process the work of Churchill *et al.* (1985) was identified as seminal. The researcher engaged with the various facets of this model at the outset and explored them within the extant literature. This led to much consideration of personal antecedents such as intelligence and personality, studies of which like the practitioner experience had mixed and contradictory results. In addition the role of salesperson motivation and in turn the link between performance, reward and motivation was considered. Despite there being much extant research in this area it did not account for cases where the salesperson is motivated to sell, rewards are aligned and yet the customer does not purchase. The summary outcome from this phase of review in the literature was that a customer decision making consideration was lacking from this model.

The consideration of the seminal model and the many paths of exploration that this led too was not however in vain. A key insight emerged from this that shifted researcher thinking on to the next level. Emotional Intelligence (EI) was noted as a potential personal antecedent missing from the model. The researcher considered the potential to extend the model to include such insight only to find that this had been previously undertaken by Sojka and Deeter-Schmelz (2002; 2003). One limitation of this extension however as noted by Sojka and Deeter-Schmelz (2003) was that their work was based on salesperson self-rating and lacked a customer perspective with respect to EI. This limitation in tangent with the lack of customer consideration given in the

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Churchill *et al.* (1985) model saw the focus of the literature review turn to the customer.

The shift in focus within the literature review to the customer illuminated to the researcher the changing predominance of the sales context in the developed world to that of a relational consultative one largely influenced by the work of Thull (2005). This saw the identification of the Trusted Advisor in Interfirm Interpersonal Relationships as a key literary development that was relative to the practitioner's area of interest as a researcher. This model seemed to address the researchers concerns with respect to the customer consideration that was absent in the earlier models reviewed and was more appropriate to the sales context of interest to the researcher based on their practitioner role. At this point the literature review cumulated to see the emergence of two key themes; a salesperson versus customer centric focus and a contextually based importance on interaction in the consultative sale and this refined the focus of the study considerably.

The literature review process that led to the presentation of this paper 1 in October 2014 commenced in mid-2013 and during this time a newly published work by Borg and Johnston (2013) seemed to be on a similar thought journey to the researcher at this point in particular with respect to the sales performance dyad of customer and salesperson and the role of interaction in the consultative sale. Delving in to this work further the researcher established that Borg and Johnston (2013) were attempting to conceptualise interpersonal skills in sales and that they strongly considered emotional intelligence as a core facet of these skills. This was appealing to the researcher as the practitioner sense and earlier literary consideration of EI indicated that EI functioning may have some role to play in salesperson performance. While Borg and Johnston (2013) sought to understand what interpersonal skill was within the buyer-seller interaction and the trusted advisor model had contributed that customer perception of trust was important to the customer decision making process, little was known as to how customer perception across the course of the continuous relational sale contributed to sustainable sales performance

To inform the literary gap the attention of the researcher in terms of engagement with the literature then turned to the person perception literature with a view towards the development of a conceptual framework for study. Social Cognition Theory in

particular informed this area. Social Cognition Theory (SCT) is an interpersonal level theory developed by Albert Badura (1986) that emphasizes the dynamic interaction between people (personal factors), their behaviour and their environments. Social cognition consists of an ensemble of mental processes that are specifically attuned to perceiving, understanding and interacting with other people and is based on the premise that people look to capitalise on the opportunities afforded by interdependence and to avoid the dangers from social living. It was selected as the theory with the potential to best illuminate the phenomenon over other theories of person perception such as attribution theory as it emphasises the social interaction during which perception takes place. It also considers the interdependence and risk that are core characteristics of the consultative sales context and comes from an evolutionary base that is likely to be more stable across cultures, with culture variance a challenge that many previous studies of sales performance.

Adding further weight to the selection of Social Cognition as the foundational theory base to explore the research gap was the previous use of social cognition in the work of Aaker (2010) who through a stereotype content (SCM) frame sought to better understand consumer perception of brands. Aaker made explicit its potential to generate lasting performance results due to its consideration of cognition behaviour and affect. This combined with strong support for the dimensions of perceived warmth and perceived competence (the cornerstones of stereotype content) as universal indicators of success in social interaction resulted in their selection for use as conceptual building blocks for this research.

Having established the foundational theoretical base and the role of warmth and competence to inform the research question with respect to customer perception and sustainable sales performance, attention turned to the salesperson influencers of such perception evaluations. This change in focus was to make accessible to practitioners insight with respect to customer perception and sustainable sales performance for the future development of sales resources in keeping with the original practitioner preoccupation. Based on the review of EI at an earlier point in the literature review the original paper presented at the DC recommended without changes, focused on the exploration of the psychological influencers of customer perceived performance. Despite recommendation without changes the researcher contemplated the reviewer's feedback that the role of Customer Orientation (CO) briefly mentioned in the paper

was "*teasingly interesting*" and "*very relevant to the study*". On consideration the researcher made the decision to include CO as a behavioural lens in the production of a more holistic model to explore the influencers of customer perceived performance. It was acknowledged that there is much tension in the marketing literature as to whether CO is a behavioural or psychological construct and while this is certainly an interesting debate it was not the aim of this study to reconcile such a matter. As a practitioner orientated programme the greatest value that CO had to offer to the study in hand was as a lens to illuminate influencers at a behavioural level to complement rather than to conflict with the psychological lens already included through the theory base underpinning the Emotional Quotient (EQ) concept. This fundamentally changed the conceptual framework and the researchers' view was supported by the then appointed supervisor Dr. Susan Whelan that the new model was a far more comprehensive offering than the original. The initial paper was resubmitted and accepted with this amendment and this resubmitted version is the paper included in this final dissertation.

As an additional point of clarity paper 1 refers to the Emotional Quotient Inventory (EQ-i) and while correct at the time of inclusion (as preceding the methodology phase), where EQ-i is mentioned henceforth within the paper series this is now understood to mean the theory base that underpins the emotional quotient based on the extensive work of Dr. Reuven Bar On and subsequent colleagues as a mixed model of Emotional and Social Intelligence (ESI) as opposed to the inventory as a measurement tool in itself.

In another matter of terminology, paper 1 refers extensively to the terms "*facilitators*", "*facilitation*" and "*facilitates*" to include in the paper title however, as later pointed out by the reviewers of paper 4, such terms can lead to a lack of clarity based on variable interpretations and it was suggested that clarification or revision of these terms would be beneficial to the reader. The use of these terms was initially influenced by two bodies of work; the BIAS Map within the SCT base and the theory base underpinning the EQ-i. With respect to the former positive behavioural response is described as "facilitation" (Fiske *et al.,* 2007), while work in the latter area regularly refers to the role of socio-emotional functioning as "to facilitate" a successful outcome (Bar On, 1997). The researcher reflected on the meaning of the term in the context of the study and defined its use as "to make easier; assist the progress of" in keeping with

most standard British dictionary references to the term. One however could "facilitate a war" as was clearly pointed out by Professor Jean-Anne Stewart (Henley Business School) as an examiner of paper 4 and to avoid any future confusion, the researcher made the decision on resubmission of paper 4 to revise the term to "influencers" and "influences" rather than facilitators and facilitates.

A final note on paper 1 as the initial paper in the series is with respect to the use of the Bar On (1997) framework to capture emotional influencers of customer perceived sales performance. This decision was made having reviewed many such constructs through the "*Handbook of Emotional Intelligence*" an edited compilation of seminal work in the emotional realm that was a comprehensive resource the researcher found invaluable in the selection of an appropriate lens. Much debate appears in the literature in this realm as to what constitutes Emotional Intelligence (EI) with many constructs to include; pure ability based models, empirically supported mixed models and broad lists considered all of personality relabelled as "*an old wine in a new bottle*" (Mayer *et al.,* 2000). The purpose of the researcher's review of this area was not to reconcile such tension however, it was to select a lens appropriate to the conceptual framework of the study. The EQ framework is considered a mixed model of emotional and social intelligence (ESI) and hence where the terms emotional intelligence, emotional competencies, social-emotional influencers are used at times interchangeably throughout the series they refer to this this mixed model concept.

PAPER 1: A FRAMEWORK TO EXPLORE THE INDICATORS AND FACILITATORS OF CUSTOMER PERCEIVED PERFORMANCE IN CONSULATIVE SELLING

BY

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ABSTRACT

This paper presents a framework to explore the dimensions of warmth and competence as indicators of customer perceived sales performance along with customer orientation and the emotional quotient as facilitators of these performance indicators in consultative sales environments. The business to business sales environment has evolved and a consultative sales context characterised by complexity, high levels of interaction and a long term focus is evident. A review of the sales performance literature reveals, a preoccupation with sales performance from a salesperson perspective, and a significant lack of attention given to the customer perceptive. The customer perspective is driven by extensive customer interaction in a social context and is particularly relevant to consultative sales environments. Understanding individual sales performance variance is essential for sales managers who wish to make informed personnel selection and development decisions in building quality sales forces that contribute sustainably to the organisational bottom line. Understanding the indicators and facilitators of the customer perspective of sales performance is therefore essential to sales managers in consultative sales environments.

Key Words: Emotional Quotient, Customer Orientation, Warmth, Competence, Customer Perspective, Sales Performance

INTRODUCTION

The aim of this paper is to present a framework to explore the performance of salespeople as perceived by the customer in a consultative business to business sales environment. The purpose of such exploration is to inform sales managers in commercial organisations for the purpose of building effective sales forces and sustainable sales revenue. The success of commercial organisations is dependent on sustainable sales revenue as a direct contributor to bottom line results (Zoltners *et al.*, 2001).

There has been a shift in focus from administrative and transactional sales contexts to consultative ones (Thull, 2005). Today, the speed of evolution has led to reverse engineering, reduced product development time and technological advancements that has seen the erosion of organisational competitive advantage particularly where this is product or brand based (Rackman and DeVincentis, 1999; Sojka and Deeter-Schmelz, 2002). The nature of customer business problems has become less defined. This is portrayed by Beardsley *et al.* (2006:53) as they describe an organisational context in the developed world whereby "collaborative, complex problem solving is the essence of their [individuals] work". In keeping with these more complex problems is the requirement for more complex solutions (Thull, 2005; Kauffman, 2007).

The source of competitive advantage in these more complex environments has shifted from the product and brand to the salesperson, whose ability to be perceived as a value creator for the customer organisation will be the differentiating factor (Bauer *et al*,. 1998; Rackman and De Vincentis, 1999; Thull 2005; Hodge and Schachter, 2006). In consultative sales environments the ability to enhance company performance lies primarily with the sales force (Thull, 2005; Kauffman, 2007). The role of the salesperson in consultative sales environments is not that of order taker and/or order maker as may be the case in commodity or transactional environments. Instead, through a value creation role, they are the source of competitive advantage in this technologically charged era (Rackman and DeVincentis, 1999; Thull, 2005; Kauffman, 2007).

In building today's quality sales organisation, sales managers are trying to achieve more with less resource. Economic constraints result in less available budget for personnel selection and development activities (Zoltners and Lorimer, 2000), and

mistakes in this area can be costly (Churchill *et al.*, 1977; Guettler, 2009). The extensive sales performance literature informing sales managers to date has focused on sales performance from a salesperson perspective (Mayer and Greenberg, 1964; Churchill *et al.*, 1977; Churchill *et al.*, 1985; Rackman and DeVincentis, 1999; Sojka and Deeter-Schmelz, 2002). Despite this historic focus, there is much consensus across multiple sales perspectives regarding the core role of customer interaction, the social context and achieving customer satisfaction for sustainable sales performance (Weitz *et al.*, 1986; Crosby *et al.*, 1990; Spiro and Weitz, 1990; Hallen *et al.*, 1991; Kelley, 1992; Jolson, 1997). Yet, the customer perspective on sales performance has been relatively unexplored. There is a gap in understanding when it comes to individual sales performance from a customer perspective that would be useful to sales managers in the construction of successful sales forces in consultative sales environments.

As a contribution to this understanding this paper will theoretically identify key indicators in the customer evaluation of salesperson performance along with the core salesperson facilitators of these indicators. Through a review of the literature these indicators and facilitators will be considered in the context of business to business consultative sales and a series of propositions regarding their potential role will be developed. These propositions will form the basis of a conceptual framework for study that will be presented along with a consideration of the practical and theoretical implications of the proposed study.

THEORETICAL FOUNDATIONS

Rooted in Social Cognition Theory (Bandura, 1986) the Stereotype content model by Fiske *et al.* (2006) is selected as best informing the indicators of customer perceived sales performance. In relation to the salesperson facilitators of these indicators, the theory base of Emotional and Social Intelligence (ESI) and specifically the concept of the Emotional Quotient (EQ) (Bar On, 1997) is identified as key at the psychological level while the application of the marketing concept at an individual level as customer orientation (Saxe and Weitz, 1982) informs the behavioural aspect of this facilitation. An overview of these theory bases and the justification for their selection now follows.

Social Cognition and the Indicators of Customer Perceived Performance

The literature relating to relationship (Jolson, 1997), adaptive (Weitz *et al.*, 1986; Spiro and Weitz, 1990; Hallen *et al.*, 1991) and customer orientated (Saxe and Weitz,

1982; Kelley, 1992) selling perspectives indicates both the social setting and the interactive nature of the consultative sales context. This characterisation is echoed by Thull (2005). In this context social cognition provides significant insight as to the indicators of customer perceived sales performance.

Fiske *et al.* (2006:77) explain the role of social cognition in determination of success in social interactions and state that "like all perception, social perception reflects evolutionary pressures". The authors describe the interactive process whereby one must "determine immediately, whether the 'other' is friend or foe (intends good or ill) and then whether the 'other' has the ability to enact these intentions". Fiske *et al.* (2002) explicitly label warmth and competence as two universal indicators of success in social interactions in their Stereotype Content Model (SCM). There is much support for the role of warmth and competence in the person perception literature. Core to this is the early work of Asch (1946), who included and varied the trait of warmth while keeping competence traits stable in a study that used lists of adjectives to describe impressions of others. The warm/cold dimension predominantly features in subsequent studies of person perception in social interaction (Rosenberg *et al.*, 1968; Bales, 1970; Peeters, 1983; 1992; 1995; Wojciszke, 1994; Wojciszke *et al..* 1998a; Fiske *et al.*, 2002). Traits akin to warmth and competence were also characteristic in studies that focused on the perception of individuals in groups. Bales (1970) use of socio-emotional and task dimensions and Peeters (1983; 1992; 1995) choice of self-profitability are consistent with the dimensions of warmth and competence. Wojciszke *et al.* (1998b) found that up to 82% of the variance in social interaction success can be explained by the two dimensions of competency and morality, with morality traits showing a fundamental overlap with the description of warmth. This shows significant support for the use of warmth and competence as indicators of success in social interaction based on person perception evaluations.

Berry *et al.* (1985) note that in environments where it is difficult to evaluate solutions due to complexity, the customer will instead evaluate the salesperson. Thull (2005) describes having the ability to build a relationship of trust so that the customer will share the business problem in the first instance and in addition the ability to understand and solve often complex non-linear problems for the customer, be that working directly or with others. Thull (2005) describes a consultative and collaborative approach as core to the role of salesperson as value creator. The work of Thull (2005)

is conducive with the use of the dimensions of warmth and competence as indicators of customer perceived sales performance in consultative sales environments and supports in particular the work of Fiske *et al.* (2006) in relation to the SCM as base theory for the exploration of these indicators. The SCM has high relevance to person evaluations in social interactions core to this study.

Psychological and Behavioural Facilitators of Warmth and Competence

Fiske *et al.* (2006) suggest that perceivers will illicit emotional responses to their perception of the behaviours that influence the warmth and competence evaluation judgement. The sales performance literature provides insight in relation to behavioural patterns pertinent to sales performance, for example relationship building activities (Jolson, 1997) and adaptive behaviour (Weitz *et al.*, 1986 and Spiro and Weitz, 1990; Hallen *et al.*, 1991). The behavioural approach however, most appropriate to this consideration of the indicators of customer perceived sales performance in this context is that of customer orientated behaviour (Saxe and Weitz, 1982). Customer Orientation (CO) is the extent to which the salesperson engages in activities that are directed towards satisfying the customer, something researchers despite divergent perspectives regarding its origin tend to agree (Schwepker, 2003). Whether this behaviour is adaptive or relational or both is not the premise but rather the degree that the behaviour is directed at meeting the customer need. The degree that salesperson behaviour is perceived as being customer orientated will be important in an evaluation judgement regarding intention and ability to meet the customer need and therefore is fundamental to the warmth and competence judgement. There is significant tension in the literature regarding the origins of the CO construct as to whether it is psychological (something one innately has or is) or behavioural (something one does) (Zablah *et al.*, 2012) but the primary focus in relation to CO in this study is at the behavioural level as a facilitator of the customer perceived sales performance indicators.

At a psychological level emotional competencies are thought to be important in the context of social interaction in business because emotions serve communicative and social functions by conveying information about an individual's thoughts and intensions in interactions and thus inform behavioural reactions (Keltner and Haidt, 2001; Gohm, 2003). Researchers note a great zeitgeist for Emotional Intelligence (EI) in occupational settings (Mayer *et al.*, 2000; Lopes *et al.*, 2004), stemming from the

suggestion that emotional competencies are useful to people in professional life (Bar On, 1997; Goleman, 1995; 1998).

The term EI was originally coined by Mayer and Salovey (1990) as a narrowly defined mental ability trait. Their intention that the term be used in this way caused them to be critical of the work of those such as Goleman (1995), who used broad lists of traits in conceptualisation, referring to such work as 'all of personality repackaged' (Mayer *et al.*, 2000). Bar On (1997) offered an alternative conceptualisation, operationalised as the emotional quotient (EQ) considered by Mayer *et al.* (2000) to be a mixed model of Emotional and Social Intelligence (ESI). Bar On (2006) supports that this is a mixed model interrelated concept, providing justification for its appropriateness having considered that much work in this area, even that of Mayer and Salovey (1990) has foundations in the early theories of social (Thorndike, 1921) and multiple intelligences (Gardner, 1983). Notably, there still remains unresolved but respectful tension regarding definition and conceptualisation in the literature. Mayer *et al.* (2000) suggest that before selecting a constructional approach in this field, one must consider one's intentions. In the context of this research study, the Bar On (1997) model is considered most appropriate. Bar On (2006:14) describes his ESI conceptualisation as "a cross section of interrelated emotional and social competencies, skills and facilitators that determine how effectively we understand and express ourselves, understand others and relate to them and cope with daily demands". This model is particularly appropriate for this study due to its operationalisation as competencies delivering high applicability to organisational contexts. The Emotional Quotient Inventory (EQ-i) provides a total Emotional Quotient (EQ) score, along with functioning levels on five composite scales and fifteen sub scales (Figure 1).

Empirically developed in a clinical psychology setting, the EQ-i draws from a theoretically eclectic base whose foundations date back to Darwin's (1872) early work on the importance of emotional expression for survival and adaptation (Bar On, 1997). In model development, Bar On (1997:15) is coming from a highly subjective and contextual place referring to the "environment" and the "outcomes one strives to achieve" making selection of this model appropriate for a contextual study such as this. Bar On (2006) importantly notes that there is support for a significant relationship between ESI as measured through EQ, and indicators of positive social interaction and this provides support for its applicability to this study. In contrast, a study conducted

by Lopes *et al.* (2004) using the alternative narrow definition of emotional intelligence, measured by the MSCEIT (Mayer Salovey Caruso Emotional Intelligence Test), shows support only for an element of the construct of EI as a facilitator of positive social interactions.

SCALE	DESCRIPTION OF SCALE
INTRAPERSONAL EQ	
Self-regard (SR)	is the ability to be aware of, understand, accept and respect oneself.
Emotional self-awareness (ES)	is the ability to recognise and understand one's emotions.
Assertiveness (AS)	is the ability to express feelings, beliefs and thoughts and to defend one's rights in a non-destructive manner.
Independence (IN)	is the ability to be self-directed and self-controlled in one's thinking and actions and to be free of emotional dependency.
Self-actualisation (SA)	is the ability to realise one's potential and to do what one wants to do, enjoys doing and can do.
INTERPERSONAL EQ	
Empathy (EM)	is the ability to be aware of, understand and appreciate feelings of others.
Social responsibility (RE)	is the ability to demonstrate oneself as a cooperative, contributing and constructive member of one's social group.
Interpersonal relationship (IR)	is the ability to establish and maintain mutually satisfying relationships that are characterised by emotional closeness, intimacy and giving and receiving affection.
STRESS-MANAGEMENT EQ	
Stress tolerance (ST)	is the ability to withstand adverse events, stressful situations and strong emotions without 'falling apart' by actively and positively coping with stress.
Impulse control (IC)	is the ability to resist or delay an impulse, drive or temptation to act and to control one's emotions.
ADAPTABILITY EQ	
Reality testing (RT)	is the ability to assess the correspondence between what is experienced internally and subjectively and what exists externally and objectively.
Flexibility (FL)	is the ability to adjust one's feelings, thoughts and behaviour to changing situations and conditions.
Problem solving (PS)	is the ability to identify and define personal and social problems and to generate and implement potentially effective solutions.
GENERAL-MOOD EQ	
Optimism (OP)	is the ability to 'look on the brighter side of life' and to maintain a positive attitude, even in the face of adversity.
Happiness (HA)	is the ability to feel satisfied with one's life to enjoy oneself and others and to have fun and express emotions.

Figure 1: Emotional Intelligence Model (Adapted from Bar On-1997)

Warmth and competence are theoretically supported as key indicators of customer perceived sales performance and there is strong support for CO at the behavioural level and EQ at the psychological level to be key facilitators of these indicators.

LITERATURE REVIEW

This literature review presents two perspectives of sales performance and identifies the gap in current understanding relating to the customer perspective. Literature

pertinent to the customer perceived sales performance indicators is reviewed and through a consideration of the SCM in relation to this sales context the building blocks for the development of propositions is laid.

Sales Performance: The Salesperson Perspective

Salesperson performance variance is an area that has received much attention from marketing researchers due to its potential to make a significant contribution to organisational success (Mayer and Greenberg, 1964; Churchill *et al.*, 1977; Churchill *et al.*, 1985; Rackman and DeVincentis, 1999; Sojka and Deeter-Schmelz, 2002). Much of the earlier research on performance in organisations focused on the role of intelligence with mixed and contradictory results (Kauffman, 2007). In some studies such as Hunter and Hunter (1984) tests of cognitive ability were found to be good predictors of performance while in alternative studies such as Hunter *et al.* (1984) the predictive power was found to be significantly less valuable. Despite an acceptance that the Intelligence Quotient (IQ) has some value in explaining performance, the literature indicates that IQ explains only between 10-30% of individual performance (Jenson 1980;1998) and therefore the scope for other influences is significant.

In a review of sales performance literature, Rozell *et al.* (2006) note assessments of many variables to include physical characteristics, personality traits, intelligence, and education in the search for insight. Some notable reviews of these studies (Cravens and Woodruff, 1973; Szymanski and Churchill, 1990) have found that like the studies of intelligence, the results often leave much to be desired in the provision of significant explanation. Sojka and Deeter-Schmelz (2002) note that other studies looked to develop understanding through a consideration of the indirect role of personal characteristics on sales performance through mediator variables. A good example of this is the work of Churchill *et al.* (1977) based largely on Vroom's expectancy theory, their examination of the role personal factors and the processes through which individuals interact to achieve sales performance outcomes resulted in a comprehensive model of motivation and performance in industrial selling. Developments in the area of sales performance research have largely used this model by way of a conceptual frame for further study. A good example of this is the work of Sojka and Deeter-Schmelz (2002; 2003) that includes EI as an antecedent personal

factor. Framed by the Churchill *et al.* (1977) model of salesperson motivation in industrial selling it includes more recent thought from the realm of EI.

One noticeable limitation of key previous research is that it largely focuses on the impact of personal variables on the salesperson, their motivation, their aptitude and their role perception (Churchill *et al.*, 1977, Sojka and Deeter-Schmelz (2002; 2003) while neglecting the impact of such variables on the customer decision to purchase and the mediator variables in this process. Interestingly, this is something noted by Sojka and Deeter-Schmelz (2002:48) and they suggest future researchers might "examine salesperson EI from the buyer's perspective" suggesting that to take a customer perspective of sales performance would be useful.

Sales Performance: A Customer Perspective

There is little understanding available in the sales performance literature today regarding the nature of sales performance from a customer perspective. There is a strong zeitgeist in the literature for the role of social interaction as core to the sales process (Weitz *et al.*, 1986; Crosby *et al.*, 1990; Spiro and Weitz, 1990; Hallen *et al.*, 1991; Kelley, 1992; Jolson, 1997; Park and Halloway, 2003), yet the need still exists to fully explore this interaction important for today's consultative sales environment. Borg and Johnston (2013) have too identified this gap in relation to the customer perspective and in acknowledging the strong interpersonal nature of the sales context have sought to conceptualise a definition of interpersonal skills relative to this context. In doing so they propose the exploration of the dyadic role of customer and salesperson EI as defined by the narrow ability model and suggest a residual effect that is satisfying mutual relationships and cooperation in interactions.

Whilst Borg and Johnston's (2013) proposal is a positive step in moving towards the customer perspective, this perspective is still very much in its infancy. Their proposal demonstrates many limitations in its conceptual stage, such as the inclusion of EI in their model based on the skills element of the seminal model by Churchill *et al.*, (1977) bringing the focus of the study back to the salesperson perspective of performance. Doubt has also been cast regarding the narrow model of EI proposed in this model as an appropriate construct for such a study due to the only partial support shown for the model in quantitative studies relating to success in social interactions (Lopes *et al.*, 2004). Finally, Borg and Johnston (2013) only seem to consider the role of the warmth

dimension in gaining cooperation in customer interactions and have not considered the second universal dimension of competence identified as an important indicator of customer perceived sales performance in consultative sales environments. While this supports the primacy of the warmth judgement in general social interaction as proffered by Fiske *et al.* (2002), Cuddy *et al.* (2011) suggest that this weighting may significantly change in an occupational setting where competence is fundamental.

The preoccupation with establishing the impact of personal factors on salesperson motivation, aptitude and role perception, in the search for answers regarding sales performance variance, may have been synonymous with the prevalent sales context of the time. In the lead up to Churchill *et al.'s* (1977) seminal research on sales performance, the sales context was predominantly characterised by administrative or transactional sales styles whereby product innovation was key to the decision to purchase (Thull, 2005). From mid-1970 to the mid 1990's the ability to differentiate products and to demonstrate product 'value add' became key. In such instances, salesperson motivation and aptitude to persuade would have been important considerations (Thull, 2005).These evolutionary implications for the role of the salesperson have been consistent with the development of more recent thought in the realms of sales performance such as relationship (Jolson, 1997), adaptive (Weitz *et al.*, 1986 and Spiro and Weitz, 1990; Hallen *et al.*, 1991;) and customer orientated (Saxe and Weitz, 1982; Kelley, 1992) selling models.

The transition to a customer centric perspective of sales performance, despite being identified as important (Sojka and Deeter-Schmelz, 2002 and Borg and Johnston, 2013) has not yet been extensively explored. To truly understand sales performance from a customer perspective, essential in today's consultative sales environment, one must fully understand the role of the indicators of success in social interactions in this context and their facilitators. What follows is a review of the literature in relation to the indicators of customer perceived sales performance drawing specifically on the SCM. This review will form the building blocks for a new conceptual framework in addressing this gap in understanding.

Warmth and Competence: The Building Blocks of a New Conceptual Framework

Perceived warmth and competence are strongly supported as universal performance indicators of success in social interactions (Asch, 1946; Rosenberg *et al.*, 1968; Bales,

1970; Peeters, 1983; 1992; 1995; Wojciszke, 1994; 1998; Fiske *et al.*, 2002). Due to the interactive nature and social context in which sales activity takes place (Weitz *et al.*, 1986; Crosby *et al.*, 1990; Spiro and Weitz, 1990; Hallen *et al.*, 1991; Kelley, 1992; Jolson, 1997), the literature regarding these performance indicators reveals important insight to inform a new conceptual framework that aims to understand sales performance driven by customer interaction and considered from a customer perspective. This is in keeping with the work of Thull (2005) specific to the consultative sales context and the role of the salesperson as a value creator in this context.

These universal drivers of warmth and competence are drawn from social cognition theory, which propose that in interactions with co-specifics, evaluations are made based on the philosophical underpinnings of ancient philosophical thinking (Wojciszke, 2014). Bakan (1966) introduced the terms agency and communion to describe the modalities of human existence. These concepts are the underpinnings of the universal dimensions of warmth and competence. In the evaluation of others, individuals will seek to establish the intentions of the other party and in turn whether or not the other party can fulfil those intentions (Fiske *et al.*, 2002; Fiske *et al.*, 2006, 2007; Cuddy *et al.*, 2011; Wojciszke, 2014). As sales performance in a consultative sales environment is primarily driven by a customer interaction in a social context (Thull, 2005), these universal dimensions of warmth and competence are important indicators of customer perceived sales performance.

In their work on stereotype content, Fiske *et al.* (2002) examine the relationship between varying levels of the two universal dimensions of warmth and competence and the impact of these variations on perception (Figure 2). This is useful to consider the role of these dimensions as performance indicators in the consultative sales environment from the customer perspective. Fiske *et al.* (2002) represent the combinations of warmth and competence levels as four key categories:

- High Competence and High Warmth
- Low Competence and Low Warmth
- High Competence and Low Warmth
- Low Competence and High Warmth

They proffer that each combination will elicit a consistent emotional response and in turn behavioural reaction from the perceiver in respect of the individual under observation, that determines the success or not of the interaction. Those that are high in both warmth and competence will elicit feelings of admiration as opposed to the feelings of contempt, envy or pity that the other combinations respectively evoke. Fiske *et al.* (2007) suggest that behavioural responses in social interactions can be predicted based on the emotional state that the combination of warmth and competence dimensions elicit in the perceptive process. They suggest that the behavioural response can be analysed on two levels: degree of intensity and degree of valance. The degree of valance will determine the intent of the response, for example to help or harm. The degree of intensity will determine the effort put in i.e. active/overt or passive/subtle. The varying combinations of intensity and valance determines the four potential behavioural outcomes of active harm, active facilitation, passive harm and passive facilitation. This understanding regarding how perceiver behavioural actions result from the combinations of warmth and competence will be used to inform the role of these indicators in determining customer perceived sales performance.
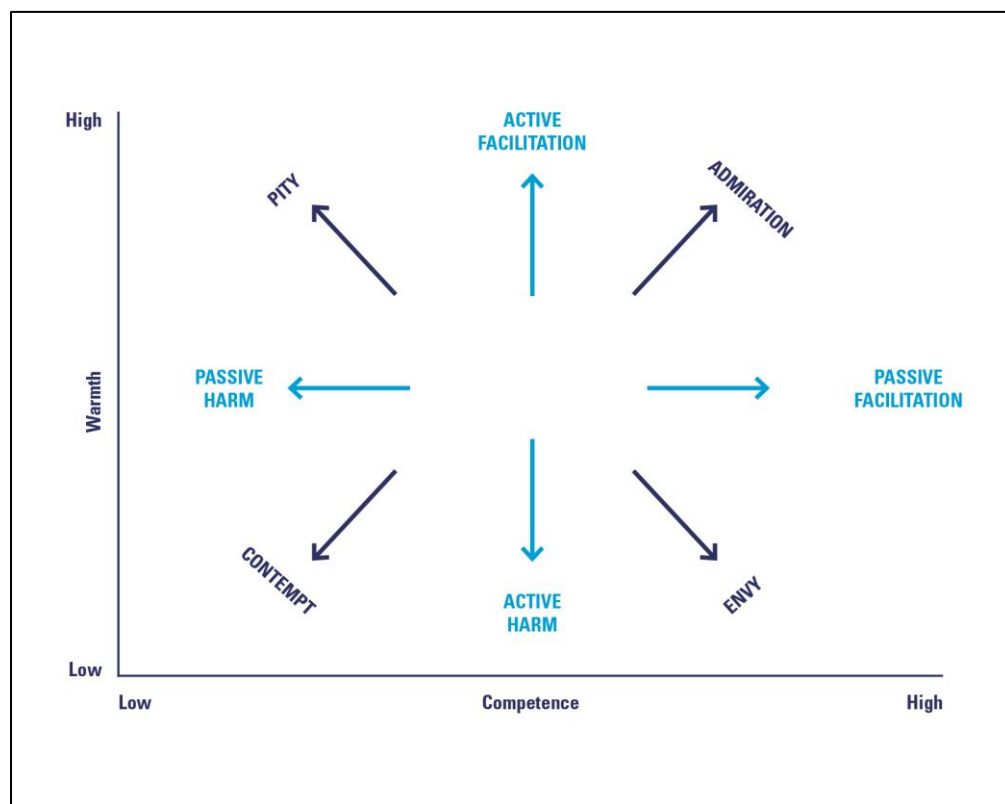
Figure 2: Schematic Representation of Behaviours from Intergroup Affect and Stereotypes (Reproduced from Fiske et al., 2006:81)

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CONCEPTUAL FRAMEWORK

This section presents a conceptual framework for the exploration of the indicators and facilitators of customer perceived sales performance, understanding necessary for managers to make informed selection and development decisions in consultative sales environments in the pursuit of high customer perceived sales performance.

The Role of Performance Indicators in High Customer Perceived Performance

The importance of customer interaction and the social nature of these interactions have been consistently referenced in the sales literature across multiple perspectives (Weitz *et al.*, 1986; Crosby *et al.*, 1990; Spiro and Weitz, 1990; Hallen *et al.*, 1991; Kelley, 1992; Jolson, 1997). It has particular importance to consultative sales environments (Thull, 2005 and Kauffman, 2007). In consideration of this, the framework for the exploration of customer perceived high performance will position customer interaction as central to the framework and as core to the performance outcome.

Universal indicators of high performance in social interactions have been established in the literature to be warmth and competence (Asch, 1946; Rosenberg *et al.*, 1968; Bales, 1970; Peeters, 1983; 1992; 1995; Wojciszke, 1994; Wojciszke *et al,.* 1998; Fiske *et al.*, 2002). In a consultative sales environment it is important to consider both the warmth and competence indicators of customer perceived performance as the requirements of the sales role in this context are that of value creator (Rackman and DeVincentis, 1999; Thull, 2005; Kauffman, 2007).

The SCM proposed by Fiske *et al.* (2007) provides further insight in to the role of both indicators: warmth and competence towards the achievement of optimum performance in the consultative sales context. According to the Fiske *et al.* (2007) model, individuals who achieve high perceptive evaluations on both dimensions: warmth and competence, will generate feelings of admiration in others that will elicit the behavioural responses of both active and passive facilitation. In an instance whereby an individual receives low evaluations on both dimensions: warmth and competence, it is unlikely that the individual will achieve satisfactory performance in any sales context as Fiske *et al.* (2007) suggest that this combination will elicit feelings of contempt and behavioural responses of active and passive harm.

This study is specific to the consultative selling environment where it is indicated that both dimensions: warmth and competence are important. Considering this in light of the "schematic representation of behaviour's from intergroup affect and stereotypes" facilitates the identification of a high performance quadrant within the schematic and informs proposition one. Figure 3 illustrates the consideration of the Fiske *et al.* (2007) stereo content model in the context of the sales profession.

Proposition 1: *Salespeople perceived to be both warm and competent in customer evaluations will be most successful in consultative sales environments*
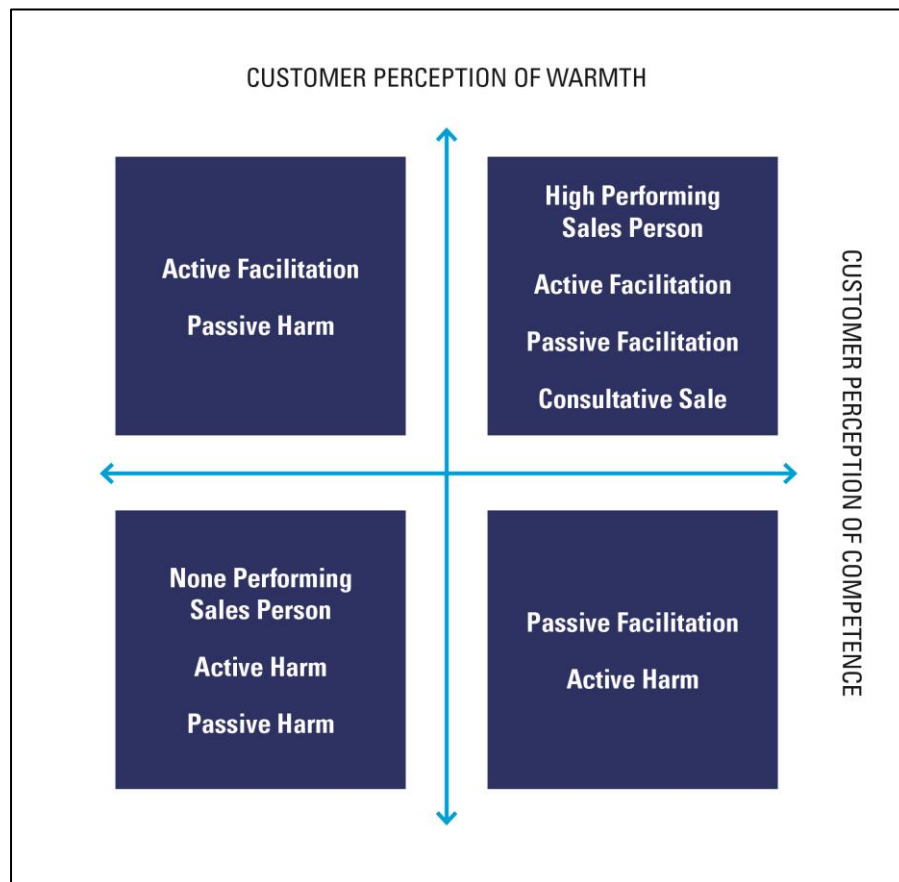
Figure 3: Consideration of the Stereotype Content Model in a Consultative Sales Context (Adapted from Fiske et al., 2006:634)

The second proposition is informed by the SCM having identified the high performing quadrant and considers the emotive responses associated with that quadrant in the Fiske *et al.* (2007) model. This informs understanding regarding the link between the customer evaluation of the salesperson in relation to warmth and competence and the customer behavioural reaction to that evaluation.

Proposition 2: *Salespeople who are evaluated as warm and competent in the customer evaluation process will elicit feelings of admiration in the customer.*

The third proposition is informed by the SCM having identified the high performing quadrant and its associated customer emotive experience and considers the behavioural responses of the customer associated with that quadrant in the Fiske *et al.* (2007) model. This informs understanding regarding the link between the customer evaluation of the salesperson and the actual performance outcome facilitated by the customer behavioural reaction.

Proposition 3: *Salespeople perceived in customer evaluations to be warm and competent will elicit a behavioural response from the customer that is one of active and/or passive facilitation*

In formulating the framework it is important to acknowledge that there are two other combinations proffered by Fiske *et al.* (2002) in their SCM; High Warmth/Low Competence and Low Warmth/High Competence. The emotive responses felt by the perceiver in these ambivalent combinations on the continuum may generate behavioural responses that are cooperative or harmful (Fiske *et al.*, 2007). An explanation of the triggers for evoking the positive response (helping), over the negative (harm) is not given by Fiske *et al.* (2007) however, it is suggested that contextual considerations may shed some light (Cuddy *et al.*, 2011). Thull (2005) notes other sales contexts whereby the role and requirements of the salesperson vary to that of the consultative sales context and a study in these contexts may provide understanding regarding the triggers for evoking the positive versus negative response on the other dimension combinations. While acknowledged, this investigation is outside of the scope of this study but may provide an interesting field of exploration for a future research project.

Fiske *et al.* (2006) refer to the halo effect in considering the relationship between the two dimensions of warmth and competence. It is suggested that a positive evaluation on one dimension will influence a positive perception on the other dimension (Fiske *et al.*, 2006). This however, may not always be the case and Cuddy *et al.* (2011) note that in occupational applications the opposite may occur. This is specifically noted in relation to situations of comparison where one individual is being evaluated against another. It is important therefore to consider generating a balanced perspective across

both dimensions. It is also likely that the primacy of one dimension over the other in the evaluation process will switch from the warmth primacy scenario (Fiske *et al.,* 2006) to the competence primacy scenario due to the complex nature of the organisational setting (Cuddy *et al.*, 2011).

Proposition 4: *In consultative sales contexts the primacy evaluation across the universal dimensions will move from warmth to competence*

Cuddy *et al.* (2011) also suggest that positive performance outcomes can reinforce the competence judgement and therefore this framework will include a reinforcing loop from performance outcome to the customer evaluation. In a consultative sales environment interaction and subsequent evaluation will be a continual process rather than stand-alone occurrences (Thull, 2005).

Proposition 5: *Performance outcomes will reinforce the customer perception of the salesperson on the competence dimension in future evaluations*

To understand how the indicators of customer perceived sales performance in consultative sales environments may influence sustainable sales performance is useful but for this to be applicable to selection and development activity in sales practice, one also needs to understand the facilitation of these indicators and specifically how they generate, maintain, balance and reinforce perceptions of warmth and competence.

Facilitators of High Customer Perceived Performance

The work of Fiske *et al.* (2007) indicates that evaluations of others as warm or competent will be based on the observed behaviour of that individual. It is important to consider salesperson behaviour and how this facilitates positive perceptions of warmth and competence. The sales literature informs this area specifically in relation to customer orientated selling strategies. Customer orientated selling strategies have specifically been linked to the role of value creators (Wotruba, 1996 and Jolson, 1997). Saxe and Weitz (1982) outline how CO manifests itself in an environment that is complex and that seeks repeat and sustainable business. They outline the salesperson requirement to demonstrate a level of expertise to craft a solution best suited to the customer need to achieve maximum satisfaction. In addition they suggest that for this to be sustainable the salesperson will need to build cooperative relationships with customers.

Proposition 6: *Salespeople who engage in customer orientated selling practices will positively influence customer evaluations of warmth and competence*

In terms of driving this customer orientated behaviour at an individual salesperson level this brings to the fore the debate regarding whether customer orientation is psychological or behavioural in its origins. The purpose of this study is not to answer that question however it does need to establish its position in relation to the debate. For the purpose of the study CO will manifest itself in behaviours however the ability to demonstrate these behaviours will lie at a psychological level. While behavioural influencers were largely acknowledged to be important facilitators of these indicators of positive outcomes in social interactions, as demonstrated in particular through an interest in verbal and non-verbal cues (Argyle, 1973; Patterson, 1983; 1991; Burgoon, 1994), attention has now turned to the underlying emotional drivers for further understanding (Lopes *et al.,* 2004; Bar On, 2006). Emotional competencies are thought to be important for social interaction because emotions serve communicative and social functions by conveying information about individual's thoughts and intensions in interactions (Keltner and Haidt, 2001; Gohm, 2003).

They are suggested to inform the behavioural reactions on which a salesperson will be judged (Lopes *et al.*, 2004; Bar On, 2006, Borg and Johnston, 2013). Unlike some other salesperson attributes such as IQ, personality traits and physical characteristics, emotional competencies are amenable to change and therefore hold great potential towards informing practice (Bar On, 1997; Goleman, 1995; 1998; Bar On, 2000; Dulewicz and Higgs, 2004). The Bar On (1997) emotional quotient (Figure 1 above) is a lens through which to explore the role of emotional competencies towards individual success. Its mixed model characteristics (Mayer *et al.*, 2000; Bar On, 2006), social constructionist underpinnings (Bar On, 1997) and developmental potential (Bar On 1997; Bar On, 2000; Bar On, 2006) make it an appropriate lens for the purpose of this study. Studies have also observed that emotional intelligence has a considerable influence on customer focused strategy in sales (Varinli *et al.*, 2009; Pettijohn *et al.*, 2010; Jain and Swarup, 2013).

Establishing Positive Warmth Perceptions

Bar On (2006) proffered that EQ influences positive outcomes in social interactions. Bar On (2006) suggests this specifically with regard to the relationship the construct

has with the warmth indicator of success in social interactions. The inclusion of an interpersonal realm in the EQ-i further supports this. The interpersonal realm facilitates the effective understanding of the needs of others (empathy), positive moral intentions towards meeting these needs (social responsibility) and skills that build effective relationships with others (interpersonal skills) (Bar On, 1997; Stein and Book, 2006). The work of Borg and Johnston (2013) in the sales performance realm has sought to define and establish the importance of interpersonal skills in building mutually satisfying relationships through the conceptualisation of interpersonal skills in personal selling. The EQ model also contains a general mood realm which according to Bar On (1997) has two elements: optimism and happiness. Emotional contagion theory suggests the potential for a transfer of this positive emotion between individuals (Barsade and Gibson, 1998; Kelly and Barsade, 2001). This would further suggest the potential for EQ through the general mood realm to influence the customer perception of salesperson warmth.

Proposition 7: EQ facilitates a positive warmth perception through its interpersonal and general mood realms

Maintaining Positive Warmth Perceptions

Throughout the consultative sales process, characterized by ongoing social interactions, the salesperson may encounter conflicting needs. The potential for stress is something that is characteristic of sales environments (Strutton and Lumpkin, 1993). Strutton and Lumpkin (1993) explain that the salesperson will often perform the role of "organisational boundary spanner" balancing conflicting needs of the organisation, customer and other stakeholders. This is particularly characteristic of consultative sales environments (Thull, 2005). Maintaining the warmth perception throughout this process is essential. An emotional experience such as stress may generate a behavioural response that is perceived negatively and that casts doubt as to the intention of the salesperson. Unlike competence where the perception can be altered overtime, the warmth perception is far more sensitive and as such is difficult to rebuild once damaged (Fiske *et al.,* 2002; 2006; 2007; Cuddy *et al.,* 2011). The ability of the salesperson to both cope with and adapt to conflicting needs during challenging periods will be essential to maintaining the warmth perception throughout the sales

process. The EQ model may facilitate and inform this through its stress management and adaptability realms.

Bar On's (1997) model indicates that competence on the stress management realm depends on the degree to which an individual is tolerant to stressors and the degree to which an individual can control impulses to react. This is suggested by the inclusion of the sub scales of stress tolerance and impulse control. Effective functioning on this composite scale is considered by an individual's ability to withstand stress without losing control (Stein and Book, 2006). The extensive work of Fiske *et al.* (2002; 2006; 2007) indicates that the customer must perceive the salesperson as having the interest of the customer in mind for their intentions to be perceived as positive. The needs of the customer may often conflict with organisational demands to deliver the sale (Strutton and Lumpkin, 1993). In order to ensure that organisational pressures do not impede on the positive impression of the customer regarding the intention or ability of the salesperson to deliver a solution that meets the customer needs, the salesperson will need to be able to deal with such tensions effectively. A salesperson who is focused on closing a deal to meet organisational targets may risk damaging the customer impression of perceived salesperson patience and in turn intention. A salesperson who reacts to challenging situations with a behavioural response that displays a lack of anger control will also have the potential to damage the customer warmth perception.

In addition to the stress management realm, the EQ construct contains an adaptability realm (Bar On, 1997). Stein and Book (2006) suggest that the adaptability realm in the Bar On (1997) model contributes to the ability to resolve such tensions as may be evident in the sales context by facilitating flexibility. Failure to adapt may signify to the customer that their interests are not at the heart of the engagement and therefore have a negative impact on the warmth judgement.

Proposition 8: EQ facilitates the maintenance of a positive warmth perception through its stress management and adaptability realms.

Balancing Impressions of Warmth and Competence

Cuddy *et al.* (2011) highlight the need to manage impressions of warmth and competence in comparative interpersonal evaluations. Cuddy *et al.* (2011) suggest that in such situations a high perception on one dimension may facilitate a negative

judgement on the other dimension. EQ may play a role in managing these impressions resulting in a balanced perspective between the two dimensions. Lopes *et al.* (2004) generated some support for emotional management in impression management. Mayer *et al.* (2004) outline that emotions are managed in the context of an individual's goals, self-knowledge and social awareness. This ability is also reflected in the Bar On (1997) EQ model which offers functioning in relation to self-knowledge through its intrapersonal skills realm and social awareness through its interpersonal skills realm. Stein and Book (2006) note that in addition it facilitates the ability to adapt in the management of these emotions. Salespeople will therefore be aware of their own emotional expression, the impact this is having on others and be able to adapt accordingly to manage impressions using their EQ.

Proposition 9: EQ facilitates a balance in customer perceptions between warmth and competence through the interpersonal, intrapersonal and adaptability realms.

Reinforcing Perceptions of Competence

According to Cuddy *et al.* (2011) perceptions on competence (or misperceptions on competence) can be reinforced (or corrected) over time through performance. The nature of the sales role in the consultative sales process may be described as relational (Jolson, 1997), adaptive (Weitz *et al.,* 1986 and Spiro and Weitz, 1990; Hallen *et al.,* 1991) and customer orientated (Saxe and Weitz, 1982; Kelley, 1992). By its nature therefore, there is an overlap between the skills required to be successful in the consultative sales role, and the EQ realms of interpersonal skills and adaptability. This is also supported in studies that consider EI and performance through motivation, aptitude and role perceptions (Sojka and Deeter-Schmelz, 2002; Rozell *et al.* 2006). This suggests that given the opportunity to engage in the sales process that the salespersons EQ will assist their task performance and in turn reinforce (or correct) customer perceptions of effective performance.

Proposition 10: EQ assists salespeople in task performance which aids to reinforce customer perceptions of competence

The conceptual framework model (Figure 4) outlines the research area and highlights the potential to significantly contribute to practitioner understanding regarding sales performance from a customer perceived sales performance perspective. This

framework will now form the basis of an exploration of the indicators of customer perceived sales performance and their facilitators in consultative sales environments.

Figure 4: Framework to Explore the Indications and Facilitators of Customer Perceived Performance in Consultative Selling

PRACTICAL AND THEORETICAL IMPLICATIONS

Theory in relation to customer perceived sales performance is in its infancy, unlike its salesperson based counterpart. In consultative environments, customer perceived sales performance drives organisational sales performance in a more sustainable way than

a focus on short term salesperson results. There is inadequate understanding regarding the indicators and facilitators of customer perceived sales performance and this study intends to address this gap in understanding. There is also the potential for this study to springboard future research as an additional contribution. In defining the scope of this study through the conceptual framework some out of scope points were raised regarding other contexts that may prove worthy of future exploration. For example would the high performing quadrant proposed in relation to consultative sales environments remain the same in contexts that are transactional as opposed to consultative?

NEXT STEPS

The proposed study will explore the research propositions in an Information and Communications Technology (ICT) solution provider organisation. An ICT Solutions provider was selected as the host organisation due to its close association with the core characteristics of consultative sales organisations identified by Thull (2005). A comparative study will explore individual sales performance variance in the organisation. It will seek to obtain multiple perspectives in relation to the indicators and facilitators of customer perceived sales performance in order to qualitatively explore the propositions developed and presented in this conceptual framework.

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PAPER 2 PREFACE

This second paper in the cumulative paper series describes the overarching methodological approach that was proposed to explore the conceptual framework and the rationale for this approach. The key focus of this paper was to ensure cohesiveness between what was to be researched and how it was to be researched. It also sought to give due consideration to the role of the underpinning philosophical nature of the research and the researcher's own philosophical paradigm. The paper was structured around three key questions "what to research", "how to research" and "why research". This approach was taken based on the work of Holden and Lynch (2004) whose paper aided the practitioner in their researcher role to understand the concept of methodology as distinct from research method and the overarching purpose of the methodology paper. This second paper was recommended but required changes on examination and the implementation of these changes prior to the resubmitted and accepted final version are now outlined.

For the researcher the "why" of this study posed one of the biggest personal challenges. Reflection on philosophical matters does not form part of the regular modus operandi in most practitioner roles and philosophical perspectives from a literary perspective are frequently pitched at the highest academic level. The world of philosophy was made accessible to the researcher as a practitioner researcher through the same paper by Holden and Lynch (2004) that had also assisted with the methodology structure. This aided the researcher to consider her own philosophical perspective and how this fit with the "what" of the study. It was perhaps the researchers often matter of fact practitioner world view that created a conflict with a study that saw the practitioner as a researcher in a space that largely revolved around the subjective lived experience of the participants. The Holden and Lynch (2004) paper opened the researchers thought process to the notion of somewhere on a continuum rather than an exact fit in to a polar opposite position. This change in thought made more in depth consideration of various positions on the philosophical continuum possible. The provision of a base level of knowledge that a practitioner researcher could build from made more specific in-depth resources on alternative paradigms accessible with the work of Crotty (1998) and Creswell (2003) later playing a key role in support of the social constructionism position of the research.

The "what is to be researched" question had been largely established in the preceding paper however, the decision was taken to split proposition 6 outlined in paper 1 in to propositions 6 and 7 in paper 2 in order to aid the exposition of both facets of the CO construct; building cooperative relationships and demonstration of expertise during later analysis. This split was informed by the behavioural CO interpretation consistent with the original use of CO in the construction of the conceptual framework based on the work of Saxe and Weitz (1982) in paper 1. This resulted in a subsequent renumber of the later propositions to accommodate this change.

There was also a change from paper 1 with respect to the initial indicative proposal as to how the research would be operationalised. This saw a shift from the high/low performer comparative approach that was the lead consideration on conclusion of paper 1 to a focus on high performers in the resubmitted paper 2. This change to a focus on high performers resulted in the introduction of a phased data collection strategy in the resubmitted paper 2. The purpose of the phased structure was to allow the capture of high performance from the customer perspective quantitatively in the first instance in order to identify the high performers within the selection pool for the later qualitative study.

The decision to change focus from high/low to solely high performers was taken on the basis of issues arising from the natural conflict between the researcher's dual role as both researcher and practitioner. This researcher from the inside tension was also an area suggested as worthy of greater consideration by the examination panel for paper 2 that comprised Professor Jean-Anne Stewart (Henley Business School), Professor Alan Wilson (University of Strathclyde) and Dr. Aidan Duane (WIT). A key facet of this tension was the potential that poor performance was likely to be identified within the lower performing group within the comparative study initially considered. As a manager the practitioner role may have required that such poor performance be addressed and as a result attrition within this group may have occurred. In terms of the research undertaking this may have made it difficult as a researcher to elicit cooperation/consent to participate and/or to ensure participant availability/access due to the potential for conflict and attrition with respect to low performing individuals. From an organisational perspective it may have created an ethical tension for the practitioner in the event that it became necessary to address issues of performance because of the later requirement to elicit the support of these

same individuals for the research undertaking. A focus on high performers within the existing employee group was the strategy adopted as an outcome of this consideration to mitigate the risk of such challenges arising.

The researcher from the inside position also created a tension with the data collection method of observation that was initially proposed in the original submission of paper 2. This was a matter the review board suggested the researcher pay particular attention to with the suggestion that perhaps observation in addition to interviews was unnecessary. On review the researcher agreed the challenges with observation would be potentially more than the benefit it would bring and observation was eliminated from the data collection strategy. The researcher later opted for a multi-perspective interview strategy to ensure adequate illumination and triangulation of the phenomenon despite the removal of the observation element.

Finally, it was raised in paper 1 that there is a risk of a halo effect in comparisons on two dimensions although much research had actually found that comparisons on warmth and competence correlated negatively and that a high perception on one was more likely to result in a lower perception on the other. This was acknowledged as a risk and while the researcher remained cognisant of this in later analysis, the use of a qualitative strategy provided a level of insurance against either effect going undetected through open questions and further probes that established the foundations of the perceptive evaluations and this was further aided by account triangulation across a number of perspectives.

PAPER 2: A RESEARCH METHODOLOGY FOR THE CUSTOMER PERSPECTIVE OF SALES PERFORMANCE IN CONSULATIVE SELLING

BY

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ABSTRACT

Technological evolution has seen a pace of organisational change that is unprecedented and this has led to increased levels of complexity and a shift towards consultative sales environments. Comparisons between solutions in this context are difficult and the customer's evaluation of a salesperson is a key factor in sales success. Despite a widespread acknowledgement of the importance of the customer perspective, sales performance research to date has traditionally focused on the salesperson perspective.

In a preceding paper customer perception of salesperson warmth and competence was presented as indicative of customer perceived performance based on social cognition theory. This paper presents a research methodology for a study that seeks to contribute to the customer perspective by understanding how these perceptive indicators facilitate performance and how salesperson customer orientation and emotional quotient may influence the construction of these perceptions in the consultative sales context.

A qualitative case study strategy is presented that employs a localist interview approach to data collection and proposes thematic coding for data analysis. This paper demonstrates how this strategy supports obtaining a customer perspective of sales performance and presents the use of a selection strategy for high performers that is customer centric in a departure from the traditional use of salesperson self-rating, subjective supervisor ranking or short term revenue results.

Key Words: Customer Perspective, Sales Performance, Warmth, Competence, Customer Orientation, Emotional Quotient, Qualitative, Case Study, Social Constructionism

INTRODUCTION

A preoccupation is observed in the existing literature with the salesperson perspective of sales performance (Mayer and Greenberg, 1964; Churchill *et al.*, 1977:1985; Rackman and DeVincentis, 1999; Sojka and Deeter-Schmelz, 2002), despite acknowledgement that customer interaction and satisfaction are key for generating sustainable success in consultative selling (Weitz *et al.*, 1986; Crosby *et al.*, 1990; Spiro and Weitz, 1990; Hallen *et al.*, 1991; Kelley, 1992; Jolson, 1997). The aim of this research is to better understand customer perception of salesperson warmth and competence across the continual sales interaction and how this contributes sustainably to sales performance. The goal is to generate findings that are useful to sales managers in consultative selling environments as they build sales teams who can contribute towards sustainable performance. This research draws on Social Cognition Theory (SCT) and the suggestion that warmth and competence are key indicators of success in the social interaction that is core to consultative selling environments. It proposes to understand how warmth and competence perceptions act as indicators of customer perceived sales performance. In addition, it aims to understand at an individual salesperson level how these indicators can be influenced towards a positive customer perception both behaviourally and psychologically, facilitated by the theoretical lenses of Customer Orientation (CO) and the Emotional Quotient (EQ) framework respectively. Based on the identified literary gap, this research seeks to explore three key research questions relating to this customer perspective of sales performance conceptualised as success in social interaction.

1. How do customer perceptions of salesperson warmth and salesperson competence facilitate sales performance in consultative sales contexts?
2. How can an individual salesperson influence these perceptions at a behavioural level?
3. How can an individual salesperson influence these perceptions at a psychological level?

The use of a conceptual framework grounded in social cognition theory rather than salesperson centric theories facilitates research drawn from the customer perspective. The researcher proposes to make use of a qualitative case study strategy to study the research questions from this perspective. Customer interviews will be employed using a localist interview approach as the primary data collection method. The selection of

high performing salespeople will be driven by customer perception and this is a departure from the predominant use of subjective management opinion, salesperson self-appraisal and short term quantitative monetary achievement when evaluating salesperson performance. This paper presents the methodological approach by considering the elements of "what to", "why" and "how to" research, necessary to ensure a cohesive research design (Holden and Lynch, 2004). The paper begins by considering the philosophical research perspective. The methodological strategy and rationale are then presented before the theoretical and conceptual framework are considered for the purpose of interview instrument (Appendix A) development supported by a summary of the logic link from problem to data to be collected in Appendix B. The issues of rigour, ethics, the dual role of the researcher, research limitations and validity are dealt in the final section of this paper.

PHILOSOPHICAL RESEARCH PERSPECTIVE: WHY RESEARCH?

Fundamental to effective research operalisation is a consideration of the "why" research question, one that is often overlooked in research design (Holden and Lynch, 2004; Saunders *et al.,* 2013). Differing philosophical views lead to differing views on how the world can be analysed and understood and this impacts on the approach and purpose of the research (Adcroft and Willis, 2008). Adding complexity to this is a lack of consensus regarding the best way to conduct management research and the propensity to settle for a conclusion of "no one best way" (Hughes and Sharrock, 1997:13). This lack of consensus can facilitate a pragmatist "just do it" approach (Eastman and Bailey, 1996) and failure to consider the philosophical underpinnings of research poses a challenge to research cohesiveness and rigour (Holden and Lynch, 2004). The philosophy most closely related to the researcher's predilections will have the biggest influence on the choice of methodology (Unisar, 1998). The "what" to research aspect of this study and the position of the researcher in the study indicate social constructionist characteristics. These characteristics and this predilection are now explicitly acknowledged.

Social Constructionism: The Philosophical Position of Study

Philosophical position depends on the core assumptions made about the nature of science; ontology, epistemology and human nature (Burrell and Morgan, 1979). In considering the ontological influence one extreme assumption is the objectivist

perspective that reality is a concrete structure, there is a definite truth. The other extreme is the subjectivist perspective that reality only really exists in the human imagination (Morgan and Smircich, 1980; Holden and Lynch, 2004). This study is concerned with customer perception and to suggest there is a definitive truth and that the human mind or society has no role to play in the creation of reality goes against the grain of the study supporting a subjectivist perspective. Most management research however, does not come from the polar stances on the subjectivist/objectivist continuum and identifying a subjectivist orientation only helps to narrow the philosophical space that underpins this study (Morgan and Smircich, 1980; Creswell, 2003; Holden and Lynch, 2004).

Turing to the epistemological stance of the study, the element concerned with "the nature, validity and limits of inquiry" (Rosenau, 1992:109). This is in essence the nature of the knowledge created and the degree that it can be considered generally applicable. The purpose of this study is not to find a definitive answer with respect to sales performance that is applicable to all sales situations. This would be counter to the research rationale which has context at the core. As the study does not at an epistemological level look to generate universal laws this counters any suggestion that the philosophical perspective is a positivist one from an epistemological assumption standpoint (Noblitt and Hare, 1998; Quinton and Smallbone, 2005). Positivist research is generally concerned with answering questions of "how much", "why" and "what" whereas interpretivist is more concerned with answering questions of how and when (Yin, 2014). The research questions in this study are asking "how" framed questions consistent with this more interpretivist approach.

The study may not be concerned with making generalisations but it is concerned with ensuring that the knowledge it creates has a value outside of the immediate context by way of applicability in same or similar contexts for future practitioner use. Positioning the study in the social constructionist paradigm within the subjectivist space helps to reconcile this. Social Constructionism is *"the view that all knowledge and therefore all meaningful reality as such, is contingent upon human practices, being constructed in and out of interaction between human beings and their world, and developed and transmitted within an essentially social context"* (Crotty 1998: 42). The social constructionist view on ontology considers reality as being created or constructed by the individual but relating to something that has an objective meaning in society

(Crotty, 1998). This is a core difference with interpretivism, despite the fact that both are concerned with understanding lived experience and agreeing that meaning is created and negotiated by human actors, interpretivism does not emphasise interaction as an important mediator in the way social constructionism does.

This constructionist paradigm positions the role of the individual in this paradigm as the creator or constructor of reality (Morgan and Smircich, 1980; Holden and Lynch, 2004). This social constructionist positioning is more appropriate than a phenomenological positioning within the subjectivist realm. It is the interplay between a conscious meaning making subject and the objects that present themselves to perception that characterise social constructionism. While the context may give rise to different meanings about the object, the object with its particularities, participates crucially in the meaning made about it (Crotty, 1998). In the case of this study the salesperson is the object and the customer is making or creating a subjective perceptive meaning about their warmth and competence based on the salespersons participation in the interaction. In describing social constructionism, Creswell (2003:8) captures the essence of its characteristics in this study when he states that such *"researchers often address the process of interaction among individuals. They also focus on specific contexts in which people work and live"*.

Research Design Implications

The what to research and why research considerations have an implication for the fundamental cornerstones of research design namely the level of abstraction and the type of data that will be gathered in conducting the study. This section will consider these implications that form the foundation of the research strategy and its proposed operalisation.

Level of Abstraction

As an implication of philosophical perspective comes a level of abstraction in how knowledge will be generated. Crotty (1998) describes the key characteristics of interpretivist and constructionist research designs as gathering subjective participant accounts of phenomenon. This they suggest leads to a deeper understanding through the identification of patterns, themes and sequences and then reflecting on these versus theories and literature. This is in keeping with an inductive research approach. To ensure congruence between purpose, philosophy and method this study will look to

generate data in a more inductive manner. While this study commences in acknowledging existing literature through a premise grounded in social cognition theory, its propositions drawn from the theoretical lenses of customer orientation and the emotional quotient are tentative and a phased approach to data collection and analysis is employed to facilitate the emergence of additional patterns, themes and sequences as well as the deeper exploration of those tentatively proposed. An inductive approach need not ignore existing literature, it just consciously avoids being driven by pre-conceptions (Trauth, 1997; Holden and Lynch, 2004).

Type of Data

The differing research approaches of quantitative and qualitative are a result of a need arising from epistemological variance and the type of research problem (Creswell, 2003). A key research implication of subjectivist perspectives is its operationalisation (Holden and Lynch, 2004). This is conducive with qualitative methods involving small sample sizes investigated in depth over time (Fawcett and Hearn, 2004; Holden and Lynch, 2004; Prasad and Prasad, 2002). Qualitative approaches facilitate a focus on the meaning of social phenomena rather than measurement and this enables an understanding of the problem in its contextual setting (Easterby-Smith *et al.,* 1991; Hughes and Sharrock, 1997). This is in keeping with the "what" and "why" to research aspects of this study.

RESEARCH STRATEGY

The research strategy is how one intends to answer the research question (Saunders *et al.,* 2012). These are the overarching or general procedures that will be used to conduct the study as guardians of cohesiveness (Creswell, 2003). In the selection of the most appropriate research strategy three key criteria should be assessed; the type of questions being investigated, the level of control over behavioural events and the focus of the study in contemporary versus historical events (Yin, 1994). The rationale for strategy selection and its operalisation pertinent to the current study is presented.

Research Strategy Rationale

The researcher wants to understand how the combination of high customer perceived warmth and high customer perceived competence influences sales performance and how an individual salesperson can influence these perceptions at a behavioural and

psychological level? This excludes the use of survey and archival analysis methods that tend to ask more factual type questions and produce more quantitative data generally associated with positivist research paradigms. The "how" questions of this study are concerned with understanding the lived experience of the customer through a social interaction and seeks a deeper understanding drawn from a qualitative type of knowledge more conducive to its social constructionist underpinnings. The context is contemporary and therefore is directly observable precluding the need for a historical strategy approach. The natural social construction of the interaction is core to the conceptual framework and is best understood in its natural environment rather than through researcher manipulation of behavioural events through experimentation or action.

A case study strategy is deemed appropriate due to its usefulness when trying to understand behaviours or contemporary events (Benbasat *et al.*, 1987; Yin, 1994; Stake, 1995; Rowley, 2002). This fits particularly well with the qualitative approach required in this study as "rigorous qualitative case studies afford researchers the opportunities to explore or describe a phenomenon in context using a variety of data sources" (Baxter and Jack, 2008:544). Despite the applicability of the case study design to both positivist and interpretivist research (Remenyi *et al.,* 1998) there is well documented support for the use of the case study methodology in studies coming from a social constructionist paradigm (Stake, 1995; Rowley, 2002; Yin, 2014). The case study design is also in keeping with the inductive approach to research. Yin (1994) describes the use of the case study in an inductive way as playing the role of detective, weighing up the evidence, deciding on what to further explore and drawing conclusions that are supported by evidence. That is not to say that existing literature does not play a role in inductive case studies. Researchers use previous literature to formulate the research problem and to identify variables that may be important (Eisenhardt, 1989). These are represented by guiding propositions in this study and the capture of additional variables is facilitated through the phased approach to data collection and analysis.

Case Study Design and Preparation

A case study is undertaken when the researcher aims to understand in depth an event, activity or process engaged in by one or more individuals. The case is bound by this

activity and uses a variety of data collection methods to collect detailed data regarding the phenomenon under investigation (Stake, 1995). Having considered the first part of this definition in the case study rationale or what Yin (2014:2) refers to as the "plan" stage attention is now turned to the "design" aspect. Yin (2014) describes and presents effective case study research as a linear but iterative process balancing both rigour and induction elements (Figure 1). The focus of this paper is on the design and preparation stages with the next paper in this series focusing on the collection and iterative analysis stages, followed by a final paper that presents final analysis of findings.

Design-Type of Case Study

The case study has some guiding propositions and clearly defined research questions. This is in keeping with Rowley (2002) who suggests that descriptive case studies require propositions and research questions. The study is coming from a more interpretivist frame and is not looking for a cause and effect type explanation that would be more characteristic of positivist research paradigms. Instead it aims to describe how customer perceptions of salesperson warmth and competence are constructed within the consultative sales interaction.
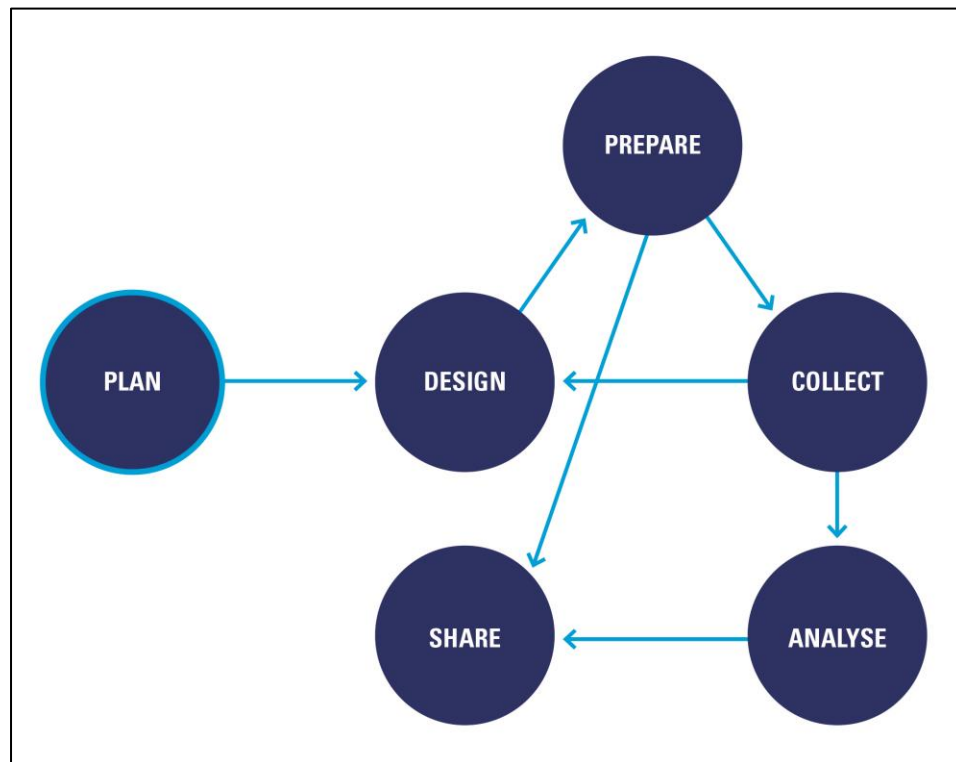
Figure 1- Case Study Strategy Model (Reproduced from Yin, 2014:2)

Design- Defining the Unit of Analysis and Binding the Case

The identification of the Unit of Analysis (UOA) for study is related to the research questions and the propositions for investigation (Yin, 2014). Through the consideration of these elements we can define the case that will be studied. The study is concerned with three key questions:

1. How do customer perceptions of salesperson warmth and salesperson competence facilitate sales performance in consultative sales contexts?
   a. Where salesperson performance is conceptualised as success in social interactions *and*;
   b. Where customer perceived warmth and competence are considered indicators of this success?
2. How can an individual salesperson influence these customer perceptions at a behavioural level (through the lens of customer orientation)?
3. How can an individual salesperson influence these customer perceptions at a psychological level (through the lens of the emotional quotient)?

The case study aims to better understand the process engaged in by the customer and the salesperson in the consultative sales context and as such the unit of analysis is the consultative buyer-seller interaction. The research questions and associated unit of analysis of this study have a contextual dependency and as such will be best understood through a single case that is representative of the contextual setting.

This research focuses on consultative sales and is specific to business to business selling environments. Today, the speed of evolution has led to reverse engineering, reduced product development time and technological advancements that has seen the erosion of organisational competitive advantage particularly where this is product or brand based (Rackman and DeVincentis, 1999; Sojka and Deeter-Schmelz, 2002). The pace of development has seen the nature of customer business problems become less defined. This is best described by Beardsley *et al.* (2006:53) who describe an organisational context in the developed world whereby "collaborative, complex problem solving is the essence of their [individuals] work". In keeping with these more complex problems is the requirement for more complex solutions (Thull, 2005; Kauffman, 2007). This not only drives the requirement for a consultative type of sale but also results in lengthier and less linear sales processes (Thull, 2005). In

consultative sales environments there is a requirement to coordinate with other people when selling and collaboration between sales and service personnel is crucial (Thull, 2005).

This study will be undertaken in the Information and Communication Technology (ICT) industry. Sales based on brand only are rare in this industry and customers no longer want to deal with a leading manufacturer reseller, instead they want to deal with a solutions provider that incorporates best of breed technology appropriate to their specific need as part of an overall solution to their needs. The sales cycle is lengthy and there is often no clear start or stop to the sale. The rapid pace of change in technology drives this lack of linearity meaning that solutions often have to be enhanced post installation to deal with unforeseen growth or emerging security threats. In addition ongoing consultancy and support to optimise the solution is often part of the ongoing sale. The role of the salesperson is to collaborate with pre-sales, vendors, finance and the customer to come up with the solution that best meets the customer needs and with project management, procurement, engineering and service to ensure it delivers its objectives.

To understand customer perceptions of warmth and competence, it is important to engage with these customers at a depth that allows their perceptions to be exposed over time. When selecting such a case environment, full and complete company access is vital (Kelliher, 2005) and 'random selection is neither necessary, nor even preferable' (Eisenhardt, 1989:537). Thus, following identification of a suitable case environment (that is, a company providing consultative sales), access was negotiated via personal contact in the author's own work setting. The host organisation for the study is a leading Irish Information and Communication Technology (ICT) solution provider. In business over 34 years, the organisation has a turnover in excess of €56 million per annum. ICT solution providers are architects of complex solutions to meet customer needs. These usually stem from a portfolio of manufacturer options, and combine elements of hardware, product, software solution, solution design, solution implementation and ongoing service delivery as part of the overall solution.

Preparation: Data Collection Methods

Case Studies draw from multiple sources of evidence including direct observation, systematic interviewing and public and private archives. The relevance of these data

sources are due to the contextual focus (Voss *et al.,* 2002; Rowley, 2002). The researcher intends to use a phased approach that incorporates a selection survey, semi-structured customer interviews and customer clarification interviews to implement the case design.

Phase 1: Selection Survey

In order to firstly identify customer perceived high performers an initial customer survey will be conducted. The aim of this survey will be to identify the salespeople perceived by their customers to be high on both the warmth and competence dimensions. The survey will be issued to twenty percent of the top fifty customers on each of twenty sales territories and these top fifty will be segmented based on highest average annual turnover over the past three years. Three years is considered appropriate due to the lengthy, non-linear sales cycles and often capital nature of purchases that are characteristic of the organisational context. The twenty percent of these one thousand customers will be picked randomly by selecting every fifth name on the database or every fourth or sixth where the fifth customer is not willing to participate and so on. This strategy will ensure the even distribution of surveys across all salespeople. The twenty sales territories were selected as they represent the sales territories of twenty salespeople with over three year's sales experience and with over twelve months experience working on those specific customer accounts. This eliminates new starters and trainees from the study and/or salespeople who have just taken over customer accounts and who may not have had the opportunity to interact to any great extent.

The short survey is expected to take no more than ten minutes and will be conducted by telephone to ensure an adequate number of responses are received in the shortest possible time frame. The survey will be conducted by an individual from the organisation's marketing team for the following reasons:

1. The customer is being asked to rate the salesperson and they are more likely to be honest in this appraisal if the individual asking the question is not perceived to hold a position of power over the salesperson in the organisation
2. To add rigour to the selection process by this level of independence and to ensure no researcher bias in the selection
3. To reduce any researcher pre-conceptions going in to the interview phase

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The top four ranking salespeople will be selected as high performers relative to others and their customers will be the subject of phase two of this study. The customer will be informed that their responses will be confidential. Customers will be selected for phase two randomly from the top fifty customers previously identified under the territories of each of the four salespeople selected. This may include those initially surveyed or additional customers not originally surveyed to ensure the study takes a balanced view of the customer perspective.

Phase 2: Semi-Structured Interviews

The research interview is one of the most prominent methods implemented in social sciences, (Qu and Dumay, 2011) and is selected to gather data from customers in answering the research questions. Questions are designed to capture data from the perspective of the customer regarding:

1. How customer perceptions of salespeople as both warm and competent influence the social interaction, success in which is conceptualised as customer perceived performance?
2. How they construct perceptions of salesperson warmth and competence?

The research design does however acknowledge, that the zeitgeist for the interview method in social sciences increases the risk of design over-simplification through a presumption that interviewees are automatically "moral truth tellers" (Alversson, 2003:140). The localist perspective of the interview method is suggested (Alversson, 2003) as a counter strategy to mitigate this risk having considered the purpose and philosophical underpinnings of the research. The localist is concerned with framing meaning within its social construction and the development of situated accounts (Alversson, 2003).The localist perspective sees the role of the researcher transform the generation of thick descriptions to thick performances that requires engagement in an embodied rather than a purely cognitive way (Sergi and Hallin, 2011). This is to facilitate an understanding of the context beyond the acceptance of the volunteered perspective of the participant as the objective truth (Qu and Dumay, 2011). The localist perspective is best suited to inform the interview design of this study as it focuses on understanding accounts in a social context rather than as a means to an end tool for data collection (Qu and Dumay, 2011).

The interview is most commonly associated with qualitative research approaches with much criticism coming from quantitative researchers who consider it nothing more than a mere casual conversation (Qu and Dumay, 2011). Qu and Dumay (2011) propose that this criticism is often associated with an unstructured interview type and suggest that using a semi-structured interview resolves this problem and is more in keeping with the localist perspective. Semi-structured interviews from a localist perspective transform interviewer involvement, often seen as a source of interview bias, in to a more appropriate way to understand social complexities (Alversson, 2003). This is facilitated through the use of open questions that allow the interviewee to speak freely and the interviewer to probe for clarity of the context and meaning behind the responses.

Semi-structured interviews will be conducted with five customers of four salespeople in the case context to result in the completion of twenty customer perspective interviews. An interview guide (Appendix A) drawn from the propositions of the conceptual frame will be used to ensure that the study stays within scope (Yin, 1981; Eisenhardt, 1989; Stake, 1995; Bryman, 2004) however, will not be followed so strictly as to prevent interpretation or the investigation of new themes as they emerge. This will also assist when coding data at a later point as codes that relate to the key threads within the propositions serve as the starting point for analysis and help to keep the research manageable (Gibson and Brown, 2009).

Phase 3: Clarification Interviews

To ensure the researcher can fully appreciate the contextual meaning of the data in interpretation, a secondary round of interpretation clarification interviews may be required with some or all of the customers. This would facilitate both clarification of meaning and also the emergence of new themes. All first round interviews will be conducted face to face and will be recorded using a voice recorder. They will be transcribed directly after the interview along with any observations made by the interviewer during the interview. Second round interviews may be conducted over the telephone for practicality and this is considered appropriate as the relationship between the interviewer and interviewee will have been established from the first round interviews.

Preparation: Data Analysis Planning

Interpretation is a major part of all research (Stake, 1995). Gathering information without interpretation is like documenting evidence without solving the crime (Yin, 1981). It is this transformation of data to meaning that develops theory. The interview method will result in a high volume of textual data not uncommon in qualitative research undertakings (Creswell, 2003). The researcher will need to employ analysis techniques in order to manage and make sense of this data towards the proposed contribution to practice. The role of the study propositions is key in managing this process (Yin, 2014) however techniques employed must also be flexible enough so that it does not stifle understanding of the real life contextual experience. This study proposes to use template analysis to facilitate the thematic coding of data in meeting this objective.

Thematic coding is a commonly accepted form of qualitative data analysis (Gibson and Brown, 2009; Creswell, 2003). Suitable for contextual constructionist studies (Madill *et al.*, 2000) it can deal with the analysis of perspectives that is rich in description (King, 2012). It also provides more flexibility in terms of the iterative process to be followed than alternatives (Strauss and Corbin, 1990). Template analysis like Interpretative Phenomenological Analysis (IPA) develops conceptual themes however it also recognises the role of propositions in this process unlike IPA (King, 2012). The template is essentially a list of codes presenting themes identified in the textual data. Many of these themes will be a priori in that they are identified from the propositions however this technique facilitates flexibility to add and modify codes as textual transcripts are read and interpreted (King, 2012). This facilitates analysis of new themes emerging from the inductive process along with the key tentative themes identified in the literature.

The template and the coding aspect of this analysis approach are only a means to an end and without interpretation provide not much more than flat descriptions (King, 2012). Interpretation will be aided by the use of hierarchy, relationship and memo functionalities in NVivo to ensure the presence of a robust audit trail so that interpretations drawn are not at risk of being considered nothing more than researcher conjecture.

DEVELOPMENT OF INTERVIEW INSTRUMENT: WHAT TO RESEARCH"

The following section will explain the theoretical background to this research and will provide a conceptual framework for exploration to include some tentative propositions that form the basis of the semi-structured interview guide (Appendix A). These are the building blocks in the development of the research instrument and a summary of this development from theory to the identification of data be collected is tabulated in Appendix B.

Theoretical Framework

SCT is used as the theoretical foundation for this study due to the evolutionary role it plays in social perception. Social perception is an interactive process whereby one must determine if the other party intends good or ill and then whether they have the ability to enact their intentions (Fiske *et al.*, 2006). Success in social interactions is consistently thought to be predominantly influenced by perceptions of warmth and competence (Rosenberg *et al.*, 1968; Bales, 1970; Peeters, 1995; Wojciszke and Abele, 2014) and hence it is appropriate that they are considered indicators of success in a sales environment contextualised by interaction. Fiske *et al.* (2006) suggest that perceivers will illicit emotional responses to the behaviours they encounter in interactions however, emotional competencies are also thought to be important as they serve to transmit an individual's intentions to the perceiver and this influences their behavioural reaction (Keltner and Haidt, 2001; Gohm, 2003). The constructs of Customer Orientation (CO) at the behavioural level and the Emotional Quotient (EQ) framework at the psychological level form a conceptual lens for the exploration of the salesperson influence on customer warmth and competence perceptions.

Customer Orientation is the extent to which the salesperson engages in activities directed towards satisfying the needs of the customer (Schwepker, 2003). CO is selected over other behavioural perspectives as it is the degree to which the behaviour is directed at fulfilling a customer need that is the premise rather than the behavioural approach to selling. This is particularly appropriate as intention is core to the customer perception founded on a SCT base.

The construct of EQ is defined by Bar On (2006:14) as "*a cross section of interrelated emotional and social competencies, skills and facilitators that determine how effectively we understand and express ourselves, understand others and relate to them*

and cope with daily demands". This conceptualisation is considered a mixed model of emotional and social intelligence (Bar On, 2006; Mayer *et al.*, 2000). The operationalisation of EQ as competencies (Figure 2) makes it practically useful in organisational settings. Its theoretical foundations date back to the early work of Darwin (1872) on the importance of emotional expression for survival and adaption and are particular fitting to the SCT base.

SCALE	DESCRIPTION OF SCALE
INTRAPERSONAL EQ	
Self-regard (SR)	is the ability to be aware of, understand, accept and respect oneself.
Emotional self-awareness (ES)	is the ability to recognise and understand one's emotions.
Assertiveness (AS)	is the ability to express feelings, beliefs and thoughts and to defend one's rights in a non-destructive manner.
Independence (IN)	is the ability to be self-directed and self-controlled in one's thinking and actions and to be free of emotional dependency.
Self-actualisation (SA)	is the ability to realise one's potential and to do what one wants to do, enjoys doing and can do.
INTERPERSONAL EQ	
Empathy (EM)	is the ability to be aware of, understand and appreciate feelings of others.
Social responsibility (RE)	is the ability to demonstrate oneself as a cooperative, contributing and constructive member of one's social group.
Interpersonal relationship (IR)	is the ability to establish and maintain mutually satisfying relationships that are characterised by emotional closeness, intimacy and giving and receiving affection.
STRESS-MANAGEMENT EQ	
Stress tolerance (ST)	is the ability to withstand adverse events, stressful situations and strong emotions without 'falling apart' by actively and positively coping with stress.
Impulse control (IC)	is the ability to resist or delay an impulse, drive or temptation to act and to control one's emotions.
ADAPTABILITY EQ	
Reality testing (RT)	is the ability to assess the correspondence between what is experienced internally and subjectively and what exists externally and objectively.
Flexibility (FL)	is the ability to adjust one's feelings, thoughts and behaviour to changing situations and conditions.
Problem solving (PS)	is the ability to identify and define personal and social problems and to generate and implement potentially effective solutions.
GENERAL-MOOD EQ	
Optimism (OP)	is the ability to 'look on the brighter side of life' and to maintain a positive attitude, even in the face of adversity.
Happiness (HA)	is the ability to feel satisfied with one's life to enjoy oneself and others and to have fun and express emotions.

Figure 2: Emotional Quotient Competences and Descriptions (Adapted from Bar On, 1997).

Conceptual Framework

The influence of SCT in understanding person perception is delineated by Fiske *et al.* (2006) in the Stereotype Content Model (SCM) and informs propositions about how

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warmth and competence combinations may indicate customer perceived performance in consultative sales environments. The dimensions of warmth and competence combine in four ways with each combination proffered to elicit consistent emotional responses and in turn behavioural reactions from the perceiver in respect of the person under evaluation. Those high in both warmth and competence will elicit feelings of admiration as opposed to feelings of contempt, envy or pity that the other combinations may evoke. The behavioural reaction in turn is proposed to have a degree of intent (help/harm) and a degree of effort (active/passive). These intent/effort combinations determine the four behavioural outcomes of active harm, active facilitation, passive harm and passive facilitation. In social interaction the primacy judgement is proposed to be intention and then ability to enact intention. Cuddy *et al.* (2011) note however that in occupational applications the opposite may occur. They also suggest that positive outcomes in interactions serve to reinforce competence judgements in future interactions. Based on the foregoing, the researcher drew from this literature to build propositions 1-5 that serve to inform RQ1 (Table 1).

TABLE 1: Propositions for the Exploration of Research Question 1: How do customer perceptions of salesperson warmth and salesperson competence facilitate sales performance in consultative sales contexts?	
P1	Sales people who are perceived to be both warm and competent by the customer will elicit feelings of admiration
P2	Sales people who are perceived to be both warm and competent by the customer will elicit a behavioural response of active facilitation
P3	Sales people who are perceived to be both warm and competent by the customer will elicit a behavioural response of passive facilitation
P4	In consultative sales contexts the primacy evaluation across the universal dimensions may move from warmth to competence
P5	Performance outcomes will reinforce the customer perception of the salespersons performance on the competence dimension in future evaluations

Table 1: Propositions for Exploration of Research Question 1

Saxe and Weitz (1982) outline how CO manifests itself in an environment that is complex and seeks sustainable repeat business. They outline the salesperson requirement to demonstrate a level of expertise to craft a solution best suited to the customer need to achieve maximum satisfaction. In addition they suggest that for this to be sustainable the salesperson will need to build a cooperative relationship with the customer. RQ2 therefore has two associated propositions numbered 6 and 7 (Table 2).

TABLE 2: Propositions for the Exploration of Research Question 2- How can an individual salesperson influence customer perceived performance at a behavioural level?	
P6	Salespeople who act to build cooperative relationships facilitate a positive perception of warmth
P7	Salespeople who act to demonstrate a level of expertise facilitate a positive perception of competence

Table 2: Propositions for Exploration of Research Question 2

EQ is proposed to contribute to the generation of positive warmth perceptions through its interpersonal and general mood realms. The interpersonal realm facilitates the effective understanding of other's needs (empathy), positive moral intentions towards meeting those needs (social responsibility) and skills that build effective relationships (interpersonal skills). Such interpersonal abilities have been strongly associated with the generation of warmth perceptions (Bar On, 2006; Borg and Johnston, 2013). The general mood realm may facilitate warmth through the transfer of positive emotion between individuals (Barsade and Gibson, 1998; Kelly and Barsade, 2001). EQ is also proposed to contribute to the maintenance of this initial warmth perception through the facilitation of an ability to cope with the contextual role challenge of being an "organisational boundary spanner" (Strutton and Lumpkin, 1993; Thull, 2005) and to aid constructive adaption to conflicting customer and stakeholder needs (Strutton and Lumpkin, 1993) through its stress management and adaptability realms (Stein and Book, 2006). EQ may facilitate a balance in perception management between dimensions through the interpersonal, intrapersonal and adaptability realms and their potential to manage social awareness, self-awareness and self-regulation respectively (Bar On, 1997; Stein and Book, 2006). EQ may also assist sales task performance (Sojka and Deeter-Schmelz, 2003; Rozell *et al.* 2006) to reinforce the competence perception. This informs four propositions for the exploration of RQ3 (Table 3).

TABLE 3: Propositions for the Exploration of Research Question 3- How can an individual salesperson influence customer perceived performance at a psychological level?	
P8	EQ facilitates a positive warmth perception through its interpersonal and general mood realms
P9	EQ facilitates the maintenance of a positive warmth perception through its stress management and adaptability realms
P10	EQ facilitates a balance in customer perception between warmth and competence trough the interpersonal, intrapersonal and adaptability realms
P11	EQ assists salespeople in task performance which aids to reinforce customer perceptions of salesperson competence

Table 3: Propositions for Exploration of Research Question 3

The theoretical framework of social cognition is the basis for the decision to select salespeople that are both warm and competent as this theory suggests that those who are both will elicit the most positive emotional and behavioural reactions in the interaction and are therefore more likely to experience success. The tentative propositions 1-5 are indicative of what might be the case considering this theory in the context of consultative selling. A consideration of customer orientation and the emotional quotient in this context suggests how the construction of customer perceptions about salesperson warmth and competence may be influenced by the salesperson. This is represented in Figure 3 as a conceptual framework for the research and indicates the areas of data capture in the semi-structured interview.
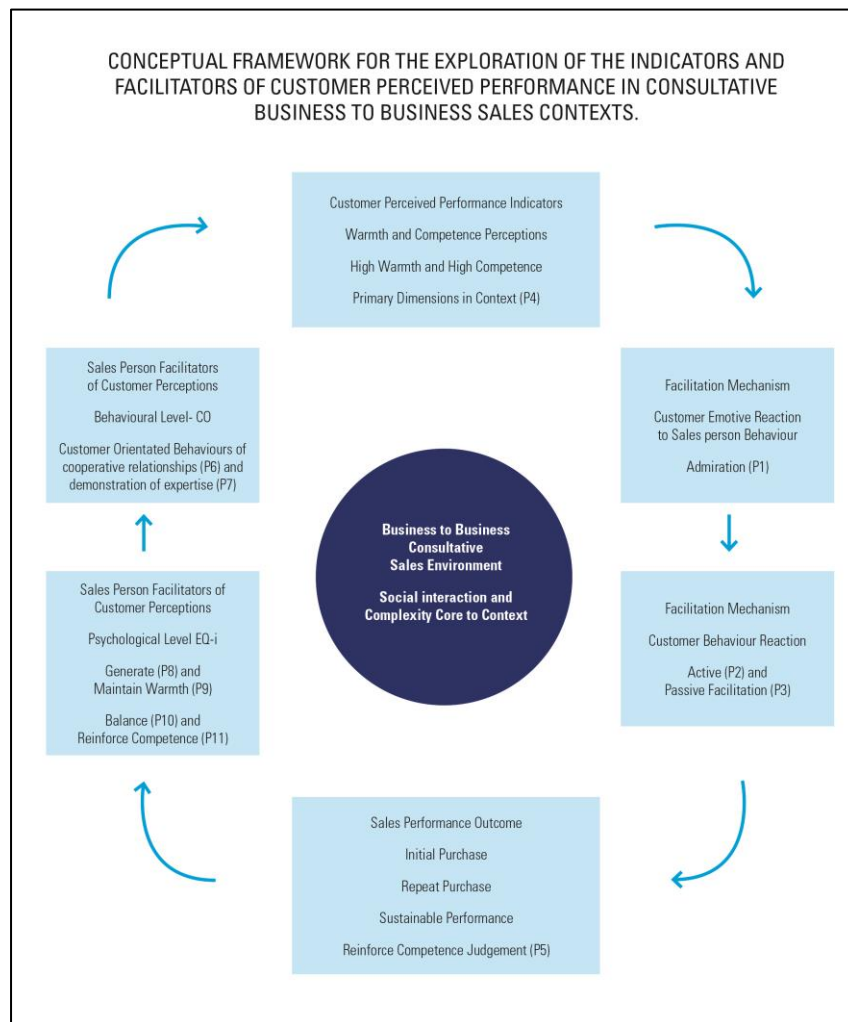

Figure 3: Conceptual Framework for the Exploration of the Indicators and Facilitators of Customer Perceived Performance in Consultative Business to Business Contexts

RELIABILITY, VALIDITY, POSITION AND ETHICAL CONSIDERATIONS

Qualitative Case Study (QCS) design and inquiry from the inside are not without their challenges and limitations. This section highlights matters of reliability, validity, researcher position and ethics pertinent to this study and outlines the strategies taken to overcome these limitations and mitigate risk.

Reliability and Validity

QCS designs are often criticised by positivist researchers as rarely allowing generalisations applicable to the general population (Easterby-Smith *et al.,* 1991). It is widely accepted however, that qualitative approaches are generally chosen in circumstances where the intention is not to test what is thought to be universally applicable (Schofield, 2002). In this study the *raison d'etre* is based on contextual circumstance and the objective is to understand this situation. The study does aim to generate understanding to facilitate effective decision making by practitioners in the immediate organisation and in organisations with similar contexts. In this facilitation, the researcher has grounded the study in the community of sales managers in consultative sales environments, clearly describing the context and characteristics to enable consideration of similarities and differences when practitioners are assessing the reliability of the results for use in their organisation.

QCS designs are also criticized as not having the rigour afforded by natural science methods with concerns over the *"actual accuracy of accounts"* (Maxwell, 1992:285) and the risk of loose interpretations due to the volume of data created (Easterby-Smith *et al.,* 1991). The research problem highlights that in building sales teams, the consequences associated with getting it wrong can be detrimental to overall organisation success. In drawing on the findings of this study the researcher and future practitioners need a degree of confidence that the findings are as they are presented or valid. In the proposed design the researcher has considered this and has incorporated a number of mitigating counter strategies. The role of theory, the access afforded as a researcher from the inside, the application of a case study strategy and localist interview approach along with the role of technology for record keeping all contribute the mitigation of QCS risks. These role these strategies play are summated in Table 4.

Strategy	Application Characteristics	Purpose
Role of Theory	Propositions Conceptual Framework	Manageability of Data Volume Control for Scope Creep Aid Cohesive Design
Researcher from Inside	Continual Checking Loop-facilitated by participant access Contextual awareness	Validation of Accounts Validation of Interpretations
Case Study Strategy	Unit of Analysis Binding of Case	Cohesiveness and Rigour
Localist Interview Approach	Semi-Structured Interview	Prevent Casual Conversations
Record Keeping	Voice Recording-interviews	Accuracy of Account
Computer Software	NVivo for Analysis	Rigour via Audit Trail
Participant Validation	Clarification Interviews	Validation of Interpretations

Table 4: Reliability and Validity Features
Supported by the work of Yin (2004:2014), Stake (1995), Evered and Louis (1991), Taylor and Bogdan (1984), Rowley (2002) Baxter and Jack (2008) and Eisenhardt (1989)

Position of the Researcher

The research will take place in an organisation where the researcher holds a General Management role. For the researcher it affords the opportunity to acquire knowledge relative to the specific organisational situation that can be transferred to the occupational role (Evered and Louis 1981). The aim of the inquiry has a contextual aspect and it is expected that the understanding gleaned will have high situational relevance. This is in keeping with a researcher from the inside approach (Evered and Louis, 1981) and is appropriate to a practitioner orientated DBA.

The researcher from inside approach is consistent with the social constructionist philosophical position (Evered and Louise, 1981; Creswell, 2003). Interpretivism is based on the study of social phenomena in their natural environment with the constructionist paradigm putting additional emphasis on social interaction. It would be extremely difficult to understand the dynamics of such interaction without a contextual awareness and the wide access that comes from being a researcher from the inside (Evered and Louis, 1981).

Being a researcher from the inside while appropriate to the subjectivist cause and with the benefits of being more valid, useful and relevant to the organisation and

practitioners (Evered and Louis, 1981) does not come without its criticisms. Russell (1945) in particular refers to this in what he considers "the fallacy of subjectivism". This however can be overcome if acknowledged and where the benefits of this approach outweigh these risks, it is a matter of management (Holden and Lynch, 2004). The researcher will manage this risk through the use of the memoing function in NVivo to provide an audit trail for analysis steps and through clarification interviews to demonstrate accuracy in interpretation.

An additional challenge highlighted by Walcott (1994) is the position of power the researcher holds relative to the participants and purpose of study. The researcher in this instance holds a general management position and as such has overall responsibility for the sales function of the organisation as an element of this role. This study looks to understand customer perceptions of salesperson warmth and competence and a number of tensions between the researcher's role as both researcher and practitioner arise from this. Firstly, the customer as interviewee may not be a moral truth teller to a researcher they perceive to hold a position of power over the object of the interview, the salesperson. The researcher proposes to mitigate this through a clear briefing document for the customer highlighting the developmental nature of the research and the fact that salesperson support for the research has been obtained. Secondly, the researcher may face a dilemma whereby the interview content indicates something negative relating to a salesperson and yet anonymity to the customer in terms of feedback to the salesperson has been guaranteed. The researcher intends to mitigate this risk through a focus on those perceived to be high performers based on the customer perceived indicators of warmth and competence and by outlining that feedback may be given to the salesperson in an aggregated way through the presentation of themes emerging across all twenty customer interviews as a development intervention rather than by way of specific individual feedback.

Ethical Considerations

This study will be conducted by a "researcher from inside" who holds a position of power in the case organisation. While the participants of interest are largely customers external to the organisation, the insight sought is their perception of salespeople within the organisation. The organisation and its authorized representatives have an inherent right to discuss salesperson performance with the customer in the context of the

customers' satisfaction with the salesperson as an organisational representative. The researcher considers however, that in transforming this in to a structured educational undertaking, the findings of which may in part become published, it affords an additional element of right to the salesperson as to the decision to participate. The researcher therefore needs to be explicit and overt with regard to the purpose of the study and the potential use and implications of the findings. This will be achieved through a salesperson briefing document and informed consent form for salespeople selected for phase two. It will be clear in the briefing document that confidentiality of selected salespeople and participating customers will be maintained to protect individual identities. The customer by the nature of their position will be purely a voluntary participant in the process and will also be provided with a briefing document and an informed consent form prior to the research. In particular concerns foreseen from this group include confidentiality for their organisation and the manner in which their views would be fed back to the individual salesperson. The researcher will so far as is reasonably practicable and necessary cooperate with any requirements and recommendations made the governing body research ethics council.

CONCLUSIONS

The preceding paper in this series established the need for a greater understanding of the customer perspective of sales performance in consultative sales environments and presented a conceptual framework to guide research around the key issues pertinent to this perspective namely the indicators (warmth and competence perceptions) and potential salesperson facilitators (customer orientation and emotional quotient) of customer perceived performance. Such research will contribute a body of knowledge to assist sales managers as they endeavour to build effective sales teams towards sustainable success in consultative sales situations. Sales is the lifeline of any commercial entity and therefore such a contribution would be a significant benefit to practice.

This paper presented the research methodology employed to deliver such a contribution. The pursuit of these research questions requires a deep understanding of the subjective perceptions of customers and the construction of these perceptions in the context of consultative selling. This places the research solidly in the social constructionism realm and positions it comfortably on the 'inside'. The "how" type

nature of the research questions and the need to understand them in their contemporary natural setting provides a strong rationale for a QCS strategy. The employment of a localist customer interview approach to data collection is appropriate to gathering the customer perspective and the use of customer perceptions of the proposed performance indicators in the identification of high performers for the purpose of this study is cohesive with being true to the customer perspective absent in the existing body of research.

In addition this paper addresses the issues of reliability and validity so as to ensure study findings can be relied upon in terms of theory and practice. The key concern with the chosen methodology is the risk posed by the "fallacy of subjectivism" associated with qualitative research designs. This will be controlled for by the researcher through the use of clarification interviews with participants and a clear audit trail in interpretation through the use of NVivo. Finally, the paper discussed the challenge in design posed by the position of power held by the researcher to the customer being a "morale truth teller" and the potential for the study to impact the forming of cooperative salesperson/customer relationships in to the future. To mitigate these challenges the researcher proposes to focus on those likely to be high performers and to have clear briefing documents in place that explain the process for interview feedback to the salesperson.

Having selected an appropriate methodology and provided a robust defence for its selection that takes in to account both benefits and limitations, the researcher intends to conduct the initial selection phase of the research design in January. This will be followed by the first round of customer interviews in February and March. The results of these will be presented in a third paper in this series entitled "initial findings" and will feed in to the final stage of the research process, the clarification interview stage.

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APPENDIX A: INTERVIEW GUIDE

First Impression

Customer Perception
Sales Person Warmth

[Friendly, well intentioned,
warm, good natured, sincere,
trustworthy]*

Customer Perception of
Sales Person Competence

[competent, confident,
capable, efficient, intelligent,
skilful, *trustworthy]*

Interview Guide
Proposition 1-5

Feelings Elicited Towards
the Salesperson

[contempt, disgust/admiration,
pride/pity, sympathy/envy,
jealousy]*

Feelings Elicited Towards
the Salesperson

[facilitation, helping, protection/
attacking, fighting/cooperation,
association/exclusion,
demeaning]*

Task Performance Outcomes

*Scales from Fiske et al. 2007

Interpersonal Realm
Interpersonal Skills
Social Responsibility
Empathy

Generating
Warmth

Customer Orientation
Schwepker, 2003

General Mood Realm
Optimism
Happiness

Maintaining
Warmth

Interview Guide
Propositions 6-10

Adaptability Realm
Reality Testing
Flexibility
Problem Solving

Balancing
Perceptions

Stress Mgt Realm
Impulse Control
Stress Tolerance

Reinforcing
Competence

Interpersonal Realm
Self Regard
Self Actualisation
Assertiveness
Independence
Emotional Self
Awareness

Task
Performance

EQ Scale
Bar on 1997

TYPES OF QUESTIONS	PURPOSE OF QUESTIONS	SOME EXAMPLES
1. Introducing questions	To kick start the conversation and move to the main interview	"Can you tell me about […]?" "Do you remember an occasion when […]?" "What happened in the episode mentioned?"
2. Follow up questions	To direct questioning to what has just been said	Nodding, "mm", Repeating significant words
3. Probing questions	To draw out more complete narratives	"Could you say something more about that?" "Can you give a more detailed description of what happened?" "Do you have further examples of this?"
4. Specifying questions	To develop more precise descriptions from general statements	"What did you think then?" "What did you actually do when you felt a mounting anxiety?" "How did your body react?"
5. Direct questions	To elicit direct responses	"Have you ever received money for good grades?" "When you mention competition, do you then think of a sportsmanlike or a destructive competition?"
6. Indirect questions	To pose projective questions	"How do you believe other pupils regard the competition of grades?"
7. Structuring questions	To refer to the use of key questions to finish off one part of the interview and open up another, or to indicate when a theme is exhausted by breaking off long irrelevant answers	"I would now like to introduce another topic […]"
8. Silence	To allow pauses, so that the interviewees have ample time to associate and reflect, and break the silence themselves with significant information	
9. Interpreting questions	Similar to some forms of probing questions, to rephrase an interviewee's answer to clarify and interpret rather than to explore new information	"You then mean that […]?" "Is it correct that you feel that […]" "Does the expression […] cover what you have just expressed?"
10. Throw away questions	To serve a variety of purposes, i.e. to relax the subject when sensitive areas have been breached	"Oh, I forgot to ask you […]"

APPENDIX B: DEVELOPMENT OF INTERVIEW GUIDE

Research Context/Research Problem	Knowledge Gap	Research Questions
Speed of evolution- technology advancements	***Salesperson Perspective of Sales Performance***	
Erosion of traditional competitive advantage sources- brand and product	Cognition, personality, physiology, motivation, emotional intelligence, motivation- theory bases	
Complexity of customer need	Mixed and contradictory results	
Complexity of solution (to meet need)	Core role of interaction identified	
Focus on consultative selling	Consistent across multiple sales perspectives: relational, adaptive, customer orientated	
Solutions difficult to evaluate/compare	***Customer Perspective of Sales Performance***	
Customer evaluation of the salesperson in the interaction is the differentiator	Customer perspective in its infancy	
Sales Performance Literature	Acknowledges interactional nature of consultancy sales and customer perspective but still relies on theory founded in salesperson perspective in trying to understand sales performance	
Sustainable sales for organisational success	Needs to focus on success in customer interaction and its indicators of success warmth and competence	How do customer perceptions of salesperson warmth and salesperson competence facilitate sales performance in consultative sales contexts?
Need to build effective sales teams and do so efficiently as mistakes can be costly	Need to understand how the customer evaluates salesperson performance as a key differentiator in the context and how the salesperson can influence this evaluation for it to be useful to building sales effective sales teams efficiently	How can an individual salesperson influence these perceptions at a behavioural level? How can an individual salesperson influence these perceptions at a psychological level?

Theoretical Foundations	Conceptualisations/Definitions	Philosophical Underpinnings	Guiding Propositions	
Social Cognition	Sales Performance- contextually conceptualised as "Success in the Social Interaction"	Social Constructionism- how constructed customer perception of a salesperson as warm and competent facilitates success in social interaction in consultative sales context	P1	Salespeople who are perceived to be both warm and competent by the customer will elicit feelings of admiration
			P2	Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of active facilitation
	Indicators of Performance- Warmth and Competence (Fiske *et al.*, 2002)		P3	Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of passive facilitation
			P4	In consultative sales contexts the primacy evaluation across the universal dimensions may move from warmth to competence
			P5	Performance outcomes will reinforce the customer perception of the salespersons performance on the competence dimension in future evaluations
Behavioural- Customer Orientation	The extent to which the salesperson engages in activities directed towards satisfying the needs of the customer (Schwepker, 2003)	Social Constructionism- how the construction of warmth and competence perceptions can be influenced by the individual salesperson at a behavioural and psychological level	P6	Salespeople who act to build cooperative relationships facilitate a positive perception of warmth
			P7	Salespeople who act to demonstrate expertise facilitate a positive perception of competence
			P8	EQ facilitates a positive warmth impression through it interpersonal and general mood realms
Psychological- Emotional Quotient	A cross section of inter-related emotional and social competencies, skills and facilitators that determine how effectively we understand and express ourselves, understand others and relation to them and cope with daily demands (Bar On, 2006:14)		P9	EQ facilitates the maintenance of a positive warmth perception through its stress management and adaptability realms.
			P10	EQ facilitates a balance in customer perception between warmth and competence trough the interpersonal, intrapersonal and adaptability realms
			P11	EQ assists salespeople in task performance which aids to reinforce customer perceptions of salesperson competence

Data Required to Understand Research Questions	Method Employed
How does the customer perceive the salesperson in terms of warmth? How does the customer perceive the salesperson in terms of competence?	Phase 1: Customer Survey- short telephone survey with 100 customers equally distributed and randomly selected from the top 50 customers across 20 sales territories. Select top 4 salespeople with the highest combined ranking on warmth and competence to move on to Phase 2
How did these perceptions develop with a focus on early interactions? (RQ1)? What feelings has the sales interactions to date elicited in the customer about the salesperson? (RQ1) How have these feelings developed? (RQ1) How has the customer initiate action as a result of the sales interaction with the customer? (RQ1) How have they helped or hindered the salesperson in terms of facilitating or blocking a positive sales outcome? (RQ1) Why did they take this course of action? (RQ1) How did the outcome of initial sales interactions feed in to subsequent? (RQ1) Does the customer feel the salespersons intentions are directed towards meeting their needs? (RQ2) How have they formed this judgement/why do they feel this way? (RQ2) How has the customer perception of warmth and competence been constructed? (RQ3) How would they describe their relationship with the salesperson? (RQ3) How does the salesperson interact with them? (RQ3) How do they describe the salespersons general demeanour? (RQ3) How willing was the salesperson to adapt? (RQ3) How did the salesperson deal with conflicting needs? (RQ3) How did they feel the salesperson undertook their duties and how did this impact the perception of competence? (RQ3)	Phase 2: Customer Interviews- Interview 20 customers (5 from each of the 4 selected salespeople territories) using a semi structured interview guide Phase 3: Conduct later clarification interviews as required to facilitate emerging themes and to clarify meanings in context

APPENDIX C: CUSTOMER RESEARCH PARTICIPATION REQUEST

Dear <Insert Customer Name>,

I am contacting you in connection with a research project that I am undertaking as part of the Doctorate in Business Administration programme at Waterford Institute of Technology in association with Host Organisation. This research project is strongly supported by Host Organisation as a practitioner orientated programme. The next phase of my research involves data collection from Host Organisation ICT Solutions customers. This communication is to seek your participation in this process as a valued Host Organisation partner.

The premise of the research is a consideration of sales interactions from the perspective of the customer. The data collection process will involve an initial 45-60 minute interview. As the research progresses additional support by way of a shorter clarification interview may be sought. The interviews will be conducted at your premises unless otherwise requested for your convenience and subsequent clarification interviews may be conducted by telephone should that be necessary. Initial Interviews will be conducted over a two month period between February and March 2016.

It is requested that interviews be taped for the purpose of accurate data capture. These tapes will be confidential and will be transferred to an electronic copy and securely stored. They will be used for the purpose of transcription for data analysis and research validation by the governing body should they be required. They will not be disclosed to any other person outside an authorised auditor on behalf of the governing body. Transcribed manuscripts will not be disclosed in complete form and interview extracts used for illustration of findings will not disclose your identify or that of your organisation in name or through the detail used.

Please find attached a copy of the research participant information sheet and consent form. If you are willing to take part your contribution would be very much appreciated. I will follow up this communication with a call in the coming days to discuss this further and to answer any queries you may have.

Kind Regards,

_____

Karen O'Connor

General Manager- ICT Solutions

APPENDIX D: PARTICIPANT INFORMATION SHEET/CONSENT FORM

INFORMATION SHEET FOR RESEARCH PARTICIPANTS

Research Overview
This study proposes a departure from the focus on motivation and monetary results in salesperson performance to a consideration of a more sustainable model of salesperson performance that puts the perspective of the customer at its heart. It seeks to understand how customers perceive their Sales Account Managers (SAMs) on the dimensions of warmth and competence, how these perceptions were formed over the course of their interactions and how these perceptions in turn influence the customer's course of action.

Role of Participants
The participant will be a customer of Host Organisation and will be requested to answer questions regarding their perceptions of their nominated Host Organisation Sales Account Manager formed during historical sales interactions and in relation to the way they interact with that salesperson in their professional capacity. The sales account manager is aware of these interviews and has consent to participation. Specific feedback of an individual nature will not be returned to the SAM however general feedback from across over twenty interviews may be delivered to SAMs collectively as a developmental debriefing exercise.

Semi-Structured Interview
The interview structure will be semi-structured in nature. A semi-structured interview is a method of research used in the social sciences. While a structured interview has a rigorous set of questions which does not allow one to divert, a semi-structured interview is open, allowing new ideas to be brought up during the interview as a result of what the interviewee says.

Participant Time Commitment.
The interview should take approximately 45 to 60 minutes.

Research Location
The research will take place at your premises or an alternative location convenient to you

Participant's Anonymity
All interviews will be coded to protect the anonymity of the participant. Only the researcher and his supervisor will have access to the raw data contained in the interviews.

Rights of Participants
Participants have the right not to answer questions and to withdraw from the study at any time up to data input. Participants have the right to contact the Research Ethics Committee at W.I.T. if they have any concerns about participating in the research.

Contact Information
Researcher: Karen O Connor (koconnor@hostorg.com) XXX-XXXXXXX (Mob)
Research Supervisor: Susan Whelan swhelan@wit.ie

CONSENT FORM

Consent Section:

I, the undersigned, declare that I am willing to take part in research for the project entitled *"Warmth and Competence: A Customer Perspective of Sales Performance in Consultative Selling (working title)"*.

I declare that I have been fully briefed on the nature of this study and my role in it and have been given the opportunity to ask questions before agreeing to participate. The nature of my participation has been explained to me and I am aware as to how the information collected will be used.

I am also aware that my participation in this study may be recorded and I agree to this. However, should I feel uncomfortable at any time I can request that the recording equipment be switched off. I am entitled to copies of all recordings made and I am fully informed as to what will happen to these recordings once the study is completed. I will also be given access to the transcript of the recording for review in order to ensure that there are no inaccuracies. I understand that direct quotations may be used but that the participants' anonymity will be protected.

I fully understand that there is no obligation on me to participate in this study and fully understand that I am free to withdraw my participation at any time up to data entry stage without having to explain or give a reason. I also realise that I am entitled to full confidentiality in terms of my participation and personal details.

_____   _____

Signature of Participant   Date

APPENDIX E: SAM BRIEFING E-MAIL

Dear <Insert Salesperson Name>,

I am contacting you in connection with a research project that is being undertaken by <Researcher> as part of the Doctorate in Business Administration programme at Waterford Institute of Technology. This research project is strongly supported by <Host Organisation> as a practitioner orientated programme. The next phase of research involves data collection from <Host Organisation> ICT Solutions customers.

I am writing to advise you that the purpose of this research is to better understand the customer perspective of sales performance and that you have been identified as a potential high performer from this perspective. It is now proposed to contract a number of your customers to participate in the study as it enters its next phase. Each customer will be interviewed and will be asked to speak about their perception of their sales account manager in terms of warmth and competence and will be asked further questions regarding how these perceptions were formed during interactions with their sales account manager.

Individual feedback to Sales Account Managers from these interviews will not be possible as assurances of customer confidentiality will be given. Interview data will be for the purpose of the research only and will not be disclosed outside of the researcher and their research supervisor and in particular will not be disclosed to any other individual in Host Organisation. Key themes identified across all twenty interviews conducted may later be disclosed to the organisation with due respect to customer and salesperson confidentiality for the purpose of future training and development programmes across current and future sales teams.

Should you be satisfied with the nature of the research and have no further queries please return the attached signed acknowledgement form at your convenience. Alternatively if you have any queries please let me know and I can set up a meeting with <Researcher> to discuss.

Kind Regards,

_____

Human Resources Team

ACKNOWLEDGEMENT FORM

Consent Section:

I, the undersigned, declare that I have been made aware and understand the nature of the research entitled *"Warmth and Competence: A Customer Perspective of Sales Performance in Consultative Selling (working title)"*.

I declare that I have no objection to the nature of this research and understand that individual feedback regarding the content of the customer interview will not be possible as participant confidentiality will be assured. I also understand that interview data will be for the purpose of the research only and will not be disclosed outside of the researcher and their research supervisor and in particular will not be disclosed to any other individual in <Host Organisation>. I understand that that the content of the customer interview is in no way related to my organisational performance review. I understand that as a result of data analysis across all interviews general themes may be given to the organisation having due respect to individual customer and Sales Account Manager (SAM) confidentiality for the purpose of developing a training and development programme for current and future sales teams.

I fully understand that in signing the consent form that I reserve the right to raise concerns relating to this research at a later time should the need arise. I also realise that I am entitled to full confidentiality in terms of my participation and personal details.

_____   _____

Signature of Participant   Date

PAPER 3 PREFACE

The purpose of the third paper in the series was to develop the methodological framework in to a detailed and tested research design. A key influence on this paper was the work of Baxter and Jack (2008) whose paper aimed at the novice researcher was referred by the research supervisor Dr. Susan Whelan as the research entered this next phase. In the conclusion of paper 2 the researchers' intention was to implement the study for the purpose of initial analysis and presentation of findings however, on review of the Baxter and Jack (2008) paper it became apparent to the researcher that the methodology paper was an iterative but not final step on the road to research implementation and that a more detailed research design step was required. In the development of this more detailed design a research protocol was developed.

The research protocol is a detailed plan that outlines the how of the research with due regard to the "what to" and "why" research considerations outlined in the methodology paper. The protocol is presented throughout paper 3 and includes features such as a tabular map from research questions and propositions to case study questions and potential sources of data, a table of context code descriptors, a table of a priori codes that relate to the propositions and an extension of work on the interview guides presented in paper 2 that specifically links the interview questions back to the data sought.

To ensure that the case study protocol was fit for purpose the decision was taken to implement a pilot rather than an initial implementation phase as proposed in paper 2. This decision was taken to ensure that the procedures put in place in the protocol were adequate to complete the case study research competently. The opportunity to conduct a pilot did not extend to complete testing of the selection procedures however did provide the opportunity to trial the role of the units of observation, to assess whether or not interview guides were adequate to generate data to inform research questions and to develop practitioner comfort and confidence with their role as a research interviewer. The progression of the research design by way of a detailed consideration in paper 3 resulted in a number of changes between paper 2 and paper 3 and these are now outlined.

In the development of the detailed research protocol it was established that observation at a level beyond that of just the customer was required in order to fully develop the

situated account of the buyer-seller interaction as the unit of analysis. The primary reason for this requirement was to enable all three research questions to be fully illuminated with research question 1 and associated propositions 1-5 heavily dependent on the position of customer but research questions 2 and 3 and associated propositions 6-11, heavily dependent on the perspective of the individual salesperson. This consideration resulted in the introduction of a SAM round of interviews to the data collection procedure to compliment and supplement the primary customer interviews.

The case study design was also amended in paper 3 to account for the focus on high performance within the single organisation case. In paper 2 the selection of customer participants was on the basis that they were customers of SAMs identified to be conceptually high performers. To facilitate an understanding of high performance within the buyer-seller interaction the recognition of selected SAMs as not only units of observation but as embedded cases in the single context case was necessary. This allowed cross (between high performing SAMs) and inter (between customers of high performing SAMs) case analysis to take place at the embedded case level for the purpose of drawing findings with respect to high performance within the phenomenon of the buyer-seller interaction.

The development of the interview instrument offered in paper 2 was essentially an iterative step to connect theory and implementation. The "interview guide" offered in paper 2 outlined the key conceptual areas for exploration and the question types to explore these areas. In paper 3 this initial interview guide of paper 2 was replaced with a more detailed interview guide to assist the researcher in the application of the semi-structured interview method. A version was produced for each interview type, customer and SAM. These revised interview guides sought to capture the dyadic accounts of customers and SAMs informed by the conceptual framework and its propositions. To illuminate the relevance of the customer perspective approach taken in this research for Sales Management Practitioners (SMPs) who are ultimately the target users of insight generated through this study, a Sales Management Representative (SMR) perspective was also added and an appropriate version of the interview guide was produced to capture this account. This perspective presented not only an opportunity to not only make relevant the findings to the target audience but was intended to serve a source of account triangulation. It wasn't possible to test this

perspective in the pilot implementation as there was only one SMR to draw from and this individual was to be part of the main study implementation. To ensure that participants in the pilot and in the main study were mutually exclusive and that the pilot still captured a third perspective a senior engineer with exposure to the sales interaction was selected to triangulate accounts. Technical resource are introduced when appropriate to the sales interaction by the SAM and have a unique position as a natural observer of the customer/salesperson interaction. The addition of these additional perspectives rendered the reliance on customer clarification interviews for the purpose of validity in the development of the situated account unnecessary and while the opportunity to conduct these remained as the level of researcher access was unchanged, it was decided that they would only be used if and where necessary.

With respect to the selection of customers for the brief telephone interview, paper 2 indicated that the researcher was going to select these customers from the organisational Customer Relationship Management (CRM) database. As the researcher moved in to paper 2 the decision was taken to instil a level of arms-length in the selection of these customers and it was decided that this task would be passed with clear direction to the systems and operations manager to coordinate with the marketing team representative directly. This step was taken so as to eliminate any risk of researcher bias going in to the qualitative research stage. The initial paper had also indicated that four of twenty customers would be selected as star performer embedded cases based on their warmth and competence rankings however this changed to five in paper 3 to reflect 25% of the selection pool so that the upper quartile in the case organisation was represented.

Paper 3 was submitted and recommended without changes however, the researcher did consider the feedback of the examination panel that comprised Professor Joseph Coughlan (Maynooth University) and Dr. Aidan Duane (Waterford Institute of Technology) that the term "blended ranking" used by the researcher was not technically correct despite the method applied being acceptable and appropriate in their view. The researcher did review this and resubmitted the paper with a change in terminology and this revised paper 3 now follows.

PAPER 3: TOWARDS SALESPERSON FACILITATION OF THE CUSTOMER PERSPECTIVE OF SALES PERFORMANCE IN CONSULATIVE SELLING: DESIGN AND INITIAL ANALYSIS

BY

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Submitted in Partial Fulfilment of the Doctorate in Business Administration

Research Supervisor: Dr. Susan Whelan

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ABSTRACT

Increased levels of complexity in today's business world has seen a shift towards consultative sales environments. Solution comparisons in this context are challenging and the customer evaluation of the salesperson is a key factor in sales success. Despite widespread acknowledgement of the important role this customer perspective plays, sales performance research has traditionally focused on the salesperson perspective. An initial paper in this series presents a conceptualisation of customer perceived sales performance as success in social interaction in the context of consultative selling. A subsequent paper supports a qualitative case study methodology to illuminate this phenomenon in its natural contemporary setting. This third paper now operationalises a study to explore how salesperson customer orientation and emotional and social competencies can facilitate customer perceived sales performance in consultative selling based on a social interaction conceptualisation. Operationalised through the presentation of a case study protocol and the implementation of a pilot data generation and analysis phase, this formative step generates tentative findings that demonstrate design suitability and the potential for valuable insight from full study implementation. Early indications suggest that in context, competence perceptions will hold a primacy position over warmth perceptions in the early customer evaluation of the salesperson. There appears to be a shift in emphasis towards communication as a facilitator at a behavioural level when it comes to maintaining a cooperative relationship throughout the ongoing interaction. There also appears to be a number of dynamics between the emotional and social competencies of the salesperson in the management of customer warmth and competence perceptions. In particular a dynamic between reality testing, assertiveness and flexibility and a further dynamic between problem solving and optimism look to have merit. These issues will be further explored through the implementation of the full study and presented as final findings in the pending fourth and final paper in this series.

Key Words: Sales Performance, Customer Perspective, Warmth, Competence, Qualitative, Case Study, Customer Orientation, Emotional and Social Competencies

INTRODUCTION

This paper is the third in a series of four papers that explores the customer perspective of salesperson performance in consultative selling. The main aim of this research is to generate insight in to how customer perception of a salesperson as both warm and competent indicates performance and subsequently to understand the role of salesperson customer orientation and emotional and social competencies in the facilitation of such perceptual evaluations by the customer in the consultative sales context.

The initial paper comprised a conceptualisation of customer perceived sales performance in context as success in social interaction, interaction being a core characteristic of the consultative sales environment. The second paper outlined the philosophical basis to the qualitative research approach, made explicit its social constructionist worldview and provided the rationale for a case study research strategy. Paper three turns attention to the data generation phase of the enquiry and its purpose is to ensure that adequate focus is paid to the relevant steps in "producing competent case study research" (Remenyi *et al.*, 1998).

This paper demonstrates an ability to understand and follow the steps necessary to produce competent case research through the presentation of a case study protocol (Tellis, 1997; Remenyi *et al*., 1998; Yin, 2014). The case study protocol is structured to include; an overview of the case study project, a detailed plan for sampling strategy implementation, the data collection procedures and the protocol for data analysis. Guided by this case study protocol a pilot multi-perspective interview procedure was implemented and initial tentative findings are presented. The paper concludes by looking forward to the finalisation of data generation and analysis in the last paper of the series.

OVERVIEW OF THE CASE STUDY PROJECT

The objective of this research is to understand how customer perception of a salesperson as both warm and competent can indicate performance in consultative selling and to illuminate how an individual salesperson's customer orientation and emotional and social competencies can shape these perceptual judgements. The research aims to generate findings that are useful to sales managers in consultative selling environments as they build sales teams that contribute towards sustainable

organisational revenue generation. In addition, it aims to contribute to the customer perspective of sales performance where knowledge to date is in its infancy (Sojka and Deeter-Schmelz, 2002 and Rozell *et al.*, 2006).

The background to this research draws on Social Cognition Theory (SCT) and the evolutionary role of both warmth and competence perceptions as universal drivers of success in social interaction. Sales performance was conceptualised in the first paper as success in social interaction due to the central role of interaction in consultative sales environments. Characteristic to such environments is a degree of complexity, the need to collaborate and non-linear processes (Thull, 2005; Beardsley *et al.,* 2006; Kauffman, 2007). A later development based on SCT, the Stereotype Content Model (Fiske *et al*., 2002) is the basis for the premise that the most positive performance outcomes will come from a positive customer perception of both warmth and competence in the consultative selling context driven by the level of complexity involved in the sale (Thull, 2005). This is based on the potential for this combination to generate consistently positive behavioural reactions from the perceiver; active and passive facilitation. This is as opposed to high warmth or competence perceptions in isolation that may generate a positive or negative behavioural reaction.

Customer Orientation (CO) is the constructional lens chosen to illuminate salesperson facilitation of customer warmth and competence perceptions at a behavioural level (Stock and Hoyer, 2005; Zablah *et al.*, 2012). It is the degree to which CO focuses on behaviour alignment to customer need that makes it appropriate to this study due to the core role of intention in customer perception. Emotional competencies are also thought to be important as they serve to transmit an individual's intentions to the perceiver influencing their behavioural reaction (Keltner and Haidt, 2001; Gohm, 2003) and the theory on which the Emotional Quotient is based (Bar On, 1997) is selected as the lens to illuminate this psychological perspective. This base is considered appropriate due to its theoretical foundations in early work relating to emotional expression for survival and adaption closely related to the evolutionary foundation of the SCT base.

In the second paper of this series a case study strategy was presented as an appropriate approach to research due to the "how" nature of the research questions, the contemporary nature of the issues under investigation and its appropriateness to the

investigation of an issue in its natural context (Yin, 2014). This case study is guided by case study propositions drawn from the theoretical lenses outlined and will use a single case study embedded design.

Case Propositions and Definition

To meet the objectives of this study a number of tentative propositions were drawn from the literature. These propositions inform the case study questions (Table 1) that the researcher must keep in mind in gathering data to ensure that they remain focused on the generation of data that informs the research questions (Tellis, 1997; Remenyi *et al.* 1998; Yin, 2014).

Research Question 1: How do customer perceptions of a salesperson as both warm and competent facilitate sales performance in consultative sales contexts?		**Case Study Questions**	**Potential Source of Data**
P1	Salespeople who are perceived to be both warm and competent by the customer will elicit feelings of admiration	What emotional response does the customer exhibit in respect of the SAM? What is it about the SAM that makes them feel this way?	Customer Interview Sales Management Interview
P2	Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of active facilitation	What action has the customer taken over the course of the continual sales interaction to help or hinder progress? Was the action taken passive or active?	Customer Interview SAM Interview Sales Management Interview
P3	Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of passive facilitation	How was this action influenced by perceived SAM warmth? How was this action influenced by perceived SAM competence?	
P4	In consultative sales contexts the primacy evaluation across the universal dimensions may move from warmth to competence	What was the customer's first impression of the SAM? What is important to the customer about the SAM function?	Customer Interview SAM Interview Sales Management Interview
P5	Performance outcomes will reinforce the customer perception of the salespersons performance on the competence dimension in future evaluations	What is the customers view on the results that have been delivered to date? How has this perception influenced the perception of SAM competence?	Customer Interview Sales manager Interview
Research Question 2- How can an individual salesperson influence customer perceived performance at a behavioural level?		**Case Study Questions**	**Potential Source of Data**
P6	Salespeople who act to build cooperative relationships facilitate a positive perception of warmth	What has the SAM done to build a cooperative relationship with the customer? How has this action influenced the perception of SAM warmth?	Customer Interview SAM Interview Sales Management Interview
P7	Salespeople who act to demonstrate a level of expertise		

	facilitate a positive perception of competence	What has the SAM done to demonstrate a level of expertise to the customer? How has this action influenced the perception of SAM competence?	
Research Question 3- How can an individual salesperson influence customer perceived performance at a psychological level?		**Case Study Questions**	**Potential Source of Data**
P8	EQ facilitates a positive warmth perception through its interpersonal and general mood realms	How would the general mood or demeanour of the SAM be described? How has this general mood influenced the customer perception of SAM warmth? What interpersonal skills does the SAM demonstrate? How have interpersonal skills influenced the customer perception of SAM warmth?	Customer Interview SAM Interview Sales Management Interview
P9	EQ facilitates the maintenance of a positive warmth perception through its stress management and adaptability realms	Does the SAM demonstrate a willingness to adapt? How has this helped the SAM in maintaining the perception of warmth? Does the SAM demonstrates the ability to manage stressful situations? How has this helped the SAM in maintaining the perception of warmth?	Customer Interview SAM Interview Sales Management Interview
P10	EQ facilitates a balance in customer perception between warmth and competence through the interpersonal, intrapersonal and adaptability realms	Does the SAM demonstrate social awareness? Does the SAM demonstrate self-awareness? Has the SAM demonstrated an ability to change approach in response to awareness to self and social context?	Customer Interview SAM Interview Sales Management Interview
P11	EQ assists salespeople in task performance which aids to reinforce customer perceptions of salesperson competence	What task skills has the SAM demonstrated? How has this contributed to the customer's perception of their competence?	Customer Interview SAM Interview Sales Management Interview

Table 1: Research Propositions, Case Study Questions and Sources of Data

The propositions facilitate data analysis through the definition of an a priori coding structure for early stage template analysis implementation (Table 2). These a priori codes drive a focus towards the study questions and are initial starting codes for analysis. It is expected that codes will be added, refined or dropped throughout the iterative analysis process (Miles and Huberman, 1994) up until the point of analysis saturation and finalisation of findings in paper 4.

PROPOSITION DRAWN INITIAL CODES

Customer Perception of Salesperson

Code	Sub-Code	Description
Warmth	Good Natured	Kind, Friendly, Patient
Warmth	Warm	Showing enthusiasm, affection, or kindness
Warmth	Sincere	Free from pretence or deceit; proceeding from genuine feelings
Warmth	Well Intentioned	Having or showing good intentions
Warmth	Friendly	Favourably disposed; inclined to approve, help, or support
Warmth	Trustworthy	Able to be relied on as honest or truthful
Competence	Confident	Sure of oneself; no uncertainty about one's own abilities or correctness
Competence	Competent	Having the necessary ability, knowledge, or skill to do something
Competence	Capable	Having the ability to do or achieve a specified thing
Competence	Intelligent	Displaying quickness of understanding, sound thought, or good judgment
Competence	Skilful	Having or showing skill, being good at something
Competence	Efficient	Working in a well-organized and competent way, achieving maximum productivity with minimum wasted effort or expense.

Customer Facilitation Mechanisms

Emotive	Admiration	Holds in high esteem, delighted or astonished approbation
Emotive	Pity	Kindly sorrow evoked due to misfortune of another
Emotive	Envy	Covetous towards another's advantage or success
Emotive	Contempt	Disapproval tinged with disgust
Behavioural	Active Facilitation	Helping behaviour
Behavioural	Passive Facilitation	Association behaviour
Behavioural	Active Harm	Attacking behaviour
Behavioural	Passive Harm	Neglectful behaviour

Sales Performance Outcomes

Short-Term	Initial Sale	A one off or initial sales success
Sustainable	Repeat Business	Additional or repeat business following initial success
Sustainable	Customer Satisfaction	Customer satisfaction with previous sales outcomes
Sustainable	Competence Perception	Reinforcement of competence perception due to outcome

Salesperson Psychological Facilitators

Interpersonal	Empathy	Aware of, understands and appreciates feelings of others
Interpersonal	Interpersonal Skills	Maintain mutually satisfying relationships
Interpersonal	Social Responsibility	Cooperative, contributing and constructive member of social group
General Mood	Optimism	Positive attitude even in the face of adversity
Stress Management	Stress Tolerance	Withstand adverse events and stressful situations and ability to cope with stress
Stress Management	Impulse Control	Resist or delay impulse, drive or temptation to act
Adaptability	Flexibility	Adjust ones feelings, thoughts or behaviors to changing situation or circumstance
Adaptability	Problem Solving	Identify and define personal and social problems and generate potentially effective solutions
Adaptability	Reality Testing	Assess correspondence between internal experience and what exists in the subjective external environment
Intrapersonal	Emotional Self-Awareness	Recognises and understands one's own emotions
Intrapersonal	Assertiveness	Express feelings, beliefs and attitudes in a non-destructive manner
Intrapersonal	Independence	Self-directed in thoughts and actions. Free from emotional dependency
Intrapersonal	Self-Regard	Aware of, understands, accepts and respects oneself
Intrapersonal	Self-Actualisation	Realises one potential, does what one wants to do and enjoys doing it
Perception Facilitation Process		
Perception Process	Generate Perceptions	Development of new perception
Perception Process	Maintain Perceptions	Maintenance of an existing perception
Perception Process	Balance Impressions	Creates a balance across both warmth and competence perceptions
Perception Process	Reinforce Perceptions	Strengthens an existing perception
Perception Process	Task Performance	Assists ability in job task performance
Salesperson Behavioural Facilitators		
Customer Orientation	Build Cooperative Relations	Communication, balanced interchange and mutual understanding
Customer Orientation	Demonstration of Competence	Demonstration of ability in task performance

Table 2: Proposition Drawn Analysis Codes

To define the case consideration was given to the purpose of research and research questions (Yin, 2014). Core to this is the consultative sales context (Thull, 2005). A case organisation meeting the characteristics of the context taken as a single case study is considered appropriate based on a common case rationale and the ability of such an approach to illuminate the circumstances and conditions of an everyday situation (Yin, 2014). Such illumination is necessary to understand the underlying social processes associated with the theoretical concepts of social cognition, customer orientation and emotional and social competencies as they relate to the performance of the salesperson in the buyer-seller interaction.

Case Selection and Unit of Analysis

In the selection of a case, attention was paid to the characteristics of the context over the degree in that the case could be considered representative of some population (Yin, 2014). Consultative sales environments are characterised by complex customer problems. Often not clearly defined (Beardsley *et al.*, 2006) these problems require equally complex solutions (Thull, 2005; Kaufmann, 2007). This complexity drives lengthy and non-linear sales cycles and a high degree of collaboration with and coordination of others when selling (Thull, 2005). The approach was to select a common case based on the evident existence of these core contextual characteristics. The host organisation, a leading Irish technology solutions provider was selected as a common case example.

Technology solution providers are architects of complex solutions to meet customer needs. These usually stem from a portfolio of manufacturer options, and combine elements of hardware, product, software, design, implementation and ongoing service delivery as part of an overall solution. The sales cycle is lengthy and there is often no clear start and stop to the sale. The rapid pace of change in technology drives this lack of linearity meaning that solutions often have to be enhanced post installation to deal with unforeseen growth or emerging security threats. In addition ongoing consultancy and support to optimise the solution is often part of the ongoing sale. The role of the salesperson is to collaborate with a range of stakeholders to include technical pre-sales, vendors, finance and the customer to come up with the solution that best meets the customer needs and with project management, procurement, engineering and

service to ensure it delivers its objectives. This organisational case exhibits complexity, lengthy and non-linear sales processes and the need to coordinate and collaborate that echo the key contextual characteristics of interest. Through the implementation of the case selection strategy, a priori context codes were identified to facilitate first stage thematic coding (Table 3)

CONTEXT DRAWN INITIAL CODES		
Code	Sub-Code	Description
Stakeholder	Sales Account Manager	SAM- responsible for the delivery of a sales target against a territory on which customer accounts sit
Stakeholder	Customer	Key contact within the customer organisation
Stakeholder	Technical Pre-Sales	Organisational resources available to SAM's to assist them with the technical requirements of solution design and delivery
Stakeholder	Vendor	A 3rd party manufacturer of development house
Stakeholder	Sales Manager	Organisational Sales Management Representative
Stakeholder	Procurement	Sourcing of 3rd party good and services in delivering a solution
Stakeholder	Finance	Organisational or 3rd party finance department
Stakeholder	Implementation Team	Team responsible for implementation of the solution design
Stakeholder	Support Team	Team responsible for the ongoing support of solutions provided
Solution Element	Hardware	Physical equipment provided to the customer as part of the solution
Solution Element	Software	3rd party software licences provided to the customer as part of the solution
Solution Element	Architecture	Architecture of the technical elements required to deliver a solution
Solution Element	Implementation	Implementation of the designed solution
Solution Element	Support	Support of the provided solution
Solution Element	Enhancement	Enhancement of solution during or after installation of initial design
Environment	Problem Complexity	Degree of complexity to the customer problem
Environment	Lack of Clarity	Lack of clarity in terms of the customer problem
Environment	Solution Complexity	Complexity of solution to the customer problem
Environment	Emerging Threats	Evolution of the external technological landscape
Sales Activity	Collaboration	Need to collaborate in provision of solution
Sales Activity	Coordination	Need to coordinate in provision of solution
Sale Type	Commodity	A transactional type of sale
Sale Type	Consultative	A sale requiring a consultative approach
Sales Cycle	Lengthy	A length of time to close a sale
Sales Cycle	Non-Linear	Progress moving back and forth

Table 3: Context Codes

Within the common case the unit of analysis is an important consideration as it delineates the contribution the researcher will make at the end of the study (Patton, 1990). In this case the researcher intends to make a contribution to knowledge with respect to the buyer-seller interaction in consultative selling to address the need to better understand performance across this relational interaction. The research will consider the role of customer perception and the salespersons influence on this

perception acknowledging inputs from both sides of the dyadic interaction. The study will seek to understand this contextual phenomenon in its natural environment through use of a common case example. Within that case example the study will identify star salespeople, referred to as sales account managers (SAM's) to be consistent with the case organisation's terminology, as embedded cases to illuminate star performance within this interaction in keeping with the optimal and sustainable individual salesperson focus of the study. This will allow the buyer seller interaction to analysed across exemplar cases (between star performers) and within exemplar cases (among customers of star performers) within the consultative sales context of the overarching case. This embedded case design is depicted in Figure 1.
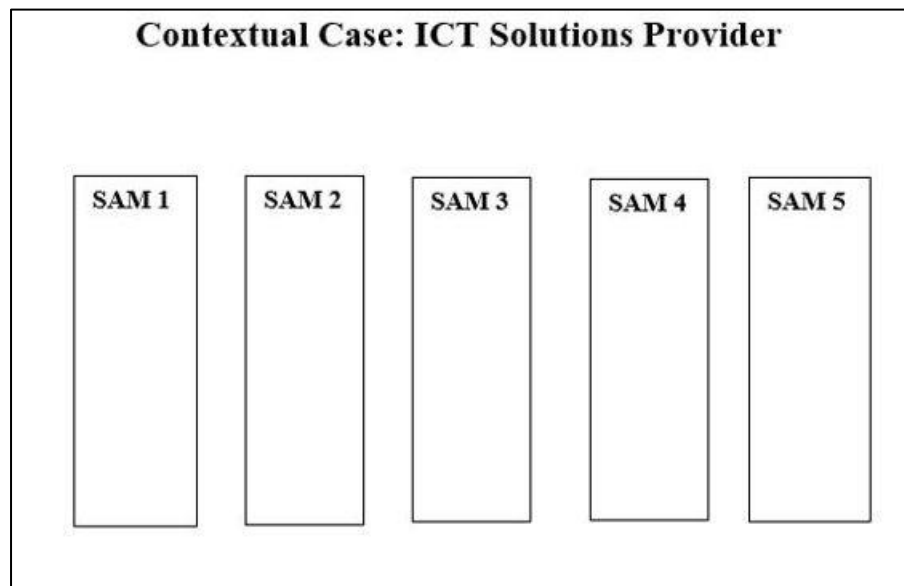
Figure 1: Embedded Case Design

SELECTION STRATEGY FOR EMBEDDED CASES

A key objective of this research is to understand how customer perception of salespeople as both warm and competent facilitates sales performance in consultative selling interaction and a pre-screening customer survey will be implemented to identify salespeople perceived by their customers to be both warm and competent towards meeting this objective. With warmth and competence perception proposed as indicative of sustainable sales performance, these salespeople will be considered exemplar performance cases embedded in the organisational case. To select salespeople for this survey, criterion sampling will be applied to ensure a level of consistency in exposure to the phenomenon (Miles and Huberman, 1994 and Creswell,

2003) and it is expected that this will result in approximately twenty[2] individuals being identified. The criteria to be applied will be length of service greater than three years and specific territory tenure of greater than twelve months. This is to ensure a consistent minimum exposure to both the organisation and the customer base.

Relating to these individuals a pool of customers considered the most financially contributing over a period of time will be identified. A list will be produced from the case organisation CRM (Customer Relationship Management) System for the sales territories of each of the twenty identified SAMs. The list will show the customer revenue spend over the last three years and the top fifty financially contributing customers on each territory will form the selection pool for surveys and will be passed to a member of the marketing team. Three years is selected to ensure a balanced financial representation over the lengthy and continual sales cycle of the context.

A brief telephone survey with a sample of the identified customer pool will be implemented by the marketer and will be used by the researcher to rank salespeople in terms of warmth and competence from the perspective of their customers. The marketer will select a random sample of ten customers for each SAM sales territory from the lists provided by picking the fifth, tenth, fifteenth and so forth customer on each territory list. Where the fifth is unavailable or does not want to participate they will move to the next on the list.

Customer Survey Implementation

The marketer will be provided with a script to introduce the short selection survey (Figure 2). The customer will then be asked to rate on a Likert scale of one to five how well each of twelve items describes their SAM. These items are Confident (C), Good Natured (W), Competent (C), Warm (W), Sincere (W), Capable (C), Well Intentioned(W), Efficient (C), Friendly (W), Intelligent (C), Trustworthy (W) and Skilful (as an Account Manager) (C) and represent the scale dimensions of warmth and competence used extensively in research around the Stereotype Content Model (Fiske *et al.*, 2006).

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[2] This is an estimated figure based on a point in time and further figures provided during this paper that are based on this figure are also estimates and will update in paper 4 to be reflective of actuals at time of implementation

The item skilful is clarified to avoid the risk that this may be interpreted as a level of technology skill given the context of the case organisation whereby all SAMs come from a non-technical background and have equal access to technical architects to draw support from as they deem appropriate over the course of the continual sales interaction with their customer.

Hi <Customer Name>

My name is <Marketing Team Member Name> and I am calling from the Marketing Department of <Case Organisation Name> where your account manager is <Sales Account Manager Name>. As a valued customer of ours we were hoping you had a few minutes to provide some feedback relating to your sales account manager. The feedback will be used to select sales account managers for the purpose of a research study supported by <Case Organisation Name>. Our marketing team are conducting the survey to ensure confidentiality for those that participate. I am the only one who will be aware of your individual responses and results will be presented in statistical overview form. Would you have five minutes today to go through a couple of questions?

(If customer consents proceed, if not ask if there is a better time, if they do not want to participate at all then move on to the next customer)

Figure 2: Customer Survey Script

The marketer will phase the question to the customer as follows:

On a scale of one to five (with five being the most positive response) how <Select Adjective from List> do you consider your Sales Account Manager (SAM) to be?

The marketer will then populate this information on to a matrix provided. The customer identity will be concealed by an alphabetical labelling convention populated by the marketing team member for each customer response in no particular order per SAM. The marketer will take note of the label attached to each customer on a separate document in the event that a data point check is later required. The matrix will auto populate the total score for each item and the total score for each dimension warmth and competence for each individual SAM. The researcher will visually inspect the dataset and identify any potential outliers (Lorenz, 1987). An outlier is an "observation that deviates so much from other observations as to arouse suspicion that it was generated by a different mechanism" (Hawkins, 1980:1). In the event a data point looks dubious to the researcher they will try to ascertain if this is a recording error or if it is a genuine observation (Osbourne and Overbay, 2004). The marketer will be

asked to recheck the accuracy of the reported data point with the customer. If it is an error it will be removed and if it is a genuine point then researcher judgement will be used and will consider the impact of removal on selection (Osbourne and Overbay, 2004). The total individual score on each dimension will be used to rank the SAM from one to twenty on each dimension to identify those considered the most warm (or competent) relative to their peers. The SAM with the highest score on the dimension warmth will be ranked as one and so forth. The ranking on both dimensions will then be added together and divided by two with the highest result representative of those perceived highest on both dimensions combined. The top five SAMs as an outcome of this process will represent the upper quartile in terms of SAM' who have the highest combined warmth and competence customer perception relative to their peers.

The customers of the upper quartile SAMs will be the focus of the customer perspective interviews to allow the closest illumination of star performance. Four customers of each of the five upper quartile SAMs will be selected as units of observation with a focus on the most financially contributing and will result in twenty customers to be interviewed. Twenty interviews is suggested to be more than adequate to generate data with the potential to illuminate phenomenon in the context of such qualitative studies (Guest *et al.*, 2006). In addition, these twenty interviews will be triangulated with multi-perspective interviews capturing observations from the SAM and a sales management representative. The iterative qualitative design will also afford flexibility in terms of where the collection of data will actually stop. In application the collection of data will continue up to a point where it is thought that data saturation in terms of the identification of common perceptions and experience across a group of similar individuals has been met.

FIELD RESEARCH PROTOCOL

The field research for this study will involve customer interviews, SAM interviews and sales management representative interviews. This multi perspective approach will allow significant triangulation to obtain the customer perspective and an adequate depth of knowledge regarding the salesperson facilitation of these perceptions in the relational sales interaction (Patton, 1990). An overview of this multi-perspective approach will now be presented.

Customer Perspective Interviews

The researcher will conduct twenty customer interviews in the core data collection phase of the research. A Customer Perspective Interview Guide (Appendix A) informed by the case propositions will be used. This guide is not proposed to be exhaustive or prescriptive and the researcher intends to probe where appropriate specific to the context. This is in keeping with the semi-structured nature of the interview using a localist approach to develop a situated account (Alversson, 2003; Legard *et al.,* 2003; Schultze and Avital, 2011). These interviews will be recorded using a voice recorder subject to the agreement of the participant for ease of transcription. These interviews will be transcribed as soon as is reasonably practicable and initial researcher notes and reflections will be captured post interview.

Multiple Perspective Interviews

The researcher will also interview the selected upper quartile SAMs to obtain their perspective. This is necessary to fully capture data in particular relating to research propositions two, three and six through eleven. In respect of propositions two and three it may aid the researcher to uncover evidence of customer passive or active facilitation. In respect of propositions six through eleven it may give a richer depth of understanding regarding how the salesperson facilitates the warmth and competence perceptions that may not be fully illuminated by the customer perspective interview alone. These interviews will be guided by the SAM Perspective Interview Guide (Appendix B). This guide will be used and data recorded, transcribed and reflected upon in a consistent manner to the customer perspective interviews.

The case organisation structure facilitates a senior role to strategically support the sales function with business development activity. This individual has exposure to customer interaction with the SAM and will have observed the subsequent internal interactions of the SAM over the last twelve months in the organisation. The researcher will interview this individual for an additional perspective to support triangulation. These interviews will be guided by the Sales Management Perspective Interview Guide (Appendix C). This guide will be used and data recorded, transcribed and reflected upon in a consistent manner to the customer perspective interviews. The researcher will have the support of the organisation in obtaining continued access to participants

for the purpose of clarifying points that remain unclear after the initial round of interviews.

ANALYSIS PROTOCOL

Template analysis technique was selected for the analysis of data and was presented in paper two of this series. The template is essentially a list of codes that presents themes identified in the textual data. Many of these themes will be a priori in that they are identified from the propositions however, this technique facilitates flexibility to add and modify codes as textual transcripts are read and interpreted (King, 2012). The template and the coding aspect of this analysis approach are only a means to an end and without interpretation provide not much more than flat descriptions (King, 2012). Interpretation will be aided by the use of hierarchy, relationship and memo functionalities in NVivo. Implementation of this strategy is divided in to three stages; prepare to analyse, analyse and interpret.

In the 'prepare to analyse' stage the researcher will define a list of codes from the propositions (Table 2). The researcher will set up a new project in NVivo running on an encrypted laptop. A back-up of this project will be saved to an encrypted memory key. The project will be saved as a new version in both locations prior to the implementation of a new/next stage in the analysis in the event a roll back is required. The textual data will be transferred to the project as internals. Within the internals section of NVivo, folders will be set up for each category of internal. A link to the voice files will be created as externals for referral access to the context or tone of a particular comment. Nodes will be set up to represent the structure of the a priori codes and will include an initial hierarchical structure that draws on the conceptual framework.

The 'analyse' stage will start in a somewhat non-linear manner to the 'prepare to analyse' stage through the capture of researcher reflections post interview and during manuscript transcription. These interview reflections will also be uploaded to NVivo as an internal. The textual data will then be subject to first round coding using the a priori node structure in NVivo and new nodes will also be set up as part of the process to capture data that strikes the researcher as potentially important. This first-level coding (Miles and Huberman, 1994) will facilitate the summarisation of segments of data. The researcher will then step the analysis up a level in the hierarchy though

pattern coding. Pattern coding sees the condensation of the first level summaries in to a smaller set of themes or constructs. From this the researcher expects to see the emergence of themes and relationships. To turn emerging themes in to interpretations the researcher will use the memoing functionality in NVivo to step back and make more conceptually coherent sense from the data in order to understand the phenomena in question. This is moving the analysis process in to the 'interpret' stage. Memos will be recorded around a structural change such as a new node or level in the hierarchy or a potential relationship that is becoming evident from the patterns observed in the data.

PILOT IMPLEMENTATION

A pilot is often used to facilitate the refinement of the research design and is considered formative (Yin, 2014). The researcher implemented this procedure in order to facilitate the refinement of the design prior to the finalization of data collection and analysis. Within the case organisation there is a smaller solution sales function that runs in tangent to the organisation's core solution sales function. This secondary sales function focuses on the sale of imaging, print and document management solutions. This function is consistent with the case context in terms of organisational systems, processes, structures and supports along with consistent complexities such as multi-vendor solutions and complex customer problems. This secondary sales function is the focus of the pilot stage. Too small to implement a pilot of the full selection process a salesperson was selected by the strategic sales management representative based on their subjective opinion of high performance in the context of sustainable results. It is not usual that convenience and access dictate selection for a pilot in this way (Remenyi *et al.,* 1998; Yin, 2014). For convenience and practicality it was only feasible to interview one customer in this pilot along with the SAM and a senior case organisation representative. To ensure no cross over with the final study, an alternative organisational third party (identified as the chief technical architect for the area) was identified to capture the organisational perspective rather than the strategic sales management representative.

INITIAL FINDINGS

The findings presented are from first pass coding of pilot interview transcripts. Through the use of a coding summary report by node and through a review of memos created to date insights are drawn from the data and presented against the key areas of

the conceptual framework; context, customer facilitation mechanisms, customer perceptions, salesperson facilitation mechanisms and sales performance outcomes. Analysis at this point is primarily at the descriptive summarisation stage.

Contextual Data

The data strongly indicated the presence of complexity in the customer environment relating to the customer problem (Appendix D). The depiction of this by the organisation representative was by way of a detailed breakdown but in contrast is more emotively depicted by the customer. This may be due to the role of the organisational representative in breaking down and working through the problem as a core element of their role as indicated by the situated account and illustrated in the statement:

"technical architect I meet with clients I assess their needs, I assess their workflows, how their organisation wants to do their various tasks anything to do with documentation or printing and then I design the systems and help them to implement everything from logistics all the way up to end user training"

Whereby the customer is dealing with the frustration of something not working or a user who *"is finding it very difficult to do their job"*. This also supports the addition of the customer level of expertise contextual code. The customer unlike the organisational representative in this instance is explicit in saying that she has *"no expert level"* and *"you're the experts showing us how it's done"* and *"again like you are the experts"*.

A key feature strongly highlighted by the data generated around problem complexity was the lack of clarity around the problem in the environment given strength by the explicitness of the language used with terms such as *"a lot of unknowns"*, *"it was very vague"*, *"we didn't know"*, *"blindsided going in"*, *"blind at this stage"* and *"they hadn't a clue really what they were looking for"*. In addition to the challenge of problem complexity there is also an indication of solution complexity in the environment (Appendix E).

The sale type is certainly a solution based sale and this is explicitly stated on a number of occasions in statements such as *"delivering a solution, all our sales are long term"*, *"it is not a commodity that we are shipping, getting a signature for and off we go"* and *"we would, invest a lot of time and energy before the sale is actually completed*

as opposed to signing the deal and starting the work" as well as being illustrated throughout all three transcripts as participants describe their experience. The various elements of the solution are captured throughout all three transcriptions, coded under their respective labels they support the presence of all components and displayed at an aggregate level under a parent node "solution elements". It is noted that every single appearance of these labels in the transcripts was not coded during first pass coding and they appear far more frequently than the coding suggests.

The lengthy and non-linear characteristics of the context are well illuminated in the transcripts and in particular those of the SAM and the organisational representative. Perhaps being linked to organisational goals and sales targets they are more in tune to the length of the cycle whereas the customer may not see it as a sales cycle at all given the continuous nature of the interaction. This continuity is evident in the customer transcripts and in particular with reference to "*we are in a contract on a yearly basis*" and *"working to get it implemented further so it is good continuity to bring it maybe to another phase"*. In addition the requirement to coordinate and collaborate with various stakeholders is illuminated with text selections attached to the labels customer, sales account manager, finance, implementation team, procurement, support team, technical pre-sales and vendor. Despite attaching over thirty five reference points the researcher would again suggest that not every single occurrence of these stakeholder references was captured during first pass coding.

Customer Perceptions

To analyse the data the researcher coded the customer/organisational representative's perception of the salesperson using the warmth and competence indicator labels as distinct from evidence of the demonstration of warmth and competence which was coded using the salesperson behavioural facilitator labels. In respect of the perception of SAM competence there were forty two references of note that attracted a competence label from the customer and organisational representation transcripts (Appendix F). These included sub-labelling in the areas capable, competent, confident, efficient and intelligent. While the sub-labels are often difficult to differentiate between the use of sub-labels was interesting as it highlighted for example the strength of efficiency in respect of the competence perception. Interesting to note was the absence of coding attached to the label skilful. This perhaps is due to its potential

association with technical skill and with a situated understanding that the SAM is "*not technical*". What is also interesting to note is the degree to which competence references appear above and beyond warmth ones perhaps indicating the primary importance of competence in the contextual setting (Appendix G). What is also interesting to note is that there are early indications of competence over warmth in terms of primacy judgement in the context. In the customer transcription for example the customer states explicitly in respect of her first impression of the sales account manager "*when I met….first I have to say she comes across as an organised person, that's one thing and that's an attribute we look for obviously when we are picking a vendor*".

In terms of the warmth perception, the sub-labels of well-intentioned and sincere dominate the customer transcription and this may indicate the importance of customer orientation in this context. This is illuminated by phases such as "*to the best of her*", "*it's not just there's your project and bye-bye*", "*not just in it for the money*", "*does her utmost*", "*I don't feel you are in it just to make money*". There is also explicit reference to the perception of SAM trustworthiness illustrated by the use of the term "*honest*" on a number of occasions. The customer believes the SAM to be friendly and gives examples of conversations around an area of mutual personal interest and while the researcher found this to be a genuine sense of what the customer believes she also sensed it to be a lower priority for the customer over competence and intention aspects. The organisational representative perception of the SAM was of a pleasant and friendly demeanour characterised by approachability. Interestingly the SAM herself indicated that she wanted to be perceived as approachable in her dealings with others during her interview. The organisational representative also indicates a perception of warmth in mentioning that the SAM "*smiles*" and has a "*nice accent*".

Customer Facilitation Mechanisms

In respect of this SAM there are no examples of active or passive harm in the transcripts in terms of behavioural customer facilitation mechanisms. There is evidence however of active (helping) and passive facilitation (association). Examples illuminating passive facilitation were "*good project to be part of*" and "*delighted to be part of it looking back now*. The helping aspect was stronger and featured strongly in all three transcripts. The customer examples evidence a state whereby the customer

seemed to feel it was her duty to help with phases such as *"it's twofold"* and *"I should be facilitating what needs to be done"*. She does however make it clear that she did not always feel this way with a previous account manager but states now that she feels *"there is a better balance"* and indicates clear role expectations as facilitating this in the statement *"this is your area and this is mine"*. The SAM transcript also indicates that help has been received from customers in statements such as *"but they were quite helpful"*, *"we got the heads up"*, *"they (the customer) needed to do a little bit of ground work"* and *"she has been very helpful in the last number of months since things have improved"*. It is the organisational representative transcript however that seems to tie this together with a good example:

"she was taking over a very difficult account at the time, difficult for many reasons….there were issues….and when she came in she was afforded a lot of patience….he went through all the documentation that he has received from us and presented that to her in a concise folder and he allowed for her to take over from the ground up rather than assuming that she should know everything which she could not"

In terms of the emotive facilitation mechanism admiration, this is best illuminated by a passage extract from the organisational representative.

"it would be a complement that I would give to her and indeed any colleague that turns up dressed for business, she's smart, she's, she always arrives with a clean car, she always arrives with a nice business suit or business attire and she's also a very good looking person so am even though it shouldn't make a difference it does because if I could swap my form for a six foot muscular one I would do (humour detected) ah yeah she walks in and she looks like she is doing business, she also her demeanour and her gait, the way she walks is one of confidence and also she is very well spoken so she has a nice accent and she has a good vocabulary so she has the entire package when it comes to first impressions which are important"

While he doesn't explicitly use of the word admiration although he does later explicitly state he is *"in awe of her"*. What is interesting about this passage is the degree to which the admiration revolves around competence. What is also interesting is that one of the comments the customer makes about the SAM again tinged with a tone of humour is *"well she is very tall especially in those heels"* and gives a sense when

combined with the humour that he admires this about her and the researcher sensed it is the humour that indicates admiration moreover envy.

The only evidence of the alternative emotive responses pity and contempt are in relation to former account managers. This is evident in both customer and organisational representative transcripts. The customer states *"I can only talk about the experience of the other two which I won't mention"*. The combination of the dismissiveness of the language *"other two"* and the tone in which it is said leads the researcher to detect contempt. This is further compounded by the knowledge she earlier shared about the impact their failings had on her personally in her role. It is further supported by two occasions where she mentions being sold something and then being dropped "*you know things are implemented and it is bye-bye"*. The respondent's tone changes completely in this example to one of disgust. The organisational representative indicates the pity dimension in relation to former less successful salespeople he has experienced. The following example illustrates how he feels someone is too nice to push back to a customer when it is needed and the mocking tone and voice indicates he feels a bit sorry for their inadequacies:

"other people might have gotten cross or indeed might have gotten in to a huff or worse still backed out completely and said you know (mocking voice) oh goodness let's see what we can do to fix that"

Salesperson Behavioural Facilitators

There is evidence to suggest the SAM works to build cooperative relationships in her role. There is a sense of mutuality between the salesperson and the customer. This is highlighted by the organisational representative who states that when he works with the SAM to deliver a solution to a customer that the focus is to embed themselves mutually with the customer creating a situation where "*we depend on the customer and the customer depends on us"*. This dependency is evident with the customer who states *"we depend on you for expertise"*. There is a sense of balance in power between both parties whereby the organisational representative states that the SAM is *"firm but fair"* with the customer, the customer states that the communication is *"two way"* between her and the SAM and that working together is *"twofold"*. The customer explicitly states that since the SAM came on board the relationship has been *"well balanced"* and that it has *strengthened our relationship"* with the organisation.

The SAM's communication appears to be a key facilitator of this cooperative relationship. The customer gives the example of how this communication facilitates cooperation in saying *"users were very cooperative and patient and her communication skills were very good"*. The customer evidences how before the SAM came on board and the relationship strengthened that the communication was *"disjointed and unorganised"* linking this to a poor reflection on the organisation. The SAM communicates proactively and sometimes goes to a meeting to give the customer a *"pat on the back"* even when there isn't anything to discuss. The organisational representative supports this noting that she keeps in regular communication to build up rapport so that it *"makes it much easier if a problem does arise"*. The customer states this communication is probably the *"biggest thing"*. This is interesting as it appears a shift has occurred from the importance of organisational abilities as the primacy concern to communication as the interaction has developed over time.

In achieving balance the SAM often *"takes the middle ground"* according to the organisational representative, stating that the SAM accepts some responsibility but not all and asserts this in a non-destructive way. The customer seems to share a balance of liability when they state *"it is not a blame game.....this is your area and this is my area"*. The organisational representative highlights an appreciation for other people's time in addition to communication in building these relationship and this is illuminated by an example given by the SAM in relation to how she interacts with a senior manager internally in the organisation.

The SAM sets out to demonstrate competence. The organisational representative surmises in his observation of her that she *"turns up dressed for business"* and is *"always ready to do business"*. He describes her as *"very punctual and fastidious in following up on things"* with the customer observing that same quality of follow up in her interactions with them. The SAM describes her approach to that follow up, she takes minutes at every meeting to ensure she always does what she says she will do for the customer. The customer illuminates the demonstration of competence and states that *"I just relay what I need and she comes back to me"* going on to state that *"she knows our standards, she knows where we want to be and she does deliver on those expectations"*. Both the organisational representative and the customer acknowledge that if she doesn't know something she is honest and says it is not her area of expertise but she will come back to them and both note that she always does.

The SAM illuminates her intention to demonstrate competence and states that she *"tries to get some homework done in the background"* and explains how she uses the demonstration of competence by offering a *"proof of concept"* to customers. This is summed up in an example given by the SAM:

"I could just take a snip of…… on my PC and send it to them, look I can see all your fleet here, we are already looking at it and everything is under control".

Salesperson Psychological Facilitators

A key theme emerged with respect to reality testing as a facilitator. The customer account highlights that the SAM is very realistic and would assert if something was unrealistic using good interpersonal skills to explain why or by being open to an alternative. This reality testing/assertiveness/flexibility combination was echoed in the SAM account by an experiential example. The SAM identified the reality that a proof of concept had to come to an end as it was costing money, asserted this to the customer and suggested a middle ground compromise regarding payment for the prior length of time the solution was on proof of concept. Another potential key facilitator highlighted in the SAM account and that was a strong predisposition to solution focused problem solving. This perhaps suggests a link between this and the strong optimism that was also evident in the SAM account in respect of their outlook to life and work in general. The SAM statement that *"there is always a chance to fix to the way I want it to go"* in relation to work was mirrored in her personal attitude in playing sport and the example that the match isn't over until the whistle blows seems to corroborate this solution focused problem solving/optimism proposition.

It is no surprise that the SAM's interpersonal skills feature heavily throughout the transcripts of all three as a facilitator considering the interactive nature of the role. These interpersonal skills include what could be typically be described as social skills. The customer describes her communication skills as *"very good"* at a formal level and at a more casual conversation level described her as *"very easy to talk to"*. These skills seem to facilitate the SAM with the high volume collaboration that she needs to undertake in her role. The comments *"I usually go straight to the person I think that can help me most and from there I ask all the questions"* and *"I just went straight to…he is the scheduling manager"*. It seems that she understands the organisational network well and has built the relationships to elicit support which she uses at

appropriate times. She is considered empathetic by both the customer and the organisational representative and this enables her to overcome objections and this is best illuminated by the passage:

"she shows great empathy with people who, normally we find with a lot of end users any change in the way they are used to working is stressful for them……she is very good for reassuring people and quietly demonstrating benefits to people when it could be easily…here is your user manual best of luck"

Perhaps the strongest interpersonal attribute however is the high level of social responsibility demonstrated by the SAM. This is characterised in her dealings with the customer and internally in the organisation. In respect of the internal dealings the organisational representative states *"she is always thinking of the bigger picture and not just the acute need"*. In her own transcription the SAM illustrates her social responsibility in respect of the customer in showing compassion when it was a charitable organisation and by explaining how she takes the customer service level agreement commitments very seriously and expects people *"to try everything"* to meet that commitment. The researcher considers that perhaps the high presence of social responsibility may by a contributing factor to the demonstration of customer orientation at a behavioural level connected by the intention to meet the customer need.

The SAM illustrated good self-awareness and could relate that to her approach as a salesperson stating *"she wouldn't come across as an aggressive salesperson"*. The experiential evidence shared shows good impulse control in dealing with the lengthy sales cycle. The organisational representative depicted her as tough in respect of handling stressful situations with an element of admiration for that in the tone, but he also stated that there are times when she gets frustrated and that in dealing with this she confides in a colleague rather than letting the customer see her annoyance.

Sales Performance Outcomes

The customer reported a high degree of satisfaction both with the solution and the SAM specifically stating that they felt *"things are starting to reshape"* when she came on board. The customer also indicated that they were working together on a new requirement while the organisational representative noted that they have done *"lots of subsequent business"* with another customer and attributes this directly to the SAM

and "*the interaction she has had with scores of people over the years*". This seems to indicate the key role of interaction in the sustainability of business in the solution sales context.

CONCLUSIONS AND NEXT STEPS

This paper has detailed the operalisation of the research study and has demonstrated the operalisation of data collection and initial analysis through a pilot study. While the scope of the pilot is limited and prevents a level of data and analysis saturation, it does succeed in its purpose to demonstrate the appropriateness of the data collection and analysis strategies towards operalisation of the research study in a competent way.

The multi-perspective approach has facilitated strong triangulation of accounts and has enabled the capture of data relating to both customer perception and the salesperson facilitation of this perception across the relational sales interaction. The findings of the pilot supports the selection of the case in terms of contextual characteristics and the implementation of template analysis at a first level has generated summary descriptive analysis that shows the potential for further development towards inferential interpretation at a higher level.

The study intends to proceed to implementation stage and this will involve full operalisation of the selection and data collection procedures. In keeping with the design, analysis will take place in tangent with data collection. Extensive use of pattern coding, relationship links and memoing functionality in NVivo will be used in to move analysis up the chain. The outcome of these next steps will be the presentation of a final findings paper that will conclude the paper series.

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APPENDIX A: CUSTOMER PERSPECTIVE INTERVIEW GUIDE

Pilot Interview Customer Perspective Questions	Question Rationale	Supporting Literature	Proposition
Introduction Section			
Researcher Introduction: • Research completed as part of the WIT DBA programme • Supported by the Case Organisation • Purpose of the research in brief is to better understand the sales interaction by gaining a customer perspective • Ethics Check – any concerns with: -how confidentiality will be maintained - what feedback will go to SAM - how data will be stored or used - the purpose of research -anything relating to participation	Provides the customer with a brief background to the study and attends to ethical and practical issues	-Legard *et al.* (2003) -Qu and Dumay (2011)	N/A
Can you tell me a little bit about your organisation? I'm interested to hear about your role? Can you tell me a little about that?	These question serve two key purpose: To ease the interviewee in to the interview by talking about something they are familiar with To better understand the perspective as a situated account	-Qu and Dumay (2011) -Legard *et al.* (2003) -Alversson (2003) - Schultze and Avital (2011) -Legard *et al.* (2003)	N/A
Section 1: How do customer perceptions of a salesperson as both warm and competent facilitate sales performance in consultative sales contexts?			
General Question: Can you start by telling me a little about the first time your encountered <Name>? **Further Probes:**	***Questions to uncover the primacy judgement in context*** Primacy of warmth evaluation may change to competence in certain org contexts	Cuddy *et al.* (2011)	P4

Can you describe to me the circumstance surrounding your first experience of <Name>? What was important to you at the time in relation to the role of the SAM? What were your primary concerns in the lead up to your first interaction with <Name>? From this experience can you recall what your first impression of <Name> was? What specifically was it that made you think that about <Name>?	Degree of complexity involved in the sale	Thull (2005) and Kaufmann (2007)	
General Question: What has been your experience of <Name> since this first interaction? **Further Probes:** What is it that you think about them now? What is it about them that makes you think that? When you think of <Name> what are you feelings towards them? What about them that makes you feel that way?	*Questions to uncover feelings elicited by the customer towards the salesperson* Drawing on the stereotype content model. Emotional responses experienced by the perceiver towards the perceived are based on warmth and competence perceptions. High warmth and competence will result in feelings of admiration over pity, contempt and envy.	Fiske *et al.* (2007)	P1 & P5
General Question: Can you tell me about the outcomes you have experienced in working with <Name>? What do these outcomes make you think about <Name>?	*Questions to uncover the role performance outcomes play in the construction of competence perceptions* Performance outcomes may reinforce the competence judgement	Cuddy *et al.* (2011)	P5
General Question: Can you give me an example of a requirement you engaged with [NAME] on in the last twelve months? **Further Probes:** Describe the process you went through in interacting with [NAME]? Describe the role you played and what actions you took in the interaction? What was it that made you follow this course of action?	*Questions to uncover customer actions in the sales interaction* Is there evidence of [facilitation, helping, protection/attacking, fighting/cooperation, association/exclusion, demeaning]	Fiske *et al.* (2007)	P2 & P3

Section 2: How can an individual salesperson influence customer perceived performance at a behavioural level?			
General Question: What do you feel <Name> is trying to achieve in your dealings with them? **Further Probes?** How would you describe <Names> approach to working with you? How does this make you feel about <Names> intention to meet your need?	***Questions to uncover perception of salesperson intention (establishing customer perspective of CO))*** Drawing on definition of CO used in conceptualisation Look for evidence of cooperative relationship building or demonstration of expertise	Schwepker (2003)	P6 & P7
Section 3: How can an individual salesperson influence customer perceived performance at a psychological level?			
General Question: How would you describe the general demeanour of <Name> **Further Probes:** What is it about them that makes you think that? What does their demeanour make you think about the type of person they are?	***Questions to uncover construction of warmth (probe around socio-emotional competencies)*** General Mood and the Construction of the Warmth Perception	Bar On (1997) Barsade and Gibson (1998) Kelly and Barsade (2001)	P8
General Question: How would you describe the way in which <Name> interacts with you? **Further Probes:** What interpersonal skills do they demonstrate? Can you give me an example of what makes you think that?	Interpersonal Skills (IPS) and the Construction of the Warmth Perception	Bar On (1997) Bar On (2006) Stein and Book (2006)	P8/P10
Can you give an example of a time when you felt that <Name> truly understood where you were coming from?	Empathy within IPS		
Can you give an example of a time where you really felt they were trying to meet your needs?	Social Responsibility within IPS		

Have you ever engaged socially with the SAM? What does the way \<Name\> engages with you make you think about them?	Social Skills within IPS		
General Question: When you are engaging with \<Name\> do you feel there is a willingness to adapt to meet your needs? **Further Probes:** Can you give me an example of a time that made you feel this way? Can you describe the circumstance as to what happened? What did this make you feel towards them?	***Questions to uncover maintenance of warmth (probe around socio-emotional competencies)*** Adaptability and the Maintenance of the Warmth Perception	Bar On (1997) Stein and Book (2006)	P9 & P10
General Question: How would you say \<Name\> handles challenging or pressurised situations in your dealings with them? **Further Probes:** Was there ever a time when you were working with \<Name\> and you experienced a set-back or serious challenge? Can you tell me about it? How did they react? What did the way they handled the situation make you think about them?	Stress Tolerance and the Maintenance of the Warmth Perception	Bar On (1997) Strutton and Lumpkin (1993) Thull (2005)	P9
General Question: Can you tell me about an important meeting you had in which \<NAME\> was involved? **Further Probes** How would you describe \<NAME\> in this circumstance? **General Question:** Can you tell me about a more relaxed/sociable interaction that you would have had together? **Further Probes** How would you describe \<NAME\> in this circumstance?	***Questions to uncover the construction of a balance between of warmth and competence perceptions (probe around socio-emotional competencies)*** Social Awareness	Mayer *et al.* (2004) Bar On (1997)	P10

General Question: When you are not happy with what is being proposed does \<Name> seem to pick up on this quickly or do you have to very directly tell them? **General Question:** Has the approach taken by \<Name> ever had a negative impact on you? **Further Probes** Can you tell me more about that? Can you tell me why you think this is?	Awareness and Adaption Self-Awareness		
General Question: From your experience of working with \<Name> what specific tasks do you think they perform very well in their role? **Further Probes:** What does this make you think about them as your SAM?	*Questions to uncover reinforcement of competence (probe socio-emotional competencies)* -Task Performance Reinforcement -Relational -Adaptive -EI and SP	Cuddy *et al.* (2011) Jolson (1997) Weitz *et al.* (1986), Spiro & Weitz (1990), Hallen *et al.* (1991) Sojka and Deeter-Schmelz (2002); Rozell *et al* (2006)	P11

APPENDIX B: SALES ACCOUNT MANAGER INTERVIEW GUIDE

Pilot Interview Salesperson Perspective Questions	Question Rationale	Supporting Literature	Proposition
Introduction Section			
Researcher Introduction: • Research completed as part of the WIT DBA programme • Supported by the Organisation • Purpose of the research in brief is to better understand the sales interaction by gaining a customer perspective • Collecting multiple perspectives to better understand this customer perspective • Ethics Check – any concerns with: -how confidentiality will be maintained - how feedback will be handled - how data will be stored or used - the purpose of research -anything relating to participation	Provides the salesperson with a brief background to the study and attends to ethical and practical issues	-Legard *et al.* (2003) -Qu and Dumay (2011)	N/A
How would you describe your role in the organisation to a stranger?	This question serves two key purposes: To ease the interviewee in to the interview by talking about something they are familiar with To better understand the perspective as a situated account	-Qu and Dumay (2011) -Legard *et al.* (2003) -Alversson (2003) - Schultze and Avital (2011) -Legard *et al.* (2003)	
Section 1: How do customer perceptions of a salesperson as both warm and competent facilitate sales performance in consultative sales contexts?			
General Question:	*Questions to uncover customer actions in the sales interaction*		P3 & P4

Can you give me an example of where you worked with a customer to deliver a solutions for them over the last twelve months? **Further Probes:** Describe the process you went through in interacting with this customer? Describe the role you played and what actions you took in the interaction? What actions did the customer take that made it difficult for you? Why do you think the customer took this course of action? What makes you think that? How did you overcome this? What actions did the customer take that were helpful to you? How did these help you? Why do you think the customer did this? What makes you think that?	Is there evidence of [facilitation, helping, protection/attacking, fighting/cooperation, association/exclusion, demeaning]	Fiske *et al.* (2007)	
Section 2: How can an individual salesperson influence customer perceived performance at a behavioural level?			
General Question: What would you say your primary intentions are when you engage with a customer? **Further Probes?** How do you go about achieving this? What do you want the customer to think about you in undertaking this?	*Questions to uncover perception of salesperson intention (establishing salesperson perspective of CO)* Drawing on definition of CO used in conceptualisation Look for evidence of cooperative relationship building or demonstration of expertise	Schwepker (2003)	P6 & P7
Section 3: How can an individual salesperson influence customer perceived performance at a psychological level?			

General Question: How would you describe your general attitude to work and life in general? How would you describe your general demeanour? **Further Probes:** What do you feel it is about you that represents this? How do you think others might know this about you?	***Questions to uncover construction of warmth (probe around socio-emotional competencies)*** General Mood and the Construction of the Warmth Perception	Bar On (1997) Barsade and Gibson (1998) Kelly and Barsade (2001)	P8
General Question: Can you tell me a bit about how you go about interacting with your customers? **Further Probes:** Can you give me an example in relation to a specific customer that you think demonstrates this? How does this help you to achieve your aims?	Interpersonal Skills (IPS) and the Construction of the Warmth Perception	Bar On (1997) Bar On (2006) Stein and Book (2006)	P8&P10
Would you say that you have the ability to understand the perspective of the customer in your dealings with them? Can you give an example of a time where you felt you truly understood where your customer was coming from? Can you tell me a bit more about this? What did you do? How did the customer respond to what you did? In undertaking your role what stakeholder needs do you consider important and why?	Empathy within IPS		
Can you give an example of a time where you really felt you had met the need of the customer? Can you describe the social skills you demonstrate in your interactions with customers?	Social Responsibility within IPS		
Can you give some examples of social engagement with the customer? How did this come about?	Social Skills within IPS		

How did this impact your future interactions with this customer?			
General Question: Can you tell me about the need to change or adapt in your day to day role? Why is this necessary? **Further Probes:** Can you give me an example of a time when you had to adapt or change something in order to deliver a solution for the customer? Can you describe the circumstance as to what happened? How much do you feel you had to concede? Was the customer satisfied with the outcome? What were the consequences of this adaptation? **General Question:** How would you say you handle challenging or pressurised situations in your role? **Further Probes:**	***Questions to uncover maintenance of warmth (probe around socio-emotional competencies)*** Adaptability and the Maintenance of the Warmth Perception	Bar On (1997) Stein and Book (2006)	P9 & P10
Can you give me an example of a time when you experienced a set-back or serious challenge? Can you tell me about that time? How did you deal with that situation? Did you overcome it and how?	Stress Tolerance and the Maintenance of the Warmth Perception	Bar On (1997) Strutton and Lumpkin (1993) Thull (2005)	
General Question: Would you say you are consciously aware of the social situation you in at any given time? **Further Probes** What makes you say that? Can you give an example? How did the awareness of the situation influence your actions? **General Question:** How do you know if a customer isn't happy with what you are proposing?	***Questions to uncover the construction of a balance between of warmth and competence perceptions (probe around socio-emotional competencies)*** Social Awareness Awareness and Adaption	Mayer *et al.* (2004) Bar On (1997)	P10

Further Probes What do you do when you feel the customer isn't happy with what you are proposing? **General Question:** Are you generally aware as to how you are feeling at a given time? **Further Probes** How does this level of awareness impact the actions you take in your role? Can you give me an example of a time when you acknowledged your feelings going in to a situation and how you dealt with that in the situation?	Self - Awareness		
General Question: What skills do you think are important to be successful in your role? **Further Probes:** How are these skills useful?	*Questions to uncover reinforcement of competence (probe around socio-emotional competencies)* -Task Performance Reinforcement -Relational -Adaptive -EI and SP	Cuddy *et al.* (2011) Jolson (1997) Weitz *et al.* (1986), Spiro & Weitz (1990), Hallen *et al.* (1991) Sojka and Deeter-Schmelz (2002); Rozell *et al* (2006)	P11

APPENDIX C: SALES MANAGEMENT PERSPECTIVE INTERVIEW GUIDE

Pilot Interview Sales Management Perspective Questions	Question Rationale	Supporting Literature	Proposition
Introduction Section			
Researcher Introduction: • Research completed as part of the WIT DBA programme • Supported by the Case Organisation • Purpose of the research in brief is to better understand the sales interaction by gaining a customer perspective • Collecting multiple perspectives to better understand this customer perspective • Ethics Check – any concerns with: -how confidentiality will be maintained - what feedback will go to SAM - how data will be stored or used - the purpose of research -anything relating to participation	Provides the sales management representative with a brief background to the study and attends to ethical and practical issues	-Legard *et al.* (2003) -Qu and Dumay (2011)	N/A
I'm interested to hear about your role? Can you tell me a little about? Tell me a little more about the exposure you have had to the sales account manager in question?	These question serves two key purposes: To ease the interviewee in to the interview by talking about something they are very familiar with To better understand the perspective as a situated account	-Qu and Dumay (2011) -Legard *et al.* (2003) -Alversson (2003) - Schultze and Avital (2011) -Legard *et al.* (2003)	N/A
Section 1: How do customer perceptions of a salesperson as both warm and competent facilitate sales performance in consultative sales contexts?			

General Question:	Questions to uncover the primacy		P4
What type of first impression do you think <Name> gives the customer?	**judgement in context**	Cuddy *et al.* (2011)	
Further Probes:	Primacy of warmth evaluation may change to competence in certain in organisational		
What makes you think that?	contexts		
General Question:	*Questions to uncover feelings elicited by the customer towards the salesperson*		P1
What emotional response do you think <Name> generates in their customer?	Drawing on the stereotype content model. Emotional responses experienced by the	Fiske *et al.* (2007)	
Further Probes:	perceiver towards the perceived are based		
-What is it that make you think that?	on warmth and competence perceptions. High warmth and competence will result in feelings of admiration over pity, contempt and envy.		
General Question:	*Questions to uncover the role performance outcomes play in the construction of competence perceptions*		P5
Can you tell me about some of the outcomes that you have seen <Name> achieve with their customers?	Performance outcomes may reinforce the competence judgement	Cuddy *et al.* (2011)	
How do you think these outcomes have helped or hindered <Name> in future dealings with these customers?			
General Question:	*Questions to uncover customer actions in the sales interaction*		P2 & P3
Can you tell me about a customer solution that you worked closely with <Name> on?	Is there evidence of [facilitation, helping, protection/attacking, fighting/cooperation, association/exclusion, demeaning]	Fiske *et al.* (2007)	
Further Probes:			
Can you describe the actions the customer took in the interaction?			
What impact did this have on the moving the interaction forward or holding it back?			
Why do you think they did that?			
Section 2:			
How can an individual salesperson influence customer perceived performance at a behavioural level?			

General Question:	Questions to uncover perception of		P6 & P7
What actions does <Name> undertake in the organisation in delivering solutions for their customers?	*salesperson intention (establishing SMR perspective of CO)* Drawing on definition of CO used in conceptualisation	Schwepker (2003)	
Further Probes? How would you describe their approach to interacting with their customers? What do you think their intention is in their undertakings?	Look for evidence of cooperative relationship building or demonstration of expertise		
Section 3: How can an individual salesperson influence customer perceived performance at a psychological level?			
General Question: How would you describe the general demeanour of <Name>	*Questions to uncover construction of warmth (probe around socio-emotional competencies)*		
Further Probes: What is it about them that makes you think that? What does their demeanour make you think about the type of person they are?	General Mood and the Construction of the Warmth Perception	Bar On (1997) Barsade and Gibson (1998) Kelly and Barsade (2001)	P8
General Question: What interpersonal skills has name demonstrated in their dealing with their customers?	Interpersonal Skills (IPS) and the Construction of the Warmth Perception	Bar On (1997) Bar On (2006) Stein and Book (2006)	P8 & P10
Further Probes: Can you give me an example of a time <Name> demonstrated these skills?			
Would you consider <Name> empathetic to their customer's needs? What makes you think that?	Empathy within IPS		
To what extent do you think <Name is concerned with meeting the needs of the customer? Why do you think this?	Social Responsibility within IPS		
Does <Name> engage their customers socially? Can you give me some examples of this?	Social Skills within IPS		

General Question: How would you describe <Names> ability to adapt to meet their customer's needs? **Further Probes:** Can you give me an example of a time when they demonstrated this? Can you describe what happened? **General Question:** How would you say <Name> handles challenging or pressurised situations in your dealings with them? **Further Probes:** Have you ever witnessed <Name> experience a set-back or serious challenge? Can you tell me about it? How did they react? What did the way they handled the situation make you think about them?	*Questions to uncover maintenance of warmth (probe around socio-emotional competencies)* Adaptability and the Maintenance of the Warmth Perception Stress Tolerance and the Maintenance of the Warmth Perception	Bar On (1997) Stein and Book (2006) Bar On (1997) Strutton and Lumpkin (1993) Thull (2005)	P9 & P10
General Question: Do you think <Name> is socially aware? **Further Probes** What makes you think this? Can you tell me about a time they demonstrated this awareness? How did they change or adapt their approach to suit the situation? **General Question:** Do you think <Name> is self-aware? **Further Probes** What makes you think this? Can you tell me about a time they demonstrated this awareness?	*Questions to uncover the construction of a balance between of warmth and competence perceptions (probe around socio-emotional competencies)* Social Awareness Awareness and Adaption Self - Awareness	Mayer *et al.* (2004) Bar On (1997)	P10
General Question:	*Questions to uncover reinforcement of competence (probe around socio-emotional competencies)*		P11

From your experience of working with <Name> what specific tasks do you think they perform very well in their role? **Further Probes:** What does this make you think about their suitability for their role as SAM?	-Task Performance Reinforcement -Relational -Adaptive -EI and SP	Cuddy *et al.* (2011) Jolson (1997) Weitz *et al.* (1986), Spiro & Weitz (1990), Hallen *et al.* (1991) Sojka and Deeter-Schmelz (2002); Rozell *et al* (2006)	

APPENDIX D: COMPLEXITY IN CUSTOMER PROBLEM

Internals\\Company Representative Interview Transcripts\\OrgRep1 Transcription

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                                                              1   KOC   13/03/2016 21:55

Yes well we had one of our largest projects from a numbers and a logistical point of view the Customer Name lots of sites very difficult physical access for machines and personnel so you had things like (removed for sensitivity) restrictions you had restrictions bringing certain types of tools in to certain areas and also the sites are vast in size and we deal with Location A and Location B and Location C, there were also about eight different models, there are about 700 individual cost centres within the organisation and there were one, two, three project managers through the one project, two left and another one arrived so she in her defence was taking up a lot of slack from the earlier people

                                                              2   KOC   13/03/2016 21:57

The (area of customer business) which is a vital part of the Customer Name, the infrastructure of it because if things aren't printed, (customer implication removed for sensitivity), if they don't have a manifest so it's very critical, that was done before with various old school technology that wasn't compatible with the complex billing structure that we now have in place with all the cost structures and the Customer Name wanted to charge back the various service users for printing because that is one of the many services they provide

                                                              3   KOC   13/03/2016 21:59

Absolutely if our system doesn't work a (customer implication removed for sensitivity) and there are lots of fines and lots of things that will happen

Internals\\Customer Interview Transcripts\\Customer 1 Transcription

No   0.0788   9

                                                              1   KOC   13/03/2016 15:28

it was challenging because it's like you set your system requirements, your business requirements, we would have done up our project plan

                                                              2   KOC   13/03/2016 15:31

a challenging project enjoyable but it does open you up, you can test, test, test but when you go live there is a lot of unknowns

3	KOC	13/03/2016 15:35

you have to balance in a live production system when things go down

4	KOC	13/03/2016 16:39

you're trying to balance both and your head is all over the place and your trying to support business, implement a project and keep productions going so there's a lot of onus on myself and planning and ensuring things are fully tested and implemented

5	KOC	13/03/2016 16:59

Yeah well we had am an issue in our shipping area which proved to be very, very difficult we put in a device it wasn't fit for purpose even though at the start it was but it looks like the volumes of data changes, it was outside of the scope of the project, that you can't really plan for your volumes of data

6	KOC	13/03/2016 17:00

well because the user down in shipping was finding it very difficult to do their job so that worked well,

7	KOC	13/03/2016 17:30

I keep going back to it, it's a big thing you know especially for the size of this company here time is very time is money you know its very value and downtime means lost time so that's the way we focus on things are down for very minimal time so

8	KOC	13/03/2016 17:43

We will say that our processes here wouldn't have been straight forward

9	KOC	13/03/2016 17:49

there were times I said to Manager Name I feel like running out of here and they are challenging but I think that's in today's business world

APPENDIX E: SOLUTION COMPLEXITY

Nodes\\Context\Environment\Solution Complexity

Document

Internals\\Company Representative Interview Transcripts\\OrgRep1 Transcription

No   0.0036   1

                                                                      1   KOC   13/03/2016 22:38

all the various little steps to come to a solution

Internals\\Customer Interview Transcripts\\Cust1 Transcription

No   0.0431   5

                                                                      1   KOC   13/03/2016 17:32

I could propose something and obviously she would go back to her technical crew and say this is what they want can it be put in place and we are having that conversation as it is to get a system in to connect it's a kind of…. it's an interface but it's not a standard PC and trying to get a printer to connect to that

                                                                      2   KOC   13/03/2016 17:36

and she said well I know that's going to change and it has somewhat and it may be not where we want it to be because again I suppose if someone has an expert level it is very hard to transfer

                                                                      3   KOC   13/03/2016 17:47

get devices to maybe get a driver an older driver that would work with I suppose we had a lot of what would I say global systems and the lads had to try to log on and get it to work with an older driver, you're putting a new system on an older driver how effective is that you know so again there was a lot of you know

No   0.0363   5

	1	KOC	13/03/2016 19:07

then we found out that they have their IT outsourced, and they have two different networks in Customer Name so for us to do a valid proof of concept we now had to put in two multi-function printers and get two Vendor licences for trials so it was like having two separate customers but it was the one proof of concept for us and a proof of concept is trying to implement the full solution for users and giving them the training,

	2	KOC	13/03/2016 19:08

they then found out they were going out to tender for servers for their IT Infrastructure and they were going to combine their two servers in to one which would mean we'd need that work done before we put in our print solution because we'd only be doing all the work twice

	3	KOC	13/03/2016 19:16

it's nice that it got to that full stage, it kind of went through every stage where the hold-up was there because we didn't realise until we went in that they had two separate servers, then they decided to go out to tender so we had to wait for that to be done and ah it was like their IT is also outsourced so our engineers were dealing with two different IT companies to install the printers

	4	KOC	13/03/2016 19:39

Then when we spoke in December their trial licence was running out in January with Vendor Name so I was like I don't mind extending but we are going to have to request another trial licence then from Vendor Name which is 45 days

	5	KOC	13/03/2016 20:10

like they had a very rough install and I suppose a lot of things went wrong, wrong devices were shipped and you know a lot of errors by Host Organisation that I wasn't involved in so I don't really know the ins and outs of it I just know when I took over it, it was the worst account and nobody wanted it

APPENDIX F: COMPETENCE PERCEPTIONS

Nodes\\Customer Perceptions\Perception of Competence

Internals\\Company Representative Interview Transcripts\\OrgRep1 Transcription

Yes   0.0686   11

1	KOC	13/03/2016 21:48

she's smart

2	KOC	13/03/2016 21:50

her gait the way that she walks is one of confidence

3	KOC	13/03/2016 21:51

she has a good vocabulary

4	KOC	13/03/2016 21:53

Well initially it would be one of confidence

5	KOC	13/03/2016 21:53

she is always very well prepared when she goes in to a particular meeting am but asking people like myself am the questions to ask the answers

6	KOC	13/03/2016 21:58

 remember when we had a previous account manager this opportunity came up two years ago or maybe three and they didn't have the confidence in our or indeed anyone's organisation to take on the huge step from moving from their old AS4000 existing working model to the new model

7	KOC	13/03/2016 22:24

and she is always ready to do business

	8	KOC	13/03/2016 22:36

organisational skills

	9	KOC	13/03/2016 22:36

<SAM Name> knows there is a deadline coming up and she will invariably have things done well in advance

	10	KOC	13/03/2016 22:37

She's never been late for a meeting and it doesn't matter if that meeting is in Monaghan or in Derry she is always very well organised. She always has her paperwork very well organised and even her desk space is very well organised so if I ring her up and ask her do you happen to have the contract for blah, blah, blah she will have it and she will have it very quickly

	11	KOC	13/03/2016 22:37

its broadly organisational skills, organised, her calendar is always organised indeed she often I share my calendar with her and she is quite readily able to see you know when would suit me on something because she might say ok there is a meeting in Limerick on Friday but I see you are actually in Galway the day before so maybe that doesn't suit because you'll need to do

Internals\\Customer Interview Transcripts\\Cust1 Transcription

Yes	0.0832	31		

	1	KOC	13/03/2016 15:38

Well I'll be honest when I met <SAM Name> first I have to say she comes across as an organised person that's one thing and that's an attribute we look for obviously when we are picking a vendor

	2	KOC	13/03/2016 15:40

she was very professional in her management skills

	3	KOC	13/03/2016 16:36

if it is very disjointed communication and disorganised it's going to be a poor reflection on

	4	KOC	13/03/2016 16:37

it was organised

	5	KOC	13/03/2016 16:43

she is very good at following up

	6	KOC	13/03/2016 16:51

it's being proactive really

	7	KOC	13/03/2016 16:52

she gets things done

	8	KOC	13/03/2016 16:52

in a timely manner

	9	KOC	13/03/2016 16:52

for any project it is very much driven by the timing

	10	KOC	13/03/2016 16:54

they are timely

	11	KOC	13/03/2016 16:54

she delivers on deadlines

	12	KOC	13/03/2016 16:55

that's the difference I've seen whereas with the previous two I felt I was chasing them

| 13 | KOC | 13/03/2016 16:57 |

you have confidence in it

| 14 | KOC | 13/03/2016 17:01 |

No I feel I just relay what I need, she will go and get the information and come back to me

| 15 | KOC | 13/03/2016 17:01 |

the biggest thing is that deadlines

| 16 | KOC | 13/03/2016 17:02 |

that deadline is being pushed, pushed, pushed you lose confidence

| 17 | KOC | 13/03/2016 17:02 |

she put in deadlines realistic deadlines

| 18 | KOC | 13/03/2016 17:03 |

she gets she is able to get the resources in to do the job

| 19 | KOC | 13/03/2016 17:04 |

real time project planning,

| 20 | KOC | 13/03/2016 17:05 |

if I am involved in any project I do have to put in time in it but I can manage along with doing my own work so there is a better balance

| 21 | KOC | 13/03/2016 17:09 |

I suppose if I was to go back to the start of managed print services the resources weren't available from Host Organisation probably because it wasn't planned correctly, the devices weren't delivered on time again its planning, like planning in any project is the key I think myself just going on that experience like.

| | 22 | KOC | 13/03/2016 17:09 |

planning, timely

| | 23 | KOC | 13/03/2016 17:12 |

<SAM Name> she is organised

| | 24 | KOC | 13/03/2016 17:37 |

and she said well I know that's going to change and it has somewhat and it may not be where we want it to be because again I suppose if someone has an expert level it is very hard to transfer

| | 25 | KOC | 13/03/2016 17:38 |

In (Location) they were taking up the IS person's time.

| | 26 | KOC | 13/03/2016 17:39 |

I suppose that you can see the difference in how managers from one to the other there is a big, big difference over the three I have seen to date and I would say of the three <SAM Name> has been the best based on just general daily work with her, her

| | 27 | KOC | 13/03/2016 17:41 |

you have to be professional about it,

| | 28 | KOC | 13/03/2016 17:43 |

she knows our standards she knows where we want to be and she does deliver on those expectations

APPENDIX G: WARMTH PERCEPTIONS

Nodes\\Customer Perceptions\Perception of Warmth

Document

Internals\\Company Representative Interview Transcripts\\OrgRep1 Transcription

very well spoken so she has a nice accent

you could ring <SAM Name> at 7pm and she will always answer or ring you back and she is always ready to talk

I would say she has an approachability if that is a word am in that she has a pleasant demeanour

she smiles

she makes small talk

Internals\\Customer Interview Transcripts\\Cust1 Transcription

to the best of her knowledge

you know things are implemented and its bye- bye where as I find with <SAM Name> there is a total follow up

the project is completed we are still refining it and trying to make it more cost effective going forward but we do have the monthly meeting which is good because it shows us that you have the interest and it's not just there's your project and bye –

that you are currently working in it to get it implemented better and further so it is its good continuity to bring it in to maybe another phase where you can implement more

 do feel <SAM Name> is good with that and its even the ideas that you are kind of making us aware of software coming to end of use how can we say put a replacement before its gone sometimes you hear oh that software is no longer supported and your like what do I do I can't continue where as its being proactive really

she does her utmost to deliver

but I do feel she gives an honest you know like let's look at this device honestly

I don't feel you are in it to kind of make money

based on what you did say, that to me is good enough to say yeah you're not solely in it for the money

suppose this year we are looking at cutting down the number of devices if required that do we need it or don't we need it because and that is going to be based on usage and so because <SAM Name> is entering in to that dialogue with me I feel year

to be a very honest person

I'm from (Place Name) and she is from (Place Name) and we are big in to the sport so we always have a conversation about the weekend games or what's coming up so from a person point of view she is very easy to talk to

I will say overall she listens to what you say

and she said well I know that's going to change and it has somewhat and it may be not where we want it to be because again I suppose if someone has an expert level it is very hard to transfer

PAPER 4 PREFACE

This fourth paper in the series documents the implementation of the case study design presented and piloted in paper 3. The implementation of the case study method was relatively similar to the procedures proposed and piloted in paper 3 however, there are some changes that this preface draws the reader's attention to and provides a rationale for. These concern the addition of additional perspectives and their role in the research, the variance in the total number of participants from those proposed in earlier papers and enhancements to the interview questionnaires following the pilot.

Addition of Perspectives

In paper 4 along with the customer, SAM and SMR perspectives previously included the researcher included a fourth perspective, that of a pre-sales engineer. In keeping with the iterative design of the qualitative methodology this was an enhancement added as an outcome of the pilot implementation in paper 3. In paper 3 the engineering perspective compensated for the SMR perspective as a workaround to avoid an overlap in participants between the pilot and the live implementation. This workaround however, illuminated the value of this additional perspective and in acknowledgement of the specific specialist technical knowledge and skills these individuals bring into the consultative sale as a development from team and solution selling, the researcher made the decision to add this perspective as an additional source of phenomenon illumination and account triangulation. The pilot highlighted the value that this perspective could play as an independent observation of the interaction in its natural setting without the risks associated with researcher observation that was originally contemplated during the methodology development stage. The engineer is brought in to the interaction as part of the normal engagement and therefore does not change the dynamic of the natural interaction. In addition the engineer role does not hold a legitimate position of power over the salesperson as the researcher in their management capacity does and thus avoids the associated risk that such power might change the interaction dynamic. To accommodate the addition of the engineer perspective the SMR interview guide originally proposed as an appendix in paper 3 was amended to capture the engineer perspective.

With respect to the SMR perspective, rather than conducting an interview four times with the same person (as only one SMR) about each of the four different SAMs

identified as star performers, the researcher took the opportunity presented by the addition of the engineer perspective to make another iterative change. This change saw the role of the SMR become more holistic in the process and a smaller set of more open questions was used to capture SMR views. This amendment provided a valuable opportunity to reconcile organisational and customer perspectives. This interview covered:

- What constituted sales performance from an organisational perspective?
- Who the SMR considered high performers based on his subjective organisational perspective?
- Why he felt these were more successful than others?
- What he thought their customers thought about them?
- Why he felt they would think that?

Variance in Interview Participant Numbers

Due to the iterative nature of the DBA programme and the development of the research over time, a number of changes with respect to the number of interviews proposed versus those actually conducted occurred from paper to paper. A table to illustrate this progression is included in this preface to aid the reader to follow the research journey in this respect. The rationale for these changes are also outlined.

Template of Selection Changes	Paper 2	Paper 3	Paper 4
Phase 1 SAM Selection Pool	20	20	16
Phase 1 Customers Pool for Survey	Top 50 X 20	Top 50 X 20	Top 50 X 16
Phase 1 % of Top 50 for Survey	20%	20%	20%
Phase 2 SAM Cases	4	5	4
Phase 2 Customer Interviews per SAM	5	4	3
Total Customer Interviews	20	20	14
Sales Manager Interviews	1	1	1
Engineer Perspective	N/A	N/A	4
Total Accounts	25	25	23

In papers 2 and 3 it was estimated that twenty SAMs would meet the criteria to be objects in the phase 1 customer survey to select star performers. Due to natural attrition and organisational changes this figure was sixteen by the time the selection phase was implemented. The number of SAMs to be considered for the second qualitative phase of the research as embedded cases was originally four in paper two. As the research

design matured in paper 3 this was amended to be a 25% of the overall number of SAMs meeting the original criteria so that those selected as star performers would be representative of the upper quartile. This saw the number of SAMs change over the course of the research papers relative to the total number of phase 1 SAMs at the time in order to keep the percentage consistent.

In addition to variance in the number of SAMs over course of the papers there was also a variance in the number of customer interviews from paper to paper. The number of proposed customer interviews was reduced from five per SAM in paper 2 to four per SAM in paper 3 to account for an increase in the number of SAMs from four to five and the aim to conduct twenty customer interviews in total at that given point in time. The figure of twenty was selected as an objective however was not intended to be a definitive number as data saturation could only be determined during actual implementation. This was based on a suggestion by Mason (2010) who state that most Ph.D. level students start with a multiple of ten when conducting qualitative research i.e. twenty. As additional perspectives were added post pilot the researcher thought it possible that data saturation might occur at an earlier point in the process and made the decision to start by conducting twelve customer interviews drawing on the research methods literature that suggested that this is a good starting point until saturation is confirmed (Bertaux, 1981 and Guest, 2006). Twelve customer invites were sent and eight customer participants confirmed. The researcher sent another four invites towards the aim of obtaining the initial figure of twelve. These four customers agreed to participate as did two others that had previously not responded. The researcher was satisfied at the point of twelve that data saturation had occurred due to the lack of new insights coming to the fore however, decided to interview the additional two late respondents due to their interest and support in agreeing to participate thus bringing the final number of actual customer interviews to fourteen.

As previously discussed the engineer perspective was a later addition in paper four however this saw the transformation of the sales manager perspective to a more holistic role providing some organisational context and perspective with the engineer perspective instead becoming the key point of triangulation for the customer and sales person accounts. On final implantation there was little by way of variance between the total numbers of interviews conducted at twenty three versus the twenty five originally proposed.

Enhancements to Interview Guides

Included as an appendix to paper 4 is the short form questionnaire that was used to respond to customer requests for questions in advance of the interview (requested by two customers in total). It was not the researcher's original intention to prepare a short form version however, this is something that was recommended by the reviewers of paper 3 and proved necessary in order to elicit participant consent. This short form essentially removed the conceptual and literary frame from the interview guides. This detail had been included to ensure the researcher explored all areas of the framework over the duration of the interview due to the non-linear form of the semi-structured approach and to guide the researcher as to suitable probes that may be applicable at a given point in time.

A key outcome of the pilot interview stage was the potential to illuminate the ambivalent perceptive combinations of low warmth/high competence and high warmth/low competence as it was noted that the customer and engineer participants in the pilot volunteered information about "other" and "previous" sales account managers that fell in to these categorisations. In delineating the scope of the project in paper 1, insight with respect to these combinations was considered out of scope due to the focus of the study on high performers. The insight illuminated in the pilot with respect to these ambivalent combinations highlighted the value of these alternatives to the development of the situated account. In addition the fact that these positions were captured about "other" or "previous" SAMs rather than other members of the organisational selection pool overcame the researcher from inside challenge associated with comparisons of relative high and low performers within the organisational pool.

Paper 4 was recommended by the examination panel that comprised Professor Jean-Anne Stewart (Henley Business School) and Dr. Aidan Duane (Waterford Institute of Technology) with minor changes that included the addition of a timeline chart upfront in the paper and the inclusion of findings summary tables in the concluding section. Paper 4 was resubmitted with these changes and the revised paper with the accepted changes is the paper that now appears in this final dissertation.

PAPER 4: SALESPERSON FACILITATION OF THE CUSTOMER PERSPECTIVE OF SALES PERFORMANCE IN CONSULATIVE SELLING: ANALYSIS OF FINDINGS

BY

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September 28th, 2016

ABSTRACT

Increased levels of complexity in today's business world has seen a shift towards consultative sales environments. Solution comparisons in this context are challenging and the customer evaluation of the salesperson is a key factor in sales success. Despite widespread acknowledgement of the important role this customer perspective plays, sales performance research has traditionally focused on the salesperson perspective. A salesperson might be motivated to sell, rewarded to sell and educated to sell but what is it that makes the customer want to buy from that salesperson? Previous papers in this series presented a contextual conceptualisation of customer perceived sales performance as success in social interaction (Paper 1), supported a qualitative case study methodology towards illumination of this phenomenon in its natural contemporary setting (Paper 2) and provided a piloted case study design to competently guide research (Paper 3). This final paper in the series presents the implementation of research and key findings for future discussion. Key findings in context include; salesperson competence as the primacy judgement in the customer evaluation, the importance of both warmth and competence perception for sustainable performance and the role of warmth and competence perceptions in the activation of the alternative customer behavioural responses of active facilitation and passive facilitation. This insight has the potential to add knowledge that is specific to consultative selling to the theory base of social cognition and this will be the subject of a future discussion. The findings also present insight as to individual salesperson behavioural influencers of customer perception. Presented through the lens of customer orientation these findings illuminate the actions salespeople in context undertake as they build relationships and demonstrate competence in a way that generates warmth and competence perceptions respectively. Finally, through the lens of the theory base that underpins the emotional quotient, the study reveals how salesperson emotional and social competencies aid the generation and maintenance of warmth perceptions, the achievement of balance between warmth and competence perceptions and the reinforcement of competence perceptions. This behavioural and psychological insight at the individual salesperson level will form the basis of discussion towards a contribution to sales management practice.

Key Words: Sales Performance, Customer Perspective, Warmth, Competence, Qualitative, Case Study, Customer Orientation, Emotional and Social Competencies

INTRODUCTION

The aim of this research is to explore in the context of consultative selling, how customer perception of a salesperson as both warm and competent indicates performance and subsequently to gain insight in to the role of salesperson customer orientation and emotional and social competencies in the generation of such perceptual evaluations. Based on a contextual conceptualisation of customer perceived sales performance as success in social interaction (Paper 1), this research takes a qualitative approach considered appropriate to its social constructionism worldview (Paper 2).

Based in Social Cognition Theory (SCT), the research explores in context warmth and competence perception, considered indicative of success in social interaction. Both warmth and competence are considered based on the Stereotype Context Model (SCM). This model presents consistently positive behavioural reactions of active and/or passive facilitation from the perceiver where both dimensions are perceived. This is opposed to warmth or competence perception in isolation which may generate a positive or negative behavioural reaction (Fiske *et al*., 2006). To inform practical application towards the construction of sustainable sales teams, the role of the individual salesperson in the generation of warmth and competence perception is explored. This exploration is conducted at the behavioural level through the lens of Customer Orientation (Stock and Hoyer, 2005; Zablah *et al.*, 2012), considered appropriate due to the role of intention in customer perception and at the psychological level through the theory base that underpins the emotional quotient (EQ) inventory (Bar On 1997), appropriate due to its theoretical foundations in early work relating to emotional expression for survival and adaption closely related to the evolutionary foundation of the SCT base.

The research is implemented in an Information and Communications Technology (ICT) Solutions Provider Organisation in keeping with the single case organisation design of the study. A list of a priori context codes drawn from literature were used in a pilot implementation and confirmed the suitability of the selected case organisation (Paper 3). This paper presents the implementation of the selection, data collection and analysis stages of the research. An overview of these activities to include sub-tasks, duration and order of completion is presented in Figure 1 and is reflective of in excess of four hundred and fifty hours of effort.
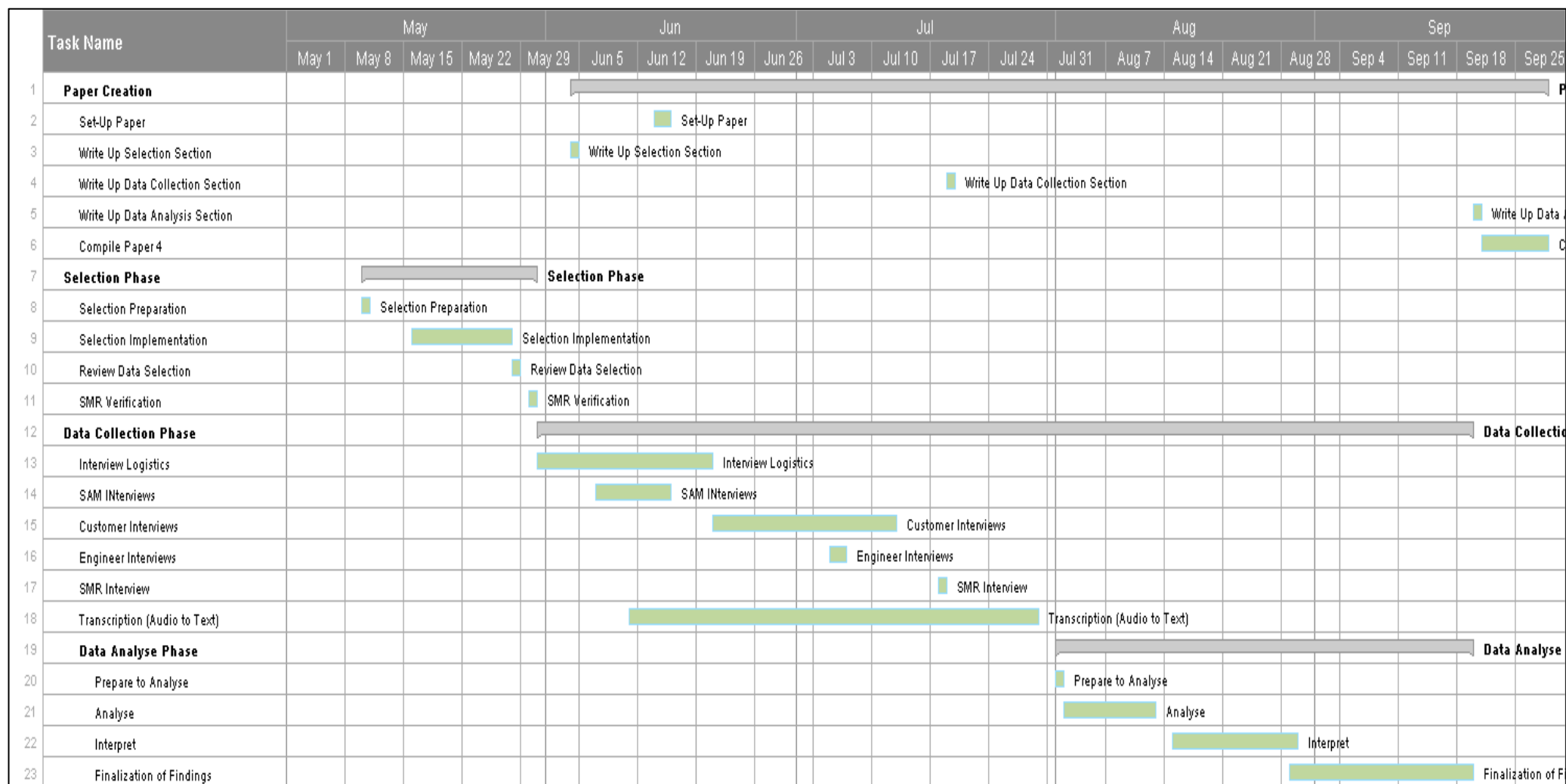
Figure 1: Research Implementation-Tasks and Timeline

The case organisation was selected on the basis that it met core characteristics of consultative sales contexts that are wrought with complexity, the need to collaborate and non-linear processes (Thull, 2005; Beardsley *et al.,* 2006 and Kauffman, 2007). Embedded in this contextual case are case examples of star Sales Account Manager (SAM) performers, to enable a better understanding of performance across the relational sales interaction with this context. The research question regarding how customer perceptions of a SAM as both warm and competent indicate performance in consultative sales contexts, required the customers of star performers to participate as units of observation while the SAM influencers of these perceptions required observation at the level of the salesperson. The engineer perspective added a point of account triangulation and the sales manager perspective provided some holistic organisational context to the interaction phenomenon of interest.

As an output of this phase of research findings are presented in this paper and are structured around the research questions and the tentative theoretical propositions. The paper concludes by looking forward to the use of these findings to inform discussion towards a contribution to knowledge with respect to the role of customer perception as an indicator of star sales performance and to the practical application of such knowledge by sales managers towards sustainable organisational success.

IMPLEMENTATION OF SELECTION PROCEDURES

SAMs in this study were selected from a pool within the case organisations solution sales team that met the criteria of service greater than three years and specific territory tenure of greater than twelve months, applied to ensure the selection pool had a level of consistency in exposure to the phenomenon (Miles and Huberman, 1994 and Creswell, 2003). This identified sixteen potential participants profiled in Table 1.

Selection Pool Profile	
SAM Selection Pool (Tenure)	
Average Tenure in Sales Role within Company	5.65 Years
Tenure in Solution Sales Role with Existing Territory	4.46 Years
SAM Selection Pool (Age)	
Average Age	39.81 Years
Median Age	36
Upper Age	55
Lower Age	28
SAM Selection Pool (Gender)	
Male	56.25%
Female	43.75%

Table 1: Selection Pool Profile

The top fifty customers considered the most financially contributing over a period of time on each SAM territory were then identified from the case organisation Customer Relationship Management (CRM) System. These lists were passed by the organisations Systems Operations Manager directly to an identified member of the organisation's marketing team. The marketer was also provided with an introductory script and survey instrument (Appendix A) in order to conduct a brief telephone survey. The survey instrument comprised the warmth and competence perceptive scales used in the SCM (Fiske *et al.,* 2006). The marketer was instructed to select a random sample of ten customers for each SAM sales territory from the lists provided. The marketer then asked the randomly selected customers to score their SAM on a Likert scale of 1-5 on each of the scale items in the survey and populated this information on to a matrix provided. The customer identity was concealed by an alphabetical labelling convention populated by the marketer. The matrix once populated calculated a total score for each SAM on each perceptive dimension warmth and competence.

The researcher visually inspected the returned dataset and observed that no outliers were present. The researcher then attached a rank from one to sixteen to each SAM on each of the two dimensions warmth and competence. The average ranked position was then calculated with the lowest position representative of those perceived highest on both dimensions combined. The four SAMs found to be highest on both dimensions combined were selected to go on to the qualitative phase of the study. The results in respect of these four individuals are presented in summary in Table 2.

UOA	W Rank	C Rank	Combined	Position	W Score	C Score
1	1	2	1.5	1	300	293
2	1	3	2	2	300	289
3	3	4	3.5	4	296	288
4	4	1	2.5	3	295	294

Table 2: Extract of Survey Result (Selected SAM's)

The SAM cases selected represent the SAMs perceived to be the highest performers from the perspective of the customer, given a conceptualisation of performance as success in the social sales interaction and with the warmth and competence dimension scales used as a measure of this performance perception. The profile of these SAMs is illustrated in Table 3.

Case Label	Gender	Age	Company Sales Tenure	Territory Sales Tenure
SAM 1	Female	28	5	2
SAM 2	Female	30	6	3
SAM 3	Female	32	12	4
SAM 4	Female	34	5	3

Table 3: Selected SAM Profile

To triangulate customer perception of performance with an organisational perspective, a Sales Management Representative (SMR) was asked to describe sustainable sales performance. The SMR is a senior organisational representative with over twenty years of sales management experience and extensive exposure to the interactions of SAMs past and present. He described three elements to sustainable performance; achievement of targets, high levels of customer satisfaction and a level of respect among colleagues internally. The SMR was also asked to rank the same selection pool of SAMs in order of performance and the same top four featured. It was found that there was alignment between the customer sales performance perception and the organisational perspective in the case organisation.

> *"Not just one thing- a combination of the objectives- hitting target and customer satisfaction- intrinsically linked, and a third thing how they deal with other stakeholders in the process. No point in selling all around you having a happy customer and everything else falling down around that"- Sales Management Representative*

In the selection of customer participants the customers of the SAM cases were targeted. The selection of customers was in order of financial contribution, then willingness and availability to participate. The organisational profile of the customer participants and the profile of the key customer contact participant was captured (Table 4).

The customers units of observation (UOO) included representation across the three key entity types serviced by the case organisation: private or public commercial entity (69%), state or semi-state body (14%) and not for profit organisation (17%). The age profile of the participants was in the main in the range of 35-49 years (77%), with 16% in the 50-65 years range and only 7% in the 18-34 age category. The low % in the lower age range is indicative of the level of responsibility held by the key contacts in the customer organisation who are the IT decision markers for their respective organisations. The gender profile of selected customer participants is 79% male and 21% female. The researcher is satisfied that the predominant percentage of male

customer participants is not an issue with the selection procedure but instead is representative of the case organisation industry.

UOO Label	Industry	Entity Type	Number Employees	Role of Contact	Gender	Age
1A	Tertiary	Private Commercial	1-49	Finance Manager/Director	M	50-65
1B	Quaternary	Private Commercial	1-49	IT Manager/Director	F	50-65
1C	Secondary	Private Commercial	200+	Other Technical	M	35-49
2A	Tertiary	Private Commercial	50-199	Other Technical	F	35-49
2B	Tertiary	Private Commercial	200+	IT Manager/Director	M	35-49
2C	Quaternary	State/Semi-State	200+	IT Manager/Director	M	35-49
2D	Secondary	Private Commercial	50-199	Other Technical	M	18-34
2F	Tertiary	Private Commercial	1-49	Operations Manager	M	35-49
3A	Tertiary	Private Commercial	1-49	Owner Manager	M	35-49
3B	Tertiary	Not for Profit	200+	IT Manager/Director	M	35-49
3D	Tertiary	Private Commercial	50-199	Finance Manager/Director	M	35-49
4A	Tertiary	Not for Profit	200+	IT Manager/Director	M	35-49
4B	Quaternary	State/Semi-State	50-99	Operations Manager	F	35-49
4D	Tertiary	Not for Profit	50-199	Operations Manager	M	50-65

Table 4: Customer UOO Profile

The customer perspective was also triangulated with the perspective of one senior case organisation engineer per SAM case. The engineers were aligned on the basis that they had multiple projects in common with the SAM over the previous twelve months. All selected engineers had greater than four key projects in common with the aligned SAM and had in excess of ten years' experience with the organisation (Table 5).

UOO Label	Gender	Age Category	Company Tenure	Key Mutual Projects
Engineer 1E	Male	35-49	26.5	6
Engineer 2E	Male	35-49	10	4
Engineer 3E	Male	50-65	21.5	5
Engineer 4E	Male	18-34	13	5

Table 5: Engineer Participant Profile

IMPLEMENTATION OF DATA COLLECTION PROCEDURES

Data was collected through the application of a localist interview approach to develop a situated account (Alversson, 2003; Schultze and Avital, 2011) and in keeping with this approach semi-structured interviews with fourteen customers, four SAMs, four engineers and the SMR were conducted.

Selected SAMs were requested to participate by way of a participant request e-mail that had attached a participant information sheet and consent form (Appendix B). The researcher then followed up with each SAM individually to ensure they had no queries or concerns. Once SAM consent was obtained the customer participants were then contacted by e-mail that had attached a participant request letter, participant information sheet and consent form (Appendix C). Finally, the selected engineers were contacted on a one to one basis by the researcher, the researcher used a participant information sheet to explain the nature and purpose of the research and the role of the engineer in the research. Agreement to participate was confirmed by way of a consent form (Appendix D).

As consent to participate was obtained participants were added to an interview schedule. The researcher used interview guides for each participant type to conduct these interviews (Appendix E). These were not used prescriptively and the researcher ordered the flow of the interview and probed answers where considered appropriate. A short form version of the customer interview guide was made available as this was requested in advance by two interviewees (Appendix F). The SMR interview was conducted last to prevent the influence of an organisational perspective bias in the implementation of the customer perspective interviews. All interviews were recorded using a voice recorder and transcribed to a word document format. Researcher notes and reflections were documented immediately post interview. The researcher was satisfied that adequate data saturation had occurred in respect of the customer perspective at the point of three customer interviews per SAM case.

IMPLEMENTATION OF DATA ANALYSIS PROCEDURES

The template analysis technique to organise and analyse data by theme was applied to analyse the data generated by the researcher. In keeping with King (2012) many of these themes in application were from the a priori list of themes (Appendix G) drawn from the conceptual framework and assessed for fit during the design phase through a pilot implementation (Paper 3). Due to the contextual nature of the study, contextual data was too captured and subsequently analysed using an a priori list of context codes (Appendix H) drawn from consultative sales literature and also assessed for fit during the design phase through the same pilot implementation.

The use of the template technique gave the researcher the flexibility to expand and contract the codes and hierarchies in NVivo to enable interpretations to be made and findings to be finalised. The application of this technique in conjunction with the extensive use of the memoing function in NVivo aided the interpretation of findings. The researcher kept a process memo to record the key steps taken during the analysis process and this is presented in Table 6. Throughout the process a daily back up was taken of the NVivo project from the encrypted laptop to an encrypted memory key to accommodate roll backs and to mitigate against data loss.

Analysis Stage	Activity Extracted from Process Memo
Prepare to Analyse	- NVivo software upgrade to NVivo Pro 11 - Copy of pilot project taken and data cleared with the node structure remaining as no change required in terms of starting point - Set up folders in internals- customer interview, SAM interview, engineer interview, SMR interview and researcher reflections - Link to voice recordings created as external in NVivo - Imported transcribed manuscripts to respective folders - Imported researcher notes from post interview reflections - Initial project back up taken to encrypted memory key - Naming convention applied to protect identity (See Table 7)
Analyse	- Initial review of transcripts and rough first round coding exercise- analyst initial sense of data with the a priori code list in mind - New nodes were set up as part of this process- each new node was linked to a memo- description of node and rationale for creation captured - Node quality check completed- node summary printed off for each node (698 pages), each reference coded was examined and thought was given to suitability of each reference, a process of uncoding and recoding of references followed - Particular focus given to areas and nodes where reference coverage was light- using node structure report and further coding followed
Interpret	- Set up theme memos for key areas of study- customer perception (warm), customer perception (competent), customer behavioural responses, customer emotive response, salesperson demonstration of competence, salesperson building cooperative relationships, adaptive competencies, interpersonal competencies, general mood competencies, stress management competencies and intrapersonal competencies to capture thoughts and patterns - Engaged with transcripts at a deeper level- started to see potential relationships in between nodes and some initial links were set up - Pattern Coding and Creation of New Nodes to aggregate a number of nodes where a pattern emerged and a higher level theme was evident
Finalization of Findings	- Exhausted memo process and printed memos (80 pages) - Reviewed at theme level - Initial findings documented - Finalisation of findings

Table 6: Analysis Process Memo Summary

In the analysis and presentation of findings a labelling convention to preserve confidentiality was used to represent individual participants (Table 7). This

convention used three combinations to represent the three categories of SAM, customer and engineer participant. The application of this convention was useful to clearly demonstrate triangulation across multiple perspectives in the analysis and presentation of findings.

Label Convention	Representative Participant Category
Number Only	Sales Account Manager Perspective- SAM 1, SAM 2, SAM 3, SAM 4 respectively in presentation of findings
Number and Letter E	Engineer Perspective- number depicts the SAM the engineer is aligned to in the study and the letter E depicts it is an engineer perspective. 1E, 2E, 3E, 4E
Number and Letter (Except E)	Customer Perspective- number consistent with the SAM of the customer and the letter depicts the individual customers of the SAM- for example 1A, 1B, 1C are three distinct customers interviewed in respect of SAM 1

Table 7: Participant Labelling Convention

RESEARCH FINDINGS

To present an interpretation of data that is meaningful the contextual findings are presented as a prelude to the overall research findings. The research findings are presented by theme as they relate to each of the three research questions and their respective propositions made possible by the application of the template analysis technique. As a guide to this presentation structure, the "research question to data sources" element of the case study design has been extracted from Paper 3 and is included as Appendix I.

Contextual Findings

There is a customer dependency on case organisation competence with three key associated themes; limited customer resources, limited level of in-house customer expertise and a level of perceived risk (Table 8).

The contextual risk is characterised by a high value purchase, a high level of criticality for operational continuity and perceived risks with newer platforms such as "*cloud*". The continuous evolution of technology is depicted with *"new technologies"* (SAM 2), the need to *"keep up to date on technologies"* (SAM 1) and the emergence of new "*threats*" (3A) to include "*data security and retrievability (1A)*" and *"Cybersecurity (4D)"*.

UOO	Observation of Dependency in Context	Sub-Theme
1C	*"and that's why I actually do rely on the managed services of [case organisation name]" {following a statement indicating limited ICT resources in the organisation}*	Limited In-House ICT Resources
2	*"a lot of companies we would deal with wouldn't have an IT manager and, they're dependant on us for their IT requirements"*	Limited In-House ICT Resources
2	*"he knows a little bit about IT but not very much so he relies on us"*	Limited In-House Expertise
3A	*"and we have become so dependent on" {statement in respect of mobile devices used by the organisation}*	Perceived Risk
3B	*"if our e-mail system is down for an hour, all hell breaks loose"*	Perceived Risk
3D	*"from my perspective, being a one man band {in terms of ICT resource and not a one man size organisation} I needed someone to come in"*	Limited In-House ICT Resources
4B	*"It's not a role I have time for to be honest, which is why I rely on our external provider so much"*	Limited In-House ICT Resources
4B	*"we rely on other organisations such as [case organisation name] then, to provide us with specialised skills for items we can't fix ourselves"*	Limited In-House Expertise

Table 8: Dependency in Context

Organisational factors such as mobility, global needs, complex organisational structures, budgetary constraints and organisational growth requirements are reported in addition to the technical nature of the problem (Appendix J). Exacerbating this is a lack of clarity about the true nature of the problem. The customer reports that *"we're trying to do something and we're not really sure what we're trying to do"* (1C). This is triangulated by engineer statements such as *"they couldn't make up their mind"* (1E) and *"they had a requirement and they were all over the place to be honest at the start"* (4E).

The provision of a solution in this context is complex with *"so many solutions out there"* (SAM 1) and a number of solution elements to consider (Appendix K). It often results in *"many revisions"* (3E) before the solution is agreed and requires the involvement of a large number of stakeholders (Appendix L). Unlike a commodity type sale where the SAM can *"just sell it out"* (SAM 4) the sales cycle is lengthy (Appendix M) and non-linear (Appendix N) characterised by a lot of *"back and forth"* (1, 2A, 2D, 3, 4E).

The contextual complexity drives a need to collaborate and the solution sale is depicted as a "*complete team effort*" (SAM 4).

> *"She has guided me all along to the right people in [host organisation]. It's a fairly big organisation, much more complex than... Actually, I found out something very recently that I didn't even know. It was a telephone solution that I didn't even know that [host organisation] were involved in"-1A*

The multi-stakeholder/multi-solution nature of the environment drives the need to have the right people and information at the right time in order to understand the customer need and to design and deliver a solution to meet that need.

> *"You know, when there was a few players in that thing I was talking about, she coordinated things well and made sure everybody, you know, hit their, hit their spots, did things when they should"-Customer 1A*
>
> *"It was going between each of the different vendors and making sure that all the timings were right and that the step-by-step plan was followed out"- SAM 2*

The contextual review highlighted what the customer deems important in terms of the sales account management function. These factors revolve around the provision of a quality service and the seamless delivery of solutions to meet their needs. The specific aspects of this are presented in Table 9 and supported by Appendix O. The knowledge, skill and ability nature of these elements indicates the importance of SAM competence to the customer in context.

Quality of Service	Seamless Delivery of Solutions
Takes Ownership of Issue	Understands Problem
Single Point of Contact for all Issues	Knowledge of Expert Resources
Timely Response	Knowledge of a Solutions Portfolio
Proactive with Updates	Delivery of Solution to Meet Need
Delivers a Quality Resolution of the Issue	

Table 9: Important to the Customer

Research Question 1

The exploration of the research question *"how do customer perceptions of a salesperson as both warm and competent indicate sales performance in consultative sales contexts"* was structured around three key areas; customer perceptions, customer emotive responses and customer behavioural responses. Results are presented under these three themes and the presentation draws conclusions in respect of support for propositions one to five of the study.

Customer Perceptions

A top level analysis of the competence perception sub-nodes, representative of the Fiske *et al.* (2006) competence perception scale items, found that the sub-nodes coded most frequently were competent (41 references) and capable (41 references) accounting for almost 72% of total competence perception about the SAM. Efficient (18) also featured strongly however, low frequencies were observed for intelligence (5), skilful (5) and confident (5). The prominent competence perceptions were observed in the data associated with all four SAM cases (Appendix P). The same analysis procedure was applied to the warmth perception sub-nodes, representative of the Fiske *et al.* (2006) warmth perception scale items. All scale labels for the warmth perception dimension were represented with respect to each SAM case (Appendix Q). Well-intentioned (36) and friendly (36) were observed most frequently, followed by trustworthy (29), good natured (23), sincere (21) and warm (13).

Competence Perception in Context

The competence perception primarily revolves around perceptions of the SAM as capable, efficient and competent. The perception of capable is represented in the transcripts by some key terms that illuminate its meaning in context. The perception of the SAM's ability to "*get it sorted*", the degree to which they are perceived to be "*professional*" and the feeling of safety they evoke in the customer, illustrated by statements such as "*capable hands*"(1A, 1B, 2A) capture its essence. In respect of the competent sub-label this is characterised by perceptions of the SAM as knowledgeable. This knowledge however, is not related to technical knowledge, instead it refers to the SAM being "*knowledgeable about everything that [case organisation] can do*", and knowledgeable about case organisation resources so that they can "*guide [the customer] all along to the right people*"-(1A). In respect of the sub-label efficient, this perception manifests itself around the SAM's ability to identify the urgency of an issue and to respond appropriately. Perception statements such as "*she's on the ball*", "*there is never a delay*" and "*proactive*" with Customer 4A making explicit that the SAM "*understands the urgency*" illustrate this.

The low volume of references coded under intelligent and skilful are symptomatic of the context. Technical skill or academic intelligence are not referenced as important by the customer. The intelligent node references include "*decisive*", able to "*think*

outside the box", *"organised in her thoughts, in a logical kind of way"* and having *"her wits about her".* The skilful node lists skills that are not of a technical nature but that are task specific to the role of the SAM such as good *"attention to detail"*, *"organisational"* and *"relationship building"* skills.

Warmth Perception in Context

The label *"friendly"* appears as a term in 100% of customer interview transcriptions to describe SAM's and is often accompanied by the terms *"approachable"* and *"helpful"*. The label good natured captured a demeanour that portrays an easy-going, even-tempered, patient and good humoured nature. In this respect SAMs are perceived as "calm" (2A and 3D), "easy going" (2B, 2D, 3D), *"nice",* (2A, 3D), *"personable"* (3B, 4A), *"pleasant"* (2B, 2C, 3D), *"positive"* (1B, 2B, 3E), *"bubby"* (2C, 3A, 3D) and *"outgoing"* (3B, 1E).

Sincerity is reflected in the warmth nodes through a customer perception of *"not feeling fobbed off"* (1C) and the use of terms such as *"fairness"* (3A, 3B) and *"genuine"* (2B, 1E). This is best captured in statements such as *"not trying to pawn you off", "no nonsense people"* and *"no fuss about her….no false promises".* The customers report a sense of getting *"honesty out of the relationship"* (2B) and *"knowing where they stand"* (2B) as a result of this sincerity. In a similar vein to sincerity is trustworthy and this captures the customer sense that you can take the SAM at *"face value"* and is underpinned by terms such as *"trust"* (1C, 2A, 2B, 4A, 4B, 4E)), *"honest"* (1C, 2B, 3B, 4A, 1E, 3E) and being *"open"* (1C) or *"upfront"* (3A, 3B).

The label well intentioned captures the degree to which the customer perceives the SAM intention as directed towards meeting their needs. This is illustrated in Table 10. This is one of the most visible themes and is evident across 100% of customer and engineer transcripts. The SAM is not perceived to *"push [case organisation] business"* (1A, 1B, 2A, 2F, 3A, 3B, 4A, 4B, 4D, 1E, 3E).

UOO	Statements that illustrate a Well-Intentioned Perception
1A	*"Her first instinct is to help me"*
2C	*"I think she is trying to do what I want"*
2C	*"To make the customer happy"*
3A	*"She comes across as having our best interests at heart"*
4A	*"To find out how she can serve us as an organisation"*
4D	*"Effectively to satisfy our needs"*

Table 10: Statements that Illustrate a Well-Intentioned Perception

Finally, the label warm seems to be an overarching feeling that the SAM generates in their interactions with the customer around the degree to which the customer perceives they can comfortably relate to the SAM. This is captured by statements such as "*she is human, a mother, normal*" (1B) and "*she is homely*" (1B) and by the expression that they are not dealing with "*a faceless person*" (1C and 2A).

Customer Emotive Response

The analysis revealed a strong presence of the emotive response of customer admiration towards all four SAM cases perceived to be both warm and competent (Table 11). The a priori code structure employed sought to capture the alternative emotive responses of pity, contempt and envy however these were not found to be emotive responses displayed by the customer participants towards the SAM cases. This supports Proposition 1: ***Salespeople who are perceived to be both warm and competent by the customer will elicit feelings of admiration***.

The admiration emotive response is observed in descriptive statements that reflect the way the SAM makes the customer feel and bring to life the essence of the emotive response experienced. The SAM makes the customer feel great and they admire their ability to make them feel like the only one. The customer shows great admiration for what the SAM has achieved in their role in terms of their ability to take it on and succeed. The customer holds the SAM in high regard and this is observed in terms of the high praise and sense of value they place on the SAM. Some customers go so far as to display a sense of adoration towards their SAM. The statements of customer 1B (description of the SAM as "*the cake*") and customer 2D (who "*loves dealing with her*" and "*loves talking with her*") clearly illuminate the presence of warmth and competence in the generation of the emotive response of admiration.

The transcript of Engineer 1E supports the presence of customer admiration for SAM 1 with statements such as "*I do know [customer name] thinks very highly of her*", "*that some of them think she is absolutely wonderful*" and that "*[customer name] absolutely loves her and has the height of respect for her*". The engineers own emotive response reflects this admiration with statements such as "*she is probably the best salesperson*", "*she's streets ahead*", "*she's is great to be around*" and "*is an excellent salesperson*". These statements illustrate the presence of both warmth and competence perceptions in the emotive response. The SMR terminology was consistent with that

of the customers when the representative used the term "*assets*" to describe SAM 2 and SAM 4.

UOO	Statement	Comment Reflection
1A	*[SAM 1 had a big pair of boots to fill......and she was just able to slide in"*	Admiration for Achievement
1B	*"He may have been the icing but she is the cake. You get everything, the entire shooting gallery, there is a rock solid foundation there"*	Adoration- "cake" is an analogy for perceptive presence of both warm and competent dimensions
1B	*"Whereas SAM 1 is a multi-tasker"*	Admiration in the form of pride (distinct change in tone versus previous SAM)
1B	*"Superb, absolutely superb, couldn't find fault with her, couldn't find a fault"*	Admiration in the form of high praise
1B	*"I don't know how she actually does it to tell you the truth. I don't know how she does it"*	Admiration in the form of awe
1C	*"Completely spoiled"*	Admiration in the way the SAM makes the customer feel important
2A	*"So I actually gave her a very big job to do"*	Admiration for Achievement
2A	*"100% quality, absolutely fantastic"*	Admiration in the form of high praise
2B	*"I think it's quite refreshing"*	Admiration in respect of SAM approach
2B	*"I think she's an asset to you, you know, I genuinely thinks she's an asset to you. She'd be an asset to anyone, I think"*	Admiration in the form of sense of value
2B	*"She brought him a colouring book, you know what I mean"*	Admiration in the form of awe (customer is in awe that she was so thoughtful and didn't make him feel awkward because he had his child with him)
2D	*"Just sort of felt great"*	Admiration in the way the SAM makes the customer feel important
2D	*"She was flying"*	Admiration for Achievement
2D	*"She's done a hell of a lot for this company in the last two years"*	Admiration for Achievement
2D	*"I love dealing with her, I love talking to her"*	Adoration- again both competence and warmth dimensions -competence listed first
2D	*"Oh Wow, she brought, I nearly forgot that. She worked so hard on that"*	Admiration for Achievement
3A	*"Feel like we're an important customer"*	Admiration in the way the SAM makes the customer feel important
3B	*"Up there with the best of them"*	Admiration in the form of high praise
4B	*"She makes you feel like you're the only one"*	Admiration in the way the SAM makes the customer feel important
4B	*"I sound like I'm paid don't I"*	Admiration in the form of high praise

Table 11: Presence of Admiration

Observations in respect of "previous" (same organisation former) or "other" (other organisation) SAMs provided contrast to the perception of admiration with the detection of the alternative emotive customer responses of pity and contempt in some of the examples given by the customers. Where contempt was observed in respect of a "previous" SAM (1B and 1C), there was an absence of both the warmth and competence perception. Customer 1B describes the previous SAM as "*not a people*

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person" and "*all about the money*" and states that he did "*absolutely nothing*" to deal with her challenges. Customer 1C states that he "*didn't gel*" with this SAM and that he "*wasn't being dealt with*". The contempt felt towards this previous SAM was illuminated by Customer 1B in the statement "*there you go again Mr. [Previous SAM], I should have gone myself, the only time I saw his face was when he connected with me on Linked In*". Customer 1C openly refers to this former SAM as "*a blip*".

Customer 1B also gave an example of an "other" SAM that she described as "*a spooffer*" who "*didn't know his stuff*". This indicated an absence of sincerity and competence and the degree of contempt felt towards this SAM is illustrated in the following passage:

> *"[Other SAM] came in here and he didn't know his stuff, he bluffed his way through, you had to listen to his tales of woe about his family, his wife, his children, his this, his that, and while we all talk about our kids and what not he was just fobbing us off, because he didn't know, he didn't know his system and he certainly didn't know how to deal with customers"*

The emotive response of pity was observed in an example of another "other" SAM whose demeanour and presentation were described as unprofessional by Customer 1B. When probed about her behavioural response that followed the customer stated that she felt sorry for the "*poor crater*" and "*sure you never know what a person has going on at home*". The key point of relevance to the customer emotive proposition is that when the competence perception was missing the emotive response was pity and not admiration.

Customer Behavioural Responses

Active facilitation is one of four behavioural responses depicted in the Stereotype Content Model (Fiske *et al.*, 2006). Based on the meaning of active facilitation in this model customer active facilitation in context is an observed customer response that helps the salesperson over the customers own self-interest. This level of facilitation towards all SAM cases is evident and this supports Proposition 2: ***Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of active facilitation in consultative sales contexts***. There are some trends observed in respect of this active facilitation; customer willingness to

accommodate the SAM, engagement in public testaments of their satisfaction and a balanced perspective when something goes wrong. This is illustrated in Table 12.

The presence of active facilitation is triangulated by the engineer and SAM accounts. Engineers state that customers will often *"tip off"* (1E, 4E) the SAM about upcoming pieces of business. The SAM account reveals customer facilitation of; the SAM's schedule (SAM1), alternative delivery dates (SAM2), participation in marketing campaigns (SAM 3 and SAM 4) and facilitation of another SAM customer (SAM 4).

UOO	Statement	Comment Reflection
1A	*"I mightn't be exactly expressing the problem correctly"*	Balanced Perspective/Share Blame
1A	*"It wasn't a major item now…I don't want to misrepresent this"*	Balanced Perspective
1B	*"I don't want to be putting her out dragging her up here when she has a little boy and everything"*	Accommodation
IC	*"There are times you miss an e-mail who doesn't…I can only imagine how many e-mails she gets"*	Balanced Perspective
1C	*"No hand-up I should have told you"*	Balanced Perspective/Share Blame
2B	*"Look they did really well it wasn't really their fault"*	Balanced Perspective/Share Blame
3A	*"If it doesn't work for [Case Organisation] well then we may have to… work something differently"*	Accommodation
3B	*"Look I'm in [Customer Location] I'd like to meet up…you're going that grand….whereas a forceful person trying to sell you something you'd go I'll just say I'm busy"*	Accommodation
1B	*"Because I always had something positive to say"*	Public Testament
2A	*"Reference, whatever she needs, absolutely"*	Public Testament
2B	*"I'm doing this aren't I"*	Accommodation
3B	*"As I've said rather publically recently"*	Public Testament
3D	*"Any more surveys like that no problem"*	Accommodation

Table 12: Active Facilitation

It was observed in respect of the "other" SAM that elicited the emotive response of pity from Customer 1B that a behavioural response of active facilitation was also present in that she gave him a large order to help him out. The presence of active facilitation in this case indicates that the warmth dimension can trigger this type of facilitation as this SAM was not perceived by the customer to be competent. The context in this situation however was a commodity sale and the customer was explicit that this active facilitation would not have been afforded to this SAM in a solution sale. When asked if she would purchase a system or solution rather than a commodity

item from him her response was "*you must be joking me I'd show him the door*". This indicated that context played a significant role in the positive versus negative (passive harm) response where the competence perception was absent.

Passive facilitation is the alternative behavioural response proposed by the SCM in where there is a presence of both warmth and competence perceptions. Passive facilitation is an association for the purpose of one's own self-interest rather than the selfless helping that is found with active facilitation. The presence of this type of facilitation was observed in respect of the SAM cases and this supports Proposition 3: *Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of passive facilitation in consultative sales contexts*.

Passive facilitation is observed in the literature in examples where the customer was proactive and spent time to bring a new account manager up to speed (1A, 2A, 2D, 3D, 4B). The rationale for this was made explicit by customer 4B who states "*because what they are coming back with is going to be good for us in the end, so I mean you are obviously going to*". There is also a sense of association observed whereby the customer deems themselves part of the project team (1A, 1B, 3A). This was something that was also evident in the pilot and can be linked to the perception of competence. The Fiske *et al.* (2006) SCM model proposes that passive facilitation can exist where there is competence only and this would suggest that competence is an important factor in evoking the passive facilitation behavioural response.

While it may be the case that competence can evoke passive facilitation, an example given by customer 2B illuminates the importance of both warmth and competence perception. He described a telephony arrangement he has with a multi-national organisation. He stated that they tried to "*ram [another solution] down [his] throat*". While this global company has a reputation for being a professional organisation, the SAM sees this as a "*faceless*" organisation and where there is an alternative to purchase from a "*human*" (SAM 2) this is the choice he makes. This indicated that where there is a choice of alternative provider that the synergy of warmth and competence together is preferable to competence on its own for sales success.

Primacy of Competence Perception

The literature indicates that the primacy judgment in people perception during social interaction will be warmth, in keeping with the friend or foe evolutionary theory of

social cognition (Fiske *et al.*, 2006). The finding in this context however supports Proposition 4: ***In consultative sales contexts the primacy evaluation across the universal dimensions may move from warmth to competence*** and a number of observations are now presented in support of this proposition.

The first observation is that competence is the key preoccupation of the customer as they approached the first interaction with their new SAM.

> *"I didn't have a lot of concerns that, you know, things were going to go... I would have wondered that would [SAM 1] be of the same quality of service"- 1A*
>
> *"My first thought was genuine, gosh, she is a bit young, isn't she, I wonder will she be all right"?-2B*

The second observation is the position of competence before warmth in customer transcripts and descriptive passages. Customer 2B speaks of her core values. She mentions her core value of "*quality*" early on and she brings up her core value of "*trust*" towards the end. The perceptive combination of warmth and competence is also visible in a key passage in transcript 1B. In this passage the customer emphasises the competence perception first and then explains that the friendship developed later.

> *"I was passionate about [case organisation], they had a salesperson down there called [SAM Name], she was very, very strong……and she was hands on, totally motivated person, but even on a personal level I would have developed a friendship with her"-1B*

The third observation that supports the primacy of competence is the presence of explicit statements made by customers as to the primacy of the competence perception.

> *"When went to present recently having been shortlisted for a tender the comment was that was a very well written tender and that everyone who was involved after that- ultimately everyone who goes in starts off on a good foot it that first impression is good"-SMR*

The importance of the competence impression is triangulated in the SAM perspective by the statement *"professional is the most important impression to leave on your customer" (SAM 3).* This perspective is also recognised by the SMR.

> *"I'm all for being loyal to someone but hey ho-they were the weakest link"-2B*
>
> *"They get the job done. It is a bonus that you get on with them"-4B*

Sales Performance Outcomes

The data analysis revealed high levels of customer satisfaction and repeat business to be the sales performance outcomes experienced by SAM UOA. This customer satisfaction observed is centred on two aspects of performance, satisfaction with a specific outcome and general satisfaction with the overall experience. Some customer observations that depict this are provided in Table 13 to illustrate this point.

UOO	Statement	Comment Reflection
1A	*"The whole thing worked seamlessly"*	Specific Outcome
1A	*"I wanted to see that I was getting value for money at the end of the day and you know I was really satisfied"*	Specific Outcome
1A	*"Service has been of the same quality"*	Overall Experience
1A	*"It was a very positive experience I have to say"*	Specific Outcome
1A	*"Interactions....has been positive, it certainly has been with me"*	Overall Experience
1B	*"I'm very happy with SAM 1, very, very happy"*	Overall Experience
1B	*"We would always have something positive to say"*	Overall Experience
2A	*"So I think that's worked really well"*	Specific Outcome
2A	*"So I got a really good deal there, I was really happy with that*	Specific Outcome
2B	*"Absolutely amazing experience form a project perspective....unbelievable, 100% quality"*	Specific Outcome
2D	*"It been brilliant, like, because she's been really, really good. In fact probably too good,*	Overall Experience
2D	*"And it was brilliant"*	Specific Outcome
2F	*"100% positive experience"*	Overall Experience
3A	*"Have done nothing to let us down"*	Overall Experience
3B	*"Oh God, it absolutely did [meet needs]"*	Specific Outcome
3B	*"I am quite happy to say the cutover from one box to another was brilliant"*	Specific Outcome
3D	*"It was just positive"*	Overall Experience
4B	*"It's just perfect as it is"*	Overall Experience
4D	*"It was very effective"*	Specific Outcome

Table 13: Customer Satisfaction Outcomes

In keeping with the sustainability aim of this study there were many observations of repeat business. Some specific quotations have been extracted that illustrate the link between a high level of customer satisfaction with the overall experience and repeat business (Table 14). This sustainability approach is observed in the SMR transcript

where he states "*the intention (of perceived high performers) is not to sell it is to keep the customer long term*".

UOO	Statement
1B	*"I'm very happy with [SAM 1] and I hope to see out the few years I have left her with [Case Organisation*
1C	*"The way we are looked after with [Case Organisation] is the reason that when the support contract rolls around it's signed"*
2F	*"Definitely 100% positive experience from our point of view"* and *"definitely 100% I intend to continue working with her"*
3A	*"SAM 3 know we're not likely to jump ship too handy, you know, you've done nothing to, [Case Organisation] have done nothing to let us down"*
4B	*"They're (SAM 3 & 4) very good, which is probably why we extended the contract for another year, we had an option on it and I was happy, I was happy to go forward without any hesitation".* *"It's perfect just as it is, if I didn't have to go to tender I'd be happy enough to move on another couple of years"*

Table 14: Repeat Business Extracts

It was also observed in respect of sales performance outcomes that satisfactory outcomes to specific interactions led to the generation and reinforcement of customer competence perceptions at the individual SAM level (Table 15).

This supports Proposition 5: ***Performance outcomes will reinforce the customer perception of the salespersons performance on the competence dimension in future evaluations***

UOO	Statement	Reflection on Statement
1A	*"She knows our set-up pretty intimately here and has guided us to all the right people in [case organisation]*	This customer thought UOA to be "*fairly junior*" when she came in to the role based as she came from a sales support background. This perception on the competence dimension has clearly changes here based on "*positive outcomes*" he has experienced
2A	*"I started looking for laptops at that point just to sort of see what the experience was going to be"* *"The project was really to prove this relationship was worth continuing"*	Started with a low risk interaction to generate a perception of competence then moved on to a more substantial project that reinforced the judgement
3E	*"the solution is going to be right when it's sent to the customer and therefore it will give the customer confidence in the organisation"*	Engineer described the customer as having more confidence as an outcome when the solution is right for them
4E	*"I think the customer had more respect for us, we won more business out of it"*	Engineer describes the customer as having more respect as an outcome of the project interaction with the SAM

Table 15: Reinforcement of SAM Competence Perception

Research Question 2

The exploration of the research question *"how can an individual salesperson influence customer perceived performance at a behavioural level"* was structured around two key areas; the construction of cooperative relationships and the demonstration of a level of expertise to craft a solution best suited to the customer need. Drawn from the theoretical base of customer orientation, these core proponents of the concept inform the behavioural aspect of the research (Saxe and Weitz, 1982). Results are presented under these two themes and provide support for propositions six and seven.

Acts to Build Cooperative Relationships

It is observed that the SAM cases enjoy cooperative relationships with their customers. Statements from the customer perspective in Table 16 support the presence of respectful interaction, mutual understanding and balanced interchange that are at the core of cooperative relationships (Saxe and Weitz, 1982).

UOO	Statement	Comment Reflection
1B	*"I didn't want to be dragging her up here"*	Appreciation for SAM time
1B	*"Very much a two way street"*	Cooperation
2B	*"I'm pleased to say we've been a partner….do you hear me a partner….it feels like a partnership actually"*	Committed Relationship
2D	*"You could nearly blame me for holding it up"*	Balanced Interchange
2D	*"I didn't want to be annoying here either"*	Appreciation for SAM time
2D	*"I mean she did all that for me"*	Appreciation of SAM effort
2D	*"Work in hand"*	Cooperation
2F	*"There is going to be a few times when things slip through the cracks…..we have to be realistic about these things"*	Mutual Understanding
2F	*"She understands our business but we understand we can just lift the phone and have a frank discussion"*	Mutual Understanding
3A	*"I mean if it didn't work for [case organisation] it wouldn't be happening"*	Balanced Interchange
3D	*"Nice person to work with"*	Cooperation
4A	*"Mutual kind of decision to say 'yes look here's how we are going to proceed"*	Mutual Understanding
4A	*"An understanding of what us as an organisation are expecting and I think from our perspective it is an understanding of what [case organisation] are able to deliver"*	Mutual Understanding
4B	*"It was our fault that we didn't move forward"*	Balanced Interchange

Table 16: Cooperative Relationships

The influence of these cooperative relationships in the construction of customer warmth perceptions was identified in the customer transcripts where they link the development of warmth labels over time to relationship building with statements such as *"we developed a friendship"* (1B) and *"built a trusting relationship"* (4B). Findings in respect of communication style, approach to compromise, engagement in relational activity and level of interaction demonstrated by the SAM cases in the construction of these relationships provides further insight in to the construction of a positive perception of warmth and these are now presented in support of Proposition 6: ***Salespeople who act to build cooperative relationships generate a positive perception of warmth.***

Communication Style

Communication is a core element of cooperative relationships (Saxe and Weitz, 1982). In this context, the terms *open*, *direct* and *comfortable* are frequently observed in relation to the communication style of the SAM cases. The term *"open"* (2B, 2C, 3B, 4B) is observed to generate a perception of *"honesty"* reflective of the trustworthy warmth sub component. The term *"comfortable"* (1A, 2A, 3A, 3D, 4A, 4B 4D) is observed to generate to a perception of good natured with terms such as *"easy"*, *"relaxed"* and *"natural"* reflective of the easy-going aspect of this warmth dimension. The term *"direct"* (1A, 2A, 2A, 2F, 3B, 4D, 4E) is observed to aid the maintenance of the sincere perception through the management of expectations. SAM 4 is explicit in stating that clear communication is essential to the preservation of the relationship when she states *""there can't be any grey, because grey leads to the breakdown on the relationship"*. In the context of the passage this was interpreted to mean that if there is a lack of clarity, there is a risk expectations won't be met and this may result in a customer sense that they were not dealt with fairly, the connection to the sincerity label. The application of this behaviour to support the preservation of the sincerity perception is supported by Engineer 4E in the statement *"there is a level of clarity and communication in what they are getting"* and by Customer 2A who states that SAM 2 *"always drops her a line after something has been agreed"*.

Communication in this context is described as something that is ongoing and has developed, conducive with a relational rather than tactical nature. Customer 4A for example describes how communication between him and his SAM has *"matured"*

over time and Customer 2A describes how communication between her and her SAM became "*way less formal*" as the relationship developed, a sense echoed by the SAM perspective (SAM 2, 3 and 4). Customer 3B describes communication between him and his SAM as something that is "*constant*". Customers 1A and 2F both indicate the two-way nature of the communication style. Statements such as *"I can speak to her frankly"-2F* indicate the open and direct nature of the reciprocal communication style.

Finally, listening and questioning to listen are observed as core to the SAM communication style. Its predominance when the interaction is at the clarification of need stage links it to the well-intentioned warmth perception. This is illustrated by statements such as "*she takes the time to listen [to needs]*" (3B). SAMs 3 and 4 both describe asking the same question over and over again and listening to determine needs from wants. The SMR perspective notes the absence of listening was counter to performance in the cases of two SAMs he has encountered in the statements *"he never listed to the customer and tried to sell what he thought was best"* and "*she never listened to a thing in her life*".

Compromise

To build cooperative relationships the SAM cases engage in compromise. The memo on compromise sums up the analysts sense in the statement "they don't worry about the battle in winning the war" in respect of the SAM perspective. The presence of compromise is observed in the customer transcripts (Table 17) and terms such as "*accommodate*", "*pulls*", "*no problem*" and "*it's never a no*" indicate a warmth link as these were terms also considered in the warmth perception label friendly.

UOO	Statement
2A	*"She was able to accommodate that"* and *"she was quick to consider"*
2B	*"It was not problem that I wanted to go with [vendor solution] even though it wasn't [case organisation's] bag"*
2C	*"She pulls somebody from the job and sends them out"* (in context despite it not being covered by the SLA)
3A	*"She was reluctant but we convinced her so there was compromise there"*
4A	*"It's never a no…..it's yeah let's take that back…and see what we can do"*

Table 17: Compromise

Relational Activity

It is observed in the data that SAM cases endeavour to engage in activity for the purpose of building the relationship with the customer. SAM 2 for example invited a customer (2A) and her child to join her on a day out to the zoo after a project they

were working on for some time had closed. The customer stated that she had had mentioned early in the interaction that she had never been, that she is not the type to "*take a carrot*" from companies that offer incentives but that this was a more thoughtful gesture and that she was really looking forward the opportunity to spend time with SAM 2 on a more "*personal, social level*". Customer 2B also described a situation when he had to bring his child to an important project meeting and SAM 2 arrived with a colouring book. He stated that this gesture made him feel like it "*wasn't a problem*". Customer 2D stated he can relate more to SAM 2 than her predecessor because "*she is a family woman and stuff as well*". SAM 2 makes explicit the connection between her behaviour and relationship building.

> "*Where I have good relationships I know a little about their personal life….how many children they have or you know if they are married*".

SAM 4 is also observed to engage in relational activity and a positive intention perception is indicated as an outcome. Customer 4A described SAM 4 as naturally finding "*common ground, common interests*" something he perceived meant SAM 4 was "*thinking about your [his] organisation and your [his] challenges*". Engineer 4E illuminated the relational behaviour of SAM 4 further when he described little gestures such as "*bringing strawberries to the [customer] meeting*" and how he has observed her to always stay for "*a chat and a laugh and a joke with the customer*" after the meeting. Engineer 4E explicitly states this behaviour has allowed SAM 4 to "*build up a good rapport*" with her customers and that she is "*capable of being friends*" a link yet again to the warmth sub component of friendly. Engineer 3E mentions that SAM 3 bought him a token gift at Christmas and while it wasn't called for it was much appreciated and he describes this as being in her nature, an association with the good natured perception.

Level of Interaction

SAMs are observed to tailor their level of interaction to the preferences of their customer (2C) and their needs at a given time. All SAMs stated as an answer to the question how often do they interact with their customer, "*It depends*". Customers reported an increased level of interaction when there was something of high importance in terms of an issue or new solution but a reduced level of interaction at

other times. This is triangulated by the SAM account. The customer account indicates that they consider this appropriate (1C, 4B) and consistently note that the SAM still ensures "*regular account review meetings*" (3A, 3B, 4A) take place and that the SAM will "*check in*" (2B, 2C, 3B, 3E) from time to time during quieter periods. This is supported by the SMR perspective that those perceived as successful use every "*touch point*" as a reason to "*check in*" with the customer, even a "*toner cartridge*". The use of more transactional items as a reason to "*touch base*" with the customer is also noted by SAM 3. This is perceived by the customer as "*making sure everything is ok*" (1C, 2F, 3B) and indicates that the perception generated by this behaviour is well-intentioned. SAM cases are observed to interact at a face to face level to "*put a face to the name*" (1A, 2A, 3D), or "*if they are in the area*" (2D, 3B 3D, 1E). SAM 2 is explicit here that "*popping in for a chat makes the relationship that little bit tighter*". The customer perception of these pop-ins is illustrated by 3B when he states he is happy to meet up as SAM 3 is "*not one of those account managers trying to sell you something*".

Demonstration of a Level of Expertise

In context the customer depends on the SAM to efficiently resolve issues and effectively deliver solutions to meet their needs. The perception of the SAM UOA is one of competence and they are specifically considered capable, efficient and competent. The expertise demonstrated by the SAM through the actions taken in the resolution of issues and delivery of solutions for customers is found to be conducive to the generation and reinforcement of capable, efficient and competent perceptions and these are now presented in support of Proposition 7: ***Salespeople who act to demonstrate a level of expertise generate a positive perception of competence.***

It was found that the behaviour of the SAM cases in the delivery of resolutions for their customers supported the perception of the SAM as capable. Key to this is the long term fix approach taken to ensure the issue "*doesn't happen again*"-1C. They don't just work to resolve the surface level issue, they collaborate with others to establish a "*root cause*"- (SAM 4) to complex problems in order to provide customers with "*answers*" (2A, 2C, 2D, 4B). They "*persevere*" until they get to the "*end*" of the issue and deliver solutions that "*fix*" or "*sort*" the problem (2D, 2F, 3A, 4B). Customer 4B summarises this as "*getting solutions and answers*". To provide these answers and

solutions the SAM cases collaborate with others, something Customer 4A states is a "*good thing*". Customer 4A describes how SAM 4 doesn't try to resolve the issue on her own but "*gets the relevant people involved*" and will "*bring the relevant experience with her*". SAM 1 also refers to this collaborative approach and states that collaboration is the key "*to get to the nub of customer concerns*" and to her ability to confidently explain the situation to the customer. There is a sense that customers are "*reassured*" (1B, 2D) that their issue will "*get sorted*" (1C, 3B, 4A, 4B) and that they are in "*capable hands*" (1B, 2A) as a result and this is consistent across all four SAM cases.

It was also observed that SAM behaviour was consistent with the portrayal of a professional impression, a facet of the capable perception present in the customer perception. They are observed to present professionally in terms of appearance, timekeeping and the delivery of information (Table 18).

UOO	Statement
1E	"*She's always dressed well.....she tried to give the best impression she can*"
2D	"*She's very well presented, well spoken*"
2D	"*You don't see her tired, wrecked, hair dishevelled or anything like that*"
3E	"*She had her [case organisation] brochure with her and if I was a customer receiving [SAM 3] I would have been very happy to receive her*"
3E	"*She took the meeting seriously from the get go*"
3E	"*She was very well turned out on a personal level*"
4E	"*She did well in her presentation*", "*she had all the slides and printouts prepared*"

Table 18: Professional Presentation Behaviours

SAM cases in the delivery of resolutions for their customers generate a perception of efficiency through their level of responsiveness. The term "responds" is used frequently throughout the customer transcripts when they describe the SAM behavioural reaction to their requests. The response is reported to be timely (2C, 2F, 3A, 3B, 3D, 4B) and in keeping with the urgency of the issue logged (1A, 2C, 2F, 4B).Customers also report that it is easy to get in contact with the SAM when they have an issue (2C, 2D, 3B). Proactive is another key term used by customers in the illumination of the efficiency perception and the behaviours that appear with this term in the text include; chases others continuously (2B, 3B, 4A), takes on ownership immediately (2C) and communicates updates before the customer looks for it (2A, 3B, 4A). The demonstration of a proactive response to requests is also supported by the engineer perspective with the term "*proactive*" (1E, 3E, 4E) observed alongside behavioural phrases such as "*straight on it*" and "*hop on*" (1E).

The responsive approach taken to the resolution of customer issues is illustrated in the SAM perspective. This is best described by SAM 1 in the passage:

> "*As soon as a customer emails me, if I can't quote them back straight away, I'll e-mail them back to say 'look, I need to try find this out, I'll come back to you'. I think going back to them quick is the main thing*"

SAM 2 states that she'd *"get back to them in an appropriate length of time",* going on to say that she thinks *"you need to react to things as quickly as possible".* The approach of SAM 3 is consistent and she makes explicit the link to the generation of an efficiency perception when she states that she *"does come back to them as quickly as possible. I am very efficient".* SAM 3 puts this down to experience from her previous role as a commodity salesperson, a role that was highly process driven. This view is shared by the SMR who states that such experience *"creates"* a SAM culture of *"discipline"* that aids efficient behaviour. SAM 4 describes how she likes to *"assure the customer"* that she is working on their issue and will come back to them. This makes explicit the SAMs intention to influence the competence judgement of efficiency through her behaviour.

Finally, it was found that the behaviour of SAM cases in the delivery of solutions for their customers supported the perception of the SAM as competent. At a behavioural level SAM's demonstrate their ability to understand the customer problem through *"clear"* (1A, 2A, 3A, 4D, 1E, 4E) articulation of the problem and the presentation of proposals that meet these needs (Table 19).

UOO	Statement
2C	*"She understood the problem and she always understands the urgency"*
2D	*"And you know she understood……even from a technical point of view….she totally gets what I want"*
2F	*"Even though she is not technical herself she had a good grasp of what we needed"….."she works within that"….."she understands our business"*
3B	*"She was communicating to them what I needed"*
4A	*"She has a good grasp of what the issue is"*
4B	*"She understood because we are a public sector organisation…….a good read of us"….."gets a sense of why I am worried and what I want done"*
4D	*"I don't think I could ever say she misunderstood"* and *"I think she understood very fully our requirements and constraints"*
4E	*"good understanding of needs….during the meeting"*

Table 19: Demonstrates Understanding of Needs

The SAM cases in the generation of the competence perception also demonstrate knowledge of solutions and expert resources to meet these needs (Table 20).

UOO	Statement	Comment Reflection
1A	*"She put me in touch with somebody else in your organisation who gave me a really good solution to something that shouldn't have been a problem to me but was from a particular supplier we were dealing with at the time"* and *"So she brought up [technical pre-sales engineer] and introduced him to me"*	Knowledge of Resources
1C	*"She will normally bring [engineer name], he is our preferred engineer"*	Knowledge of Resources
2C	*"She introduced me to the engineers that would be looking after that"* and *"So getting me in contact with [case organisation] engineers"* and *"I needed to speak to the right people involved and [SAM 2] was able to accommodate that for us"* and *"I believe she is able to get us in contact with the right people at the right time"*	Knowledge of Resources
3D	*"[SAM 3] heard what I said and brought in a resource that I connected with very well"*	Knowledge of Resources
1A	*"It was a telephone solutions that I didn't even know [case organisation] were involved in"* And *"For [Vendor Solution] she introduced me to stuff like that"*	Knowledge of Solutions
2A	Customer states they *"leveraged"* SAM to understand *"what best trends, options and solutions were"*	Knowledge of Solutions
2F	*"[SAM 2]pointed me on the direction…..and she brought us a solution such as [Vendor Solution]"*	Knowledge of Solutions
3A	*"She woke us up to"* (Comment in respect of Managed Print Services)	Knowledge of Solutions
3B	*"She knows her core portfolio but also knows what solutions the organisation can't or doesn't offer"*	Knowledge of Solutions
4B	*"Where she can potentially see something down the road that might be a solution we haven't thought of"*	Knowledge of Solutions
4D	*"very good at coming up with options and delivering an improved solution"*	Knowledge of Solutions

Table 20: Demonstration of Solution and Resource Knowledge

In the demonstration of resource knowledge the SAM introduces the customer to the "*right*" technical resources pertinent to their needs. The emphasis on "right" is something triangulated by SAM 2 in the following passage:

> *"Depending on the customer requirements, there are going to be engineers that would have the skillsets that are more relevant to their requirements. So I suppose I am doing this for a while, I usually have an idea which engineer might be suited and then some customers have a preference for certain engineers……so you might request a specific engineer…..if something needs to be done quickly and you don't have the right resource then you need to escalate internally"*

The SAM demonstrates a level of expertise with respect to solution knowledge through the presentation of "*options*" (1C, 2F, 3B, 4D) to their customers. The perception of competence in terms of solution knowledge is reinforced when solutions proposed actually meet the needs of the customer (4D) and they are sold the "*right fit*" (2B). The perception of competence with respect to portfolio knowledge is also demonstrated when they state "*it's not our business if it's not*", something that both Customer 4A and the SMR indicate preserves the perception of competence.

The SAM perspective illuminates their demonstration of knowledge around solutions. SAM 2 "*goes with the full portfolio in mind*" and this reflects the SMR perspective that those perceived as successful do not suffer from solution "*bias*". The SAM perspective describes how they "*tailor*" (SAM 4) solutions with a focus on features and functionality that meet the customer need. The SAM perspective highlights that they are "*not technical*" (SAM 1-4) with the caveat that they "*still need to understand what [they] are selling*" (SAM 2). This surface level knowledge is acquired through research (SAM 3), training and accreditations (SAM 2) and learning "*as you go*" (SAM1). Engineer 1E described the latter approach when he states, "*she will always stop me in the corridor and go 'such a customer asked me this'…so to be fair she is learning all the time*". The lack of "*technical*" skillset aids a positive competence perception due to the perceived absence of "*bias*". Customer 2B illuminates this in the passage:

> *"[Previous SAM] thought he was technical, and he would come in here and say 'that will do it for you', only for me to find out mid-installation from the technical guys that it will only partly do what I need it to……no it reassures me that [current SAM] brings the technical guys in from the start that way I am confident that what I am being sold will meet my needs"*

Finally, the competence perception is influenced by the seamless delivery of solutions. The SMR describes those perceived to be successful as applying a *"stitch in time saves nine"* approach towards the preservation of a competence perception and this perspective is triangulated across accounts as illustrated by statements in Table 21.

UOO	Statement
1A	*"Her attention to detail is good"* and *"I was really satisfied when I made an examination of what she was talking about"*
1A	*"She coordinated things well and made sure everyone, you know, hit their, hit their spots, did things when they should do things so that the eventual implementation didn't have any snags because someone hadn't done something they should have in time"*
SAM1	*"When you are putting the projects together. Like you have to be really detailed in all the information.....one small thing can mess up an entire project"*
SAM 1	*"Then I came back and put it kind of together"*
1E	*"She's very good at, her admin side of stuff"*
1B	*"She had gone through it and she had ticked off what we didn't have and she had reassessed the whole situation and a new contract back to me"*
2C	*"She'll put all the paperwork together and do her bits and pieces that need to be, the boxes that need to be ticked off"*
2C	*"Came back with more detailed specs of what had to happen, and then when we had a meeting that went through all those steps and figured out whose responsibility it was and where the information lay and how we would get access to it"* (described the role of SAM in relation to this passage as a facilitator)
2C	*"She pulled all the paperwork together and do her bits and pieces that needs to be, boxes that needed to be ticked off about it"*
2D	*"put in timescales"*, *"involved in every aspect"*, basically became project manager"*, *"single point of contact"*, *"organising* (logistics-engineers and parts mentioned*) and *"contingency plan"*(customer description of role of SAM in solution delivery)
SAM 2	*"Having changes reviewed properly* {technical changes by the engineer} and *"taking good notes at the meeting"* (gives example of being able to go back on an e-mail and pin point something to resolve a challenge with a customer expectation on a project)
SAM 2	*"the project is going to be much smoother if from the outset you manage it correctly"* (describes- getting credit approval early on and checking future resource availability)
3A	*"We wrote down each printer"* and *"She actually did her homework"*
3B	*"Takes notes and basically comes back on each point"* *"She'll have her agenda"*
3D	*"Facilitated the migration"* -*"made sure the relevant people came back to me"*, *"dealt with it and managed it"*
3E	*"taking notes all the time"*
SAM 3	*"A lot of information to keep the account up to date"*
SAM 3	*"We used to set agendas and we'd literally go through it issue by issue"*
4A	*"Point person"* (on project) and *"facilitating and guiding the project"* *"Her follow up is excellent, you always get a mail back confirming what was discussed, what was going to happen and it always happens"*
4D	*"{minutes} were very good"*
4E	*"Accuracy around quotes and tender response"* and *"doing homework"* and *"first time right approach"*
SAM 4	*"Being able to record information accurately"*, *"Making sure you are passing on the right details"*(explains the consequence incorrect information has on the delivery of the solution) *"An eye for detail"* , *"No grey areas"* (notes this helps protect the relationship from misaligned expectations)
SAM 4	*"So to get the project over the line I took on the project management part"*, *"going between each vendor and making sure that all the times were right and that the step by step plan was followed"*, *"there was a whole plan in place, the whole company nearly had to come together to install it"*

Table 21: Stitch in Time Saves Nine Approach

This approach manifests itself in behaviours that are reminiscent of project management with terms such as plan, organise, coordinate, facilitate and manage dominant across transcripts and the term *project manage* explicitly used. The importance of accuracy is stressed and documentation activity such as note-taking, agendas, minutes and follow-up mails are consistently proffered to support the achievement of this. Engineer 1E states that *"I know well enough that if I ring her she has made a note of it"* going on to state *"she always has her notebook with her".* Engineer 1E also notes that not all SAM's are as organised and that those who aren't often *"find themselves on the back foot with the customer"* to again link demonstration with preservation of the competence perception.

Research Question 3

Emotional competencies are thought to be important as they serve to transmit an individual's intentions to the perceiver influencing their behavioural reaction (Keltner and Haidt, 2001; Gohm, 2003) and the theory on which the Emotional Quotient is based (Bar On 1997) is selected as the lens to explore the question *"how can an individual salesperson influence customer perceived performance at a psychological level".* Findings to support propositions 8-11 are now presented as an outcome of that exploration.

Generating Perceptions of Warmth

The outlook described by the SAM cases in this study is optimistic. In keeping with the Bar On (1997) definition of optimism they have a positive attitude to work and life even in the face of adversity. They also portray a sense of happiness or contentment. This is akin to the emotional state of happiness proffered by Bar On (1997) in the general mood realm of the EQ proposition. The presence of such optimism and contentment among SAM cases is presented in Table 22.

The SMR perspective also notes that SAMs perceived to be successful possess a level of optimism when he states *"they don't have any preconceived ideas before any event and I think that's optimistic".*

UOO	Statement	Comment Reflection
SAM 1	*"If something bad happens you get it fixed"*	Positive in Face of Adversity
SAM 1	*"I like working, I enjoy working, and I enjoy the company.*	Happiness/Contentment
SAM 2	*"I suppose I am always positive"*	General Optimism
SAM 2	*"So I suppose my outlook is, is positive. I go in with that view. I put as much as I possibly can in to it and hope for the best we will win the business"*	Optimistic of a Positive Outcome
SAM 3	*"Yeah I was gutted, but I'd said to [customer] that I'd still love to do transactional bit with him and if there's anything outside the scope of the contract*	Optimistic in Face of Adversity
SAM 3	*"Confident that I am going to win it"*	Optimistic of a Positive Outcome
SAM 3	*"Have a stab at it"*	Positive Approach
SAM 4	*"You have to want it to work"*	General Optimism

Table 22: General Mood - SAM Perspective

The customer transcripts identify how this emotional competence translates in to the sales interaction (Table 23). The customer sense of SAM optimism and happiness is accompanied by a customer perception of the SAM as warm and terms associated with the warmth perception such as *"bubbly"* and *"cheery"* are observed in tangent. A sense of emotional contagion was also detected in the engineer perspective with Engineer 1E stating that she would *"put anyone in a good mood"*. The customer perspective also reflects an emotive response of positive mood supported by statements such as *"It was a very positive experience"* (1A), *"I was a happy camper"* (2B), *"100% positive experience"* (2F), *and "It was just positive"* (3D) used to illustrate how the customer feels in the sales interaction.

UOO	Statement	Comment Reflection
1B	*"She seems happy"*	Happy
2B	*"All very positive"*	Optimistic
3A	*"She is bubbly, happy you know"*	Happy
3A	*"She never comes in here depressed"*	Optimism/Positive
3D	*"A bubbly, cheery type of person across the board"*	Happy/Positive
3D	*"Very Positive"*	General Optimism
4A	*"Very Positive"*	General Optimism
4A	*"Just kind of a happy, positive kind of person"*	Happy/Optimism

Table 23: General Mood in Sales Interaction

The SAM cases in this study are also observed to possess interpersonal competencies at the psychological level. This is characterised by empathy, social responsibility and interpersonal skills. Interpersonal skills are described by Bar On (1997) as social skills necessary to maintain mutually satisfying relationships and are therefore important for the formation of cooperative relationships towards the generation of a warmth

perception. The customer account supports the presence of interpersonal skills among the SAM cases illustrated by statements such as "*she is easy to talk to*" (1A), *a fantastic communicator* (2A), *willing to listen, able to listen* (2C) and *a good communicator* (3A, 4A). The engineer perspective supports the presence of such ability with statements such as "*she will lead a conversation, sit back and listen when she has to, she would use body language and she knows when to leave the customer speak*" (1E), "*she is not afraid of small talk*" (3E) and "*she is attentive to customers, she knows when to speak and when not to speak during and interaction, she speaks when required and she lets everyone have their say....she's not demanding*" (4E). This SMR description of SAMs perceived to be high performers is aligned to this and he states "*they are good communicators who allow the customer to talk, they listen to the customer*".

Insight in to the formation of the customer warmth perception is gleaned from the SAM account as they describe how they use these interpersonal skills in their day to day role (Table 24). Interpersonal ability is used to engage in communication about the customer's needs. This interpersonal orientation also aids a perception of sincerity as they engage in relational activity that is driven by a "*genuine interest in finding out about others*" (SAM 1).

UOO	Interpersonal Skill Observations SAM Perspective
SAM 1	Describes how she enjoys meeting with people and has a genuine interest in finding out about them. She states that listening to customers problems helps her to portray to her customer that she is going to do the best for them
SAM 2	Describes how it is important to be a good listener and describes how she engages in attentive listening so that she can accurately understand the needs of the customer
SAM 3	Emphasises the importance of good communication skills and being a good listener in order to truly understand the needs of the customer
SAM 4	States listening is most important as if you keep talking they won't ask questions and that is not conducive to understanding how you can help them

Table 24: Interpersonal Skills Observations SAM Perspective

While the SAM uses their interpersonal skills to hear the customer need and to communicate they understand the need, empathy facilitates true understanding of that need (Table 25). Engineer 1E recognised SAM empathy when he was working with SAM 1. In particular he noted her comment "*I know you are under pressure but the customer is under pressure too*".

UOO	Presence of Empathy- SAM Perspective
SAM 1	*"I don't blame them for being mad, we didn't do this, we didn't do that....I see where they are coming from"*
SAM 2	*"Usually people are so busy…I don't think it is appropriate as it could be a really inappropriate time"* *"They usually have somebody breathing down their neck on it"*
SAM 3	*"I completely understood when he did get a little bit frustrated because he was trying to plan for his role as well as trying to alert his staff exactly like we would do here"*
SAM 4	*"So if that server is down it means [specific example to customer industry that may identify customer] regardless of if they are paid of not. So they lose thousands….so [customer name] was only doing his job"*

Table 25: Observations of Empathy Functioning- SAM Perspective

The customers also detect this empathy in their interactions with the SAM cases. This is illustrated by the statements in Table 26. This feeling supports the facilitation of the customer perception in terms of a positive warmth perception.

UOO	Empathy Sensed by Customer
1A	*"She perfectly understood"*
1C	*"She understands where we are at"*
2A	*"She was very understanding"*
2B	*"Willing to listen to our concerns….and took them on-board I think"*
2D	*"She would have understood my frustration"*
2D	*"Very compassionate, totally empathetic"*
3B	*"In always found her to be an empathetic person"*
3B	*"She is a very empathetic person"*
4B	*"She understands and gets a sense of why I am worried"*

Table 26: Empathy Sensed by Customer

In addition to competencies in respect to empathetic understanding and the ability to effectively convey this understanding, the presence of a social responsibility orientation allows the SAM to direct action to meet needs with due regard to the common good. All SAM cases state their orientation is "*to meet needs of customer*" and to deliver a "*best fit*" solution. The engineer perspective supports this orientation with statements such as "*what's the best thing I should sell rather than what can I sell?*" and "*definitely to make the sale…. but not at any cost*". The SMR perspective echoes the "*at any cost*" when he states making the customer happy is not at the cost of "*everything else around them falling down*" in terms of SAMs perceived to be successful. SAM 4 makes explicit the role social responsibility plays in the generation of a warmth perspective when she states "*it will ruin your relationship*", if you sell something that isn't the right fit or that you can't deliver. The perspective of Customer 4A best illuminates the role of effective social functioning in the generation of a well-intentioned warmth perception when he states:

> *"I get a sense with [SAM 4] that she is always going back to their vendors looking for value for money for us and emphasising that we are a charity"*

The ability to truly understand customer need, to communicate effectively about this need and to want to meet these needs within the parameters of what is possible describes how customer interpersonal skills can influence the customer perception of the SAM as warm. **Proposition 8:** *Emotional and Social competencies influence a positive warmth perception through the realms of interpersonal ability and general mood* is therefore supported.

Maintenance of the Warmth Perception

The dependency and complexity evident in the contextual findings are conducive with an environment type that has the propensity to generate adverse situations. Despite customer acknowledgment of such adverse situations their perception of the SAM is that they are good natured and well-intentioned, underpinned by a sense that they are calm and patient (*customer perception findings*). The SAM cases also report adverse situations but do not report feelings of stress. The description of these situations and how they deal with them sheds light as to the psychological factors that influence the maintenance of the warmth perception in such circumstances.

The customer perspective reports a consistent approach to dealing with adverse situations as illustrated by statements such as: *"she kept her cool all the time and she was always coming back to me with solutions and options"*-2F and *someone that is level-headed when dealing with problems…..look where do we go from here, what can we do*-4A. The essence of this finding is illustrated in the following passage from the SMR perspective.

> *"Sales Account Managers who are on top of their game should not be stressed. SAM2 and SAM4 for example would make light work of something that is pear shaped, they dissect the problem, take apart the problem and there is five small problems, they adapt within the parameters that they can, they are out of the box thinkers and solution finders"*

It is found that a dynamic exists between the stress tolerance aspect of the stress management realm, the problem solving component of the adaptability realm and the optimism component of the general mood realm (ST/PS/OP Dynamic) and that this

dynamic assists an emotive SAM response to adverse situations that is conducive to the preservation of the positive warmth perception. The SAM cases possess a high stress tolerance level and this is aided by their solution focused, forward moving approach to problems. This is supported by a summary of evidence from the SAM perspective in Table 27.

UOO	Stress Management- SAM Perspective
SAM 1	SAM 1 described a situation where she realised close to a deadline that a volume of work she had prepared for a framework response hadn't saved. She stated that she *stayed calm* and just *put down her head to work at getting it done*. In getting it done she weighed up her options prioritising meeting the mandatory requirements. She went on to explain that when something bad happens at work she just thinks "*it is not the end of the world you'll get it fixed*". She states "*she doesn't let it bog her down it is not the end of the world*"
SAM 2	SAM 2 described a recent incident where the wrong processors were delivered for a key customer for a major project that the customer organisation was relying on, to make matters worse the correct processors were now in constraint. She described the process of escalation she followed and the numerous avenues that she took to source the next quickest lead time and she described working with the engineer to generate options in the interim to keep the customer operational. She stated that she didn't panic as "*getting her knickers in a twist was not going to get the processors to the customer any faster*".
SAM 3	SAM 3 described the dynamic environment in which she works and gives the example that "*you could be having a great day, and you could get the worst call where you customer, their whole site is down and you don't know what to do*". She described her approach to the situation and states "*you have to literally, take each day as it comes and each call as it comes and each scenario......not to panic, to say, 'Okay', it's not the end of the world look at it practically and say 'What's happened here? How do I resolve this and what's the end goal from this point on*"
SAM 4	SAM 4 describes a similar approach when something goes wrong and states she will "*step back and look at it and look at the different scenarios or the different ways that you can deal with it, instead of rushing in and committing to something that, one you might not be able to commit, or that, two is going to cost you the full amount of the solution*"

Table 27: Stress Management SAM Perspective

In addition to the dynamic between stress tolerance, problem solving and optimism, the individual adaptability components of flexibility and reality testing influence the maintenance of the warmth perception. The SAM's willingness and ability to adapt aids the maintenance of the perception that the SAM is well-intentioned. There is significant support for the presence of SAM flexibility among the SAM cases. This is observed in the customer and engineer transcripts in respect of providing solution options to meet customer preferences (1A, 2A, 2F, 3A, 4A, 4B, 1E, 4E), logistical accommodation to suit customer (2B, 3D), contract amendments to meet changing needs (3B, 4A) and vendor returns where a solution doesn't meet a need (4A). The common theme among these instances is that the flexibility is directed towards the customer need and therefore is an influencer of the well-intentioned perception. The

SAM's sense of reality testing helps them to manage customer expectations so that they do not over-commit and this helps to maintain the perception of sincerity/honesty. The SAM's sense of reality testing ensures they don't over commit in terms of what is really feasible in the reality of their context. This is supported by the SMR perspective when he states that SAMs perceived to be successful *"adapt within the parameters"*, *"say it's not our business if it's not"* and *"are not looking to make empty promises"*. This sense of reality is also observed in the SAM perspective as illustrated in Table 28.

UOA	Reality Testing and Maintenance of Warmth- SAM Perspective
SAM 2	*"There was a new business customer who I was really keen to get in with.....and there was a tender that they e-mailed us directly to work on. I got pre-sales time approved and I thought it looked like a really nice project. When the engineer sat down with it, there was one element that he was not confident on, none of the engineers were....and because of that I decided not to spend the time doing it because if we were going to get caught it just wouldn't be worth it"*
SAM 3	*There is no point in putting a golden nugget in front of someone and them saying 'oh, I'd love that' and then you say 'actually that's 100 grand' and they have 10 grand. So there's zero point in that. You always have to managed their expectations as well, I think, and that's where.....You have to manage your own expectations as well"*
SAM 4	*"Instead of rushing in and committing to something that one you might not be able to commit"*

Table 28: Reality Testing and the Maintenance of Warmth- The SAM Perspective

The customer perspective presented in Table 29 illustrates that this helps to maintain the perception of sincerity and trustworthiness within the warmth dimension.

UOA	Reality Testing and Maintenance of Warmth- Customer Perspective
1C	*"She doesn't promise the sun, the moon and the stars"*
1C	*"She won't say don't be worrying about it, it will be grand and then it isn't"*
3B	*"Look that can't be done in two weeks, can we do it next month, she'll say straight up"*
4A	*"Not to overcommit, not to overcommit us"*

Table 29: Reality Testing and the Maintenance of Warmth- The Customer Perspective

Proposition 9: ***Emotional and social competencies influence the maintenance of a positive warmth perception through the realms of stress management and adaptability*** is supported however, the general mood realm is found to assist in addition through a dynamic with the stress tolerance and problem solving components of the stress management realm.

Balanced Perceptions of Warmth and Competence

Emotional and social competence was found to aid the generation and maintenance of a customer warmth perception (P8 and P9), however it was also found in context that a competence perception in tangent to a warmth perception is necessary for optimal sales success (P2 and P3). The person perception literature identifies the risk that an

inverse perception of competence can form where a perception of high warmth exists (Cuddy *et al.*, 2011). It is therefore necessary for a salesperson in the context of this study to manage a balance in customer perception between warmth and competence effectively if they are to be successful. Emotional and social competence is found to aid the consultative salesperson to achieve such balance in three ways and these findings are now presented.

Firstly, SAM cases were found to effectively use their reality testing competence to balance the customer perception generated by their optimistic disposition to be one of both warmth and competence. The SMR perspective highlighted the risk attached to the perceived optimistic disposition found to contribute to the generation of the warmth perspective and described a scenario where the presence of a perceived high level of optimism resulted in a perception that the individual lacked competence as a result in the case of a former SAM.

> *"He was optimistic but lacked a sense of reality, chasing pipe dreams, a dreamer, a lack of commercial awareness, a lack of a true sense of knowing the customer, an inflated perception"*

While SAM cases considered successful were also found to be optimistic they did not generate a perception that they were "*dreamers*" lacking on the competence dimension in the same way that the SAM considered unsuccessful did. It was found that the presence of reality testing in those perceived to be high performers balanced this. In support of this finding key statements that illustrate the role of reality testing in the development of a perspective that is balanced is presented in Table 30.

UOO	Reality Testing and Balanced Perceptions- Not a Dreamer
1B	*"I am reassured by the fact that she is grounded, positive and enthusiastic yes, but realistic about what can and can't be done"*
2C	*"She realises she is doing it in the hope that [case organisation] will get the business from us not the assumption they will"*
3A	*"Put it this way if we said we wanted it for free the answer is no…we are realistic about things like that and it is reassuring that despite wanting to keep us happy she is too"*
4A	*"She is always positive that a solution can be found, I can be demanding in terms of what I want and she works with that, but she doesn't promise me the impossible and that gives me a level of confidence"*

Table 30: Reality Testing and Balanced Perceptions

Secondly, SAM cases are found to manage a balance between warmth and competence in customer perception when they use flexibility in their dealings with customers. They are found to do this by asserting a level of independent thought in negotiations and

thus avoid the perception that the flexibility level shown is at the cost of the correct solution being sold. Reports of this assertion of independent thought in negotiations to support this finding are presented in Table 31.

UOO	Flexibility/Independence/Assertiveness Dynamic
1A	*"I can talk to her about changes and I could say to her I think this is better than that other one and I'll tell you why and she would accept, if she accepted what I was saying"*
1E	*{will support the customer decision}"Having presented a case"*
1E	*"She'll just give them an honest opinion"*
3A	*"to convince her and she was not giving in easily"*
4E	*"There was a bit of hard-balling but she stood her ground on it"*

Table 31: Flexibility/Independence/Assertiveness Dynamic

Finally, SAM cases are found to use emotional and social competence to manage the balance between warmth and competence in customer perception. This management is supported by a combination of interpersonal skill that helps them to pick up on the social nuances in the context, intrapersonal skill that allows them to be aware of and understand their personal impact on the interaction and an ability to adapt that enables them to alter their style accordingly to manage the perceptions that result from the interaction. Examples of this flexibility, assertiveness and independence dynamic are presented in Table 32 to support this finding.

UOO	Interpersonal Skills/Emotional Self-Awareness/Flexibility Dynamic
SAM 1	*"You know the customers you can have the craic with but you also pick up on the ones particularly when the interaction is new that don't appreciate that and you have to make sure to tone it down and get straight to business"*
1E	*"She knows when to reign herself in and to let the customer speak"*
1E	*"She could try to sell them something extra.....but then she holds back......and she might drop it in after they have agreed to buy the other"*
2A	*"I'm sure she was frustrated, I never felt the frustration once"(Customer perspective) "I knew the [vendor] firewall was a better option but I sensed she was unsure and it was a blocker for her, I felt frustrated as it was dragging on so long, but it was such a large part of the overall solution that I went with the alternative and so was far more comfortable with that (SAM perspective)*
SAM 3	*"I am always conscious that I am selling expensive solutions and you often get a sense particularly in early interactions that they are thinking who is this young girl coming in here, so I make sure in those early interactions that I tone down the cheery [SAM name] and I make sure I am extra professional......professional is the most importance impression to leave "*
SAM 3	*"I know the customers I can have a laugh and a joke with but I know the situations where it wouldn't be appreciated"*
SAM 4	*"I was a little more to point that I normally would be, but I felt it was needed, whether right or wrong, I didn't want to appear weak, I felt he was chancing his arm and so I took this approach"*

Table 32: Interpersonal Skills/Emotional Self-Awareness/Flexibility Dynamic

The findings supports **Proposition 10:** *Emotional and Social Competencies influence a balance in customer perception between the warmth and competence perception through interpersonal, intrapersonal and adaptability ability.*

Reinforcement of Competence Perception

At the behavioural level it was found that the demonstration of competence by a SAM served to influence the customer perception of their competence (P5). The SAM's ability to resolve issues and to seamlessly deliver solutions to meet customer needs were identified as key areas of importance for the customer towards this competence judgement. The contextual analysis of data revealed that SAM cases were required to engage in extensive collaboration and coordination in order to resolve customer issues and to seamlessly deliver solutions. Through the lens of the theoretical framework supporting the emotional quotient a number of emotional and social competences were identified among SAMs perceived to be high performers as contextually defined. The triangulated accounts reported strong interpersonal skills among the SAM cases (P8) and an effective problem solving ability to deal with the adverse and complex situations that are inherent to the context (P9). These interpersonal and problem solving skills are useful in a role that require a high level of interaction to collaborate and problem solving to coordinate in effectively resolving customer issues and seamlessly delivering solutions.

The consideration of these early findings support **Proposition 11:** *Emotional and social competencies assist salespeople in task performance which aids the reinforcement of customer perceptions of salesperson competence.*

SUMMARY AND NEXT STEPS

The analysis revealed a number of key findings that illuminate how customer perception of salesperson warmth and competence act as important indicators of sales success in consultative sales environments. These findings are organised around the key themes of customer emotive response, customer behavioural response, primacy judgements and sales performance outcomes and are presented in summary in Table 33. The contextual revelation of a primacy competence judgement and insight in to the activation of alternative behavioural responses to customer emotive experience have the potential to make an important new contribution to knowledge in the area of social cognition and in particular to the stereotype content model of person perception through the addition of knowledge that is specific to the context of consultative selling.

Customer Emotive Response	*Salespeople who are perceived to be both warm and competent by the customer will elicit feelings of admiration- Supported*
	• SAM cases elicit emotive response of admiration from their customers
	  – Makes the customer feel "*great*" and "*like they are the only one*"
	  – Holds SAM in high regard –high praise and high value on their SAM
	  – Admiration for their achievements and role development
	  – Expressions of adoration- "*love dealing with her and love talking with her*"
	  – Warmth and competence both coming through
	• No presence of alternative emotive responses in respect of SAM cases
	  – Contempt and Pity detected in respect of previous and other SAMs
	  – Other SAMs not perceived as warm and competent or competent respectively in terms of the alternative emotive responses displayed

Customer Behavioural Response	*Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of active facilitation- Supported*
	• Customer Facilitation of the SAM in the interest of the SAM
	  – Accommodation of SAM
	  – Public Testament
	  – Balance Perspective and Shared Blame
	• The warmth dimension was found to be the trigger
	  – Active Facilitation also found to be present where warmth only was the perception
	  – Context however was different and behavioural response was found to change to passive harm where context changed
	  – Both therefore important but warmth the trigger for the more discretionary behaviour
	
	Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of passive facilitation- Supported
	• Customer Facilitation of the SAM in the interest of the Customer
	  – Proactive in bringing new SAM up to speed
	  – Association with the project/project team
	• The competence dimension can trigger passive facilitation
	• Found that where an alternative existed the customer choice was the SAM who was both *human* and competent rather than the *faceless* alternative

Primacy of Competence Perception	*In Consultative Sales Contexts the primacy evaluation across the universal dimensions may move from warmth to competence- Supported* • Contextually Important to the Customer from SAM Function • Competence was the key preoccupation of the customer when their SAM changed • Competence was given primacy of position in transcripts and passages over warmth • Explicit statements by the customer supporting primacy of competence over warmth
Sales Performance Outcomes	*Performance outcomes will reinforce the customer perception of the salesperson on the competence dimension in future evaluations- Supported* • High levels of *Customer Satisfaction* both with specific outcomes and the overall experience reported • Extensive *Repeat Business* observed in keeping with the sustainability aim of the study • Satisfaction with specific outcomes found to reinforce the SAM competence perception

Table 33: Warmth and Competence as Indicators of Consultative Sales Success

The analysis revealed that SAM cases perceived by their customers to be both warm and competent act to build cooperative relationships and to demonstrate expertise in their interactions at a behavioural level and revealed a consistent approach to communication style, compromise, relational acts and level of interaction. These behaviours and their associated influence on the perceptive response of the customer is summated in Figure 2.

BEHAVIOUR	PERCEPTIVE RESPONSE
COMMUNICATION STYLE Open Direct Comfortable/Relaxed Attentive Listening	Trustworthy Sincere Good Natured Well Intentioned
COMPROMISE Concedes on some aspects of proposal Goes out of way/extra mile	Well Intentioned Friendly/Warm
RELATIONAL ACTS Personalised Gestures Common Ground (eg. Family) Non Business Conversation	Well Intentioned and Good Natured Well Intentioned and Warm Friendly
LEVEL OF INTERACTION Appropriate Uses every touch point Pops in for a chat/face to the name	Sincere Well Intentioned Friendly

Figure 2: Behavioural actions and customer perception of salesperson warmth

In addition the analysis revealed behavioural actions that influence perceptive responses akin to the key competence labels of capable, efficient and competent. These behaviours are directed towards reassuring the customer that they are; in capable hands, being dealt with and being sold the right solution for their need. These behaviours and their associated influence on the perceptive response of the customer is summated in Figure 2. This illumination of actions taken by SAMs perceived to be both warm and competent by their customers as they demonstrate expertise and build cooperative relationships has the potential to be valuable to practitioners as they build sales teams towards sustainable success in the context of consultative selling.

PERCEPTION	BEHAVIOUR
CAPABLE "Reassured" "Capable Hands"	- Long term fix approach - Root Cause - Answers and Solutions - Collaborates with Others to Fix - Appearance - Timekeeping - Presentation of Information
EFFICIENT "Assure the Customer" "They are being dealt with"	- Responsive to requests - Response in keeping with urgency - Easy to contact - Proactive in chasing others for answers - Communicates Updates - Take ownership of issue immediately
COMPETENT "Assured they are being sold the right Fit"	- Clear articulation of needs in proposals to customers - Introduces right technical resource to meet needs - Presents solution options to meet needs - State it's not their business if it's not - No solution bias-full portfolio in mind-tailor to customer - Not technical research to understand what they are selling - Project Management approach "stitch in time saves nine" - Extensive documentation (minutes, note taking, e-mails)

Figure 3: Behavioural actions and customer perception of salesperson competence

The analysis also unearthed dynamics in the emotional and social competencies displayed by SAM cases that illuminate the generation and maintenance of warmth perceptions, the creation of a balance in perceptions between warmth and competence and the reinforcement of competence perceptions. These emotional and social competency dynamic combinations and their associated influence on the perceptive response of the customer are summated in Table 34. With sales performance conceptualised as success in social interaction this insight has the potential to make a contribution useful to the sales managers in practice as they build sales teams towards sustainable sales success. Such insight might serve to inform sales managers beyond surface level behavioural knowledge in isolation and provide a more extensive understanding of the salesperson influence on customer perception that indicates sustainable performance in context.

Generation of Warmth Perception	*Emotional and social competencies influence a positive warmth perception through the realms of interpersonal ability and general mood- Supported* • SAMs are found to possess an optimistic outlook- general optimism, optimism in the face of adversity and general contentment • SAMs are found to generate a positive and bubbly customer perception • SAMs are found to possess effective functioning on the interpersonal realm • Interpersonal Skills, Empathy, Social Responsibility • Found to facilitate: a focus on meeting needs (social responsibility), an ability to hear (interpersonal skills) and truly understand needs (empathy) and to convey this understanding (interpersonal skills) • Found to facilitate a perception of well-intentioned and sincere
Maintenance of Warmth Perception	*Emotional and social competencies influence the maintenance of a positive warmth perception through the realms of stress management and adaptability - Supported* • Context conducive with propensity to generate stressful situations • Customer Perception that SAMs are Good Natured and Well Intentioned underpinned by a sense that they are calm and patient • SAMs do not report experiencing stress • Found a dynamic between Stress Tolerance /Problem Solving/Optimism facilitated this in the context (note general mood realm here also) • Found flexibility facilitated maintenance of well-intentioned through a willingness and ability to adapt to meet customer need • Found reality testing facilitated maintenance of a sincerity/honesty perception- doesn't lead them to make false promises
Balance Warmth and Competence perceptions	*Emotional and Social Competencies influence a balance in customer perception between the warmth and competence perception through interpersonal, intrapersonal and adaptability ability- Supported* • Reality Testing (countering high optimism to ensure they are not perceived as a dreamer) • Flexibility/Independence /Assertiveness Dynamic (FX/ID/AS Dynamic)- maintains assurance the solution is right by not being over accommodating • Emotional Self Awareness/Interpersonal Skills/Flexibility Dynamic (ES/IP/FX Dynamic)- picks up nuances in social context, is aware of themselves in this and adapts their style accordingly
Aids Task Performance	*Emotional and social competencies assists salespeople in task performance which aids the reinforcement of customer perceptions of salesperson competence - Supported* • Positive specific sales outcomes reinforced perception of SAM competence (Supported P4) • SAMs required to engage in extensive collaboration and coordination activities (context findings) • SAMs in context possess effective functioning in terms of interpersonal skills (P8) and problem solving ability (P9) that are useful to such coordination and collaboration

Table 34: Dynamics in Emotional and Social Competence displayed by Customer Perceived High Performers

In summary the findings of this study have demonstrated the research aims have been met through support for the eleven tentative propositions proposed. They have also identified areas as the basis for discussion with the potential to make valuable contributions both to knowledge and practice.

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APPENDIX A: SELECTION SCRIPT AND INSTRUMENT

Selection Survey Script

Hi <Customer Name>

My name is <Marketing Team Member Name> and I am calling from the Marketing Department of <Case Organisation Name> where your account manager is <Sales Account Manager Name>. As a valued customer of ours we were hoping you had a few minutes to provide some feedback relating to your sales account manager. The feedback will be used to select sales account managers for the purpose of a research study supported by <Case Organisation Name>. Our marketing team are conducting the survey to ensure confidentiality for those that participate. I am the only one who will be aware of your individual responses and results will be presented in statistical overview form. Would you have five minutes today to go through a couple of questions?

(If customer consents proceed, if not ask if there is a better time, if they do not want to participate at all then move on to the next customer)

Selection Survey Instrument

On a scale of one to five (with five being the most positive response) how <Select Adjective from List> do you consider your Sales Account Manager (SAM) to be?

- Confident
- Good Natured
- Competent
- Warm
- Sincere
- Capable
- Well Intentioned
- Efficient
- Friendly
- Intelligent
- Trustworthy
- Skilful (in context of account management not technical skill)

PARTICIPANT REQUEST E-MAIL (SAM)

Dear <Insert Salesperson Name>,

I am contacting you in connection with a research project that I am undertaking as part of the Doctorate in Business Administration programme at Waterford Institute of Technology. This research project is strongly supported by [Case Organisation Name] as a practitioner orientated programme. I am writing to seek your consent to participate in the next phase of my research. This involves data collection through interviews with you, a sample of your customers and another representative of the organisation. I have attached a participant information sheet for your information and an associated participant consent form should you have no objection to proceeding.

In brief the purpose of this research is to better understand the customer perspective of sales performance and you have been identified as a conceptual high performer through an initial screening process. It is now proposed to contact a number of your customers to participate in the study as it enters its next phase. Each selected customer would be interviewed and asked to speak about their perception of you, their sales account manager. They would be asked further questions regarding how these perceptions were formed during interactions with you. You too would also be interviewed to glean your perspective on how you interact with your customers. In addition another representative of the business who would have worked with you on one or more customer requirements would also be asked to share their perspective.

Individual feedback to salespeople from the customer interviews will not be possible as assurances of customer confidentiality will be given. Interview data will be for the purpose of the research only and will not be disclosed outside of the researcher and their research supervisor and in particular will not be disclosed to any other individual in [Case Organisation]. Key themes identified across all interviews conducted may later be disclosed to the organisation with due respect to participant confidentiality for the purpose of future training and development programmes across current and future sales teams.

Should you be satisfied with the nature of the research and have no further queries please return the attached signed consent form at your convenience. Alternatively if you have any queries please let me know and I would be happy to meet with you to discuss any concerns you may have.

Kind Regards,

_____

Karen O' Connor

PARTICIPANT INFORMATION SHEET (SAM)

Research Overview

This study proposes a departure from motivation and tangible revenue results as the focus of salesperson performance to a consideration of a more sustainable model of salesperson performance that puts the perspective of the customer at its heart. It seeks to understand how customers perceive their sales account managers and in particular how these perceptions were formed over the course of their interactions.

Role of Participants

The customer participant will be a customer of <Case Organisation Name> and will be requested to answer questions regarding their perceptions of you as their sales account manager and further questions around how these perceptions have been formed over the course of their interactions with you. Specific feedback of an individual nature will not be returned to you however general feedback from across multiple interviews may be delivered to the sales team collectively as a future developmental intervention. As a sales account manager participant you will also be asked to participate in an interview to glean your perspective on the sales interaction with your customers. In addition another representative of the organisation will also be asked to share their perspective from their experience in working with you and their knowledge of the organisation.

Semi-Structured Interview

The interview structure will be semi-structured in nature. A semi-structured interview is a method of research used in the social sciences. While a structured interview has a rigorous set of questions which does not allow one to divert, a semi-structured interview is open, allowing new ideas to be brought up during the interview as a result of what the interviewee says.

Participant Time Commitment.

The interview should take approximately 45 to 60 minutes.

Research Location

The research will take place in a meeting room at the <Case Organisation Name> premises

Participant's Anonymity

All interviews will be coded to protect the anonymity of the participant. Only the researcher and her supervisor will have access to the raw data contained in the interviews.

Rights of Participants

Participants have the right not to answer questions and to withdraw from the study at any time up until data input. Participants have also the right to contact the Research Ethics Committee at W.I.T. if they have any concerns about participating in the research.

Contact Information

Researcher: Karen O'Connor koconnor@hostorg.com XX-XXXXXXX (Mob)
Research Supervisor: Susan Whelan swhelan@wit.ie

CONSENT FORM (SAM)

I, the undersigned, declare that I am willing to take part in research for the project entitled *"Warmth and Competence: The Customer Perspective of Salesperson Performance in Consultative Selling"*.
-working title subject to minor adjustment prior to final submission

I declare that I have been briefed as to the nature of this study and my role in it and that I have been given the opportunity to ask questions before agreeing to participate. The nature of my participation has been explained to me and I am aware as to how the information collected will be used.

I am aware and agree that my participation in this study may be recorded however, I am also aware that should I feel uncomfortable at any time that I reserve the right to request that the recording be terminated. I am entitled to copies of all recordings made and subsequent transcriptions and I am fully informed as to what will happen to these recordings once the study is completed. I understand that direct quotations may be used but that the participants' anonymity will be protected.

I fully understand that there is no obligation on me to participate in this study and fully understand that I am free to withdraw my participation at any time up to data entry stage without having to explain or give a reason. I also realise that I am entitled to full confidentiality in terms of my participation and personal details.

_____   _____
Signature of participant   Date

PARTICIPANT REQUEST LETTER (CUSTOMER)

Reference: Doctoral Research Participation Request

Date: XX/XX/XXXX

Dear [Customer Contact Name]

I am contacting you in connection with a research project that I am undertaking as part of the Doctorate in Business Administration programme at Waterford Institute of Technology in association with [Case Organisation]. This research project is strongly supported by [Case Organisation] as a practitioner orientated programme. The next phase in my research involves data collection from [Case Organisations] ICT Solutions customers. This communication is to seek your participation in this process as a valued [Case Organisation] partner.

The over-arching aim of this data collection phase is to generate data regarding sales interactions from the perspective of the customer. The data collection process will involve an initial research interview lasting approximately 45 minutes. As the research progresses additional support by way of a shorter clarification call may be sought. The interviews will be conducted at your premises unless otherwise requested for your convenience. Initial interviews will be conducted over a two month period between June and July 2016.

It is requested that interviews be taped for the purpose of accurate data capture. These tapes will be confidential and will be transferred to an electronic copy and securely stored. They will be used for the purpose of transcription for data analysis and for research validation by the governing body in the event that they are required. They will not be disclosed to any person beyond an authorised auditor on behalf of the governing body. Transcribed manuscripts will not be disclosed in complete form and interview extracts used for illustration of findings will not disclose your identify or that of your organisation in name or through the detail used.

Please find attached a copy of the research participant information sheet and consent form. If you are willing to participate then your contribution would be very much appreciated. My contact details are included on the participation information sheet and should you have any queries please do not hesitate to contact me.

Kind Regards,

_____

Karen O'Connor

PARTICIPANT INFORMATION SHEET (CUSTOMER)

Research Overview

This study proposes a departure from a focus on salesperson motivation and tangible revenue results in respect of salesperson performance and considers a more sustainable model of salesperson performance that puts the perspective of the customer at its heart. It seeks to understand how customers perceive their sales account managers, how these perceptions were formed over the course of their interactions and how they in turn influence the customer course of action.

Role of Participants

The participant will be a customer of [Case Organisation] and will be requested to answer questions regarding their perceptions of their nominated [Case Organisation] sales account manager as formed during sales interactions with that salesperson in their professional capacity. The sales account manager is aware of these interviews and has consented to participation. Specific feedback of an individual nature will not be returned to the salesperson however general feedback drawn from multiple interviews may be delivered to the salespeople collectively as a developmental debriefing exercise.

Semi-Structured Interview

The interview structure will be semi structured in nature. A semi-structured interview is a method of research used in the social sciences. While a structured interview has a rigorous set of questions which does not allow one to divert, a semi-structured interview is open, allowing new ideas to be brought up during the interview as a result of what the interviewee says.

Participant Time Commitment.

The interview should take approximately 45 minutes.

Research Location

The research will take place at your premises or an alternative location convenient to you

Participant's Anonymity

All interviews will be coded to protect the anonymity of the participant. Only the researcher and her supervisor will have access to the raw data contained in the interviews.

Rights of Participants

Participants have the right not to answer questions and to withdraw from the study at any time up until data input. Participants also have the right to contact the Research Ethics Committee at W.I.T. if they have any concerns about participating in the research.

Contact Information

Researcher: Karen O'Connor koconnor@hostorg.com XXX-XXXXXXX (Mob)
Research Supervisor: Susan Whelan swhelan@wit.ie

CONSENT FORM (CUSTOMER)

I, the undersigned, declare that I am willing to take part in research for the project entitled *"Warmth and Competence: The Customer Perspective of Salesperson Performance in Consultative Selling"*.
-working title subject to minor adjustment prior to final submission

I declare that I have been briefed as to the nature of this study and my role in it and that I have been given the opportunity to ask questions before agreeing to participate. The nature of my participation has been explained to me and I am aware as to how the information collected will be used.

I am aware and agree that my participation in this study may be recorded however, I am also aware that should I feel uncomfortable at any time that I reserve the right to request that the recording be terminated. I am entitled to copies of all recordings made and subsequent transcriptions and I am fully informed as to what will happen to these recordings once the study is completed. I understand that direct quotations may be used but that the participant anonymity will be protected.

I fully understand that there is no obligation on me to participate in this study and fully understand that I am free to withdraw my participation at any time up to data entry stage without having to explain or give a reason. I also realise that I am entitled to full confidentiality in terms of my participation and personal details.

_____   _____
Signature of participant   Date

APPENDIX D: ENGINEER PARTICIPANT REQUEST DOCUMENTATION

PARTICIPANT INFORMATION SHEET (ENGINEER)

Research Overview
This study proposes a departure from motivation and tangible revenue results as the focus of salesperson performance to a consideration of a more sustainable model of salesperson performance that puts the perspective of the customer at its heart. It seeks to understand how customers perceive their sales account managers and in particular how these perceptions were formed over the course of their interactions.

Role of Participants
The customer participants will be customers of <Case Organisation Name> and will be requested to answer questions regarding their perceptions of their sales account manager and further questions around how these perceptions have been formed over the course of their interactions. The sales account manager will also be interviewed to glean their perspective on their sales interactions with their customers. As an engineer participant you will also be asked to participate in an interview to glean your perspective on the salespersons interaction with their customers as a third perspective in the process. The salesperson will be aware you are aligned to them as an individual in your participation and you will be given the opportunity to review with the researcher the data that is proposed for use in the research findings to ensure you are comfortable with its content.

Semi-Structured Interview
The interview structure will be semi-structured in nature. A semi-structured interview is a method of research used in the social sciences. While a structured interview has a rigorous set of questions which does not allow one to divert, a semi-structured interview is open, allowing new ideas to be brought up during the interview as a result of what the interviewee says.

Participant Time Commitment.
The interview should take approximately 45 to 60 minutes.

Research Location
The research will take place in a meeting room at the <Case Organisation> premises

Participant's Anonymity
All interviews will be coded to protect the anonymity of the participant. Only the researcher and her supervisor will have access to the raw data contained in the interviews.

Rights of Participants
Participants have the right not to answer questions and to withdraw from the study at any time up until data input. Participants have the right to contact the Research Ethics Committee at W.I.T. if they have any concerns about participating in the research.

Contact Information
Researcher: Karen O'Connor koconnor@hostorg XXX-XXXXXXX (Mob)
Research Supervisor: Susan Whelan swhelan@wit.ie

CONSENT FORM (ENGINEER)

I, the undersigned, declare that I am willing to take part in research for the project entitled *"Warmth and Competence: The Customer Perspective of Salesperson Performance in Consultative Selling"*.
-working title subject to minor adjustment prior to final submission

I declare that I have been briefed as to the nature of this study and my role in it and that I have been given the opportunity to ask questions before agreeing to participate. The nature of my participation has been explained to me and I am aware as to how the information collected will be used.

I am aware and agree that my participation in this study may be recorded however, I am also aware that should I feel uncomfortable at any time that I reserve the right to request that the recording be terminated. I am entitled to copies of all recordings made and subsequent transcriptions and I am fully informed as to what will happen to these recordings once the study is completed. I understand that direct quotations may be used but that the participant anonymity will be protected.

I fully understand that there is no obligation on me to participate in this study and fully understand that I am free to withdraw my participation at any time up to data entry stage without having to explain or give a reason. I also realise that I am entitled to full confidentiality in terms of my participation and personal details.

_____   _____

Signature of participant   Date

APPENDIX E: INTERVIEW GUIDES

CUSTOMER PERSPECTIVE INTERVIEW GUIDE

Customer Perspective Questions	Question Rationale	Supporting Literature	Proposition
Introduction Section			
Researcher Introduction: • Research completed as part of the WIT DBA programme • Supported by the Case Organisation • Purpose of the research in brief is to better understand the sales interaction by gaining a customer perspective • Ethics Check – any concerns with: -how confidentiality will be maintained - what feedback will go to SAM - how data will be stored or used - the purpose of research -anything relating to participation	Provides the customer with a brief background to the study and attends to ethical and practical issues	-Legard *et al.* (2003) -Qu and Dumay (2011)	N/A
Can you tell me a little bit about your organisation? I'm interested to hear about your role? Can you tell me a little about that?	These question serve two key purpose: To ease the interviewee in to the interview by talking about something they are familiar with To better understand the perspective as a situated account	-Qu and Dumay (2011) -Legard *et al.* (2003) -Alversson (2003) - Schultze and Avital (2011) -Legard *et al.* (2003)	N/A
Section 1: How do customer perceptions of a salesperson as both warm and competent facilitate sales performance in consultative sales contexts?			
General Question: Can you start by telling me a little about the first time your encountered <Name>? **Further Probes:**	***Questions to uncover the primacy judgement in context*** Primacy of warmth evaluation may change to competence in certain org contexts Degree of complexity involved in the sale	Cuddy *et al.* (2011) Thull (2005) and Kaufmann (2007)	P4

Can you describe to me the circumstance surrounding your first experience of <Name>? What was important to you at the time in relation to the role of the SAM? What were your primary concerns in the lead up to your first interaction with <Name>? From this experience can you recall what your first impression of <Name> was? What specifically was it that made you think that about <Name>? Any comments about previous SAM at this point?			
General Question: What has been your experience of <Name> since this first interaction? **Further Probes:** What is it that you think about them now? What is it about them that makes you think that? When you think of <Name> what are you feelings towards them? What about them that makes you feel that way? How does this compare with your experience of your previous account manager?	*Questions to uncover feelings elicited by the customer towards the salesperson* Drawing on the stereotype content model. Emotional responses experienced by the perceiver towards the perceived are based on warmth and competence perceptions. High warmth and competence will result in feelings of admiration over pity, contempt and envy.	Fiske *et al.* (2007)	P1 & P5
General Question: Can you tell me about the outcomes you have experienced in working with <Name>? What do these outcomes make you think about <Name>?	*Questions to uncover the role performance outcomes play in the construction of competence perceptions* Performance outcomes may reinforce the competence judgement	Cuddy *et al.* (2011)	P5
General Question: Can you give me an example of a requirement you engaged with [NAME] on in the last twelve months? **Further Probes:** Describe the process you went through in interacting with [NAME]? Describe the role you played and what actions you took in the interaction?	*Questions to uncover customer actions in the sales interaction* Is there evidence of [facilitation, helping, protection/attacking, fighting/cooperation, association/exclusion, demeaning]	Fiske *et al.* (2007)	P2 & P3

What was it that made you follow this course of action?			
Section 2: How can an individual salesperson influence customer perceived performance at a behavioural level?			
General Question: What do you feel <Name> is trying to achieve in your dealings with them? **Further Probes?** How would you describe <Names> approach to working with you? How does this make you feel about <Names> intention to meet your need?	*Questions to uncover perception of salesperson intention (establishing customer perspective of CO))* Drawing on definition of CO used in conceptualisation Look for evidence of cooperative relationship building or demonstration of expertise	Schwepker (2003)	P6 & P7
Section 3: How can an individual salesperson influence customer perceived performance at a psychological level?			
General Question: How would you describe the general demeanour of <Name> **Further Probes:** What is it about them that makes you think that? What does their demeanour make you think about the type of person they are?	*Questions to uncover construction of warmth (probe around socio-emotional competencies)* General Mood and the Construction of the Warmth Perception	Bar On (1997) Barsade and Gibson (1998) Kelly and Barsade (2001)	P8
General Question: How would you describe the way in which <Name> interacts with you? **Further Probes:** What interpersonal skills do they demonstrate? Can you give me an example of what makes you think that? Can you give an example of a time when you felt that <Name> truly understood where you were coming from?	Interpersonal Skills (IPS) and the Construction of the Warmth Perception Empathy within IPS Social Responsibility within IPS	Bar On (1997) Bar On (2006) Stein and Book (2006)	P8/P10

Can you give an example of a time where you really felt they were trying to meet your needs? Have you ever engaged socially with the SAM? What does the way <Name> engages with you make you think about them?	Social Skills within IPS		
General Question: When you are engaging with <Name> do you feel there is a willingness to adapt to meet your needs? **Further Probes:** Can you give me an example of a time that made you feel this way? Can you describe the circumstance as to what happened? What did this make you feel towards them?	***Questions to uncover maintenance of warmth (probe around socio-emotional competencies)*** Adaptability and the Maintenance of the Warmth Perception	Bar On (1997) Stein and Book (2006)	P9 & P10
General Question: How would you say <Name> handles challenging or pressurised situations in your dealings with them? **Further Probes:** Was there ever a time when you were working with <Name> and you experienced a set-back or serious challenge? Can you tell me about it? How did they react? What did the way they handled the situation make you think about them?	Stress Tolerance and the Maintenance of the Warmth Perception	Bar On (1997) Strutton and Lumpkin (1993) Thull (2005)	P9
General Question: Can you tell me about an important meeting you had in which <NAME> was involved? **Further Probes** How would you describe <NAME> in this circumstance? **General Question:** Can you tell me about a more relaxed/sociable interaction that you would have had together? **Further Probes**	***Questions to uncover the construction of a balance between of warmth and competence perceptions (probe around socio-emotional competencies)*** Social Awareness	Mayer *et al.* (2004) Bar On (1997)	P10

How would you describe \<NAME\> in this circumstance? **General Question:** When you are not happy with what is being proposed does \<Name\> seem to pick up on this quickly or do you have to very directly tell them? **General Question:** Has the approach taken by \<Name\> ever had a negative impact on you? **Further Probes** Can you tell me more about that? Can you tell me why you think this is?	Awareness and Adaption Self-Awareness		
General Question: From your experience of working with \<Name\> what specific tasks do you think they perform very well in their role? **Further Probes:** What does this make you think about them as your SAM?	*Questions to uncover reinforcement of competence (probe socio-emotional competencies)* -Task Performance Reinforcement -Relational -Adaptive -EI and SP	Cuddy *et al.* (2011) Jolson (1997) Weitz *et al.* (1986), Spiro & Weitz (1990), Hallen *et al.* (1991) Sojka and Deeter-Schmelz (2002); Rozell *et al* (2006)	P11

SAM PERSPECTIVE INTERVIEW GUIDE

SAM Perspective Questions	Question Rationale	Supporting Literature	Proposition
Introduction Section			
Researcher Introduction: • Research completed as part of the WIT DBA programme • Supported by the Organisation • Purpose of the research in brief is to better understand the sales interaction by gaining a customer perspective • Collecting multiple perspectives to better understand this customer perspective • Ethics Check – any concerns with: -how confidentiality will be maintained - how feedback will be handled - how data will be stored or used - the purpose of research -anything relating to participation	Provides the salesperson with a brief background to the study and attends to ethical and practical issues	**-**Legard *et al.* (2003) -Qu and Dumay (2011)	N/A
How would you describe your role in the organisation to a stranger? ***Amendment from pilot- ask about the role of the salesperson versus the technical team***	This question serves two key purposes: To ease the interviewee in to the interview by talking about something they are familiar with To better understand the perspective as a situated account	-Qu and Dumay (2011) -Legard *et al.* (2003) -Alversson (2003) - Schultze and Avital (2011) -Legard *et al.* (2003)	
Section 1: How do customer perceptions of a salesperson as both warm and competent facilitate sales performance in consultative sales contexts?			
General Question: Can you give me an example of where you worked with a customer to deliver a solutions for them over the last twelve months? **Further Probes:**	***Questions to uncover customer actions in the sales interaction*** Is there evidence of [facilitation, helping, protection/attacking, fighting/cooperation, association/exclusion, demeaning]	Fiske *et al.* (2007)	P3 & P4

Describe the process you went through in interacting with this customer? Describe the role you played and what actions you took in the interaction? What actions did the customer take that made it difficult for you? Why do you think the customer took this course of action? What makes you think that? How did you overcome this? What actions did the customer take that were helpful to you? How did these help you? Why do you think the customer did this? What makes you think that?			
Section 2: How can an individual salesperson influence customer perceived performance at a behavioural level?			
General Question: What would you say your primary intentions are when you engage with a customer? **Further Probes?** How do you go about achieving this? What do you want the customer to think about you in undertaking this?	***Questions to uncover perception of salesperson intention (establishing salesperson perspective of CO)*** Drawing on definition of CO used in conceptualisation Look for evidence of cooperative relationship building or demonstration of expertise	Schwepker (2003)	P6 & P7
Section 3: How can an individual salesperson influence customer perceived performance at a psychological level?			
General Question: How would you describe your general attitude to work and life in general? How would you describe your general demeanour? **Further Probes:**	***Questions to uncover construction of warmth (probe around socio-emotional competencies)*** General Mood and the Construction of the Warmth Perception	Bar On (1997) Barsade and Gibson (1998) Kelly and Barsade (2001)	P8

What do you feel it is about you that represents this? How do you think others might know this about you? **General Question:** Can you tell me a bit about how you go about interacting with your customers? **Further Probes:** Can you give me an example in relation to a specific customer that you think demonstrates this? How does this help you to achieve your aims? Would you say that you have the ability to understand the perspective of the customer in your dealings with them? Can you give an example of a time where you felt you truly understood where your customer was coming from? Can you tell me a bit more about this? What did you do? How did the customer respond to what you did? In undertaking your role what stakeholder needs do you consider important and why? Can you give an example of a time where you really felt you had met the need of the customer? Can you describe the social skills you demonstrate in your interactions with customers? Can you give some examples of social engagement with the customer? How did this come about? How did this impact your future interactions with this customer?	Interpersonal Skills (IPS) and the Construction of the Warmth Perception Empathy within IPS Social Responsibility within IPS Social Skills within IPS	Bar On (1997) Bar On (2006) Stein and Book (2006)	P8&P10
General Question: Can you tell me about the need to change or adapt in your day to day role? Why is this necessary? **Further Probes:**	*Questions to uncover maintenance of warmth (probe around socio-emotional competencies)* Adaptability and the Maintenance of the Warmth Perception	Bar On (1997) Stein and Book (2006)	P9 & P10

Can you give me an example of a time when you had to adapt or change something in order to deliver a solution for the customer? Can you describe the circumstance as to what happened? How much do you feel you had to concede? Was the customer satisfied with the outcome? What were the consequences of this adaptation? **General Question:** How would you say you handle challenging or pressurised situations in your role? **Further Probes:** Can you give me an example of a time when you experienced a set-back or serious challenge? Can you tell me about that time? How did you deal with that situation? Did you overcome it and how?	Stress Tolerance and the Maintenance of the Warmth Perception	Bar On (1997) Strutton and Lumpkin (1993) Thull (2005)	
General Question: Would you say you are consciously aware of the social situation you in at any given time? **Further Probes** What makes you say that? Can you give an example? How did the awareness of the situation influence your actions? **General Question:** How do you know if a customer isn't happy with what you are proposing? **Further Probes** What do you do when you feel the customer isn't happy with what you are proposing? **General Question:** Are you generally aware as to how you are feeling at a given time? **Further Probes**	*Questions to uncover the construction of a balance between of warmth and competence perceptions (probe around socio-emotional competencies)* Social Awareness Awareness and Adaption Self - Awareness	Mayer *et al.* (2004) Bar On (1997)	P10

How does this level of awareness impact the actions you take in your role? Can you give me an example of a time when you acknowledged your feelings going in to a situation and how you dealt with that in the situation?			
General Question: What skills do you think are important to be successful in your role? **Further Probes:** How are these skills useful?	*Questions to uncover reinforcement of competence (probe around socio-emotional competencies)* -Task Performance Reinforcement -Relational -Adaptive -EI and SP	Cuddy *et al.* (2011) Jolson (1997) Weitz *et al.* (1986), Spiro & Weitz (1990), Hallen *et al.* (1991) Sojka and Deeter-Schmelz (2002); Rozell *et al* (2006)	P11

ENGINEER PERSPECTIVE INTERVIEW GUIDE

Engineer Perspective Questions	Question Rationale	Supporting Literature	Proposition
Introduction Section			
Researcher Introduction: • Research completed as part of the WIT DBA programme • Supported by the Case Organisation • Purpose of the research in brief is to better understand the sales interaction by gaining a customer perspective • Collecting multiple perspectives to better understand this customer perspective • Ethics Check – any concerns with: -how confidentiality will be maintained - what feedback will go to SAM - how data will be stored or used - the purpose of research -anything relating to participation	Provides the sales management representative with a brief background to the study and attends to ethical and practical issues	-Legard *et al.* (2003) -Qu and Dumay (2011)	N/A
I'm interested to hear about your role? Can you tell me a little about? Tell me a little more about the exposure you have had to the sales account manager in question?	These question serves two key purposes: To ease the interviewee in to the interview by talking about something they are very familiar with To better understand the perspective as a situated account	-Qu and Dumay (2011) -Legard *et al.* (2003) -Alversson (2003) - Schultze and Avital (2011) -Legard *et al.* (2003)	N/A
Section 1: How do customer perceptions of a salesperson as both warm and competent facilitate sales performance in consultative sales contexts?			
General Question: What type of first impression do you think <Name> gives the customer? **Further Probes:** What makes you think that?	***Questions to uncover the primacy judgement in context*** Primacy of warmth evaluation may change to competence in certain in organisational contexts	Cuddy *et al.* (2011)	P4

General Question: What emotional response do you think <Name> generates in their customer? **Further Probes:** -What is it that make you think that?	***Questions to uncover feelings elicited by the customer towards the salesperson*** Drawing on the stereotype content model. Emotional responses experienced by the perceiver towards the perceived are based on warmth and competence perceptions. High warmth and competence will result in feelings of admiration over pity, contempt and envy.	Fiske *et al.* (2007)	P1
General Question: Can you tell me about some of the outcomes that you have seen <Name> achieve with their customers? How do you think these outcomes have helped or hindered <Name> in future dealings with these customers?	***Questions to uncover the role performance outcomes play in the construction of competence perceptions*** Performance outcomes may reinforce the competence judgement	Cuddy *et al.* (2011)	P5
General Question: Can you tell me about a customer solution that you worked closely with <Name> on? **Further Probes:** Can you describe the actions the customer took in the interaction? What impact did this have on the moving the interaction forward or holding it back? Why do you think they did that?	***Questions to uncover customer actions in the sales interaction*** Is there evidence of [facilitation, helping, protection/attacking, fighting/cooperation, association/exclusion, demeaning]	Fiske *et al.* (2007)	P2 & P3
Section 2: How can an individual salesperson influence customer perceived performance at a behavioural level?			
General Question: What actions does <Name> undertake in the organisation in delivering solutions for their customers? **Further Probes?** How would you describe their approach to interacting with their customers?	***Questions to uncover perception of salesperson intention (establishing SMR perspective of CO)*** Drawing on definition of CO used in conceptualisation	Schwepker (2003)	P6 & P7

What do you think their intention is in their undertakings?	Look for evidence of cooperative relationship building or demonstration of expertise		
Section 3: How can an individual salesperson influence customer perceived performance at a psychological level?			
General Question: How would you describe the general demeanour of <Name> **Further Probes:** What is it about them that makes you think that? What does their demeanour make you think about the type of person they are?	***Questions to uncover construction of warmth (probe around socio-emotional competencies)*** General Mood and the Construction of the Warmth Perception	Bar On (1997) Barsade and Gibson (1998) Kelly and Barsade (2001)	P8
General Question: What interpersonal skills has name demonstrated in their dealing with their customers? **Further Probes:** Can you give me an example of a time <Name> demonstrated these skills?	Interpersonal Skills (IPS) and the Construction of the Warmth Perception	Bar On (1997) Bar On (2006) Stein and Book (2006)	P8 & P10
Would you consider <Name> empathetic to their customer's needs? What makes you think that?	Empathy within IPS		
To what extent do you think <Name is concerned with meeting the needs of the customer? Why do you think this?	Social Responsibility within IPS		
Does <Name> engage their customers socially? Can you give me some examples of this?	Social Skills within IPS		
General Question: How would you describe <Names> ability to adapt to meet their customer's needs? **Further Probes:** Can you give me an example of a time when they demonstrated this? Can you describe what happened? **General Question:**	***Questions to uncover maintenance of warmth (probe around socio-emotional competencies)*** Adaptability and the Maintenance of the Warmth Perception	Bar On (1997) Stein and Book (2006)	P9 & P10
		Bar On (1997)	

How would you say <Name> handles challenging or pressurised situations in your dealings with them? **Further Probes:** Have you ever witnessed <Name> experience a set-back or serious challenge? Can you tell me about it? How did they react? What did the way they handled the situation make you think about them?	Stress Tolerance and the Maintenance of the Warmth Perception	Strutton and Lumpkin (1993) Thull (2005)	
General Question: Do you think <Name> is socially aware? **Further Probes** What makes you think this? Can you tell me about a time they demonstrated this awareness? How did they change or adapt their approach to suit the situation? **General Question:** Do you think <Name> is self-aware? **Further Probes** What makes you think this? Can you tell me about a time they demonstrated this awareness?	*Questions to uncover the construction of a balance between of warmth and competence perceptions (probe around socio-emotional competencies)* Social Awareness Awareness and Adaption Self - Awareness	Mayer *et al.* (2004) Bar On (1997)	P10
General Question: From your experience of working with <Name> what specific tasks do you think they perform very well in their role? **Further Probes:** What does this make you think about their suitability for their role as SAM?	*Questions to uncover reinforcement of competence (probe around socio-emotional competencies)* -Task Performance Reinforcement -Relational -Adaptive -EI and SP	Cuddy *et al.* (2011) Jolson (1997) Weitz *et al.* (1986), Spiro & Weitz (1990), Hallen *et al.* (1991) Sojka and Deeter-Schmelz (2002); Rozell *et al* (2006)	P11

APPENDIX F: SHORT FORM CUSTOMER INTERVIEW GUIDE

Customer Perspective Questions (Short Form)
Introduction Section
Can you tell me a little bit about your organisation?
I'm interested to hear about your role? Can you tell me a little about that?
Section 1:
General Question: Can you start by telling me a little about the first time your encountered [SAM]? **Further Probes:** -Can you describe to me the circumstance surrounding your first experience of [SAM]? -What was important to you at the time in relation to the role of the account manager? -What were your primary concerns in the lead up to your first interaction with [SAM]? -From this experience can you recall what your first impression of [SAM] was? -What specifically was it that made you think that about [SAM]?
General Question: What has been your experience of [SAM] since this first interaction? **Further Probes:** -What is it that you think about them now? -What is it about them that makes you think that?
General Question: Can you tell me about the outcomes you have experienced in working with [SAM]? What do these outcomes make you think about [SAM]?
General Question: Can you give me an example of a requirement you engaged with [SAM] on in the last twelve months? **Further Probes:** Describe the process you went through in interacting with [SAM]? Describe the role you played and what actions you took in the interaction? What was it that made you follow this course of action?
Section 2:
General Question: What do you feel [SAM] is trying to achieve in your dealings with them? **Further Probes?** How would you describe [SAM]'s approach to working with you? How does this make you feel about [SAM]'s intention to meet your need?
Section 3: How can an individual salesperson influence customer perceived performance at a psychological level?
General Question: How would you describe the general demeanour of [SAM]? **Further Probes:** What is it about them that makes you think that? What does their demeanour make you think about the type of person they are? **General Question:** How would you describe the way in which [SAM] interacts with you? **Further Probes:** What interpersonal skills do they demonstrate? Can you give me an example of what makes you think that? Can you give me an example of a time when you felt that [SAM] truly understood where you were coming from? Can you give an example of a time where you really felt they were trying to meet your needs? Have you ever engaged more socially with [SAM]? What does the way [SAM] engages with you make you think about them?
General Question: When you are engaging with [SAM] do you feel there is a willingness to adapt to meet your needs? **Further Probes:** Can you give me an example of a time that made you feel this way? Can you describe the circumstance as to what happened? What did this make you feel towards them? **General Question:** How would you say [SAM] handles challenging or pressurised situations in your dealings with them?

Further Probes: Was there ever a time when you were working with [SAM] and you experienced a set-back or serious challenge? Can you tell me about it? How did they react? What did the way they handled the situation make you think about them?
General Question: Can you tell me about an important meeting you had in which [SAM] was involved? **Further Probes** How would you describe [SAM] in this circumstance? **General Question:** Can you tell me about a more relaxed and sociable event/meeting that you would have attended together? **Further Probes** How would you describe [SAM] in this circumstance? **General Question:** When you are not happy with what is being proposed does [SAM] seem to pick up on this quickly or do you have to very directly tell them? **General Question:** Has the approach taken by [SAM] ever had a negative impact on you? **Further Probes** Can you tell me more about that? Can you tell me why you think this is?
General Question: From your experience of working with [SAM] what specific tasks do you think they perform very well in their role? **Further Probes:** What does this make you think about [SAM] as your Account Manager?

APPENDIX G: PROPOSITION DRAWN INITIAL CODES

PROPOSITION DRAWN INITIAL CODES		
Customer Perception of Salesperson		
Code	**Sub-Code**	**Description**
Warmth	Good Natured	Kind, Friendly, Patient
Warmth	Warm	Showing enthusiasm, affection, or kindness
Warmth	Sincere	Free from pretence or deceit; proceeding from genuine feelings
Warmth	Well Intentioned	Having or showing good intentions
Warmth	Friendly	Favourably disposed; inclined to approve, help, or support
Warmth	Trustworthy	Able to be relied on as honest or truthful
Competence	Confident	Sure of oneself; no uncertainty about one's own abilities or correctness
Competence	Competent	Having the necessary ability, knowledge, or skill to do something
Competence	Capable	Having the ability to do or achieve a specified thing
Competence	Intelligent	Displaying quickness of understanding, sound thought, or good judgment
Competence	Skilful	Having or showing skill, being good at something
Competence	Efficient	Working in a well-organized and competent way, achieving maximum productivity with minimum wasted effort or expense.
Customer Facilitation Mechanisms		
Emotive	Admiration	Holds in high esteem, delighted or astonished approbation
Emotive	Pity	Kindly sorrow evoked due to misfortune of another
Emotive	Envy	Covetous towards another's advantage or success
Emotive	Contempt	Disapproval tinged with disgust
Behavioural	Active Facilitation	Helping behaviour
Behavioural	Passive Facilitation	Association behaviour
Behavioural	Active Harm	Attacking behaviour
Behavioural	Passive Harm	Neglectful behaviour
Sales Performance Outcomes		
Short-Term	Initial Sale	A one off or initial sales success
Sustainable	Repeat Business	Additional or repeat business following initial success
Sustainable	Customer Satisfaction	Customer satisfaction with previous sales outcomes
Sustainable	Competence Perception	Reinforcement of competence perception due to Outcome
Salesperson Psychological Facilitators		
Interpersonal	Empathy	Aware of, understands and appreciates feelings of others
Interpersonal	Interpersonal Skills	Maintain mutually satisfying relationships
Interpersonal	Social Responsibility	Cooperative, contributing and constructive member of social group
General Mood	Optimism	Positive attitude even in the face of adversity
Stress Management	Stress Tolerance	Withstand adverse events and stressful situations and ability to cope with stress
Stress Management	Impulse Control	Resist or delay impulse, drive or temptation to act

Adaptability	Flexibility	Adjust ones feelings, thoughts or behaviors to changing situation or circumstance
Adaptability	Problem Solving	Identify and define personal and social problems and generate potentially effective solutions
Adaptability	Reality Testing	Assess correspondence between internal experience and what exists in the subjective external environment
Intrapersonal	Emotional Self-Awareness	Recognises and understands one's own emotions
Intrapersonal	Assertiveness	Express feelings, beliefs and attitudes in a non-destructive manner
Intrapersonal	Independence	Self-directed in thoughts and actions. Free from emotional dependency
Intrapersonal	Self-Regard	Aware of, understands, accepts and respects oneself
Intrapersonal	Self-Actualisation	Realises one potential, does what one wants to do and enjoys doing it
Perception Facilitation Process		
Perception Process	Generate Perceptions	Development of new perception
Perception Process	Maintain Perceptions	Maintenance of an existing perception
Perception Process	Balance Impressions	Creates a balance across both warmth and competence perceptions
Perception Process	Reinforce Perceptions	Strengthens an existing perception
Perception Process	Task Performance	Assists ability in job task performance
Salesperson Behavioural Facilitators		
Customer Orientation	Build Cooperative Relations	Communication, Balanced Interchange and Mutual Understanding
Customer Orientation	Demonstration of Competence	Demonstration of ability in task performance

APPENDIX H: CONTEXT DRAWN INITIAL CODES

CONTEXT DRAWN INITIAL CODES		
Code	**Sub-Code**	**Description**
Stakeholder	Sales Account Manager	SAM- responsible for the delivery of a sales target against a territory on which customer accounts sit
Stakeholder	Customer	Key contact within the customer organisation
Stakeholder	Technical Pre-Sales	Organisational resources available to SAM's to assist them with the technical requirements of solution design and delivery
Stakeholder	Vendor	A 3rd party manufacturer of development house
Stakeholder	Sales Manager	Organisational Sales Management Representative
Stakeholder	Procurement	Sourcing of 3rd party good and services in delivering a solution
Stakeholder	Finance	Organisational or Third Party finance department
Stakeholder	Implementation Team	Team responsible for implementation of the solution design
Stakeholder	Support Team	Team responsible for the ongoing support of solutions provided
Solution Element	Hardware	Physical equipment provided to the customer as part of the solution
Solution Element	Software	3rd party software licences provided to the customer as part of the solution
Solution Element	Architecture	Architecture of the technical elements required to deliver a solution
Solution Element	Implementation	Implementation of the designed solution
Solution Element	Support	Support of the provided solution
Solution Element	Enhancement	Enhancement of solution during or after installation of initial design
Environment	Problem Complexity	Degree of complexity to the customer problem
Environment	Lack of Clarity	Lack of clarity in terms of the customer problem
Environment	Solution Complexity	Complexity of solution to the customer problem
Environment	Emerging Threats	Evolution of the external technological landscape
Sales Activity	Collaboration	Need to collaborate in provision of solution
Sales Activity	Coordination	Need to coordinate in provision of solution
Sale Type	Commodity	A transactional type of sale
Sale Type	Consultative	A sale requiring a consultative approach
Sales Cycle	Lengthy	A length of time to close a sale
Sales Cycle	Non-Linear	Progress moving back and forth

APPENDIX I: RESEARCH QUESTIONS TO SOURCES OF DATA

Research Question 1: How do customer perceptions of a salesperson as both warm and competent indicate sales performance in consultative sales contexts?		**Case Study Questions**	**Potential Source of Data**
P1	Salespeople who are perceived to be both warm and competent by the customer will elicit feelings of admiration	What emotional response does the customer exhibit in respect of the SAM? What is it about the SAM that makes them feel this way?	Customer Interview Sales Management Interview
P2	Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of active facilitation	What action has the customer taken over the course of the continual sales interaction to help or hinder progress? Was the action taken passive or active? How was this action influenced by perceived SAM warmth? How was this action influenced by perceived SAM competence?	Customer Interview SAM Interview Sales Management Interview
P3	Salespeople who are perceived to be both warm and competent by the customer will elicit a behavioural response of passive facilitation		
P4	In consultative sales contexts the primacy evaluation across the universal dimensions may move from warmth to competence	What was the customer's first impression of the SAM? What is important to the customer about the SAM function?	Customer Interview SAM Interview Sales Management Interview
P5	Performance outcomes will reinforce the customer perception of the salespersons performance on the competence dimension in future evaluations	What is the customers view on the results that have been delivered to date? How has this perception influenced the perception of SAM competence?	Customer Interview Sales manager Interview
Research Question 2- How can an individual salesperson influence customer perceived performance at a behavioural level?		**Case Study Questions**	**Potential Source of Data**
P6	Salespeople who act to build cooperative relationships generate a positive perception of warmth	What has the SAM done to build a cooperative relationship with the customer? How has this action influenced the perception of SAM warmth? What has the SAM done to demonstrate a level of expertise to the customer? How has this action influenced the perception of SAM competence?	Customer Interview SAM Interview Sales Management Interview
P7	Salespeople who act to demonstrate a level of expertise generate a positive perception of competence		
Research Question 3- How can an individual salesperson influence customer perceived performance at a psychological level?		**Case Study Questions**	**Potential Source of Data**

P8	Emotional and social competencies influence a positive warmth perception through the realms of interpersonal ability and general mood	How would the general mood or demeanour of the SAM be described? How has this general mood influenced the customer perception of SAM warmth? What interpersonal skills does the SAM demonstrate? How have interpersonal skills influenced the customer perception of SAM warmth?	Customer Interview SAM Interview Sales Management Interview
P9	Emotional and social competencies influence the maintenance of a positive warmth perception through the realms of stress management and adaptability	Does the SAM demonstrate a willingness to adapt? How has this helped the SAM in maintaining the perception of warmth? Does the SAM demonstrates the ability to manage stressful situations? How has this helped the SAM in maintaining the perception of warmth?	Customer Interview SAM Interview Sales Management Interview
P10	Emotional and social competencies assists salespeople in task performance which aids the reinforcement of customer perceptions of salesperson competence	Does the SAM demonstrate social awareness? Does the SAM demonstrate self-awareness? Has the SAM demonstrated an ability to change approach in response to awareness to self and social context?	Customer Interview SAM Interview Sales Management Interview
P11	Emotional and Social Competencies assist salespeople in task performance which aids the reinforcement of customer perceptions of salesperson competence	What task skills has the SAM demonstrated? How has this contributed to the customer's perception of their competence?	Customer Interview SAM Interview Sales Management Interview

APPENDIX J: PROBLEM COMPLEXITY NODE ANALYSIS

Presence of Problem Complexity in Participant Account	
Perspective	**UOO**
Customer	1A, 1C, 2A, 3A, 3B, 4A, 4D
Salesperson	1E, 2E, 3E, 4E
Engineer	1, 2, 3, 4

Core Illuminations of Problem Complexity
Mergers and Acquisitions: *"[Company Name A] were then taken over by a company called [Company Name B] in the UK, or in, in the States, and about a year later, [Company Name B] have now been purchased by [Company Name C]. So, we're now going to be coming under surveillance, obviously, so everything now has to completely change. Everything has to level up. They want everything – they want encryption, they want, you know, five years to last, whereas, if something broke, you could just get a new one, but now it's, you know, you have to do capex for basic stuff like that, so. The whole way that the system works has changed, as instead of being just, 'Yes, let's get it done', but now there's rules and regulations and ways it has to be done."* **-Customer 1B**
Legacy Infrastructure and Large Fleet Management: *"I would be one of those people that will be quite detailed so, okay, if there is equipment listed on the contract and, obviously, due the projects some equipment was retired, some equipment was moved around, down the country. I've eventually, because of the project I had a big delay so probably about two months' delay. I'm still working the backlog. I eventually sat down, went through the project, went through all the list and crossed off what was retired, put back whatever was still, I wanted to be supported."* **-Customer 2A**
Mobility and Multiple Software Versions: *" I've a Windows 7 laptop that when you're in front of the computer you can, you know - Whereas when you actually trying to answer the guys questions over the phone and he's on Windows 10"* **-Customer 3A**
Global Requirement: *And so especially around infrastructure hardware, so networking and servers. And I suppose some of the requirements from our perspective was not only in relation to the hardware, but in relation to global warranty, ensuring global warranties were in place and, you know, around detailed specifications for logistics, shipping etc., whatever like that. So it wasn't just a simple, you know, here's a quotation for a piece of hardware that you require.* **-Customer 4A**

APPENDIX K: SOLUTION ELEMENTS NODE ANALYSIS

Key Descriptor	Customer References	Engineer References	SAM References
Innovation/Modernisation	1A, 1A, 1B, 2A, 2A, 2B, 3A, 3A, 3A, 3A, 3B, 3D, 4B, 4B, 4B, 4D, 4D, 4D	3E, 3E, 3E	2, 2, 2, 3, 4, 4
Support/Proactive Monitoring/Health Check	1A, 1A, 2A, 3A, 3A, 3A, 4A, 4A, 4B, 4B, 4B, 4D	3E	4, 4
Hardware	1A, 1A, 1B, 1B, 2A, 3A, 3A, 3A, 4A, 4B, 4D, 4D	1E	2, 2, 3, 3, 4
Set-Up/Configuration/Install	1A, 1A, 1A, 1B, 1B, 1C	2E, 3E, 3E, 4E	1, 2, 2, 2, 3, 4
Cloud Service	1A, 3A, 3A, 3D	2E, 4E	3
Infrastructure/Network	1A, 1B, 2A, 2A, 3A, 3A, 3B, 3D, 4B, 4D	3E, 4E, 4E	4
Software/Licencing/Application	1A, 1B, 1B, 1C, 1C, 2A, 3A, 3A, 3A, 4D, 4D	1E, 3E, 4E	1, 3, 4
Security/Continuity	1A, 1A, 1A	2E	1, 1, 1, 3

APPENDIX L: STAKEHOLDERS NODE ANALYSIS

Key Descriptor	Customer References	Engineer References	SAM References
Vendor/Manufacturer	1A, 1A, 1A, 1C, 1C, 2C, 2D, 2D, 2D, 4A, 4A	2E	1, 1, 1, 1, 2, 2, 3, 3, 4, 4
Third Party Partner	1A, 1A, 2A, 2A, 3A, 3A		4
Technical Presales Engineer	1A, 1C, 2B, 4B	3E	1, 1, 1, 1, 2, 3, 3, 4
Implementation Engineer	1A, 1B, 3B, 4B		1, 2, 2, 2, 3, 3, 4
Support Desk	1B, 4B		3, 4, 4
Finance/Accounts	1C, 3B, 3B, 4B	3E, 3E	2, 4, 4
Organisational Management		4E	2, 2, 2, 3, 3, 4, 4
Project Manager			2, 2, 2, 3, 4
Procurement		2E	2, 2, 2, 4, 4, 4, 4

APPENDIX M: LENGTHY SALES CYCLE NODE ANALYSIS

Illustrative Quote	UOO
"The eventual implementation"	1A
"3 months prior to the installation"	1B
"It took us probably a year to put everything together" *"I think another year passed"* *we are very slow at making decisions, we are, it took us over a year to put that project actually in real life"* *"I slept on it for, like six months before I made a decision"*	2A
"It was a good six months" *"Because we didn't sign up to it until, was it February or March this year and, like, we'd been looking at this since September, actively looking at this since September"*	2D
In fairness to her, she kept that going for a while and we only upgrade about three months ago	2F
"We'll review it after six months and see, you know, how it's working for both parties" *"We look at Nav, you know, later in the year"*	3A
"Has actually asked us to do that proposal, I think, four times"	3E
"At least everyone understands where they are and where, where we are in the sales cycle"	4E
"It could take four or five months to close a deal"	1
"It kept being pushed out" *"In the end we were on version 10 before they gave us the deal"* *"Such a different type of sales that it takes ages for something to fall"* *"That went on forever because even though they really needed to do it there were so many other things they needed to do as well and factor in"*	2
"The sales cycle, or the solutions cycle" *"You might have to look at the solution as part of a five or ten year plan"*	4

APPENDIX N: NON-LINEAR SALES CYCLE NODE ANALYSIS

Illustrative Quote	UOO
"Back and forth with the little minor adjustments "	2A
"I only expected to do one upgrade this year"	2B
"She was going back and forth to [Vendor Name] all the time"	2D
"We'll review it after six months and see, you know, how it's working"	3A
"Has actually asked us to do that proposal, I think, four times"	3E
"And she'd always keep communicating, keep me involved in the communication, so that's, like, very important as well because at least everyone understands where they are and where, where we are in the sales cycle" *"And they went for, you know, bits and pieces of it"* *"A lot of over and back, a lot of customer meetings, a lot of pricing.*	4E
"Then you give, you'd give them maybe a week or so to go through it, and then he actually rang me to say he wanted our engineer to go back out to go through it"	1
"So I met with the customer who I get on with really well, brought an engineer to site. There were some challenges because an engineer left so I had to bring a different engineer"	2
"It took that much, do you know, going back and forth"	4

APPENDIX O: IMPORTANT TO THE CUSTOMER ANALYSIS

Ambassador Examples:

2C: "I believe she's able to get me in touch with the right people at the right time."

2D: "In the sense of being the one-stop shop to go to the different departments if we ran into any difficulties."

2D: "So it was, like, it was a single point of contact. It was exactly what I want. I don't want to be dealing with five different people on the same project."

2F: "So, like, we would have been concerned but, like, it was more along the lines of we didn't know who we were to contact and who was supposed to meet us, but once she took over, like, she's taken ownership of everything and, to be honest, I haven't a bad word to say about her."

3B "But what turns me off is a very forceful salesperson trying to be an account manager. I think account managers are more ambassadors, you know?"

4A: "I suppose what you're looking for is good communication, someone who is kind of taking ownership of the account and someone who is going to work on your behalf to make sure that issues are resolved when they need to be."

SMR: "Build customer profile well in the company"

Communication Examples

4A: "You're looking for communication."

4B: "Where you don't have the time. And the solution he could have told me along, he could have told me on the first month the issue they were having and I would have understood."

4B "Like, it's just send me an email and say, 'Look, I'm out of the office', or, 'I broke my leg', whatever it is, I don't mind, I understand. Leaving you waiting drives me insane, like six months of waiting I think is just totally unacceptable."

Quality of Service Examples

1A: "I won't say, when you say concerns, I didn't have a lot of concerns that, you know, things were going to go... I would have wondered that would [SAM] be of the same quality of service that [Former SAM] was giving us in relation to me putting through requests for changes and stuff like that, he was very knowledgeable about, you know, everything that [Host Organisation] could do and could not do etc.-so I kind of wondered how that would work out as we moved forward."

1C: "Level of service"

2A: "That came here and done the whole project, unbelievable, 100% quality. Every single person that actually worked - I'm involved with [Engineer Name] now - every single person that worked with me, I worked with or I had the pleasure to interact with, 100% quality. And this is my core value"

2A: "Quality is my core value so, it was really, really important to me."

4A   "Someone who can deliver upon what they're saying"

1E: "It's, 'How can we help you to fix it?' –That's all he wants to hear"

Takes Ownership Examples

2A: "Is going to step in and then take ownership for the project."

2F: "So, like, we would have been concerned but, like, it was more along the lines of we didn't know who we were to contact and who was supposed to meet us, but once she took over, like, she's taken ownership of everything and, to be honest, I haven't a bad word to say about her."

3D: "Then, also my concerns around that, from my perspective, being a one-man operation, I needed somebody to come in and take ownership of the project"

3D: "If I raise a question or concern or request for quote or a demand, we'll call it, and I don't mean that in a demanding way, it's important that the person comes back to me, not necessarily with an answer, but an acknowledgement of my request and a commitment to do something about it, and then it's out of my head, out of my email, and it's not my problem"

4A: "So you need someone I suppose that's going to take the ownership"

4B: "To take care of our needs here"

4B: "Like, I need it off my desk, like, you've emails sitting there, so you just – I've 14 email accounts that I deal with, so the amount of emails that come in every day, you just, you want it gone"

4B: "If you haven't got a good account manager, it's just – we don't have time to manage it here and I don't want to know."

4B: "You can trust – you want the account manager to manage the account, you don't want to be coming back"

4B: "You want someone to come in and deal with it for you."

4:      "As an account manager, it's your job to know that, and then you need to step in and take ownership"

Understands Problem Examples

1A: "The most important thing is, is, I think, knowledge of what's available that can be of help. So two things maybe, an understanding of our business needs, you know, or what's critical for our business needs and also a clear knowledge of products or, out there that will actually fill those needs."

3B: "She always take the time to understand the issue."

3B: "I have an account manager with another company who does that and, you know, I'm having the account meetings to discuss what I want to do in the next couple of months with [Host Organisation]."

3D: "I suppose an understanding of what I'm looking for and what I'm talking about."

4A: "Look, yes, I know what your requirements are."

4D: "Somebody to clearly understand what our needs and requirements were."

4E   "Now, this didn't… So, it was 5,000 users the exchange platform was for, and so it was our job to identify the requirements [and extract?] different products."

Knowledge of Solutions

1A: "I won't say, when you say concerns, I didn't have a lot of concerns that, you know, things were going to go... I would have wondered that would [SAM] be of the same quality of service that [Previous SAM] was giving us in relation to me putting through requests for changes and stuff like that, he was very knowledgeable about, you know, everything that [Host Organisation] could do and could not do etc.-so I kind of wondered how that would work out as we moved forward."

1A: "The most important thing is, is, I think, knowledge of what's available that can be of help. So two things maybe, an understanding of our business needs, you know, or what's critical for our business needs and also a clear knowledge of products or, out there that will actually fill those needs."

1C: "Level of knowledge."

2B: "Like I find it very handy to have someone I can say, 'I'm thinking of doing this' – What would you think? And this is what I'm thinking of doing', you know?"

4A   "You're looking for knowledge."

4A: "You need someone with a good portfolio of knowledge in different products, different solutions."

4B: Getting advice on is this the best system to go ahead with

4:    There's an expectation that you, as their IT provider, have crammed all that into it and that you should know how much the kit needs to grow and -

APPENDIX P: COMPETENCE PERCEPTIONS

Capable Examples

<Internals\\Customer Interview Transcripts\\Interview 1A> - § 2 references coded [0.69% Coverage]

Reference 1 - 0.54% Coverage

```
She's there if I have a problem.  She's quite responsive so,
she's like a safety blanket for me, that's the way I feel,
you know?
```

Reference 2 - 0.15% Coverage

```
It's casual but it's professional,
```

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 6 references coded [9.25% Coverage]

Reference 1 - 4.25% Coverage

```
I was passionate about [Host Organisation], they had a
salesperson down there called [Former Account Manager] and
technically very, very strong, she supplied all our PC's and
she was hands on, totally motivated person, but even on a
personal level I would have developed a friendship with her
and her husband and my husband as well and we would go out
to dinner and all the rest of it so we had that rapport going
on.
```

Reference 2 - 1.33% Coverage

```
Now there have been a few issues with the support desk when
I ring and [SAM 1] all I have to do is ring her and she sorts
it
```

Reference 3 - 0.88% Coverage

```
I don't know what she says but she lets them have it anyway
because it gets sorted.
```

Reference 4 - 0.90% Coverage

I told [SAM 1] about it and she sorted it out and so far so good, everything is ok.

Reference 5 - 1.15% Coverage

As I say she is a people's person, pick up the phone, if there's a problem she's there, to manage the problem,

Reference 6 - 0.75% Coverage

That we would be in capable hands still and I was happy to go with that.

<Internals\\Customer Interview Transcripts\\Interview 1C> - § 7 references coded [4.59% Coverage]

Reference 1 - 0.19% Coverage

She makes the problem go away.

Reference 2 - 0.77% Coverage

So it's basically, it's like '[SAM 1], can you do this? [SAM 1], can you do that?' and she'll get it sorted out.

Reference 3 - 0.84% Coverage

You know, it's not like we – because it will be a two-liner email, usually, '[SAM 1], I need X, Y and Z done', and it gets done.

Reference 4 - 0.14% Coverage

Always business-like.

Reference 5 - 0.34% Coverage

You just say, 'I need this done', and it gets done.

Reference 6 - 1.22% Coverage

The email is normally, 'Yes'. Not, 'Well, why?', or, 'you can't because…' It's normally, 'Yeah, I'll have a look at

that for you', or you get the feeling that she is sorting
out the issue.

Reference 7 - 1.09% Coverage

When you ring somebody and they're looking after the problem,
you can then move on to limiting the damage or doing
something else, and you know it's going to be sorted.

<Internals\\Customer Interview Transcripts\\Interview 2A> - § 2 references coded
[0.35% Coverage]

Reference 1 - 0.09% Coverage

It's very professional –

Reference 2 - 0.26% Coverage

'This is the questions I have, can I leave it in your very
capable hands?' –

<Internals\\Customer Interview Transcripts\\Interview 2B> - § 1 reference coded [0.16%
Coverage]

Reference 1 - 0.16% Coverage

Oh, very well, very, very well. Very professional.

<Internals\\Customer Interview Transcripts\\Interview 2C> - § 1 reference coded [0.09%
Coverage]

Reference 1 - 0.09% Coverage

Very professional

<Internals\\Customer Interview Transcripts\\Interview 2D> - § 1 reference coded [0.05%
Coverage]

Reference 1 - 0.05% Coverage

Extremely professional

<Internals\\Customer Interview Transcripts\\Interview 2F> - § 3 references coded [0.56% Coverage]

Reference 1 - 0.19% Coverage

```
I'd say she was very professional
```

Reference 2 - 0.10% Coverage

```
Very professional.
```

Reference 3 - 0.28% Coverage

```
I'd say she's very capable and she does a great job.
```

<Internals\\Customer Interview Transcripts\\Interview 3A> - § 1 reference coded [0.04% Coverage]

Reference 1 - 0.04% Coverage

```
She's organised.
```

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 3 references coded [0.44% Coverage]

Reference 1 - 0.10% Coverage

```
Was a very professional person
```

Reference 2 - 0.16% Coverage

```
Very professional person and gets the job done.
```

Reference 3 - 0.18% Coverage

```
I would describe, professional but friendly, you know.
```

<Internals\\Customer Interview Transcripts\\Interview 4A> - § 5 references coded [1.25% Coverage]

Reference 1 - 0.18% Coverage

```
No, we'll get something sorted there'.
```

Reference 2 - 0.07% Coverage

    Well-organised.

Reference 3 - 0.80% Coverage

    whether it's a business opportunity, whether it's an issue,
    whether it's whatever the situation, that she's there to,
    you know, take it on and basically get it resolved or,

Reference 4 - 0.12% Coverage

    A very capable individual

Reference 5 - 0.07% Coverage

    Is very capable,

<Internals\\Customer Interview Transcripts\\Interview 4B> - § 4 references coded [1.21% Coverage]

Reference 1 - 0.23% Coverage

    She has a very relaxed approach, but it's very professional.

Reference 2 - 0.15% Coverage

    They are very professional in that way,

Reference 3 - 0.34% Coverage

    I've taken to both of them and I think they're very good and
    very professional, they are.

Reference 4 - 0.48% Coverage

    I sound like I'm paid, don't I, for them? But no, they
    really are good and they're friendly but in a, in a
    professional way.

<Internals\\Customer Interview Transcripts\\Interview 4D> - § 1 reference coded [0.40% Coverage]

Reference 1 - 0.40% Coverage

```
I found her warm, friendly, business-like.
```

<Internals\\Engineer Interview Transcripts\\Interview 3E> - § 3 references coded [0.20% Coverage]

Reference 1 - 0.06% Coverage

```
Very well, very professional.
```

Reference 2 - 0.06% Coverage

```
Consummate professional self
```

Reference 3 - 0.08% Coverage

```
I think she's extremely professional.
```

<Internals\\Engineer Interview Transcripts\\Interview 4E> - § 1 reference coded [1.17% Coverage]

Reference 1 - 1.17% Coverage

```
And it sticks in my mind because there was – it put me on
the spot, but it was very good, like, yeah, I liked
interacting with them all.  But in that meeting, she was
very strong
```

Competent Examples

<Internals\\Customer Interview Transcripts\\Interview 1A> - § 4 references coded [3.47% Coverage]

Reference 1 - 2.13% Coverage

```
I won't say, when you say concerns, I didn't have a lot of
concerns that, you know, things were going to go...  I would
have wondered that would [SAM 1] be of the same quality of
service that [Previous SAM] was giving us in relation to me
putting through requests for changes and stuff like that, he
was very knowledgeable about, you know, everything that host
organisation could do and could not do etc.-so I kind of
```

wondered how that would work out as we moved forward. And if
I had concerns they were quickly allayed, really.

Reference 2 - 0.44% Coverage

She knows pretty intimately our set-up here and she has
guided me all along to the right people in [Host
Organisation].

Reference 3 - 0.80% Coverage

So, hence when he was saying he was leaving it looked to me
like somebody fairly junior was stepping into the role with
maybe not a lot of experience but it hasn't really worked
out that way.

Reference 4 - 0.10% Coverage

Given her the experience

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 7 references coded [9.89% Coverage]

Reference 1 - 0.61% Coverage

So that we are in a position that we feel 99.9% confident.

Reference 2 - 3.31% Coverage

It may have seemed like [SAM 1] had a big pair of boots to
fill when [Previous SAM] left as perhaps he was more
technical, but he wasn't a people's person, [Previous SAM]
may have been the icing but [SAM 1] is the cake. You get the
currants you get everything, the entire shooting gallery,
there is rock solid foundation there, she

Reference 3 - 2.11% Coverage

Also dealt with [Host Organisation] on the software side of
things with [Software Solution]. [Other SAM] was the sales
guy we dealt with one this. [Other SAM] came in here and he
didn't know his stuff, he bluffed his way through,

Reference 4 - 0.52% Coverage

```
Because he didn't know, he didn't know his system
```

Reference 5 - 0.63% Coverage

```
I do believe that she was doing a lot of the work for
[Previous SAM].
```

Reference 6 - 0.92% Coverage

```
She just slide in to the position and I couldn't actually
fault her [Researcher Name] if I tried.
```

Reference 7 - 1.80% Coverage

```
Companies hire these quick talkers, who come in and they are
going to be great and they fall at the first hurdle, that's
because they are only the icing, you need the cake.
```

<Internals\\Customer Interview Transcripts\\Interview 1C> - § 3 references coded [4.84% Coverage]

Reference 1 - 0.72% Coverage

```
You know, she will, she'll give me a solution to the problem,
rather than, 'Well, no, you can't do that because…
```

Reference 2 - 0.60% Coverage

```
And what didn't we have, what cover don't we have?  And I
have to say, [SAM 1] does that.
```

Reference 3 - 3.52% Coverage

```
In any of our support contracts, I need to be able to make
a call to the account manager and not be told, 'Oh, well,
now, you need to be on to support on this department or that
department'.  We do have an issue like that with [Telephony
Company].  We need - we ring our account, email the account
manager and I'm told, 'Well, ring support'.  That's not good
enough.  That's - the account manager needs to ring support
and say, 'Listen, our company here needs to be sorted out',
```

and that's what you need to get. You need – they're going
to manage your account.

<Internals\\Customer Interview Transcripts\\Interview 2A> - § 3 references coded
[0.56% Coverage]

Reference 1 - 0.31% Coverage

I know that if I tell her, 'This is what I want', she will
come back to me to deliver to –

Reference 2 - 0.16% Coverage

Extremely knowledgeable person, absolutely 100%

Reference 3 - 0.09% Coverage

She delivers everything –

<Internals\\Customer Interview Transcripts\\Interview 2B> - § 1 reference coded [0.33%
Coverage]

Reference 1 - 0.33% Coverage

I didn't think – now, at this point, I would say to you
[Previous SAM Name] actually didn't do as good a job as [SAM
2].

<Internals\\Customer Interview Transcripts\\Interview 2D> - § 2 references coded
[0.35% Coverage]

Reference 1 - 0.26% Coverage

She was very professional, dealt with everything, reassured
us that everything was going to be the same, [there wasn't?]
- Or better

Reference 2 - 0.10% Coverage

But absolutely no qualms at all, she's brilliant.

<Internals\\Customer Interview Transcripts\\Interview 2F> - § 2 references coded [1.26%
Coverage]

Reference 1 - 0.98% Coverage

> And we would have had a different account manager who would
> have left, so things were kind of getting a bit strained and
> [SAM] then has done a great job of recovering, to be honest.

Reference 2 - 0.28% Coverage

> I'd say she's very capable and she does a great job.

<Internals\\Customer Interview Transcripts\\Interview 3A> - § 2 references coded [0.36% Coverage]

Reference 1 - 0.21% Coverage

> Maybe she, maybe again her knowledge, you know the way when
> you're unsure in a new role –

Reference 2 - 0.15% Coverage

> If she said, 'I'll find out', she did find out; never let me
> down.

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 2 references coded [1.14% Coverage]

Reference 1 - 0.84% Coverage

> I kind of remember saying, 'Well, whoever comes in has very
> big boots to fill', you know, in fairness. There was great
> expectation for what SAM 3 was going to do for us. I have to
> say I'm delighted. In fairness, she's filled the boots very
> well.

Reference 2 - 0.31% Coverage

> But we've had her now as account manager for two years and
> it's been great – very, very good.

<Internals\\Customer Interview Transcripts\\Interview 4A> - § 3 references coded [1.71% Coverage]

Reference 1 - 0.66% Coverage

So I would say communication, strong. Relationship-building
is very good. There's a sense that her ownership of the
situation is very good.

Reference 2 - 0.93% Coverage

Then to more kind of going, that if the challenges arise,
you know, I'm here to support. What can we do? And then I
suppose looking to make sure that, you know, regardless of
what the situation is,

Reference 3 - 0.12% Coverage

Someone who we can rely on

<Internals\\Customer Interview Transcripts\\Interview 4B> - § 5 references coded [3.35%
Coverage]

Reference 1 - 0.37% Coverage

You felt happy knowing that there was someone more qualified,
and I wouldn't be qualified enough –

Reference 2 - 1.33% Coverage

And did [SAM 4], and whoever she would have brought to that
meeting with her, did she give you a sense of reassurance
that your, your concerns would be met?

Yeah, it did, because they were going to run a whole system
search on our system

Reference 3 - 0.78% Coverage

[Host Organisation] were very forthcoming. They went
through the whole system, they sent us all the reports, what
was the best way to move forward. Yeah, no, we were very
confident with them, very happy with them.

Reference 4 - 0.71% Coverage

I would go back to [SAM 4] and she would – in [SAM 4], and
[SAM 3]'s case I have to say, they were both excellent in
that. I would definitely, definitely say both of them were
very good.

Reference 5 - 0.17% Coverage

```
I find [SAM 3] equally as good as [SAM 4]
```

\<Internals\\Customer Interview Transcripts\\Interview 4D\> - § 4 references coded [2.40% Coverage]

Reference 1 - 1.02% Coverage

```
[SAM 4] was very effective in terms of operating between
ourselves   and   your   own   organisation   and   [Vendor
Organisation]
```

Reference 2 - 0.76% Coverage

```
But, you know, generally, she's been very effective at
delivering a service to us.
```

Reference 3 - 0.33% Coverage

```
Effectively, to satisfy our needs.
```

Reference 4 - 0.29% Coverage

```
Knowledgeable about her subject.
```

\<Internals\\Engineer Interview Transcripts\\Interview 1E\> - § 2 references coded [0.73% Coverage]

Reference 1 - 0.22% Coverage

```
If they didn't have confidence in her she wouldn't be getting
it and she'd be losing customers
```

Reference 2 - 0.50% Coverage

```
I would, I've had one or two that have kind of questioned
whether [SAM 1] was really the person that was selling them
the stuff in the Sales Admin role rather than their last
account manager, put it that way.
```

\<Internals\\Engineer Interview Transcripts\\Interview 4E\> - § 1 reference coded [0.17% Coverage]

Reference 1 - 0.17% Coverage

```
A bit of knowledge around
```

Confident Examples

<Internals\\Customer Interview Transcripts\\Interview 1A> - § 2 references coded [2.45% Coverage]

Reference 1 - 0.22% Coverage

```
Given her the experience and maybe the confidence.
```

Reference 2 - 2.23% Coverage

```
But she is more confident about, you know, any approach she
would make than she was at the beginning.  She was a little
bit  tentative  and  she  certainly  found  it  very,  very
tentative, I thought, when she wasn't the manager of that or
when she wasn't our first contact.  She did sound pretty
junior.   But she doesn't anymore and I'm presuming it's
because of  the  experience  she's  getting  and  maybe  the
confidence that, you know, some of the interactions she's
had with your clients has, has been positive.  It certainly
has been with me.
```

<Internals\\Engineer Interview Transcripts\\Interview 1E> - § 2 references coded [0.77% Coverage]

Reference 1 - 0.18% Coverage

```
She had a good confidence about her which, you know, always
goes down well.
```

Reference 2 - 0.59% Coverage

```
Yeah, she gets the clarification for herself.

What do you think that makes the customer think about her?

Well, from my point of view, I would say that it would make
a customer feel a little bit more confident with her
```

<Internals\\Engineer Interview Transcripts\\Interview 3E> - § 1 reference coded [0.11% Coverage]

Reference 1 - 0.11% Coverage

> She's a confident woman, she has her wits about her.

Efficient Examples

<Internals\\Customer Interview Transcripts\\Interview 1A> - § 1 reference coded [0.44% Coverage]

Reference 1 - 0.44% Coverage

> If it's of high importance or it's of concern to me, I can see SAM 1 working on it more diligently –

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 5 references coded [2.51% Coverage]

Reference 1 - 0.77% Coverage

> And it is smooth running, all the "I"'s are dotted and the "T"s are crossed

Reference 2 - 0.32% Coverage

> And she sorts it straight away,

Reference 3 - 0.17% Coverage

> One man one job,

Reference 4 - 0.38% Coverage

> Whereas [SAM 1] is a multi-tasker,

Reference 5 - 0.87% Coverage

> Very quickly, super quickly, there is never a time delay really, she's on the ball,

<Internals\\Customer Interview Transcripts\\Interview 1C> - § 2 references coded [0.45% Coverage]

Reference 1 - 0.24% Coverage

It was immediately all hands on pump.

Reference 2 - 0.21% Coverage

It's – you're being dealt with.

<Internals\\Customer Interview Transcripts\\Interview 2C> - § 2 references coded [0.46% Coverage]

Reference 1 - 0.17% Coverage

She's very good, very responsive

Reference 2 - 0.29% Coverage

She's always been quite proactive at pushing those along.

<Internals\\Customer Interview Transcripts\\Interview 3A> - § 3 references coded [0.74% Coverage]

Reference 1 - 0.28% Coverage

When something needs to be sorted, that's different. There's not, there's no casualness about that, if you've got an issue

Reference 2 - 0.36% Coverage

Follow-up, she's very good at following up. If we ignored something she sent us, you can rest assured you'd hear from her again so we've, so now we deal with it.

Reference 3 - 0.10% Coverage

You tend to know the people that work hard

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 4 references coded [2.14% Coverage]

Reference 1 - 0.17% Coverage

She wanted to make sure the handover went smoothly.

Reference 2 - 0.16% Coverage

```
                    Very professional person and gets the job done.
```

Reference 3 - 0.82% Coverage

```
                    She'll come in.  She'll have her agenda.  She won't waste
                    your time.  She'll come in and she'll have her agenda on
                    what we're going to discuss.  It could be the contract
                    renewal and she'll come in with her contract.  We'll go
                    through the contract.
```

Reference 4 - 1.00% Coverage

```
                    Beforehand, but we'll get down to it – sort out the contract.
                    I'll probably have about 10 – you were asking about changes,
                    flexibility – I'd probably have 10 changes to go onto the
                    contract after having read it the first time but, in
                    fairness, she'll take it away and sort it out, basically,
                    you know.
```

<Internals\\Customer Interview Transcripts\\Interview 3D> - § 1 reference coded [0.75% Coverage]

Reference 1 - 0.75% Coverage

```
                    And then to come back to me as quickly as possible with a
                    solution and costing around that.
```

<Internals\\Customer Interview Transcripts\\Interview 4B> - § 1 reference coded [0.14% Coverage]

Reference 1 - 0.14% Coverage

```
                    So in that way they are proactive.
```

Intelligent Examples

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 1 reference coded [0.35% Coverage]

Reference 1 - 0.35% Coverage

```
                    It's not thinking outside the box,
```

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 2 references coded [0.25% Coverage]

Reference 1 - 0.11% Coverage

```
    It's organised in her thoughts,
```

Reference 2 - 0.14% Coverage

```
    In a, sort of, a logical kind of a way.
```

<Internals\\Engineer Interview Transcripts\\Interview 1E> - § 1 reference coded [0.04% Coverage]

Reference 1 - 0.04% Coverage

```
    She's decisive
```

<Internals\\Engineer Interview Transcripts\\Interview 3E> - § 1 reference coded [0.11% Coverage]

Reference 1 - 0.11% Coverage

```
    She's a confident woman, she has her wits about her.
```

Skilful Examples

<Internals\\Customer Interview Transcripts\\Interview 1A> - § 2 references coded [0.30% Coverage]

Reference 1 - 0.14% Coverage

```
    Her attention to detail is good.
```

Reference 2 - 0.17% Coverage

```
    Her organisational ability is good too.
```

<Internals\\Customer Interview Transcripts\\Interview 4A> - § 1 reference coded [0.34% Coverage]

Reference 1 - 0.34% Coverage

```
So I would say communication, strong.  Relationship-building
is very good.
```

<Internals\\Engineer Interview Transcripts\\Interview 4E> - § 1 reference coded [0.24% Coverage]

Reference 1 - 0.24% Coverage

```
I think she handled that quite well
```

APPENDIX Q: WARMTH PERCEPTIONS

<u>Friendly Examples</u>

<Internals\\Customer Interview Transcripts\\Interview 1A> - § 1 reference coded [0.03% Coverage]

Reference 1 - 0.03% Coverage

```
Helpful
```

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 3 references coded [5.16% Coverage]

Reference 1 - 4.25% Coverage

```
I was passionate about [Host Organisation], they had a
salesperson down there called [Former Account Manager], she
was technically very, very strong, she supplied all our PC's
and she was hands on, totally motivated person, but even on
a personal level I would have developed a friendship with
her and her husband and my husband as well and we would go
out to dinner and all the rest of it so we had that rapport
going on.
```

Reference 2 - 0.74% Coverage

```
We would have the most pleasant of evenings and out of that
friendship
```

Reference 3 - 0.17% Coverage

```
She is friendly
```

<Internals\\Customer Interview Transcripts\\Interview 1C> - § 2 references coded [0.37% Coverage]

Reference 1 - 0.06% Coverage

```
Friendly
```

Reference 2 - 0.31% Coverage

```
    Approachable would be the other way of saying it.
```

<Internals\\Customer Interview Transcripts\\Interview 2A> - § 4 references coded [0.35% Coverage]

Reference 1 - 0.05% Coverage

```
    Very friendly,
```

Reference 2 - 0.06% Coverage

```
    Very accommodating
```

Reference 3 - 0.19% Coverage

```
    But she is extremely friendly, extremely nice, and very calm.
```

Reference 4 - 0.05% Coverage

```
     Very friendly,
```

<Internals\\Customer Interview Transcripts\\Interview 2C> - § 2 references coded [1.13% Coverage]

Reference 1 - 0.51% Coverage

```
    As it panned out, yeah, that wasn't a concern.   [SAM 2]'s
    very, very approachable and very available.
```

Reference 2 - 0.63% Coverage

```
    I thought she was a friendly girl.  I wasn't able to form an
    impression of how she'd do as an account manager from that.
```

<Internals\\Customer Interview Transcripts\\Interview 2D> - § 2 references coded [0.14% Coverage]

Reference 1 - 0.07% Coverage

So approachable, it's been brilliant.

Reference 2 - 0.08% Coverage

But, yeah, so approachable, definitely.

<Internals\\Customer Interview Transcripts\\Interview 2F> - § 1 reference coded [0.07% Coverage]

Reference 1 - 0.07% Coverage

Very friendly

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 3 references coded [0.63% Coverage]

Reference 1 - 0.25% Coverage

I would say very, very personable, very friendly, very outgoing type person.

Reference 2 - 0.18% Coverage

I would describe, professional but friendly, you know.

Reference 3 - 0.19% Coverage

We'll obviously have a bit of banter for a few minutes –

<Internals\\Customer Interview Transcripts\\Interview 3D> - § 1 reference coded [0.37% Coverage]

Reference 1 - 0.37% Coverage

Extremely bubbly, live person, very friendly,

<Internals\\Customer Interview Transcripts\\Interview 4A> - § 4 references coded [1.52% Coverage]

Reference 1 - 0.12% Coverage

Someone that came across

Reference 2 - 1.23% Coverage

```
someone that was keen to engage, find out what the
organisation did and someone, I suppose, who was also keen
to kind of see, look, where do [Host Organisation], where do
they fit in and that and how they could probably, you know,
best serve, I suppose, us as an organisation
```

Reference 3 - 0.05% Coverage

```
Personable,
```

Reference 4 - 0.12% Coverage

```
Always willing to help.
```

<Internals\\Customer Interview Transcripts\\Interview 4B> - § 4 references coded [0.76% Coverage]

Reference 1 - 0.07% Coverage

```
Was very friendly.
```

Reference 2 - 0.06% Coverage

```
Very friendly.
```

Reference 3 - 0.14% Coverage

```
I'd say, and [SAM 3], very friendly.
```

Reference 4 - 0.48% Coverage

```
I sound like I'm paid, don't I, for them?  But no, they
really are good and they're friendly but in a, in a
professional way.
```

<Internals\\Customer Interview Transcripts\\Interview 4D> - § 1 reference coded [0.40% Coverage]

Reference 1 - 0.40% Coverage

```
I found her warm, friendly, business-like.
```

<Internals\\Engineer Interview Transcripts\\Interview 1E> - § 2 references coded [0.21% Coverage]

Reference 1 - 0.14% Coverage

```
    You know, to be fair, she approaches it in the right way.
```

Reference 2 - 0.07% Coverage

```
    I would say she's approachable,
```

<Internals\\Engineer Interview Transcripts\\Interview 3E> - § 4 references coded [0.53% Coverage]

Reference 1 - 0.14% Coverage

```
    She is very, very personable, she's a very, very friendly
    person,
```

Reference 2 - 0.04% Coverage

```
    And it's a friendly
```

Reference 3 - 0.22% Coverage

```
    And certainly, the interaction between the customer and [SAM
    3] was very, very friendly, very positive.
```

Reference 4 - 0.12% Coverage

```
    Interacted with the customer on a very, very friendly basis
```

<Internals\\Engineer Interview Transcripts\\Interview 4E> - § 2 references coded [2.83% Coverage]

Reference 1 - 1.36% Coverage

```
    She's friendly, she'd always, she sometimes brings stuff for
    the meeting, you know, like, I don't know, strawberries or
    something and, or – and also she'd often offer to bring you
    out to lunch and whatever.
```

Reference 2 - 1.47% Coverage

And also having that trust and good communication with the
customer, you know, [she can?] be friends and friendly with
everyone, so, you know, you're on the right track to winning
the deal, I suppose, would be [inaudible].

Good Natured Examples

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 1 reference coded [0.39%
Coverage]

Reference 1 - 0.39% Coverage

    I thought she was over enthusiastic,

<Internals\\Customer Interview Transcripts\\Interview 2A> - § 3 references coded
[0.35% Coverage]

Reference 1 - 0.11% Coverage

    Sort of very calm personality.

Reference 2 - 0.19% Coverage

    But she is extremely friendly, extremely nice, and very calm.

Reference 3   - 0.03% Coverage

    Very calm.

<Internals\\Customer Interview Transcripts\\Interview 2B> - § 2 references coded [0.67%
Coverage]

Reference 1 - 0.33% Coverage

    But, like, the meetings were all very, very good, all very
    positive, nothing was a problem, you know?

Reference 2 - 0.34% Coverage

    So, I – she just has, she just has a really good way about
    her, you know, like, she really has, you know?

<Internals\\Customer Interview Transcripts\\Interview 2C> - § 2 references coded [0.12% Coverage]

Reference 1 - 0.05% Coverage

```
    Bubbly.
```

Reference 2 - 0.07% Coverage

```
    Very pleasant.
```

<Internals\\Customer Interview Transcripts\\Interview 2D> - § 1 reference coded [0.04% Coverage]

Reference 1 - 0.04% Coverage

```
    But very easy-going
```

<Internals\\Customer Interview Transcripts\\Interview 3A> - § 1 reference coded [0.15% Coverage]

Reference 1 - 0.15% Coverage

```
    She's bubbly, happy, you know, she's never come in here
    depressed.
```

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 1 reference coded [0.25% Coverage]

Reference 1 - 0.25% Coverage

```
    I would say very, very personable, very friendly, very
    outgoing type person.
```

<Internals\\Customer Interview Transcripts\\Interview 3D> - § 4 references coded [2.64% Coverage]

Reference 1 - 0.37% Coverage

```
    Extremely bubbly, live person, very friendly,
```

Reference 2 - 0.82% Coverage

> Very good person to have as a customer account manager, real
> pleasant and nice person to work with.

Reference 3 - 1.05% Coverage

> I don't think she has – well, I'm sure she does, but I've
> never felt or seen the stressed, grumpy side of her, sort of
> thing –

Reference 4 - 0.41% Coverage

> Very easy-going and pleasant person to work with.

<Internals\\Customer Interview Transcripts\\Interview 4A> - § 2 references coded [0.39% Coverage]

Reference 1 - 0.07% Coverage

> Very personable

Reference 2 - 0.31% Coverage

> As well, very personable and someone who's a pleasure to
> work with

<Internals\\Engineer Interview Transcripts\\Interview 1E> - § 2 references coded [0.15% Coverage]

Reference 1 - 0.05% Coverage

> She's very outgoing,

Reference 2 - 0.10% Coverage

> She's relaxed, she's not generally on edge,

<Internals\\Engineer Interview Transcripts\\Interview 3E> - § 2 references coded [0.94% Coverage]

Reference 1 - 0.22% Coverage

> And certainly, the interaction between the customer and SAM
> 3 was very, very friendly, very positive.

Reference 2 - 0.72% Coverage

> That's a hard one. Well, I'll tell you, she took me
> completely by surprise last Christmas in the fact that she
> bought all the engineers a bottle of Prosecco and gave them
> to us as Christmas presents. I mean, that was totally
> uncalled for, totally uncalled for and a complete surprise.
> You know, so that's, you know, that's her nature –

<Internals\\Engineer Interview Transcripts\\Interview 4E> - § 1 reference coded [1.25% Coverage]

Reference 1 - 1.25% Coverage

> She'd always, she sometimes brings stuff for the meeting,
> you know, like, I don't know, strawberries or something and,
> or – and also she'd often offer to bring you out to lunch
> and whatever.

Sincere Examples

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 1 reference coded [4.96% Coverage]

Reference 1 - 4.96% Coverage

> [Former Account Manager] was the sales guy we dealt with one
> this. He came in here and he didn't know his stuff, he
> bluffed his way through, you had to listen to his tales of
> woe about his family, his wife, his children, his this, his
> that, and while we all talk about our kids and what not he
> was just fobbing us off, because he didn't know, he didn't
> know his system and he certainly didn't know how to deal
> with customers so on the software side we changes from
> [Software Name] to [Software Name].

<Internals\\Customer Interview Transcripts\\Interview 1C> - § 3 references coded [2.19% Coverage]

Reference 1 - 0.59% Coverage

> We actually gained an account manager, as opposed to somebody
> who had us on their accounts.

Reference 2 - 1.20% Coverage

But it's nothing to me to say, 'Listen, by the way, is there any feedback on this?' and it's, 'Oh, God, listen, sorry, I missed it', or, you know. And it's not – you're not fobbed off.

Reference 3 - 0.40% Coverage

You know, X, Y or Z and not fob you off and not lead you down

<Internals\\Customer Interview Transcripts\\Interview 2A> - § 1 reference coded [0.66% Coverage]

Reference 1 - 0.66% Coverage

If she doesn't know the answer on the spot – which is never a problem, obviously – she will go and consult and come back to me with the answer. So I get what I'm, what I feel I'm looking for I get.

<Internals\\Customer Interview Transcripts\\Interview 2B> - § 3 references coded [1.03% Coverage]

Reference 1 - 0.49% Coverage

` Yeah, yeah. But, and [Previous Account Manager] did it as well, but it's just – [Previous Account Manager] did do it a little bit, but I just feel with [SAM] it's, you know, it's nearly genuinely,

Reference 2 - 0.23% Coverage

I get a lot more honesty out of the relationship, you know what I mean,

Reference 3 - 0.32% Coverage

So, she doesn't do that, and I like that, you know, I much prefer to know where I stand, you know,

<Internals\\Customer Interview Transcripts\\Interview 2D> - § 1 reference coded [0.03% Coverage]

Reference 1 - 0.03% Coverage

Very forthcoming,

<Internals\\Customer Interview Transcripts\\Interview 3A> - § 2 references coded [0.31% Coverage]

Reference 1 - 0.13% Coverage

        She appears to enjoy what she's doing, and it comes across,

Reference 2 - 0.18% Coverage

        'Well, that's fair, we'll give her, I mean, we'll give her
        a shot with anything',

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 5 references coded [2.55% Coverage]

Reference 1 - 0.99% Coverage

        I mean, it always, it hasn't always been great phone calls
        about how well things are going. There have been phone calls
        about, maybe things – and I'll give you an example of that
        later on – about how things haven't been going so well and,
        in fairness, she always take the time to understand the
        issue,

Reference 2 - 0.47% Coverage

        And in fairness, what I like about [SAM 3] is that she
        doesn't come into every single account meeting with a new
        product she wants to sell me.

Reference 3 - 0.23% Coverage

        To be fair to [SAM 3], I think she's trying to meet my
        expectations.

Reference 4 - 0.75% Coverage

        Engineers, you know, I know engineers aren't always
        available. So, she's trying to, as I say, she's like, she's
        in the middle of all this and she's trying to manage those
        expectations but, in fairness to her, she never bluffs.

Reference 5 - 0.12% Coverage

She's very honest in her approach.

<Internals\\Customer Interview Transcripts\\Interview 4A> - § 1 reference coded [0.31% Coverage]

Reference 1 - 0.31% Coverage

        She's not someone just to pawn you off, just to say, 'Look,
        yeah.

<Internals\\Customer Interview Transcripts\\Interview 4B> - § 1 reference coded [0.19% Coverage]

Reference 1 - 0.19% Coverage

        And there's no – I like no nonsense with people.

<Internals\\Engineer Interview Transcripts\\Interview 1E> - § 3 references coded [0.98% Coverage]

Reference 1 - 0.32% Coverage

        That there's no fuss about her. There's no false promises,
        everything is black and white, that's the way it is. There's
        no fluff –

Reference 2 - 0.38% Coverage

        You know, and I think they appreciate the fact that she's
        not, she's genuine, she's straight to the point and that's
        the one comment I get the most about her.

Reference 3 - 0.28% Coverage

        But I reckon customers realise that she is straight up,
        straightforward. If she says something, that's the way it
        is.

Trustworthy Examples

<Internals\\Customer Interview Transcripts\\Interview 1A> - § 1 reference coded [0.93% Coverage]

Reference 1 - 0.93% Coverage

```
I put through a query on it and it dragged on for a long
time and what she was saying to me was the problem was she
put it over to [Vendor Name] and they hadn't actually come
back to her.  So, I mean, I take that on face value –
```

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 1 reference coded [1.22% Coverage]

Reference 1 - 1.22% Coverage

```
But I was reassured by our then account manager SAM 1 that
smooth running would continue and that we would be ok.
```

<Internals\\Customer Interview Transcripts\\Interview 1C> - § 6 references coded [3.23% Coverage]

Reference 1 - 0.26% Coverage

```
There's not much need to because we trust
```

Reference 2 - 0.03% Coverage

```
Open
```

Reference 3 - 0.40% Coverage

```
It's always straightforward and up and, you know, trustable.
```

Reference 4 - 0.43% Coverage

```
If you can't trust that it's being sorted, you have a big
problem.
```

Reference 5 - 2.00% Coverage

```
Normally, what – you see, you tend not to get an email
saying, 'No, we can't.  You'll get her saying, 'you can't do
that because X, Y and Z', or, 'If you want to do this, you
will need to do A, B and C'.  Which would normally be a
licensing issue or something like that.  And we tend to
believe what we're told.
```

Reference 6 - 0.10% Coverage

```
Trust [SAM 1].
```

<Internals\\Customer Interview Transcripts\\Interview 2A> - § 6 references coded [1.12% Coverage]

Reference 1 - 0.66% Coverage

```
If she doesn't know the answer on the spot – which is never
a problem, obviously – she will go and consult and come back
to me with the answer.  So I get what I'm, what I feel I'm
looking for I get.
```

Reference 2 - 0.03% Coverage

```
Trust.
```

Reference 3 - 0.08% Coverage

```
Trust straight away.
```

Reference 4 - 0.16% Coverage

```
And I know that she is going to come back to me.
```

Reference 5 - 0.13% Coverage

```
I just feel that I can just trust her,
```

Reference 6 - 0.06% Coverage

```
And 100% trust.
```

<Internals\\Customer Interview Transcripts\\Interview 2B> - § 3 references coded [1.03% Coverage]

Reference 1 - 0.21% Coverage

```
I, I just, I – she's almost very trusting, very honest, I
feel.
```

Reference 2 - 0.69% Coverage

> 'I'm not sure what that is, let me find out, I'll ring you
> back', and that happens. So, I, you know, I'm a happy camper
> if, if…   I hate being lied to; I hate the feeling that
> someone is taking the piss out of me –

Reference 3 - 0.13% Coverage

> I think, because she's upfront and honest,

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 4 references coded [1.07% Coverage]

Reference 1 - 0.20% Coverage

> And honesty, I think, is the other one as well, you know.

Reference 2 - 0.21% Coverage

> She's very honest in her approach. She won't try to bluff
> us.

Reference 3 - 0.50% Coverage

> And she'll be very upfront about that and setting the
> expectations. She's very honest in setting the expectations
> of what she can do for us, basically.

Reference 4 - 0.17% Coverage

> She's honest, she's built up a trusting relationship

<Internals\\Customer Interview Transcripts\\Interview 4A> - § 1 reference coded [0.12% Coverage]

Reference 1 - 0.12% Coverage

> Someone who's trustworthy,

<Internals\\Engineer Interview Transcripts\\Interview 1E> - § 4 references coded [0.78% Coverage]

Reference 1 - 0.07% Coverage

```
Give them the honest opinion
```

Reference 2 - 0.40% Coverage

```
To be fair, most of them accept it from her -

And I think it's because she's just got a history of being
totally honest with them.
```

Reference 3 - 0.28% Coverage

```
But I reckon customers realise that she is straight up,
straightforward.  If she says something, that's the way it
is.
```

Reference 4 - 0.03% Coverage

```
She's honest
```

<Internals\\Engineer Interview Transcripts\\Interview 4E> - § 3 references coded [2.36% Coverage]

Reference 1 - 0.14% Coverage

```
They, they trust her,
```

Reference 2 - 0.75% Coverage

```
You can see that they would trust her and, with that, sort
of, over and back, you'd be more inclined to win deals -
```

Reference 3 - 1.47% Coverage

```
And also having that trust and good communication with the
customer, you know, [she can?] be friends and friendly with
everyone, so, you know, you're on the right track to winning
the deal, I suppose, would be [inaudible].
```

Warm Examples

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 4 references coded [6.13% Coverage]

Reference 1 - 3.31% Coverage

It may have seemed like [SAM 1] had a big pair of boots to
fill when [Previous SAM] left as perhaps he was more
technical, but he wasn't a people's person, [Previous
Account Manager] may have been the icing but [SAM 1] is the
cake. You get the currants you get everything, the entire
shooting gallery, there is rock solid foundation there, she

Reference 2 - 1.36% Coverage

I do think people like her, I like her, I like her for what
she is, she's a mother, she's human, she's normal, she's
like us all

Reference 3 - 0.31% Coverage

She comes in and she is homely

Reference 4 - 1.15% Coverage

As I say she is a people's person, pick up the phone, if
there's a problem she's there, to manage the problem,

<Internals\\Customer Interview Transcripts\\Interview 1C> - § 2 references coded [0.83%
Coverage]

Reference 1 - 0.45% Coverage

You're not dealing with a faceless person, you're dealing
with a human

Reference 2 - 0.38% Coverage

He just didn't, he didn't sit with us. We just didn't gel.

<Internals\\Customer Interview Transcripts\\Interview 2A> - § 1 reference coded [0.46%
Coverage]

Reference 1 - 0.46% Coverage

But I am looking forward to actually have the social
interaction and get to know her as more of a human than the
business role.

<Internals\\Customer Interview Transcripts\\Interview 2D> - § 3 references coded [0.65% Coverage]

Reference 1 - 0.36% Coverage

```
Ah, lovely, ah...  Like, we had spoken on the phone before
that and I think we'd emails so, but definitely spoken on
the phone so I kind of knew what I was getting into, that
kind of thing.
```

Reference 2 - 0.04% Coverage

```
Well, she was lovely,
```

Reference 3 - 0.25% Coverage

```
She's been so, you know, she's the kind of person [that's
kind of fuzzy?], you could just give a big hug to, do you
know what I mean?
```

<Internals\\Customer Interview Transcripts\\Interview 3B> - § 2 references coded [0.20% Coverage]

Reference 1 - 0.08% Coverage

```
Very personable person.
```

Reference 2 - 0.12% Coverage

```
She's a very – she's a people person.
```

<Internals\\Customer Interview Transcripts\\Interview 4D> - § 1 reference coded [0.40% Coverage]

Reference 1 - 0.40% Coverage

```
I found her warm, friendly, business-like.
```


Well Intentioned Examples

<Internals\\Customer Interview Transcripts\\Interview 1A> - § 5 references coded [2.08% Coverage]

Reference 1 - 0.38% Coverage

    Her first instinct is to help me to solve whatever difficulty
    if I have a difficulty there.

Reference 2 - 0.76% Coverage

    It's to sort out our difficulties. That's why I like working
    with her, you know, because she's really responsive to my
    requests rather than being proactive in trying to push
    things.

Reference 3 - 0.21% Coverage

    Rather than, you know, pushing [Host Organisation] business.

Reference 4 - 0.51% Coverage

    Hearing the difficulties they, they have or hearing the
    concerns they have, and maybe suggesting and implementing
    solutions

Reference 5 - 0.22% Coverage

    She'll try and understand exactly what I'm saying –

<Internals\\Customer Interview Transcripts\\Interview 1B> - § 3 references coded
[11.15% Coverage]

Reference 1 - 7.01% Coverage

    And before [SAM 1] came on-board and you were having issues
    and you were thinking of moving over what was your sales
    account manager doing about that?

    I felt absolutely nothing, I felt the sales manager was there
    to meet his target every month, he wasn't there to keep the
    customer happy, it's not thinking outside the box, one man
    one job, whereas [SAM 1] is a multi-tasker, where as he may
    have been technically a lot strong than [SAM 1] he wasn't
    interested in looking after the customers problems, he was
    just interested in his sales targets, hence that's why people
    leave companies. We also dealt with [Host Organisation] on
    the software side of things with [Software Name].

Reference 2 - 1.34% Coverage

I am not saying she is not worried about sales targets she
probably is but she manages the customers to the best of her
ability,

Reference 3 - 2.80% Coverage

There you have it again, [Previous SAM], he said I should
have gone myself. He should have gone. The only time I saw
his face was when he connected with me on linked in – in all
that time with [Host Organisation]. All about the figures,
all about the commission, all about the money.

<Internals\\Customer Interview Transcripts\\Interview 1C> - § 3 references coded [3.42%
Coverage]

Reference 1 - 0.84% Coverage

From what I've seen of [SAM 1]'s interactions, she wants to
find out what our problem is and how can she make it go away.

Reference 2 - 0.63% Coverage

'Right, we'll have a look at it, we'll take it down, we'll
try and fix it, and we'll try and sort it'

Reference 3 - 1.96% Coverage

You know, it's not somebody who's sitting there going, 'Well,
your contract says this. Your contract says that'. Sales
in [Host Organisation] can tend to do that. They can tend
to say, 'Well, it's not covered under your contract'.
Whereas, [SAM 1] will tend to go, 'Let's get it fixed and
then worry about it'.

<Internals\\Customer Interview Transcripts\\Interview 2A> - § 2 references coded
[0.35% Coverage]

Reference 1 - 0.28% Coverage

But if I come to [SAM] I get what I think I need, not what
you guys have for sale.

Reference 2 - 0.07% Coverage

To my best needs.

\<Internals\\Customer Interview Transcripts\\Interview 2C\> - § 1 reference coded [0.20% Coverage]

Reference 1 - 0.20% Coverage

    I think she's trying to do what I want.

\<Internals\\Customer Interview Transcripts\\Interview 2D\> - § 1 reference coded [0.10% Coverage]

Reference 1 - 0.10% Coverage

    Oh, definitely to make me a happy customer, definitely.

\<Internals\\Customer Interview Transcripts\\Interview 2F\> - § 1 reference coded [0.52% Coverage]

Reference 1 - 0.52% Coverage

    Sales-focused. Like, at, at the end of the day, she wasn't
    driving sales in a hard kind of a way.

\<Internals\\Customer Interview Transcripts\\Interview 3A\> - § 3 references coded [0.60% Coverage]

Reference 1 - 0.24% Coverage

    She always appears to have our best - to us she comes across
    as having, like, our best interests at heart –

Reference 2 - 0.32% Coverage

    I think she was concerned about the integrity of the back-
    up and a few different things so it is something that's on
    the radar to be reviewed

Reference 3 - 0.04% Coverage

     But no hard sell,

\<Internals\\Customer Interview Transcripts\\Interview 3B\> - § 1 reference coded [0.31% Coverage]

Reference 1 - 0.31% Coverage

> You know, and you're not going to try and be sold something,
> and the experience is a good one –

<Internals\\Customer Interview Transcripts\\Interview 4A> - § 6 references coded [6.82% Coverage]

Reference 1 - 1.42% Coverage

> Someone that came across very personable, someone that was
> keen to engage, find out what the organisation did and
> someone, I suppose, who was also keen to kind of see, look,
> where do [Host Organisation], where do they fit in and that
> and how they could probably, you know, best serve, I suppose,
> us as an organisation

Reference 2 - 1.20% Coverage

> In fairness to [SAM 4], they never tried to sell us something
> that may not be of benefit to the organisation. They don't
> push products and it's always with a view to, you know, what
> the expectation of the customer is or what the needs of the
> customer are.

Reference 3 - 0.54% Coverage

> [SAM 4] would accompany the technical engineer to just get
> a view from our own perspective what's involved, you know.

Reference 4 - 0.39% Coverage

> It's certainly a case that tries to get to the, you know, to
> the nub of the problem

Reference 5 - 0.69% Coverage

> And someone who is, certainly, I wouldn't think it's someone
> that's kind of saying, 'Look, I just need to make sales,
> etc. at the end of the month'.

Reference 6 - 2.59% Coverage

> And yeah, again, you know, I suppose we're the drivers of
> the project, but when we did leverage, you know, what we

> needed, the information that we needed and the pricing that
> we needed. Obviously there is a sense with [SAM 4], with
> [Host Organisation] in general, is that they are always going
> to their vendors looking for value for money for us.   I
> always get that sense. I'm always, I suppose, emphasising
> that we are a charity, etc., but I do get the sense that
> they're taking that in on board and that, you know, they are
> striving to get value for money for us.

<Internals\\Customer Interview Transcripts\\Interview 4B> - § 1 reference coded [0.28% Coverage]

Reference 1 - 0.28% Coverage

> No, she doesn't try and sell you something, no, she does
> meet your needs.

<Internals\\Customer Interview Transcripts\\Interview 4D> - § 3 references coded [1.16% Coverage]

Reference 1 - 0.46% Coverage

> I don't see her as being focused a lot on selling,

Reference 2 - 0.33% Coverage

> Effectively, to satisfy our needs.

Reference 3 - 0.37% Coverage

> Trying to fit a solution in around those,

<Internals\\Engineer Interview Transcripts\\Interview 1E> - § 1 reference coded [0.35% Coverage]

Reference 1 - 0.35% Coverage

> There's none of the usual sales banter as such where, you
> know, a customer would think, 'Ah, they're, she's just trying
> to up-sell me something'.

<Internals\\Engineer Interview Transcripts\\Interview 3E> - § 4 references coded [1.54% Coverage]

Reference 1 - 0.41% Coverage

> But not in any kind of a, a serious way, in the sense that
> I would never get a situation where [SAM 3] would say to me,
> 'No, we can't, we can't sell that because I'm not making
> enough money'.

Reference 2 - 0.29% Coverage

> And I think probably disappointed for a couple of reasons.
> One is that, well, we may not be able to do business with
> this customer –

Reference 3 - 0.47% Coverage

> Obviously I think because she's not, her target's going to
> be affected - but I don't think that that was a primary
> reason. I think it was more to do with the fact that, that's
> a shame

Reference 4 - 0.37% Coverage

> What, was there ever a time where you felt that [SAM 3] truly
> wanted to understand the needs of the customer?
>
> Every Time. Every time. Seriously, no, every time.

<Internals\\Sales Management Interview\\Interview 5> - § 1 reference coded [1.31% Coverage]

Reference 1 - 1.31% Coverage

> View it as account management rather than sales, cradle to
> grave approach

SECTION 3: DISCUSSION, CONTRIBUTIONS AND RECOMMENDATIONS

INTRODUCTION

The specific aim of this research was to better understand customer perception across the relational customer/Sales Account Manager (SAM) interaction in business to business contexts and to make such insight accessible to Sales Management Practitioners (SMPs) for the purpose of effective selection and development activity as they build sales forces for sustainable sales success. Increased economic pressure on SMPs to achieve more with lesser budgets (Zoltners and Lorimer, 2000), high costs associated with selection and development errors (Churchill *et al.,* 1977; Guettler, 2009) and the direct impact sales revenue has on the organisational bottom line (Zoltners *et al.,* 2001) contributes to the importance of effective Sales Account Manager (SAM) selection and development.

Traditionally, focus on salesperson performance has positioned salesperson centric factors as central to the research with considerations such as intelligence, personality and motivation that have historically delivered mixed and contradictor results (Cravens and Woodruff, 1973; Szymanski and Churchill, 1990; Rozell *et al.* 2006; Kaufmann, 2007). A more emergent field of research has acknowledged that a salesperson may be educated, motivated and rewarded to sell and yet the customer may not purchase. This customer orientated zeitgeist coincides with a shift in sales contexts in the developed world to more consultative ones (Thull, 2005; Kaufmann, 2007) where persuasion to buy has been replaced with the need to deliver value (Wotruba, 1991; Weitz and Bradford, 1999; Neu *et al.* 2011). Common to this movement has been acknowledgement of the core role that interaction plays as a conduit of value creation (Crosby *et al.,* 1990; Spiro and Weitz, 1990; Kelley, 1992; Jolson, 1997; Park and Halloway, 2003) and yet what happens in the buyer-seller interaction has been an under researched area (McFarland *et al.,* 2006; Newell *et al.,* 2011). In particular research over the course of the continual sales interaction to enable sales organisations to manage their business customers in a more sustainable way has been missing from this perspective (Newell *et al.,* 2011). As value lies in the eye of the beholder, key to success in this relational buyer-seller interaction is the customer perception of the value creator as the conduit of value (Parasuraman *et al.,* 1991; Ulaga and Chacour, 2001). This missing customer perspective is where this research joins the conversation and offers a comprehensive model of customer perception in relational interfirm buyer-seller interaction to inform this area.

In the development of a conceptual model sustainable salesperson performance was conceptualised as success in the buyer-seller interaction as the delivery mechanism for perceived value and given value is supported as a determinant of customer satisfaction and repeat business in consultative environments (Newell *et al.*, 2011). Based on social cognition theory (Bandura, 1986), person perception evaluations in social interaction are largely supported to be influenced by two universal evaluation dimensions; perceived warmth and perceived competence (Wojciszke *et al.* 1998 (a); Fiske *et al.,* 2002). On this basis customer perceived performance (or salesperson success in perceived value creation across the interaction) was thought to be indicated by these.

A key development in the area of social cognition knowledge was the Stereotype Content Model (SCM) and the Behaviors from Intergroup Affect and Stereotype (BIAS) Map (Fiske *et al.*, 2002; 2006). These serve to inform how perceivers feel and behave as a result of varying combinations of perceived warmth and competence. These insights influenced the development of propositions with respect to how warmth and competence perceptions may indicate performance. The premise that both warmth and competence were indicative of star performance due to the consistently positive behavioural responses generated from the admiration based emotive response this combination was supported to generate versus other ambivalent combinations was proposed. This thought was consistent with the work of Aaker *et al.,* (2012) who supported the role of warmth and competence in the generation of an admiration based optimal brand performance.

While to understand how warmth and competence perception might indicate performance is useful, for this to be transferable to practice for the purpose of selection and development it was also necessary to understand how a SAM might influence such perception. To illuminate this the conceptual model incorporated the other side of the interaction dyad, the salesperson. This did not take away from the intention to focus on the customer perspective of performance. Research questions pertaining to the SAM behaviours and psychological competencies were focused on their influence on the customer perception performance indicators warmth and competence, rather than influence on monetary sales targets.

To operationalise the study an Information and Communications Technology (ICT) Solution Provider was selected as a common case consultative sales organisation and this approach was considered necessary to obtain the depth and range of access required to

answer the how type questions this study was proposing. While studies such as Aaker et *al.,* (2012) advocate an admiration based golden quadrant of brand performance comprised of a warm and competent consumer perception on the basis of quantitative research findings, such work doesn't inform us as to how this happens over the course of an interaction and how an individual salesperson can influence this.

To illuminate how warmth and competence perception indicates star performance within the interaction a number of star performers were selected as embedded cases within the organisational case context. Consistent with the customer perceived performance focus of the study it was customer perception established by way of an initial telephone survey that determined who the upper quartile performers were. These star performers and their customer became the key units of observation in the qualitative phase of research that followed. These accounts were triangulated by an independent interaction observer and holistic organisational account through the inclusion of presales engineers and a sales management representative respectively in the data collection procedures implemented.

The application of a relational SCM consideration in a consultative sales context resulted in the identification of a contextual typology of customer perception based on varying warmth and competence combinations, which combined with the behavioural and psychological influencers of these perceptual indicators provide a comprehensive model to understand customer perception in the relational interfirm buyer-seller interaction as an outcome of this research. This key contribution provides a comprehensive resource for SMPs to access insight with respect to star performance that is based on a relational customer perception. This model will be presented and discussed in this section referencing key findings as they relate to the extant literature. This practice based model also contributes to theory an extension of the customer orientation knowledge with respect to salesperson communication behaviours and links emotional and social competencies to the perception management strategy of downplaying. These contributions to theory will be highlighted and discussed.

How warmth and competence perceptions indicate perceiver responses and resultant outcomes in specific occupational contexts has been subject to only scant research (Cuddy *et al.*, 2011). Much occupational research through the lens of the SCM has focused on transactional comparative evaluations such as hiring decisions (Masser *et al.,* 2007; King and Ahmad, 2010; Krings *et al.,* 2011) or at the level of brand perception (Andrei and

Zait, 2014; Bufquin *et al.*, 2017). In addition to the model of customer perception in relational interfirm buyer-seller interaction contributed by this study, this relational consideration of person perception extends knowledge beyond the transactional consideration given to person perception through the SCM in the extant literature. Core contributions stemming from this are the primacy of competence perception and role of relationship interdependency as an influencer of this primacy. These contributions will be presented and discussed in this section. To conclude this section theoretical implications and contributions will be made explicit. Research limitations and future research potential are considered and practice implications and recommendations are then presented.

CUSTOMER PERCEPTION IN BUYER-SELLER INTERACTION

This research sought to illuminate customer perception in buyer-seller interaction through the exploration of three questions; how do customer perceptions of a salesperson as warm and competent indicate performance, how can an individual salesperson influence this customer perceived performance at a behavioural level and how can an individual salesperson influence customer perceived performance at a psychological level? It is made explicit through the conceptualisation of customer perceived performance as success in social interaction that the formation and influence of customer perception occurs within a dyadic buyer-seller interaction as is the relational interfirm context that binds the common case to explore the phenomenon.

Primacy of Competence Finding

The first key finding of the study is the primacy of the competence perception in the buyer-seller interaction. The competence primacy illuminated in the studied organisation was characterised by; customer preoccupation with SAM competence in the early stages of interaction, the primacy of competence across transcripts and by explicit participant statements. The conclusion that competence was the primacy evaluation was interpreted through an analysis of the "important to the customer node" that captured these observations. As depicted in the Conditions Influencing Primacy of Competence Thematic Map (Figure 1) linked to this node are three drivers of this importance; namely the presence of risk, dependency and complexity in the environment.
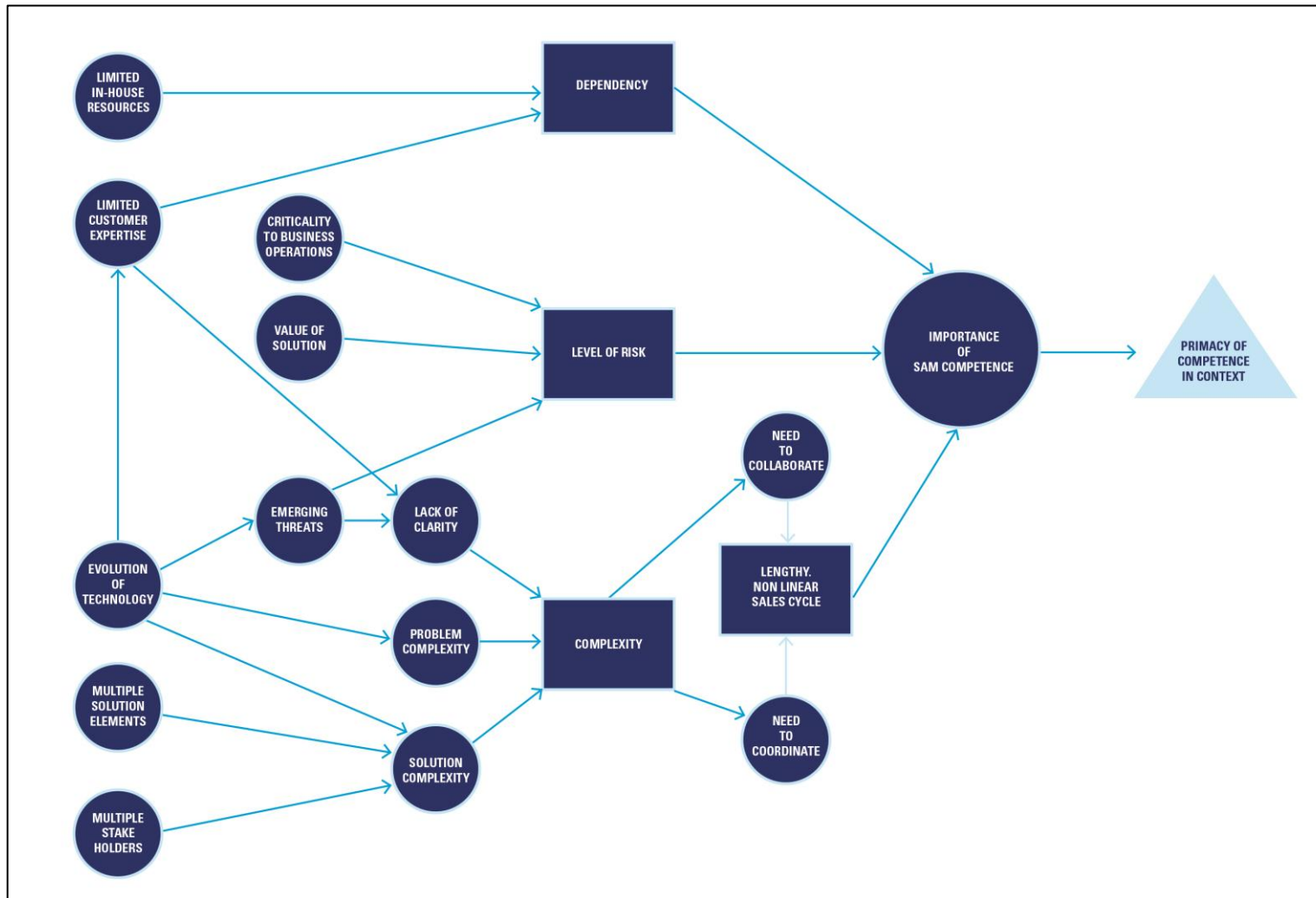
Figure 1: Conditions Influencing Primacy of Competence Thematic Map

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The presence of risk was influenced by the high value and criticality to business operations of the solutions described. This presence of risk aided the importance of key account manager competence as the consequences of errors are potentially catastrophic to both the key account manager and their organisation. A pressure to do more with the same or the same with less was inherent in most customer accounts and this combined with a limitation to the level of in-house expertise due to the rapid pace of technology development created a key customer contact dependency on the key account manager in order to access resources and knowledge. This lack of in-house expertise along with the velocity of change in the technology landscape was also found to be a driver of the lack of clarity reported across accounts when it came to the identification of customer problem and their appropriate solutions. The often multi-stakeholder and multiple solution frameworks required to meet the customer need served to add further complexity to the environment due to its impact on problem and solution complexity. It is this complexity that drives the need for collaboration and coordination in the environment and further adds to the requirement for SAM competence to manage this process throughout the lengthy and non-linear sales cycle.

Primacy of Competence Perception Contribution to Practice

In this context the term "trusted advisor" is often used to describe the salesperson role given a focus on sustainability over singular interactions (Maister *et al.*, 2000; Thull, 2005; Carlson, 2016). Thull (2005) describes the role of the trusted advisor as that of the value creator, whereby the salesperson must first build a relationship of trust and then demonstrate ability. The construct of trust in the organisational domain has antecedents that are both cognitive (ability) and emotive (Mayer *et al.*, 1995) and the trusted advisor relationship is acknowledged to start with a recognition of salesperson expertise (Maister *et al.*, 2000). This trusted advisor perspective highlights a level of mutual dependency whereby the customer depends on the salesperson in so much as the salesperson depends on the customer for the sale. The characteristics of this context portray a lengthy sales cycle with a high degree of interaction distinct from more transactional contexts where urgency in the decision making process is present (Thull, 2005; Beardsley *et al.,* 2006; Kauffman, 2007). Based on the continual nature of the sales interaction and the presence of interdependency in the relationship this research put forward a proposition of a primacy competence judgement in this context.

The conditions portrayed in the case environment are consistent with that of consultative sales environments depicted in the sales literature where complexity, incomplete information and high risk decision making are prevalent (Plank *et al.*, 1999; Neu and Brown, 2005; Belonax et *al*., 2007). This supports the proposition that in consultative sales environments the primacy perception in evaluation of key account managers in the buyer-seller interaction will be one of competence. What this analysis also illuminated however is the role the case environment conditions play in the generation of a level of dependency on the key account manager to achieve their goals and to avoid negative consequences pertaining to the alternative.

Primacy of Competence Perception Contribution to Theory

In the SCM (Fiske *et al.*, 2002) the evaluation of warmth holds a position of primacy over competence in person perception due to the evolutionary role of social cognition in the establishment of co-specifics as friend or foe, a primacy position supported in the extant literature (Cacioppo *et al.,* 1997; Wojciszke *et al.*, 1998b; Ybarra *et al.*, 2001; Willis and Todorov, 2006; Fiske *et. al.*, 2006; Cuddy *et al.*, 2011). The position of the primacy warmth judgement in the SCM is linked to "*the urgency with which people need to assess an unfamiliar others' intention*" (Cuddy *et al.*, 2011:76). It is generally supported within the social cognition realm that perceivers interpret relational behaviours that generate warmth perception as "other profitable" (to someone other than the actor) whereas they interpret functional efficiency or competence based behaviours as "self-profitable" (for the benefit of the actor). As social cognition is based on a weighting of risk and benefit to the perceiver, the primary concern of the perceiver is therefore the warmth perception (Fiske *et al*., 2002; Fiske *et al*., 2006; 2007; Wojciszke and Abele, 2008; Cuddy *et al.,* 2011).

The proposition that the primacy warmth evaluation may not hold true in some occupational contexts is acknowledged in the literature however, it is noted that research is needed within organisational settings to establish such instances (Wojciszke and Abele, 2008; Cuddy *et al.* 2011). With perceiver interest the basis for the primacy warmth perception, a consideration as to how this might apply beyond a transactional interaction to a more continual engagement provides some insight as to the conditions for the reversal of the primacy judgement in organisational contexts. Based on the double interest account (Wojciszke and Abele, 2007) whereby the actor's competency serves to benefit the

perceiver in tandem with the actor's own self-interest, there has been some initial support for the role of relationship interdependency as a condition for such reversal in singular evaluations within an organisation (Wojciszke and Abele, 2008).

The study illuminated that the primacy of the competence perception was significantly influenced by the contextual dependency of the customer on the salesperson for knowledge of and access to resources and expertise, the level of risk associated with the outcome and the environmental complexity. The focus of the customer was to assess the ability of the SAM to enact their intention early stage in the interaction in the context of these conditions. The analysis of findings supports the counter proposition of a primacy competence judgement and lends support to this alternative and lesser explored perspective. This SCM application in a relational consultative selling context illuminated counter to transactional contexts previously examined a reversal of the primacy warmth judgement and the influence of relationship interdependency that extends the initial work of Wojciszke and Abele (2008) in to a comparative interfirm arena

Competence Does Not Equal Technical Expertise

The evaluation of SAM competency was found to centre around two key areas; perceived capability to deliver a quality service and perceived ability to ensure the seamless delivery of solutions. It was important to the customer that the SAM would take ownership of an issue, act as a single point of contact, provide timely responses, be proactive with the provision of updates and that they would deliver a quality resolution to issues. It was also important to the customer that their SAM had; the ability to understand their problem, knowledge of expert resources/solutions and the ability to bring together these elements to deliver a solution. This finding is consistent with descriptions of ability to provide quality information and ability to activate a quality support network in the assessment of a competence led trust within the "trusted advisor in Interfirm interpersonal relationships model" (Neu *et al.*, 2011) and quality of service in services selling (Crosby *et al.*, 1990).

The sub-labels capable, efficient and competent featured predominantly in the analysis of competence perception. Technical knowledge was not found to be important, instead SAM knowledge, skill and ability to conduct the experts required to deliver an appropriate solution was heavily weighted. This is in keeping with the evolution of sales models in complex environments to team (1970s) and solution (1980s) selling that through an injection of technical competency and information specialisation in to the sales cycle

developed the role of salesperson from solo performer to conductor (Miller *et al.* 1987) and with consultative (2000s) selling illuminated by the trusted advisor description (Maister *et al.*, 2000; Thull, 2005; Carlson, 2016). The technical knowledge and specific information required to formulate and implement a solution in the trusted advisor model is drawn from multiple sources and the role of the salesperson is to collaborate and coordinate rather than to be a source of expert product or technical knowledge, transitioning them from an expert with professional credibility to a "deep generalist" with a broad perspective to deliver business outcomes (Sheth and Sobel, 2000).

Technical knowledge was found to be linked with the perception of solution bias and complacency and the inverse perception of impartiality was observed where a lack of specific technical knowledge was present. This is supported by a move from solution to consultative sales that focuses on consultation as a partner even if the customer solution is not within the product set of the organisation (Thull, 2007) and the important role of unbiased information that has been explicitly linked to the evolution of these consultative sales contexts (Neu and Brown 2005; Carlson, 2016). This insight contributes to practice a clear distinction between the role of key account manager competence and the role of technical expertise in the solution sale.

Warmth and Competence: The High Performance Quadrant

With the role of competence clearly considered attention now turns to the dimension of warmth. This dimension also featured prominently in the customer perception of their SAM with all warmth labels to include well-intentioned, friendly, trustworthy, good-natured, warm and sincere strongly represented among customer perceptions of high performers. The star performers perceived by their customers to be both warm and competent were reported by their customers in the study to deliver high levels of customer satisfaction with both specific outcomes and the overall experience. Extensive repeat business was also observed and this supports the proposition that warmth and competence are indicators of sustainable customer perceived performance. The presence of both warmth and competence dimensions in context is consistent with the dual elements of building a relationship of trust and ability to solve a complex problem in the value creator concept (Rackman and DeVincentis, 1999; Thull, 2005; Kauffman, 2007) but with the primacy role of competence in the context established what is the role of warmth in this sustainable optimisation and how does this interplay with the competence perception?

The high performance quadrant of customer perception and the warmth/competence interplay in the buyer-seller interaction is depicted in the typology element of The Model of Customer Perception in Relational Interfirm Buyer-Seller Interaction, the primary contribution of this research (Figure 2).

Figure 2: A Model of Customer Perception in Relational Interfirm Buyer-Seller

The Model of Customer Perception in Relational Interfirm Buyer-Seller illuminates how the study supported an emotive response of admiration by the perceiver (the customer) towards the perceived (the SAM) in the case of star performers, consistent with that expected from a high warmth/high competence combination on the SCM (Fiske *et al.*,

2007). High praise for the SAM, expressions of admiration for their achievements and expressions of general adoration characterised this illumination and the presence of both warmth and competence elements in descriptions solidified the contribution of both aspects to star performance. The alternative SCM emotive responses of pity, contempt or envy were not detected with respect to the SAM cases. There was evidence a pity based emotive response with respect to "other" or "previous" SAMs perceived by the customer as warm but not competent and there was evidence of contempt towards those considered neither warm nor competent. The emotive response of envy was not detected where "other" SAMs were considered cold but competent. This absence may be due to participant concealment, as to envy another may indicate a lacking in oneself (Fiske *et al.,* 2007) and such revelation may not be desirable in an organisational context that places such a high value on competence. It may also be the case that as a secondary emotion envy may be moderated by a primary emotion such as anger as has previously been

The emotive response of admiration from the perceiver versus alternative responses is important for the sales outcome when one considers that discrete emotions also elicit specific behaviours (Becker and Asbrock, 2012; Fiske *et al*., 2007). The SCM indicates that admired groups elicit both active and passive facilitation from the perceiver (Fiske *et al.*, 2007). From the perspective of sustainable performance this is important in that both behavioural responses aid sales outcomes unlike other emotive responses that may result in ambivalent and potentially less favourable behavioural responses. Consistent with this, the admired SAM cases elicited behavioural responses of both active and passive facilitation. Customer behaviours that served the interests of the SAM over customer in keeping with the non-self-serving portrayal of active facilitation in the SCM (Fiske *et al.*, 2007; Cuddy *et al.*, 2011) were illuminated and included; accommodation of the SAM, public testament of satisfaction and a balanced perspective that takes a share of the blame in the event of an issue. In addition, convenient and self-serving associations consistent with the passive facilitation behavioural response described in the SCM (Fiske *et al.*, 2007) such as engagement to bring the SAM up to speed on something and customer personal association with the project or project team were illuminated.

The presence of active facilitation was also detected in this study where warmth but not competence was present. These behaviors however illustrated benevolence characteristics for example to give an order out of pity, rather than to reciprocally contribute to the relationship. Similarly, passive facilitation of a "put up to get along" nature was observed

where competence in isolation was found. The presence of active facilitation in both these quadrants is in keeping with the suggestion that the activation of the active and passive facilitation behavioural responses in the SCM stems from the presence of warmth or competence perception respectively (Cuddy *et al.*, 2011). Aaker *et al.* (2012) support that brand performance outcome based on admiration is greater than when active facilitation is based on pity summed with when passive facilitation is based on envy (greater than the sum of the individual parts). What this study illuminates through the description of the resultant behaviours is how this synergy may occur. This presence of behaviours that optimise the achievement of sales results by extending the impact of the discretionary action beyond the buyer-seller relationship as an influencer of other buyer relationships (referrals and accommodation of other customers for example) versus helping that solely pertains to the immediate achievement of salesperson aims within the existing interaction (giving an order out of pity), characterise this synergy.

A limitation of the SCM is the absence of insight as to when the activation of these facilitative versus alternative harmful behavioural responses occur for group's and individual's perceived ambivalently (Fiske *et al.,* 2002; Fiske *et al,* 2007; Cuddy *et al.,* 2011; Becker and Asbrock, 2012). It has been supported in the case of transactional group perception that the salience of absent warmth or competence is the trigger for the activation of one over the other (Becker and Asbrock, 2012). This study contributes further insight with respect to relational person perception that extends this knowledge and contributes to practice an illumination of how sustainability is achieved through customer perception in the buyer-seller interaction.

Further exploration through probes deployed where observations of active facilitation existed among an "other" SAM, perceived as warm but not competent, revealed that the context described was a commodity sale and that such facilitation may not hold through in to the consultative sales context. This finding is supported in the relational consultative sales interaction whereby trust is considered a competence first concept and increases in importance as risk increases, buyer information is limited and there is uncertainty in the decision making process (Hawes *et al.,* 1989; Belonax *et al.,* 2007). This finding illuminated a key difference between transactional and relational applications of the SCM as a predictor of success in social interaction. While the perception of warmth in transactional environments may be sufficient for a positive behavioural response due to the routine nature of decision making, when the status quo was challenged and the

decision required the consideration of alternatives due to increased risk and complexity, this more transformational decision making process made relevant the perceived incompetence of the target in the decision and emphasised the salience of the primacy competence judgement of the context.

A consideration of the situated account in which the "other SAM" perceived as competent but cold did not experience passive facilitation revealed the presence of a relatively competent alternative comparator. In this comparative scenario the secondary warmth evaluation of the context became the salient factor within the decision making process due to perceived relative competence on the primacy judgement. This result is not a surprise in the context of consultative selling whereby a lack of such positive personal chemistry is proffered as the reason relationships either fail to develop or continue (Andersen and Kumar, 2006).

A final practice based contribution in stemming from the customer perception aspect of the findings is that demonstration of competence in the sales interaction serves to reinforce the customer perception of SAM competence in the continual engagement cycle. This was illuminated by the customer testing SAM competence in early interactions with lower risk requirements, reports of increased confidence in the SAM after a positive specific outcome and changed perceptions of the level of SAM seniority based on positive outcomes experienced. This is in keeping with the Cuddy *et al.* (2011) suggestion that people can affect how others judge them over time through performance, a key differential between the traditional transactional and this relational consideration of the SCM. This informs practice that a SAM should pay adequate attention to what may seem like a smaller requirement particularly at the outset of the buyer-seller engagement.

CUSTOMER PERCEIVED PERFORMANCE: BEHAVIOURAL INFLUENCE

Behaviours are largely acknowledged to be important influencers in the formation of person perception (Argyle, 1973; Patterson, 1983; 1991; Burgoon; 1994). In business interactions people communicate warmth and competence through their behaviour and performance, particularly if this interaction is continual overtime (Cuddy *et al.,* 2011). To illuminate this the lens of Customer Orientation (CO) in its behavioural interpretation was selected due to its long association with the role of the value creator (Wotruba, 1996 and Jolson, 1997). This exploration and set of findings informed the behavioural influencer aspect of the model. CO in its behavioural form has two elements; the demonstration of

a level of expertise to craft a solution best suited to the customer and the construction of cooperative relationships towards satisfaction and loyalty (Saxe and Weitz, 1982). This study found behaviours akin to personal relationship behaviours influenced warmth perceptions and behaviours akin to fact based behaviours influenced competence perceptions and this is supported by the relational sales literature that portrays the role of personal relationship and fact based behaviours in the formation of perceptions of trust and expertise respectively (Newell *et al.,* 2011).

Cooperative Relationship

The study found that to build cooperative relationships with their customers, the behaviours of high performers fell into four key themes; communication style, compromise, relational acts and an appropriate level of interaction. These behaviours largely overlap with the relational tasks of cooperative intentions, mutual disclosure, interaction intensity (Crosby *et al.,* 1990), attentive listening (Ramsey and Sohi, 1997; Drollinger and Comer, 2009) and rapport building (Gremler and Gwinner, 2000) observed in the relational sales literature. Despite significant similarities this study contributed that communication style encompassed more than just mutual disclosure and attentive listening to include a comfortable and relaxed approach and that a level of interaction that was appropriate over frequency volume was an influence in the formation of warmth perceptions. These similarities and variances with the extent literature illustrated in Table 1 and are now discussed.

Study Finding	Relationship Behaviours in Literature
Communication Style Open and direct Attentive Listening Comfortable and relaxed*	**Mutual Disclosure** Mutual disclosure (Crosby *et al.*, 1990) Open and Direct (Biong and Selnes, 1997) Attentive Listening (Ramsey and Sohi, 1997; Drollinger and Comer, 2009)
Compromise Conceded on elements Goes the extra mile	**Cooperative Intensions** Cooperative versus competitive intensions (Crosby *et al.*, 1990)
Relational Acts Personalised gestures Common ground Non-Business conversations	**Rapport Building** Establish a connection (Campbell *et al.*, 2006) Common areas of interest (Gremler and Gwinner 2008; Jackson *et al.* 2007; Lill 1996; Paul *et al.* 2009). Enjoyable interaction (Gremler and Gwinner, 2000)
Level of Interaction Frequency- uses every touch point Friendly and Approachable Appropriate-adaption*	**Interaction Intensity** High frequency (Crosby *et al.,* 1990) Cadogan *et al.* (2005)

Table 1: Relationship Behaviours: A Comparison of Study Findings Versus Relationship Literature

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Communication Style

Communication is a core element of cooperative relationships (Saxe and Weitz, 1982) and comprises not only the content of the message but also the communicator's style (Sheth, 1976). An open style of communication that fosters mutual disclosure has been considered as a relational behaviour that aids better buyer-seller relationships (Biong and Selnes, 1997; Crosby *et al.,* 1990). The findings of this study were consistent in that SAM cases demonstrated an open and direct style of communication and this was found to influence customer perceptions of SAM honesty. SAM cases were in addition found to engage in attentive listening in their communications and this was found to influence a perception that they were well intentioned. This is supported in the relational sales literature whereby attentive listening has been found to influence perceptions of trustworthiness (Ramsey and Sohi, 1997; Drollinger and Comer, 2009).

This study also revealed however, that communication style in the achievement of warmth perceptions is about more than just open communication and attentive listening. High performers were found to appear comfortable and relaxed during communications, a behavioural attribute found to influence the customer perception of them as warm. This comfortable and relaxed style is akin to that of the collaborator proffered by Carl Jung (as cited by Hanke, 2009) with the relationship-orientated collaborator perceived as easy-going, akin to the description of good natured in this study. This study therefore supports an extended view of communication as a relational sales behaviour to encompass an overall SAM communication style in the formation of cooperative relationships that influence positive warmth perceptions.

Compromise

Classified in this study as compromise, this theme is not dissimilar to that of cooperative behaviours in the development of quality sales relationships (Crosby *et al.,* 1990) that have been explicitly linked to the formation of salesperson trust perceptions (Pruitt, 1981). High performers were observed to concede on some aspects of a customer proposal and to go out of their way to accommodate the customer. This was found to influence the customer perception that they were well-intentioned and friendly/warm respectively. These behaviours are similar to signals of cooperative intension conducive to the construction of a positive trust perception (Crosby *et al.*, 1990).

Relational Acts

Relational acts were found to contribute to the customer perception of SAM warmth and are conducive to the rapport building behaviours found to influence customer perceptions of a warmth based trust in consultative selling (Newell *et al.,* 2011). SAM cases personalised gestures of goodwill such as gifts and cards and such personal touches are considered relational sales behaviour (Crosby *et al.*, 1990). The giving of gifts influenced the customer perception of the SAM as kind but it was the personalisation that influenced the perception of well-intentioned as customers considered these gifts a gesture of kindness over an incentive to close the sale. This is conducive with the role of willingness to adapt as an indicator of positive intention towards relationship commitment (Bennett and Gabriel, 2001). SAM cases were observed to seek common ground with their customer during interactions and to engage in non-business related conversations. This was found to influence a well-intentioned and friendly customer perception. These behaviours are akin to rapport building in that they establish a mutual connection (Campbell *et al.,* 2006) in particular through common areas of interest (Gremler and Gwinner, 2008; Jackson *et al.,* 2007; Lill, 1996; Paul *et al.*, 2009) and enjoyable interaction (Gremler and Gwinner, 2000), with rapport building behaviours supported to aid the construction of trust in consultative selling relationships ((Newell *et al,.* 2011).

Level of Interaction

The level of interaction that SAM cases engaged in with the customer was found to influence the customer perception of SAM warmth. This level of interaction is similar to the concept of "contact intensity" described as the frequency of communication be that face to face or indirectly (Crosby *et al.*, 1990). Contextual high performers are reported to use every touch point as a reason to engage with their customer in keeping with thought from the relational sales field that efforts to stay in touch are a key determinant of relationship maintenance (Crosby, 1984). In this study this level of interaction was found to influence the customer perception of the SAM as well-intentioned. Contact intensity reflects effort and commitment to the relationship and applied in this context is therefore not just a one-time interest for the purpose of making a sale (Williamson, 1983). SAM cases were found to "pop in" be that "for a chat" or "to put a face to the name" and this influenced the customer perception of them as friendly. Friendliness and approachability

are proposed as relational behaviours for high quality personal relationships (Cadogan *et al.*, 2005).

SAM cases were found to engage in a level of interaction that was appropriate to the situation at the time and this was found to influence the customer perception of SAM sincerity. When matters of high importance to the customer arose the level of interaction was reported to increase and while contact was maintained on a regular basis aside from this it did not have the same level of intensity. This tailored approach impressed a sense of sincerity over a sense that the contact was a forced or thought behaviour and is supported by the role willingness to adapt plays in the communication of positive intension (Bennett and Gabriel, 2001). This is a notable difference as the contact intensity predominant in the literature revolves around "high frequency" (Crosby *et al.,* 1990) as opposed to appropriate levels.

Demonstration of Competence

The study observed behaviours among SAM cases that related to three areas of customer perceived service quality assurance as influencers of customer perceptions of competence (Figure 4). Assurances with respect to relevant knowledge, ability to execute and responsiveness are synonymous with core consultative tasks suggested in the relational sales literature as service quality perception influencers. This is now discussed.

Perception	Behaviour
Efficient "Assure the Customer" "They are being dealt with"	-Responsive to requests -Response in keeping with urgency -Easy to contact -Proactive in chasing others for answers -Communicates updates -Takes ownership of issue immediately
Capable "Assured" "Capable Hands"	-Long term fix approach -Root cause -Answers and solutions -Collaborates with others to fix -Appearance -Timekeeping -Presentation of information
Competent "Assured they are being sold the right fit"	-Clear articulaton of needs in proposals to customer -Introduce the right techical resources to meeet needs -Presents solution options to meet needs -States it's not their business if it's not -No Solution bias- full portfolio in mind -Not technical –research to understand -Project management approach -Extensive documentation

Table 2: Behavioural Influencers of Competence Perception

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Assurance of Responsiveness and Perception of Efficiency

In the trusted advisor interfirm interpersonal relationships model (Neu *et al.,* 2011) salesperson responsiveness is characterised across behaviours under the umbrella '*provision of high quality information*', one of two categorises considered to influence effectiveness of customer decision outcome and efficiency of customer decision process based on the communicative function its serves about salesperson ability. The latter is consistent with the efficiency perception also found in this study to be associated with behaviours akin to those in the trusted advisor inter-firm interpersonal model. These behaviours include responsiveness to requests and takes ownership immediately (akin to responsiveness), in keeping with urgency (akin to timely), easy to contact and communicates updates (akin to frequency) and proactive in chasing others for answers (akin to proactiveness).

Assurance of Knowledge and Perception of Competence

Perceived SAM knowledge was found to be core to customer perception of salesperson competence in this study and in particular SAM knowledge of resources and relevant unbiased solutions. In terms of relevance to customer need activity was characterised by behaviours such as clear articulation of the need in proposals and the presentation of options that meet these needs. The solutions proposed and provided were observed to lack bias characterised by SAM acknowledgement if there wasn't something in their core portfolio to meet the customer need and by the absence of personal SAM technical ability in one area or another. This is consistent with the components of high quality information relevance and bias proposed to influence salesperson trust in ability as a precursor to effective as well as efficient customer decision outcomes (Neu *et al.,* 2011). In addition the competence perception was also found to be influenced by SAM knowledge of relevant resources consistent with contact relevance proposed under the umbrella of the trusted advisor interfirm model (Neu *et al.,* 2011) as an influencer of the ability trust perception.

Assurance of Ability and Perception of Capable

SAM cases were observed to demonstrate an ability to provide and activate relevant knowledge and resources and this influenced a perception of capability. These behaviours included; a long term fix approach that provided both answers as to why the problem occurred as well as solutions to the problem through root cause analysis, collaboration

with others, professional presentation of information, punctuality and professional personal appearance. In the trusted advisor in interfirm interpersonal relationships model both categories use the term *provision* in respect of information and *activation* in respect of the decision support network (Neu *et al.,* 2011) and this is akin to the assurance of ability behaviours found in this study.

CUSTOMER PERCEIVED PERFORMANCE: PSYCHOLOGICAL INFLUENCE

Emotional competencies are thought to be important in the context of social interaction in business as they serve communicative and social functions by conveying information about thoughts and intentions in interactions and thus inform behavioural reactions (Keltner and Haidt, 2001; Gohm, 2003). This study set out to explore how a salesperson may influence the performance indicators of warmth and competence perception at a psychological level through the lens of the theory underpinning the emotional quotient (EQ) as a mixed model of emotional and social intelligence (ESI) (Bar On, 1997). This exploration contributes to the model insight with respect to role of emotional and social competencies in the generation, maintenance of warmth perceptions, the achievement of balance and the reinforcement of the competence perception. These findings and related contributions are now discussed.

Generation of Warmth Perception

SAMs were found to possess an optimistic outlook both in the face of adversity and in terms of general contentment. This was accompanied by customer perceptions of the SAM as positive and bubbly in keeping with the good natured aspect of the warmth dimension. While optimism has previously been associated with positive sales performance, this has been associated through its role as an assistant to problem solving in the face of adversity inherent in sales roles (Rich, 1999; Dixon and Schertzer, 2005; Lussier and Hartman, 2017) rather than as an influencer in the generation of the warmth perception. The role of optimism as warmth perception generator is supported by the person perception literature that positions those perceived to be comparatively optimistic as socially accepted versus those perceived as comparatively pessimistic who are socially rejected (Helweg-Larsen *et al.*, 2002). This finding is given further credibility by the proposition that optimism is infectious (Smith and Muenchen, 1995) through emotional contagion (Rapson *et al.*, 1993), whereby those who are perceived to be optimistic will exert more positive feelings in the perceiver towards the target.

Interpersonal functioning was also found to play a role in the generation of the warmth perception with interpersonal skills, empathy and social responsibility strongly present in the analysis. This was found to underpin a focus on meeting needs (social responsibility), an ability to hear the need (interpersonal skills), an ability to truly understand the need (empathy) and an ability to convey to the customer that they had understood the need (interpersonal skills). This was found to support a customer perception of the SAM as well-intentioned and sincere. This finding is in keeping with the literature on the interpersonal realm of the emotional quotient framework where it is suggested that interpersonal skills aid effective understanding of others, positive moral intentions towards meeting the needs of others and the construction of effective relationships with others (Bar On, 1997; Stein and Book, 2006) and with the sales performance literature where attempts have been made to define and establish the importance of interpersonal skills in the construction of mutually satisfying relationships in consultative selling (Borg and Johnston, 2013).

Maintenance of Warmth Perception

It is essential that a positive warmth perception is maintained for sustainable success to ensue in the consultative sales context. While occasional demonstrations of incompetence are not seen to influence the perception of a person perceived as generally competent adversely, the same is not true for perceptions of warmth that are more susceptible to change from one deviation of what is expected and socially acceptable (Singh and Teoh, 2000; Ybarra *et al.,* 2001; Skowronski and Carlston, 1987; Fiske *et al.,* 2006). Consultative sales contexts are conducive to stressful situations with the role of the salesperson that of an organisational boundary spanner (Strutton and Lumpkin, 1993; Zoltners *et al.*, 2001) and therefore the ability to manage these situations effectively to prevent a behavioural response that may negatively and detrimentally influence the warmth perception is essential.

SAM cases in the studied case context were found to be good natured and well-intentioned and this perception was underpinned by a sense that the SAM was patient and calm despite descriptions of many potentially adverse situations. A high stress tolerance level was illuminated in that SAMs did not report that they experienced feelings of stress. The study found that SAMs managed stress through a dynamic with the SAM's optimism and problem solving competences (ST/OP/PS). SAMs maintained an optimistic outlook

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despite the adversity they faced and always saw a way to get a positive result from a difficult situation. In doing so they broke down problems and generated options. This problem solving approach underpinned by an optimistic disposition is supported in the sales literature (Dixon and Schertzer, 2005; Lussier and Hartmann, 2017). The role of optimism and problem solving in previous literature however, has focused on resilience and the ability to bounce back over stress management towards the preservation of a positive warmth intention as supported by this study.

The maintenance of a positive warmth impression was also supported by the SAM's propensity to be flexible in a way that was realistic (FX/RT). SAM cases were comfortable to adapt to meet customer needs, they were able to change direction easily and compromise was expected and natural to them. This was found to maintain a perception that they were well-intentioned conducive with the role willingness to adapt plays as an indicator of positive intention towards relationship commitment (Bennett and Gabriel, 2001). In tangent SAM cases were found to use a sense of reality testing about what was possible to temper commitments to prevent a situation where they overcommitted and under delivered through over adaption. Bar On (2013) describes reality testing as closely associated to situational awareness and in tandem describes flexibility as "*our ability to adapt and adjust our feelings, thinking and behavior to new situations and conditions*" and therefore provides support for the finding.

Balance Warmth and Competence Perception

It is understood that a unique relationship exists between the two dimensions warmth and competence in comparative evaluations within person perception whereby a high perception on one dimension, warmth or competence may lead to a negative perception on the other dimension in comparative contexts (Judd *et al.,* 2005; Yzerbyt *et al.,* 2005; Kervyn *et al.* 2009; Kervyn *et al.,* 2010; Cuddy *et al.,* 2011; Holoien and Fiske, 2013). Individuals have been found to direct behaviours as an impression management strategy around this compensation effect (Holoien and Fiske, 2013). Research in to the role of socio-emotional influencers on impression management has focused on the formation of positive warmth impression, characterised by studies on emotional management and positive impact on friendships and cooperative relationships (Lopes *et al*., 2004; Mayer *et al*., 2004; Bar On, 2006). This study supports an additional role that of social-emotional competencies as levers to balance warmth and competence perception illuminated in the

consultative sales context by three practical contributions; a dynamic between reality testing and optimism, a dynamic between flexibility, independence and assertiveness emotional and thirdly between social awareness, interpersonal skills and flexibility. These are now discussed.

Reality testing (RT) was found to play a role as a cog to balance perceptions of warmth and competence. The study highlighted the risk that those perceived as optimistic may also be perceived "*a dreamer*" who "*chases pipe dreams*", illuminated through the SMR and customer perspectives of "previous" and "other" SAMs. The SAM cases instead demonstrated a "*grounded*" optimism that portrayed an appropriate level of situational awareness. This supports the role of reality testing defined in this study as "*the ability to assess correspondence between what is experienced and what actually exists*" (Bar On, 1997) as a perceptive balancer that allows a perception of warmth from optimism without a negative influence on the competence perception.

In the provision of the solution the SAM has to collaborate with many individuals such as technical experts, the customer and third party vendors. These individuals may be subject to bias (Carlson, 2016) and care needs to be taken that a high level of SAM flexibility does not compromise the integrity of the solution by adapting too easily to the views of others. In this study SAM cases were found to collaborate with others but drew their own conclusions and were not afraid to assert their disagreement to protect the integrity of the solution. This management of a flexible disposition (FX) and its resultant compromise behaviour is in keeping with the constructs of independence (ID) that allows people to meet the expectation and needs of others without becoming a slave to them and the closely associated construct of assertiveness (AS) that allows one to constructively express oneself in general (Bar On, 2013). This FX/ID/AS combination aids balanced perceptions of warmth and competence through constructive assertion when the extension of flexibility goes against solution integrity.

SAMs were found to possess a level of emotional self-awareness, interpersonal skills and flexibility (ESA/IP/FX) that enabled them to; pick up social nuances in the context (IP), be aware of themselves in that context (ESA) and adapt their behaviour accordingly (FX). SAM 3 for example states how she is aware of and downplays her bubbly demeanour where she senses that it may contribute to a negative perception of the contextually salient competence in a particular social interaction. It has previously been supported that

individuals downplay one perception to increase a perception on another dimension with research as to how they manage this still required (Holoien and Fiske, 2013). Emotional self-awareness, interpersonal skills and adaptation have previously been associated with such impression management (Lopes *et al.,* 2004; Bar On, 2006) in quantitative studies that have focused on the generation of positive warmth impressions. This study extends this knowledge though an illumination of the ESA/IP/FX dynamic as a perceptive balancer and thus also provide some early insight as to the role of socio-emotional competencies as levers to manage downplaying as a compensation effect strategy.

Aids Task Performance

This study supported the proposition that specific performance outcomes reinforced perceptions of SAM competence and this is consistent with thought in the realm of person perception that performance can influence perceptions of competence over time (Cuddy *et al.*, 2011). SAM cases were considered competent by their customers and customers reported being very satisfied with the specific outcomes of their sales interactions. The nature of the consultative sales role was found to require high levels of collaboration and coordination in keeping with that expected of a consultative sales environment (Thull, 2005; Kauffman, 2007). The presence of socio-emotional competencies that may directly aid task performance in such consultative environments were found in respect of high performers in this study. In particular strong interpersonal skills (Sojka and Deeter-Schmelz, 2003; Borg and Johnston, 2013) and a creative problem solving ability (Lassk and Shepherd, 2013) are supported as specifically useful to SAMs in the collaboration with and coordination of others in their day to day role.

THEORETICAL IMPLICATIONS AND CONTRIBUTIONS

The discussion of research findings outlined a number of contributions to theory and practice. The contributions to practice are made explicit separately in a later section. The contributions to theory and their implications for research are now made explicit.

Reversal of the Primacy Warmth Judgement in Comparative Person Perception

Extensive work in the area of social cognition across both group and individual person perception has typically examined its two universally accepted dimensions (Asch, 1946; Rosenberg *et al.* 1968; Bales, 1950; Peeters, 1983, 1992, 1995; Wojciszke, 1994; Wojciszke *et al*., 1998a; Wojciszke *et al.* 1998b) with terms used to represent these

dimensions reconciled under the labels warmth and competence (Fiske *et al.,* 2002). Also common to such research is support for a warmth primacy perception based on the evolutionary pressure to determine an unknown co-specific as "friend or foe" (Cacioppo *et al.,* 1997; Wojciszke *et al.*, 1998a; Wojciszke *et al* 1998b; Ybarra *et al.*, 2001; Willis and Todorov, 2006; Fiske *et al.*, 2006; Cuddy *et al.*, 2011). This primacy perception is a core conceptual feature in the SCM and while existing literature acknowledges that in organisational contexts a reversal of the primacy warmth judgement in social cognition may be possible, it also notes that much further research is needed in to understand this phenomenon (Wojciszke and Abele, 2008; Cuddy *et al.,* 2011).

This research addressed the need to better understand the reversal of the primacy warmth judgement through an adaption of the SCM that proposed competence as the primacy judgement. This adaptation was then contemplated in the context of comparative person evaluations and applied in an interfirm salesperson evaluation by way of a common case. The application of the revised model in a comparative person evaluation resulted in the observation of competence as the primacy evaluation that perceivers made in the evaluation of targets. This is in contrast to extant literature that points to warmth as the lead judgement and to the norm of primacy first that is expected in the SCM (Fiske *et al.*, 2002). While recent studies have empirically supported a competence primacy in considerations of SCM, this limited work has been in the case of singular person evaluations (Wojciszke and Abele, 2008) and organisation/brand evaluations (Aaker *et al.*, 2012; Andrei and Zait, 2014) rather than in the case of individual comparative perception. In more recent research Kirmani *et al.* (2017) proposed and found support through experimentation for a competence primacy in comparative consumer evaluations of service providers however this does not impact the important contribution that this current study has made in the illumination of the phenomenon in its natural contemporary over experimental setting.

A Relational versus Transactional Consideration of SCM in Person Perception

Much occupational research in the area of SCM and its application has focused on transactional evaluations such as hiring decisions (Masser *et al.*, 2007; King and Ahmad, 2010; Krings *et al*., 2011) or at the level of brand perception (Kervyn *et al.,* 2010; Aaker *et al.,* 2012; Andrei and Zait, 2014; Bufquin *et al.*, 2017) however, this study extends knowledge through a consideration of SCM to a relational person perception context.

Through this research a competence primacy in comparative person evaluation is observed where there is the presence of an interdependent relationship between the perceiver and the actor. The relationship between the perceived and target in the exploratory case was subject to a significant degree of mutual dependency and this was found to support the salience of the competence perception in person evaluation. The behaviours displayed by evaluation targets that were task based influenced the perception of the target as competent and this perception was viewed as a benefit to the customer over it being a benefit for the purpose of their task achievement.

This study shows significant support for the role of dependency in the reversal of primacy order akin to that observed in singular person perception in the context of personal friendships and subordinate/supervisor interaction (Wojciszke and Abele, 2008) and in service provider trade-offs (Kirmani *et al.*, 2017). The comparative situation investigated by Kirmani *et al.* (2017) however set immorality as independent to the service that was being provided (eg. adultery in the case of a car mechanic) and while this lends support to the dependency claim it is more limited than the natural setting of this current research. The presence of a competence primacy based on dependence in an individual comparative situation illuminated in a natural setting is therefore a novel contribution that has value due to its presence in a commercial organisational situation where perceivers and targets span organisational boundaries.

The consideration of this model in a comparative person evaluation also illuminated insight with respect to the activation of the negative versus positive behavioural responses by the perceiver in response to the actions of the target. To date research on the activation of these ambivalent responses has focused on the salience of warmth and competence as triggers of one response over another and this empirical testing was confined to singular person evaluation (Becker and Asbrock, 2012). Through the contemplation of this model in a comparative evaluation situation in an organisational context, the study contributed that the cold but competent dimension may not have sustainability if an alternative competent option is available. Where two or more competent targets are perceived in such comparative situations (being the primacy in this adjusted model), then the decision process in the selection of one target over another will be based on the salience of warmth (secondary in this situation). A target who is not perceived as warm therefore is open to switching behaviour in the event that another competent alternative becomes available in a comparative evaluation context. In person comparison the presence of a positive warmth

perception alone may be sufficient in evaluations when it comes to routine decision making however, when the status quo is challenged and the decision requires the consideration of alternatives due to changed risk and/or complexity, the perceived incompetence of the target is likely to get called in to question as the decision making process becomes more transformational. This finding extends the work of Becker and Asbrock (2012) with respect to the role of salience in person perception beyond what is salient in the context warmth or competence to relational contexts where what is salient within the decision making process at the time was supported as the source of activation.

The Extension of Relational Behaviours within Customer Orientation

The findings in the target behavioural influencer aspect of this study also revealed a theoretical implication. This revolves around the finding that behaviours observed through the lens of customer orientation were unsurprisingly similar to both relational/personal and competence/task behaviours identified in the relationship quality literature (Crosby *et al.*, 1990; Newell *et al.*, 2011). The only notable variations however, were that communication style found to influence warmth perception was only partially supported as a relational behaviour through the inclusion of mutual disclosure and attentive listening. Existing work does not seem to consider the role of a relaxed and comfortable approach in a more complete profile of communication style. In addition existing literature considers contact intensity from the perspective of frequency over appropriateness. Considering the relative synchronicity between all other behaviours and the role of relationship quality theory in informing consultative sales models it is suggested that a more comprehensive communication style profile along with contact appropriateness should be considered and tested in future models in this area. This extends relational behaviours within Customer Orientation by the addition of overall communication style and contact appropriateness.

Emotional and Social Competencies as Perceptual Balancers

The role of social and emotional competencies as a lever to balance warmth and competence perceptions in person perception has been illuminated by this study whereby previous work has focused on the impact these competencies have on solely the management of warmth impressions (Lopes *et al.*, 2004; Mayer *et al.*, 2004; Bar On, 2006). In this study emotional and social competencies based on the emotional quotient framework (Bar On, 1997) were found to facilitate an individual's management of

potentially negative competence perceptions due to high warmth perceptions and thus extends existing thought to include social and emotional competencies as perceptual balancers of warmth and competence perceptions in impression management. It also extends work on the compensation effect whereby downplaying is acknowledged as an impression management strategy in this compensation effect however, has been identified as an area where the mechanisms to manage this downplaying behaviour need to be identified (Holoien and Fiske, 2013; Durante *et al.,* 2017). While the role of underdog positioning has most recently been proposed and supported through experimental research in comparative scenarios as a technique to manage perceived deficits in competence for moral brands this consideration focused on trade-offs between morality and competence and the finding did not hold through when warmth was considered as the construct over morality (Kirmani *et al.,* 2017). The role of emotional and social competencies as a perceptual balancer between warmth and competence supported by this current research is therefore perhaps a more appropriate alternative avenue of explanation for future positivistic researchers to pursue towards generalisation.

RESEARCH LIMITATIONS AND FUTURE OPPORTUNITIES

This study was based in a Western European setting and global cultural variance was outside the scope of this study due to relevance to the practitioner role held by the researcher and the absence of a prior conceptual framework that considered warmth and competence as indicators of customer perceived sales performance. Previous studies have recognised similarities and differences between salespeople across cultures and have revealed variances as a result of cultural diversity (Kale and Barnes, 1992; Money and Graham, 1999; Pettijohn *et al.*, 2010). Warmth and competence traits are thought to be relatively stable across cultures due to their evolutionary basis (Ybarra *et al.,* 2008, Cuddy *et al.*, 2009; Cuddy *et al.*, 2011) and future cross cultural studies therefore may consider the SCM as an appropriate platform to understand international sales performance. The conceptual framework designed and explored in this study may therefore act as a conceptual springboard to leverage such future cross cultural research.

This study is concerned with warmth and competence as indicators of relational sales performance, a context clearly delineated at the outset by contextual characteristics supported by literature (Thull, 2005; Kauffman 2007) and later confirmed through analysis of findings. Consultative selling was selected based on its current prominence in

the evolution of sales arenas (Thull, 2005) and as a context of significant relevance to the practitioner role held by the researcher. While the role of the salesperson in commodity based sales environments is certainly being eroded by technological developments a consideration of commodity contexts may not be the most future relevant but may provide insight through a comparative study that is of value to further illuminate warmth and competence as indicators of consultative selling.

This study was an exploratory study that was conducted through a qualitative case study methodology. It's explicit *'raisin d'etre'* was not to generate generalisations but to capture new insights in to the construction of reality in other people's worlds from a social constructionism perspective. While these new insights were both generated and valuable to theory and practice, the lack of generalisability towards more universal insight at this juncture as an outcome of this study is a current limitation. Having revealed insights pertinent to both comparative person perception and its application in consultative sales contexts though an exploratory common case lens, ample opportunity has been provided to test these insights quantitatively in future research across other comparative scenarios and/or across a multiple of consultative sales contexts in order to infer generalisations.

PRACTICE IMPLICATIONS AND CONTRIBUTIONS

Judgements on warmth and competence have been found to play an important role in consumer perception of organisations and brands (Aaker *et al.,* 2004; Aaker *et al.,* 2010) and relational sales models such as the trusted advisor in interpersonal interfirm relationships suggest that trust (a construct that reflects elements of honesty core to warmth and ability akin to competence) is a mediator of effective customer decision making in consultative sales contexts. Yet, a comprehensive consideration of these dimensions as indicators of customer perceived performance has not previously been conducted. The application of the relational SCM consideration in a consultative sales organisation in this study addressed this gap and contributed to a comprehensive model of customer perception in relational interfirm buyer-seller interaction (Figure 2), typology insight with respect to customer perception in the evaluation of key account managers based on varying combinations of the performance indicators warmth and competence. The SCM is a model that touches much of the psychological process to include cognition, emotion and behaviour and therefore action informed by such a consideration is likely to achieve lasting results (Aaker *et al.* 2012).

A key feature of the typology insight within the customer perception model contributed by this study is the identification of the high performance quadrant of perception combinations. This enables SMPs to direct selection and development activity towards influencers of the dimension combination that comprises this quadrant. This combination reflects both warmth and competence as important perceptual indicators of optimum and sustainable performance. While a golden quadrant of similar construction has been identified within B2C brand marketing (Aaker *et al.,* 2012), to the researchers knowledge a quadrant of this nature has not previously been identified in the context of B2B relational selling. Similar to the findings of Aaker *et al.* (2012) in their work on brand perception, the application of the relational SCM consideration in a consultative sales organisation identified admiration as a customer emotive response and both passive and active facilitation as behavioural customer responses towards perceptual high performers.

The initial focus of this study was star performers towards a focus on sustainable high performance however, the localist approach to data collection applied to develop a situated account also facilitated the illumination of perceptive, emotive and behavioural responses within alternate quadrants that within which high performance was found to reside. This was illuminated through comparisons made by participants with "other" and "previous" SAMs. In this respect the study contributed that those identified as neither warm nor competent elicited an emotive response of contempt and behavioural responses of active and passive harm in this context. It revealed that consultative salespeople perceived to be cold but competent elicited potential behavioural responses of passive facilitation or active harm and that salespeople perceived to be warm but incompetent elicited an emotive response of pity along with potential behavioural responses of passive harm or active facilitation. The activation of ambivalent customer behavioural responses in the ambivalent perceptive quadrants (cold but competent and warm but incompetent) was also illuminated by this study. In particular it highlighted that the presence of alternatives perceived to be relatively competent but also perceived to be warm determined switching from cold but competent targets and that where harmful versus helping behaviours towards salespeople perceived as warm but incompetent resulted that the level risk in the purchase decision making process was a contributing factor. In essence such insight illuminates the synergies to be gained from the combination of warmth and competence rather than just quantitative support for the presence of such a synergy.

Core to the SCM (Fiske *et al.,* 2006) is a primacy warmth judgement in person evaluations, a premise noted to be supported in the extant literature (Cacioppo *et al.,* 1997; Wojciszke *et al* 1998b; Ybarra *et al.*, 2001; Willis and Todorov, 2006; Fiske *et. al.*, 2006; Cuddy *et al.*, 2011). The reversal of this warmth primacy to one of competence is acknowledged as possible in some occupational contexts but many contexts still remain relatively unexplored (Wojciszke and Abele, 2008; Cuddy *et al.,* 2011). In the sales and marketing arena, a competence primacy has previously been supported in the context of B2C brand perception (Aaker *et al.*, 2012). This study extends knowledge with respect to the primacy judgment to include consultative selling within this field of practice where a competence first primacy has been supported by the current research.

This research has also provided SMPs with a mechanism to access customer perceived high performance in consultative selling identified within the frame of the SCM for the purpose of selection and development practice. This access is provided by the illumination of influencers within the model of customer perception in interfirm buyer-seller interaction. This insight enables SMPs to identify tasks and behaviours conducive to high performance along with the socio-emotional competencies that aid the direction of these behaviours towards the generation and maintenance of warmth perception, impression management between warmth and competence perceptions and competence perception reinforcement.

The behavioural influencers of customer perceived warmth were supported to be compromise, communication style, level of interaction and relational acts. The direction of these behaviours towards high performance through the generation of a warmth perception was found to be aided at the socio-emotional level by salesperson optimism and interpersonal skills. It was also supported that the maintenance of these perceptions was further influenced by socio-emotional factors to include the dynamic of salesperson stress tolerance, optimism and problem solving and the dynamic of salesperson flexibility and reality testing.

With respect to influencers of customer perceived competence, acts that demonstrate knowledge of resources and solutions, responsiveness and the ability to activate networks influence the customer perception of salesperson competence at the behavioural level. Socio-emotional competency combinations that include; Optimism/Reality Testing (OP/RT), Emotional Self Awareness, Interpersonal Skills, Flexibility (ESA/IPS/FX) and

Flexibility, Independence and Assertiveness (FX/ID/AS) are further contributed as perceptual balancers that aid salespeople to balance perceptions of warmth and competence for optimal performance. Finally, interpersonal skills and problem solving as socio-emotional competencies were highlighted to influence customer competence perceptions through task performance outcomes that serve to reinforce perceptions of competence.

The early extant literature on CO has primarily focused on behavioural antecedents to better understand customer orientated performance (Saxe and Weitz, 1982; Crosby *et al.*, 1990). More recent work from the psychological perspective has focused on establishing a link between emotional intelligence and customer orientation in salespeople (Rozell *et al.,* 2006; Pettijohn *et al.,* 2010; Jain and Swarup, 2013) acknowledging like this study that such factors often underlie the behaviours that manifest themselves as customer orientated. This study has extended this work further by illuminating emotional and social influencers through competencies and dynamics that suggest how ESI may influence CO performance as opposed to just surface level emotional intelligence considerations. This has an important implication for SMPs with the state of the art in the field of the psychological CO showing support for a satisfaction mirror between customer engagement and employee engagement (Zablah *et al.,* 2012; Zablah *et al.,* 2016). The implications for practice of the exposure of these socio-emotional dynamics that aid such customer engagement therefore may have far reaching consequences for practitioners beyond the initial area of sales performance and in to the realm of employee engagement.

RECOMMENDATIONS FOR PRACTITIONERS

This research makes recommendations for SMPs in the area of consultative sales with respect to; the selection of new hires, investment in and implementation of training and development interventions and organisational structure design. The recommendations are drawn from the findings of this study that were supported and outlined in the earlier discussion and these are now presented.

Selection of New Hires

In the selection of new hires behaviours identified to be influencers of customer perceived salesperson warmth and competence, should be considered in the selection of consultative salespeople and the use of a behavioural interview technique in this context should be refined to consider these influencers. In particular the identification of candidate

behaviours with respect to communication style, interaction level, compromise behaviour and relational activities along with the establishment of behaviours directed towards customer assurance of ability, knowledge and responsiveness are suggested areas of behavioural assessment in the selection of new hires.

In addition to behavioural assessment it is suggested that interviewers consider a candidates socio-emotional competencies in the selection process for consultative sales roles. Given that the findings of this study are based on the emotional quotient framework the use of the emotional quotient inventory (EQ-i) is one such way that this could be assessed (Bar On, 1997). In addition to top line, inter-realm and individual competence scores used traditionally in recruitment practice assessors should consider some construct scores in the context of others in the interpretation of results and these include:

- Problem Solving, Stress Tolerance and Optimism
- Flexibility, Independence and Assertiveness
- Reality Testing and Flexibility
- Emotional Self Awareness, Interpersonal Skills and Flexibility
- Optimism and Reality Testing

These results could be used as a base for interview questioning to establish how the presence of effective functioning levels detected on the above dynamic combinations are used by the candidate. For example a recruiter may present the candidate with a problem to see if when faced with an adverse situation they apply a positive solution focused approach towards a resolution that includes the generation of options and the breaking down of a problem in to smaller parts.

Training and Development Interventions: Investments and Implementation

The nature of technical solution training for salespeople should be carefully considered. An umbrella view of a wide portfolio of solutions may be useful but in-depth technical knowledge has the potential to inject perceived complacency and solution bias in to the interaction. This perception may serve to create customer doubt as to the appropriateness of the solution and in turn as to salesperson competence. Alternatively training interventions that focus on skills such as time and project management may serve to improve customer perceived performance due to the value placed on responsiveness and ability to deliver in an environment that requires extensive collaboration and coordination.

The practice based contributions of this study indicate areas of focus surrounding the development of socio-emotional competencies in consultative sales organisations. One of the key advantages of the emotional quotient framework (Bar On, 1997) is it operalisation as competencies with competencies based on such mixed models supported in terms of developmental potential (Bar On, 1997; Emmerling and Goleman, 2005; Dulewicz and Higgs, 2004). The following are suggestions as to how this potential may be realised.

1. Interpersonal Skills Training such as "Communicate for Success" type programmes are suggested to develop the social skills required for high performance in consultative selling

2. The implementation of Corporate Social Responsibility (CSR) programmes that engage employees in the process of giving back to the community are suggested as potential initiatives to develop salesperson social responsibility

3. The empowerment of salespeople to generate solutions to problems through SMP coaching rather than the provision of solutions to problems by the SMP is recommended in order to improve salesperson independence

4. Assertiveness Training is suggested as an avenue to enable salespeople to deliver disagreement in a non-destructive way in order to maintain the warmth perception

5. The use of reflection logs and one to one coaching is recommended to develop emotional self-awareness within sales team members

6. SMP's may wish to consider short term win scenarios and one to one coaching interventions that are suggested to develop salesperson optimism (Seligman, 1990; Sujan, 1999; Rich, 1999).

Organisational Structures

It is recommended that organisational processes and structures are not so rigid so as to prevent a degree of salesperson flexibility to negotiate and tailor their approach to meet the customer need in consultative sales environments. This is necessary to influence a positive warmth perception through compromise behaviours and to maintain this perception through an appropriate level of concession and change when required. In addition it is recommended that organisational structures support communication mechanisms that foster salesperson development of networks both internally and with collaborator organisations. This might include for example attendance at partner conferences and social events, the formation of interdepartmental committees and teams

and company-wide and/or intercompany social and team building events. Such activity serves to aid salespeople who are required to have knowledge of expert resources and the ability to activate these when needed in order to propose and seamlessly deliver the right solution to the customers.

CONCLUSIONS

This research sought to illuminate how customer perceptions of salesperson warmth and competence indicates performance in consultative selling. The positioning of warmth and competence as indicators of sustainable customer perceived performance was supported and is characterised by high levels of customer satisfaction and repeat business where salespeople are perceived to be both warm and competent. Beyond this surface level support the qualitative methodology applied through the research design illuminated the role of these perceptive indicators in the facilitation of such performance.

During the initial interaction phase the customer perception of salesperson competence in the relational sales context is the primacy evaluation. This competence evaluation is salient due to the contextual interdependency that exists between salesperson and customer towards the achievement of mutual success. This interdependency is largely driven by the level of risk and complexity in the context that transforms customer decision making from routine to transformational. A level of salesperson technical competence is a potential source of solution bias and competence in this context is instead perceived on the basis of the salespersons ability to deliver a quality of service and to ensure the seamless delivery of solutions. The demonstration of competence by the salesperson in the sales interaction also serves to reinforce the customer perception of salesperson competence over the course of the continual sales engagement.

Warmth also plays a role in the success of star performers in the consultative sales context although this occurs at a later stage in the continual engagement. While competence is enough to get a salesperson to the table when it comes to a choice between relatively competent comparators, it is the presence of warmth that influences the customer's choice of partner. The presence or absence of a warmth perception becomes salient when a baseline competence level is already established in the relational comparative person evaluation. To surmise both warmth and competence are supported as important indicators of sustainable performance in consultative sales contexts albeit their roles and

salience varies over the course of the interaction as illuminated by this research and as discussed in this thesis.

To make useful such insight for the efficient construction of effective sales teams within relational sales contexts, attention was given to the influencers of warmth and competence perception. Over the continual sales engagement customers infer warmth and competence from the behaviours of salespeople. In the case of star performers these behaviours can be categorised around the two core aspects of customer orientation those being the construction of cooperative relationships and the demonstration of competence. Open and direct communication, attentive listening and a comfortable and relaxed communication style influence customer perception of sales person warmth. In addition compromise, relational acts and a level of interaction that is appropriate also influence this warmth perception. In the demonstration of competence star performers act to ensure they are responsive to their customers' needs and generate a perception of efficiency. They also act to assure their customer of their knowledge and ability to further influence the customer perception that they are competent and capable.

While this study did not seek to reconcile the debate as to the constructional nature of CO it certainly highlighted the important role that underlying psychological factors play in the direction of customer orientated practices and the influence that such direction can have on customer perceived performance outcomes. It unearthed beyond surface level results socio-emotional competencies and combinations that serve to influence the direction of behaviours towards customer orientated practice and ultimately the formation of warmth and competence perceptions. The identification of these underlying dynamics that influence the generation and maintenance of warmth perception, achievement of a balance between perceptions and the reinforcement of the competence perception was unlikely to surface through a more qualitative approach. Their identification through this study however, provides a level of insight as a springboard for future qualitative testing towards results that may be more universally applicable.

The contribution of a comprehensive model of customer perception in relational interfirm buyer-seller interaction to include the identification of the behavioural and psychological influencers of such perception are important and useful contributions to practice as they enable sales management practitioners to refine their selection, development and organisational structures to leverage sustainable high performance in this context. In

addition to this practice based contribution this research has also made a number of contributions to theory to include the illumination of a primacy competence judgement in comparative person perception and the role of relationship interdependency as a contributor to this lesser known phenomenon. This relational versus transactional consideration of the SCM in person perception contributed by this study has extended the reach of this model that has traditionally been limited to more transactional contexts in terms of its applicability.

An additional knowledge based contribution is that this study has extended what is known about relational sales performance from a behavioural perspective through the addition of a comfortable and relaxed communication style and an appropriate level of interaction as influencers of relational sales performance. This refines what has previously been contributed with respect to relational sales behaviours rather than conflicts with what is a long established and well supported area of knowledge. Finally, it has also contributed from a psychological perspective to a very current gap in knowledge with respect to the management of compensation effect strategies such as downplaying through the identification of emotional and social competencies as perceptual balancers in the management of person perception.

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SECTION 4: REFLECTIVE LOG EXTRACTS

Introduction

This section presents a reflective overview of my journey as a practitioner researcher and in particular the critical shifts in thinking that have occurred in my views of and approach to sales performance in my practitioner role. It also presents a number of extracts from my reflection journal recorded from day one of the first workshop in stage one of the DBA. These extracts are illustrative of the reflection throughout the process that has enabled such learning to occur. The reflective process is a deeply personal one and as such the critical reflection and journal entries are written and presented in first person narrative. The extracts were selected from a large volume of journal entries and provide a snapshot the personal developmental journey over the course of the programme.

Transformation of Sales Performance Perspective

Over the course of the DBA journey my thought process as a practitioner has transformed in line with the researcher focus from a traditional salesperson to a more customer orientated approach. At the outset of the journey the legacy organisational selection interview questionnaire for example, that I can see now to be heavily weighted towards salesperson motivation, did not sit well with me. At the same time I could not coherently argue beyond intuition that these were inappropriate or more importantly what a more appropriately focused questionnaire would look like. To be able to step back and look holistically at salesperson performance in the contextual context through the literature rather than at the level of an operational focus on the day to day activity, helped me to reconcile why the existing organisational tools were not fit for purpose in the context. It also helped to support a case for their transformation to incorporate questioning that seeks to understand for example how a candidate uses emotional and social competencies related to the dynamics in the model contributed by this study and aligned to sustainable performance in context. Prior to this research my default when it came to sales performance was the traditional perspective however, as an outcome of this process I have internalised the customer perspective as a default and I notice that this characterises my conversation with colleagues across the business and that I can draw examples from this research to support my view. This has given me both knowledge and confidence to implement change that is more transformational in our business such as a complete redesign of selection methods and tools with customer perception considerations a central facet to this design.

Appreciation for the Role of Salesperson as Value Creator

In my general management role I am an internal boundary spanner between service delivery capacity and the sales function. As such I often encounter tension between perceptions of salesperson value in the organisation. I have found that some technical team members who have not been not privy to the buyer-seller interaction in the way that presales engineers are, feel that our sales people don't really add value for the customer as they are not technical. I was always aware of the need for an administrative function around the sales process and there were times when I too thought that perhaps increased technical knowledge would be useful for the sales team. This programme forced me to consider my position on technical expertise as a core facet of the salesperson role and broadened my view of the salesperson role beyond an administrative consideration to that or conductor of the orchestra. It also made me aware of the potential negative implications that salesperson technical expertise can have on the customer perception of competence something I would not have thought of previously.

It was an enlightening experience to stand in our support centre recently and to have a discussion with a technical team member about the role of a technical salesperson and to find that I could support a well thought out view on this matter that could be illuminated in the discussion through the customer contributions in this study. I could articulate the risks that would be associated with a "technical salesperson" in terms of impartiality perception and also the difficulty to add value as single point technical expert considering the complexity in the environment and the need to collaborate and coordinate as a deep generalist in the creation of this value. I felt that I could really influence an appreciation for the core role of the salesperson as value creator in this conversation based on my exposure to the literature and operationalisation of research through this DBA process and afterwards felt that my knowledge level had shifted to an expert level in the way that I comprehensively understood the issue and could articulate my position in the discussion.

Challenging Views on Behavioral Activity

As a result of the study my view with respect to networking as a key account manager behaviour has been completely challenged. I like many of my colleagues was of the view that these were a waste of time or an excuse for a "jolly". Through the implementation of this study the important value of this activity to enable the direct activation of resource networks and knowledge in the delivery of customer solutions, its influence on customer

perception and ultimately sustainable performance was illuminated. It has forced me to look at requests to attend events and activities through a different lens and to make an informed decision as to the potential benefit or not of a networking activity rather than dismissing it without consideration.

Supporting and Developing an Intuition into Knowledge

At the beginning of the DBA journey I always felt there was something about emotional and social competencies and star sales performers. Perhaps as an EQ-I coach I was more attuned to this but a description many years prior to this research by my colleague of a salesperson who was a consistent high sales achiever as having "a light in her eyes" always resounded with me. Through the course of this DBA journey I think this light has been well illuminated by the role of salesperson optimism. Salesperson optimism is not something that is new in the literature but this study went beyond this and opened my eyes to the many emotional and social competencies influencing customer perception and ultimately sales performance to include the pitfalls associated with some competencies if present in isolation in the context. This included optimism which without an adequate level of reality testing in the context can be problematic. My thinking with respect to emotional and social competencies at the outset of the programme was very much orientated around a salesperson skill perspective not too dissimilar to the approach of Sojka and Deeter-Schmelz (2002) in their research on emotional intelligence and sales performance. This research however has transformed my thinking on this and I have moved away from the focus on emotional and social competencies as a skill to generate warmth perception and can appreciate their more holistic role in the generation and maintenance of warmth perceptions, the achievement of balance between perceptions and the reinforcement of the competence perception.

Key Journal Extracts

This section commences with the very first journal entry and key journal extracts are subsequently presented in chronological order to represent key developmental points along the journey. The sub-headings that preface each journal extract are the headings given to each piece at the time the journal entry was made. The attachment of these sub-headings was useful to bring each reflection to a point of summary for future reflection and for ease of extraction in the preparation of the reflective assignments.

Reflections on Reflection

"The question '*do you reflect*?' was posed in today's session and my immediate thoughts on this were '*I don't have time for reflection*' and '*I am just not the reflection type*'. It amuses me now that I find myself reflecting on this question and that it has even taken me a while to realise that this is precisely what I am doing. By bringing this reflection to the forefront of my consciousness I am beginning to think that I reflect more than I realise and I wonder if it is a case that this reflection has become so internalised that I don't recognise it. I do think about things a lot when I am running, driving and at the end of the day as I prepare for bed and admittedly it is often by working things through like this in my head that I figure things out or get a nugget of clarity. I suppose it is the case that in my practitioner context we don't talk about reflection not in the same way as perhaps we do about more clearly defined functional activity. I mean I have never put in any person specification '*must be adept at reflective practice*' and yet from what I have established today it is a strongly recognised practitioner ability in the literature. Perhaps the fact it is not amplified in practice in the same way that other activity is has led me to tune out to my reflective practice. I am going to give this journaling a go and to make a conscious effort to turn up the volume on my reflection".

-Journal Entry: June, 20th, 2013

Topic Selection-Is it Just the Easy Option?

"The comment made by Denis today about ensuring that the topic you pick is something that can hold your interest for the next four years is on my mind. I am beginning to question myself…..I don't think I have given the selection of the topic enough focus and in fact I have just selected the topic obvious to me with little other consideration. The starting point for my assignment is not as I thought to read and write but to sanity check my topic selection and to consider alternatives".

-Journal Entry: June, 22nd, 2013

Impact on Future Career

"Another thought strikes me…..even if it does hold my interest how is it going to impact my career…long-term? This is too fundamental a decision to take a short-term approach to. While ultimately yes I want a Doctorate, what I want to do with the Doctorate is more important to me. I found it easy over the last few days to get caught up in the process as

a means to an end with that end being 'to get a Doctorate' but the more long reaching consequences for my career ultimately trump everything and this is where the focus needs to start in selecting my topic. I will schedule a meeting with Patrick to discuss".

-Journal Entry: June 22ⁿᵈ, 2013

Topic Selection Revisited

"Why is it that I am really considering EI and sales performance? Why not reward or motivation theory as a base to explore sales performance above and beyond general intelligence? Because the literature suggests EI may be useful to understand performance variance above and beyond general intelligence in organisations and reward and motivation have already been explored extensively when it comes to sales performance. As practitioners most of our focus goes on commission structures and incentives but I can't help feel that there is something more. My colleagues comment that one of our sales colleagues has '*a smile in her eyes*' resounded with me. It leads me to think of the optimism realm within the EQ-i. That leads to another question, I need to consider why EQ-i when there is much debate out there as to EI as a construct. Granted I have a personal interest in and knowledge of EQ-i having been certified to administrator and interpret as part of my coaching diploma and while this may be useful it doesn't necessarily mean that it is really the most appropriate lens.

-Journal Entry: June 24ᵗʰ, 2013

Why EQ-i

"Having revisited the construct of EI and associated constructs in detail (via the handbook of EI – an edited resource of key thought contributors in the area and really a very balanced representation of the concept given the tension in the literature), I still believe that the EQ-i best relates to my research area. It is broad enough to capture both social and emotional influences (considered a mixed model of emotional and social intelligence), is operationalized as competencies (so good for practice based outcomes to research) and is better supported empirically than broader models".

-Journal Entry: June 26ᵗʰ, 2013

Topic Selection-Collaboration with Others (Organisational Mentor)

"It was great to bounce some ideas with Patrick today but I was delighted that I left my front runner idea until last to pitch. While there was interest in my alternatives I could see the visible change in reaction when we moved on to sales performance and potential to improve selection and development. One interesting idea he suggested was to have a session with someone in the organisation who comes from a completely different paradigm as we are so similarities in our styles…..it's a good point and one I didn't think of".

-Journal Entry: July 17th, 2013

Topic Selection-Collaboration with Others (College Facilitator)

"I am delighted with how my meeting with Felicity went today and how she could articulate back to me the key points around my topic. I really think the more I am discussing it the more I am refining it and it is giving me a greater sense of clarity. I am going to try and speak about my work to others more in addition to writing as I think it could help to sharpen my thinking on it".

- *-Journal Entry: August 9th, 2013*

A Working Title

"My first attempt at a working title…..'A framework for the professional development of salespeople based on an understanding of the role of the emotional quotient in sales performance'…...this is an iterative process so I need to keep an open mind to this changing".

- *-Journal Entry: August 16th, 2013*

IAM Conference

"I was not sure what to expect from the conference today as I had never attended an academic conference before. It was an interesting experience and there were a couple of key takeaways from it. Firstly, it wasn't as daunting as I would have imagined. Many of the papers were presented in smaller break-out groups of 20 or so people rather than in large auditoriums. The postgraduate parallel paper sessions were very relative to our process with one of the prior cohort presenting his conceptual paper. I was surprised by how much of the feedback given was constructive and helpful versus critical. What really

opened my eyes was the fact that there seemed to be no right or wrong in the room only different perspectives……this really made me think about how I approach things as my constant perception that I am being judged as right or wrong has definitely contributed to my lack of confidence in my ability at times".

- *-Journal Entry: September 2ⁿᵈ, 2013*

Heavy Ground and a Heavy Heart

"I found this workshop really tough going and most of it went completely over my head…it was so different to what I thought it was going to be...I had this notion in my head that we were going to be thought about all these different theories….clearly EI was going to be one of them.....how wrong could I have been. I am so confused right now. Susan suggested that I look at the work of Fiske on warmth and competence in terms of selecting a theory base but I can't see how that relates to my study at all".

- *-Journal Entry: October 11ᵗʰ, 2013*

I Had to Buy It for Myself

"I think social cognition theory may be the link I was looking for between emotional and social competencies and performance in a sales. I'm excited and annoyed…..why did I not get this when Susan first mentioned warmth and competence…I could have saved myself many a dark alley and dead end. I can't stop writing now….I can't stop writing because I buy it and I guess I had to buy it for myself before I could progress it".

- *-Journal Entry: December 1ˢᵗ, 2013*

Methodology or Method

"Chatting at our coffee break Sean said that it sounds like I have a great opportunity for a case study but I learned that a case study is not the type of case study that I was familiar with in college (I now understand this to be a teaching case study). I actually don't know what the other type of case study is. The other thing I am grappling with in this regard is the terminology….method, methodology, strategy, approach, techniques….when I did my Bachelors and Masters the "methodology chapter" was concerned with…..are you doing qualitative or quantitative research and how are you gathering you data. Now there seems to be an extra dimension...such as case study, action research and so on".

-Journal Entry: April 4ᵗʰ, 2014

Multiple Paradigms

"I am not sure what I expected from workshop 3 but what I came away with was utter confusion. We have experienced contributions from three very accomplished facilitators but again like the IAM conference there seemed to be no right or wrong answers just a points of view....points of view they were often different but not wrong. I come from a paradigm that requires an answer and now it seems there are no right or wrong answers only points of view. This is personally challenging from me and I fear I may be a functionalist.

- *-Journal Entry: April 5th, 2014*

Conceptual Confusion

"I need to get my head around the conceptual framework part of this assignment. My search for understanding at the moment is a combination of the additional academic readings given out at workshop three and google as a lot of these readings are heavy going and I need to google the terminology! While I think I have established my theory base....Social Cognition.....now there is talk of concepts, contributions and models and I am not sure what exactly constitutes a conceptual framework".

-Journal Entry: May 6th, 2014

Staying in the Process

"This is not going well for me at all and it is touch and go as to whether or not assignment two is going to be handed in or not. I think I will just have to submit something to show that I understand the elements required....and I think I am beginning to now but I am still unsure as to how they exactly relate to my study as it is still in its iterative from....I think it will be enough to show that I see how they have to cohesively fit with each other and how they might relate to my study in its current iteration but I am sure now that this is not going to reflect the later work and I am frustrated by this as it feels like a waste of time".

-Journal Entry: July 10th, 2014

Critical Incident

"I know that today I reached a critical point in the DBA. I feel my writing up to this point has been piecemeal but now this evening after four long days and nights of effort in a last

ditch attempt to salvage this DBA something has changed…..a moment of clarity and I instinctively know it to be the turning point. It was only when I had shut down my laptop and almost abandoned hope that it struck me…..emotional and social competencies may assist with the generation, maintenance and reinforcement of warmth and competence perceptions…..all that piecemeal writing and now finally some semblance of structure. Six hours to the deadline but I know already I am still in the process".

-Journal Entry: August 11th, 2014

Bursting of the Bubble

"The feedback from the academic writing assignment was irreparable…..hundreds of comments for correction….I don't think there is any point in continuing….there is no way I can turn this around and resubmit in time for the colloquium".

-Journal Entry: August 11th, 2014

All the Ingredients

"Not quite ready to throw in the towel I expressed my concerns to Felicity about my ability to complete the rework on assignment four for the colloquium. I can't believe the level of humility shown to me in my despair and the selfless giving of time. Felicity pointed out that most of the items listed in the feedback were quick fixes and that among what appeared to be the rough were a number of diamonds…..two in particular that I had missed among the noise:

1. All the ingredients are there
2. The research is timely and has the potential to make an important contribution

I had missed both points completely in reading the feedback. The advice given was that I had read enough and written enough and to focus on the structure and flow of the paper and that's what I will do….still in the process"

-Journal Entry: August 25th, 2014

Underwhelmed by Simplicity

"My conceptual model is very simple versus what I see in the journal articles and seems a little unsophisticated. I mean is that it after at least twenty free hand model drawings over the past weeks? I am a little underwhelmed by my return on effort. Surely it has to comprise more than this?"

Lessons on Structure and Flow

"My colloquium paper is submitted and the biggest lesson learned has been with respect to paper structure and flow. The approach I took to the first draft of the conceptual paper was to guide the reader through the paper by mapping out how the conceptual framework developed and evolved. Looking back now I can see that this because it was still being developed in my mind as I wrote. I do believe however that the first draft was a significant step on my research journey…I would not have had my critical incident break-through without it. The difference now I believe is that the conceptual framework paper outlines the contribution the study intends to make, along with the need for and value of this contribution. Its presentation is characterized by the context of the study, the theory informing it, the pertinent literature in the area, and its philosophical underpinnings. The framework is no longer hidden within this information as was the case in the first submission. It is now essentially a map of the research territory for the researcher to follow….I think I now understand what a conceptual framework is and that I have demystified my earlier conceptual confusion".

-Journal Entry: September 4ᵗʰ, 2014

Crutch Deck

"Today was an interesting day….I was dreading having to present in front of my peer group but it turned out to be a phenomenal experience. The group provided feedback that I clearly had a great knowledge in my field but that they could not easily follow the story I was presenting as the presentation was text heavy. It brought to the fore that I was using the slide deck as a crutch to quell my confidence issues in formal public speaking scenarios. I know that it is the fear that I will forget or freeze that causes me to put every piece of information on the slide but I suppose now that I have been forced to acknowledge it like this I also have the opportunity to do something about it. A good tip from Ray was to have two decks….a presentation deck for the audience and a crutch deck for confidence".

-Journal Entry: October 3ʳᵈ, 2014

D-Day

Today is the day and I have to present at the doctoral colloquium….to say I am nervous is an understatement. I have my presentation deck and my crutch deck….I have written on the front of my crutch deck "my name is Karen O Connor"….that just about portrays the level of nerves….I may forget my own name".

-Journal Entry: October 4th, 2014

Expert in the Room

"I am so glad I was first up and it is done and dusted! My crutch deck is still on the first page….my name is….I didn't turn one leaf. My colleague Ulrich just paid me a huge compliment…he said in the Q&A with the examination panel that I came across as the expert in the room….it was a huge boost to my confidence to get that feedback. I actually think that this piece of feedback has eclipsed the fact that the examination panel has recommended my paper without changes".

-Journal Entry: October 4th, 2014

Take the Opportunity to Improve

"I have been struggling to park my conceptual paper...it has been recommended and I am lucky that I don't have to resubmit and yet I am reluctant to leave it as it is. I think it's because I have a better grasp now as to what the conceptual framework is. I am still underwhelmed by my model and despite the paper being recommended there is still a couple of nice pieces of feedback to get me thinking on this further. No, I am not going to take the easy option and park the paper I am going to take the opportunity to give this paper some further consideration and if I think there is something that can better it I am going to take this opportunity. I am lucky not because I don't have to submit, I am lucky because I have the opportunity to take a step back without pressure to reflect on the paper and to look for potential to improve"

-Journal Entry: December 8th, 2015

Conceptual Framework: The Next Iteration

"I met with Susan today, it was our first meeting since she was appointed as my supervisor and I think it went well. She said she was much happier with my conceptual paper in its revised form and happy that I resubmit the new version…..I am glad as I am much happier

with this new iteration also especially the revised model. I think representing the context on the model was important as was its position as central to the research study. The addition of the behavioural perspective via the customer orientation lens to complement the psychological lens via EQ-i strengthens the flow of the model too and will give a more comprehensive view of how the performance indicators of warmth and competence are influenced in the context of consultative selling. I can't believe the visible difference between the initial and the new model!

-Journal Entry: January 10th, 2015

Thoughts on Philosophy

"To get a handle on the philosophical aspect of this paper I have had to do extensive research….the terminology was just so challenging. The Holden and Lynch paper was a great resource to start from and laid a really good foundation for someone like me that hadn't been exposed to philosophy in any great way before. I have a better handle on it now and I need to figure out what position my research is coming from now that I understand the terminology a bit better. I am beginning to think that I am not as functionalist as I initially thought or at least if I am it is not the position of the study…..how will I deal with this conflict….am I going to be comfortable sitting in a more interpretativist space….and how far along on the continuum will I lie"?

-Journal Entry: May 25th, 2015

Utter Disappointment

"I feel utterly shattered….having finally gotten my head ahead the methodology paper or so I thought I am catapulted right back to the start again by the feedback of the paper presentation. The feedback is my paper needs major rework…I really think they were a bit harsh and the requirement to submit in three months is a bit excessive. I am not sure if I agree on some of the feedback especially the removal of the observation piece…surely this was a core aspect of the value add potential of my practitioner role….I am angry, upset and ready to throw in the towel".

-Journal Entry: October 2nd, 2015

A Kind Word

"It was nice to hear from Denis at the coffee break how he felt my conceptual model had really advanced from the one presented at the colloquium….I wonder if he knew I just needed a bit of positivity to balance things out…either way it helped. It was also reassuring to hear from him that I didn't have to remove the observation piece just because it had been suggested…..he did caution however to ensure I fully considered the suggestion and that if I decided to go forward with it in that I strongly justify its value over other methods that may deliver a similar result and that I have found a way to address the researcher from inside potential dilemma. Again I suppose it comes down to different perspectives and the need to be able to support your perspective and to mitigate any ethical risks that it might pose."

-Journal Entry: October 2nd, 2015

Regrouping

"It appears that by dinner this evening we have all had a little bit of time to digest the feedback on paper two and the earlier sense from the group that the feedback was harsh and the resultant frustration has somewhat subsided. It was good to meet the cohort in this setting I have missed the interaction since the workshops concluded. I am glad I have three months to rework my paper…..I am not sure if it will take the full three months but it is nice to have the option if needed and that seems to be the generally consensus amongst our group"

-Journal Entry: October 2nd, 2015

A Phased Approach

I was chatting through a challenge today with my research focus on those considered both warm and competent and how to implement this with Felicity and she suggested that a phased approach to data collection might work….she sent me on an example of what she meant from a previous cohort and it struck me….what if I used the proposed indicators of customer perceived performance i.e. warmth and competence as the measure of performance for the purpose of identifying star performers….I think it would be important to also reconcile this with an organisational view on performance but it would certainly be more appropriate to the customer perspective of performance than just sales revenue figures. It would certainly be a different approach to that taken in previous

literature but I am learning that this is okay and in fact is often a positive so long as it is well rationalised. I need to work out how I would implement this and what challenges I might face."

Makes it Stronger

"I have resubmitted my methodology paper and I am very happy with it. To be fair to the examiners of paper 2 they had some very valid points. Hands up I ticked a box when it came to giving a nod to the researcher from the inside dilemma in my original paper but in hindsight and in all honestly I hadn't really considered it. Had I continued on the path I was going I think it might have lead me to a dead end one way or another.....be that in the implementation of the research or much later in answering difficult questions around the researcher from inside challenges at the Viva stage. I think what I have now I can practically implement without running in to ethical dilemmas and not only that but the phased approach that I introduced adds a touch of originality at the methodology stage too and I didn't have that before. I guess on reflection the toughness of the review didn't kill my research journey but it certainly served to make my research stronger".

Learnings on Protocol

"I was very confused by the notion of the deign paper and the suggestion by Susan that my next step was a very detailed protocol....I thought I have already outlined my case and to a large extent designed my research....particularly the phased approach to data collection. I have to say however the paper by Baxter and Jacks was an eye opener....I have only tipped the iceberg on what needs to be done and I think I might have under-estimated what is involved in paper three. The one positive in this is that I am not afraid of the work if I know what I am to do and I think the Baxter and Jacks paper is a brilliant resource to guide what is required in terms of content, structure and flow".

To Pilot or Not to Pilot

"From what I am reading it appears a key aspect of the design process is to test the design and this poses a practical challenge....how to test it without impacting the selection

pool/sample for the main study. My initial thought was to perhaps extend the phased approach and I think this would be ok as my methodology allows for iteration in the process but I honestly feel based on more recent knock backs that it is possible to have overlooked something and my preference would really be to run it as a pilot to be sure of the rigour rather than contaminating my core selection pool with a failed attempt….I really only get one shot to get this right given the single case design of the study once I go live. I think a hybrid approach may be possible…..I could run a pilot of phase 2 (the qualitative phase) with the managed print solutions team but it wouldn't give me the scope to run phase one (the identification of the star performers via the customer survey). I would have to substitute identification of high performance from an organisational perspective and I would need an alternative perspective to that of the senior management representative at the interview stage to avoid participant overlap. It would however give a great opportunity to test the interview aspect of the design".

-Journal Entry: February 6th, 2016

Engineer Perspective

"I am really glad that I ran the pilot interview phase….I can't believe how valuable the engineer account is to the overall perspective….they are at such a vantage point as an observer of the interaction with no managerial power bias and had I not ran the pilot I would have missed the opportunity to incorporate this in to the main study".

-Journal Entry: March 11th, 2016

Confidence Restored

"After the outcome of the last paper presentation I was dubious about this morning but I have had success…my paper is recommended with no changes required. I really think the difference between this paper and the last one was not the level of ability or work but it was the level of consideration that I gave to my choices and decisions. I really feel I can do this now".

-Journal Entry: April 8th, 2016

Comparison with "Other Previous/SAM's

"I have revisited the pilot results in preparation for the full study implementation and one thing I notice is that there is potential value in the illumination of the phenomenon (star

performance) through comparisons with 'other' or 'previous' SAM's. I am going to try to probe the customer participants in the full study in this respect with questions such as 'how does that compare to your experience with your previous account manager or other sales account managers' where possible".

<div align="right">-Journal Entry: June 6th, 2016</div>

Humbled by Honest Participation

"I am blown away by the willingness to share and to share honestly with me…..I can detect the honesty….by the way they are engaging with me and even in some of the statements such as 'I probably shouldn't say but'. I am not sure why this is the case? Is it because I am a researcher from the inside and people in the business know and trust me? This could easily be a challenge for a researcher from the inside as the opposite could be true. I have a long track record of championing people through the organisation and a history of personal development myself and I think perhaps this has helped my cause. I have also taken the time to go through the briefing document and consent form and put a lot of thought an effort in to these forms in the first place. Again with respect to the customer participants….why is it that they are being so cooperative. Again I think the briefing document is helpful here but I also think the fact that I have focused on star performers over the original high/low contrast …I am not sure if they would have been as honest if they were talking about low performers and I was a manager in the organisation those performers worked for. I am glad now that I put the extra focus on my researcher from the inside position….I think I am gleaning the advantages and have mitigated the disadvantages well".

<div align="right">-Journal Entry: June 28th, 2016</div>

Over 450 Hours of Effort

"I am exhausted….yesterday I handed in paper four. I didn't realise how physically demanding the data analysis process would be. I am in a lot of pain with carpal tunnel syndrome as a result of the repetitive motion of coding and uncoding in NVivo and typing between memos and the write up. I have clocked over 450 hours against the study implementation and paper production. I didn't think I was going to get a paper in to present at all and it has taken all of my strength mentally and physically to get through it. I need a break before I even look at the presentation for next week".

Worth the Effort

"Only last week I thought my mind and body would never recover and today it is like that trauma never happened. The weekend off helped but the feedback from the paper today has definitely given me new life. I have some minor changes to make but nothing major –a schedule of activity and some summary tables were requested. I was a mix of proud and embarrassed when Professor Stewart complemented my presentation of qualitative data to the class and when Dr. Aidan Duane complemented the richness of data….he even said he read every one of the data segments in the appendices. Despite the one or two changes that required a resubmission the report has the usual little bits and pieces and I would expect nothing less when I think back to the level of detail Aidan put on the initial draft conceptual paper a couple of years ago …the difference now is I can see the wood from the trees in the feedback.

-Journal Entry: October 6th, 2016

Into the Discussion

"That was some good advice from Professor Stewart about the summary tables at the end of paper four it has certainly made the transition in to the discussion piece easier…I am not sure where I would have started without it"

-Journal Entry: November 21st, 2016

Exposited in the State of Art

"I have struggled with the brief set by Susan.....to exposit your contribution in the state of the art…..it is only now that I actually really understand what that means…..to position my specific contribution as it stands relative to highly regarded contributions from key contributors in the area. While this has been frustrating I feel going through this process and continuing to revisit my position with each draft has served to sharpen the articulation of my contributions"

-Journal Entry: March 12th, 2016

Introduction Advice

"I met with Susan this morning on draft one of the introduction chapter and while I would usually be dreading having to decrypt what I was actually been asked to do by way of amendments today we were very in sync with the changes that were needed for this section. I think I am probably getting stronger in terms of terminology and process and the level of the conversation is changing between us. I am invigorated after the meeting and I can't wait to get stuck in to draft two but I am carefully noting that Susan also said it was strong and not to rip it apart completely so that I don't run away with my vigour!"

-Journal Entry: April 24th, 2016

Closing Reflections

"It has been an interesting exercise revisiting my reflections journal and I think that it is only now as I look back on some of the earlier entries that I can really see the value that the journal adds to the process. I think if I had not used the journal to record throughout the process that I would not have been able to recognise the extent of the development….I had forgotten some of the things that were the pertinent challenges at the time and looking back now I can't believe how my thoughts on and knowledge of such matters have changed. To see the pattern of frustration and enlightenment as I 'sifted through glue' along the various parts of the process…..conceptualisation, methodology, design and exposition of contribution. To see the value add that giving true consideration to the researcher from the inside paradigm played out. To see the development of both the research topic and me as a researcher. This reflection has given me a confidence in my ability as a researcher and in the quality of my contribution. As someone who is prone to doubting and valuing my ability this delivers a longer term value for me from the outcome of the DBA process and is the enabler to allow me to disseminate such insight going forward."

-Journal Entry: April 27th, 2016

APPENDIX A: ETHICAL APPROVAL LETTER

Waterford Institute *of* Technology   **WIT**

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12th October, 2016

Dear Karen,

Re DBA Submission: 'The Customer Perspective of Salesperson Performance in Consultative Sales Environments'

Thank you for submitting your DBA research proposal to the School Ethics Committee. The proposal, and associated research design, is well developed and the Committee note that you have made clear attempts to avoid any conflict of interest that may arise from your dual roles as outlined in your sampling strategy. We would recommend the following minor amendments for consideration:

- In Appendix G - Documentation in support of ethics management - in the third paragraph you mention the governing body; there are also some typographical errors in this letter which require attention.

- In the Information sheet for research participants (customer) - role of participants needs clarity /rephrasing around the issue of the account manager.

The Committee is satisfied to approve your submission and to allow you to progress with your research study.

We wish you well with your future research endeavors.

Yours truly,

Professor Denis Harrington
Head of Graduate Business and Chair of the School of Business Ethical Committee, WIT