

What are the competencies, skills, and traits of high performing Sales Representatives and how best to select and transition Sales Representatives to Front Line Sales Managers?

BMPF7200 – Research Proposal

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Declaration:

To Faculty and Staff of University of Wales, Trinity Saint David:

I confirm that the content of this submission is my original work. All third-party content or materials are referenced and acknowledged according to standards defined by the University of Wales, Trinity Saint David.

A handwritten signature in blue ink, reading "Ronald E. Mechling, Jr." in a cursive script.

Ronald E. Mechling, Jr.

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Article I. What are the competencies, skills, and traits of high performing Sales Representatives and how best to select and transition Sales Representatives to Front Line Sales Managers?

Section 1.01 Abstract

Current sales research has broad coverage with notable exceptions in-depth or currency in critical elements of the sales role lifecycle from individual contributor to senior executive leader. One can find many articles, books, research, and consultants providing content associated with processes, organizational structure, enablement, and many other sales domains of expertise. While these are helpful, a gap exists in the research with an orientation from the Front Line Sales Manager (FLSM) perspective. (Plank, Reid et al. 2018) My personal experience that promoting a high-performing salesperson into their first role as a Sales Manager is fraught with risk. The correlation of Managerial success to prior Sales Performance is an assumption without a consistent outcome. My research seeks to define a framework supporting the assessment, selection, and promotion of a Sales Representative to a Front Line Sales Manager.

Section 1.02 Research Purpose

In my current role, I witness sales representatives' promotions to the role of Front Line Sales Manager in high volumes due to our rapid growth business. My position gives me a unique perspective into the phenomena of candidate review, selection, promotion, training, and resulting performance of freshly minted Front Line Sales Managers. Through my literature review and work experience, there is a denoted gap in the research and clear challenges with FLSM practitioner results. (Plank, Reid et al. 2018) In my personal experience, there is an opportunity to improve the performance of FLSMs, better understand what makes a good candidate for

promotion, select the appropriate pool of candidates, outline requisite training, coaching, and mentoring to assure the success of the promoted candidate. The sales industry is a laggard in adoption and consistency in use of human capital models (Busch 2013). Plank (2018) has stated insufficient research and development of models for this segment of the professional selling industry, specifically from the FLSM's perspective.

Section 1.03 Research Objective

In my sales leadership experience with Front Line Sales Managers, there is a wide variety of sales manager styles, inconsistency in performance, and varying business outcomes. My career has spanned multiple Fortune 500 and Technology 100 corporations as a Sales Leader. It is my experience in the Technology Corporations where I have found the most inconsistencies with promotion of Sales Representatives to Front Line Sales Manager. To balance my personal perspective, I informally queried my peers, internally and externally. There is a tacit agreement that Front Line Sales Managers are a critical hire with highly subjective methods in the selection, promotion, and training of sales managers. As Russ noted, promoting your top rep is no guarantee of success; instead, these promotions yield the worst outcomes (Russ, McNeilly et al. 1996). It will help to define the roles for reader context and clarity. Sales Representatives are individual contributors selling the company's products or services, carrying a quota, and reporting to a Front Line Sales Manager. The Front Line Sales Manager is an entry-level managerial role within the sales organization. Front Line Sales Managers are assigned a sales representative team and a quota derived from the sales representatives' aggregated quota allocations.

The research question of my focus will be on defining, "What are the competencies, skills, and traits of high performing Sales Representatives and how best to select and transition from salesperson to Front Line Sales Managers?" This relevant research will help sales leaders select sales promotions to FLSMs with a short-term model to optimize the transition from individual contributor to functioning manager. This research will highlight gaps in existing practitioner methods and academic research needed to further knowledge creation on the subject.

Article II. Review of Literature

A recent review of literature in 2017 by Plank (2018) generated ten research topics and a brief review of content associated with each case. This research and further analysis of supporting materials denoted a gap in literature defining and assessing the selection, promotion, transition, and professional development of sales professionals transitioning to FLSM (Plank, Reid et al. 2018). The tenuous period in a sales career and for a business' growth coincide with Russ' (1996) findings that "...a rep's sales performance may accurately predict managerial performance in some selling situations. Still, there is ample evidence that promoting the best sales rep often results in hiring a bad sales manager and losing a great sales rep (Russ, McNeilly et al. 1996)." "Moving from sales to sales management can be a harsh adjustment, and success in the field isn't a certain predictor of success in the home office. But sometimes the best sales managers come from the sales ranks (Marchetti 2006)." "When salespeople become managers, they often do a horrible job ... says Frank V. Cespedes. (Gerdeman 2019)" Plank (2018) denotes the need to expand research on best practices to promote, the methodology to select, and the influence of coaching and mentoring FLSM development. Defining the competencies, traits, and skills of many peer manager roles has been highly studied in human behavior research. The sales

profession has lagged in this effort (Busch 2013), and the FLSM point of view on the subject is the least studied topic (Plank, Reid et al. 2018). Sales effectiveness, a poorly defined arena, was scarcely studied or refined (Deeter-Smelz, et al., 2008). Deeter-Smelz (2008) discussed future research needs to confirm relationships in competencies and appropriate weighting. Sales representatives, individual contributors, receive significant training investments compared to the FLSM peer group (Schenk, Dickie 2017).

Constraints in research are denoted in the methods employed and the authors' industry influence, the subjects, and the practitioners engaged. A mixture of human behavioral, organization methods and process-centric perspectives delved into topics that brushed upon each other but deferred to future research or cross-compilation recommendations in research. As Plank (2018) noted, much examination has been of academic literature, and a grounded theory approach is recommended to expand the knowledge base. The FLSM practitioner's perspective is critical and lacking in much of the research to date. The Supervisor or Sales Representative is surveyed, interviewed, or observed engaging with the FLSM as the predominant source of research data (Plank, Reid et al. 2018, Busch 2013). Reid (2019) continued noting most surveys or data queried the Sales Representative about their experience with the FLSM or the FLSM expectations of the Sales Representative performance. Furthering the case, Busch (2013) noted that research lacks ties between competencies to antecedents or performance measures across companies or within a business case study approach. Limited research has developed a competency framework (Gordon, Sepherd et al. 2012), a descriptive method, and based upon resources within the FLSM practitioners environment, but provide a subjective perspective lacking a deeper FLSM perspective. Russ (1996) discussed leadership traits and left out discourse or analysis of competencies in FLSM success.

Coaching is a critical skill for sales managers, with Practitioners, Academics, and Sales Professionals rating coaching as high in quality and needs (Nguyen, Artis et al. 2019, Gordon, Sepherd et al. 2012, Busch 2013). Coaching, one of many KSA's for a FLSM, is best defined by Nguyen (2019) as “a process of equipping people with the tools, knowledge, and opportunities they need to develop themselves and become more effective.” Reid (2019) and Plank (2018) acknowledged Coaching as a common theme from literature, denoting the expectations of Sales Representatives to receive effective coaching from their FLSM. Coaching as a skill is poorly developed and a training gap in many sales organizations (Schenk, Dickie 2017).

Organizations need a framework to assess individuals' knowledge, skills, and abilities (KSA) and map these to sales competencies. Transferring or translating KSAs into a predictable model is lacking today. Understanding the model will help develop hundreds of sales competencies needed by an FLSM (Gordon, Sepherd et al. 2012). Competency mapping is required to bridge the gap as Sales Leadership selects Individual Contributors for promotion. Effective alignment of competencies guides individual Contributors' training and education plans, 'seeding' talent with the KSA's emblematic of successfully transitioning to an FLSM role. Deeter-Smelz (2018) findings suggest training content can develop the type of FLSM being sought by a firm. Current literature is lacking in a guide or mapping of Sales Competencies to FLSM Competencies. Developing a framework linking KSA's across functions will increase the probability of positive FLSM performance, mitigating risks noted by current literature (Marchetti 2006, Plank, Reid et al. 2018, Gordon, Sepherd et al. 2012). A hierarchical value map was created by Deeter-Smelz (2018) and lacked any direct correlation or mapping to sales professional value maps, and did not include the FLSM's point of view. My research will seek to develop a competency framework with top level domains and subordinate KSAs aligning to

FLSM performance expectations. Segmentation of the KSAs will further assist in digestible building blocks.

The ability to coach (Busch 2013) is an example of FLSM competency indirectly monitored during sales performance. Sales professionals rank coaching as a critical expectation of the FLSM, not a core requirement of successful sales professionals (Nguyen, Artis et al. 2019). Developing coaching knowledge, skills, and abilities of a sales professional would translate to the FLSM competency of Coaching. One example of the research project's objective is understanding a sales professional's traits that correlate to the successful delivery of coaching competency as an FLSM. Additional FLSM competencies have similar gaps within the role of sales professional. Dickie found a lack of training investment in FLSM's, aligning with the issues and inhibitors in the development of FLSM's KSAs (Schenk, Dickie 2017).

Sales Executives rely on FLSM's to hire sales professionals for their teams and assigned sales territories. Hiring a candidate depends on a mix of objective and subjective data that the FLSM analyzes to select the best candidate. Decarlo (2015) noted issues with newer FLSM's compared to more senior managers; both managers – naïve and experienced – tended to follow trend data in their decision making and ignoring variables (tenure, market conditions, 'gut', etc.) to accommodate their natural biases (DeCarlo, Roy et al. 2015). As I've experienced in discussion with a Sales Executive, 'our managers tend to hire people that look, think, and act like them.' Biased decision-making is not a component of the research. It does demonstrate the need to understand the traits of Sales Professionals that can alleviate FLSM decision-making with improved analysis and cognitive methods. This research is not covering biases within the sales profession and use of human capital management methods. Women represent less than 40% of professional sellers, a compelling reference group facing biases in their hiring and promotions

(Zoltners, et al., 2020). Further research is recommended on the effect of bias and this research will follow the influence or impact as found in the research results.

Section 2.01 Subordinate Research Questions

My review of literature has generated several subordinate research questions. The primary research question: "What are the competencies, skills, and traits of high performing Sales Representatives and how best to select and transition Sales Professionals to Front Line Sales Managers?" yields the following subordinate topics:

- What are the top competencies, skills, and traits of high-performing salespeople?
- What are the top competencies, skills, and traits of successful FLSM's?
- What is the model to map competencies, skills, and traits between the two roles – highlighting obvious correlations and unknown or unconsidered needs from one position to the next?
- What training is needed to improve the unknown or unconsidered needs for the newly promoted FLSM?

Understanding the answers to the questions will assist with a comprehensive view of the primary research objective. A sales career, measured as the individual transitioning from sales professional to multiple leadership levels over time, can benefit from a competency model that maps this very first step and will add knowledge to academic and professional research.

Article III. Research Methodology

The initial literature review has provided a perspective on existing knowledge and various methods utilized. The view of the FLSM has not been covered in detail with the

specificity of the proposed research questions. My proposed research will use the pragmatic paradigm with a mixed methods methodology. Applying a pragmatic paradigm aligns with the challenges of real-world research and outcomes-oriented to a business seeking research applicable to their workforce.

Section 3.01 Methodology and Methods

A mixed-methods methodology within the pragmatic paradigm applies to my proposed research. Utilizing a mix of qualitative and quantitative methods supports the methods suited for my research questions. Arbnor and Bjerke have noted a need to understand Actors, Systems, and Observers' roles in selecting methodology (Arbnor, Bjerke 2009). As I do not intend to observe, the focus on Actors and Systems without 'Observer as Actor' remediates some risks of the Observer's paradigms influencing data collection methods. I will revisit the Observer as Actor pending aspects of the research methods executed during the research phase and dependencies upon audience and execution plans.

Working outside a controlled environment, doing work in the real world warrants using a mixed methodology for my research. Use of the mixed methodology supports the following methods:

- Surveys – quantitative & qualitative
- Interviews – qualitative
- Artifacts – qualitative

Utilizing Surveys and subsequent interviews will address the gap in knowledge noted by Plank (2018), garnering the FLSM's perspective. Most collected data resides in a qualitative

orientation, and I will seek to add quantitative analysis as appropriate within the research's methods.

Section 3.02 Methods, Criteria, Data

Effective and successful research depends on accessing a viable pool of participants and access to subordinate data and participation from the participant pool. Utilizing my network and social media, I will recruit participants from multiple sources beginning with LinkedIn Groups, sales associations, and my network. A minimum end sample size of $n \geq 30$ for the final participant set necessitates an objective to garner three hundred plus (300+) participants meeting selection criteria. Following is the initial selection criteria:

(a) Selection Criteria

A first-time Front Line Sales Manager with more than ninety (90) days in the role. Less than thirty-six (36) months in seat selling into high technology industries products or consulting services in a for-profit business located in the United States, Canada, United Kingdom, France, Germany, or Ireland. High technology industries in this research are; Software, Digital Agencies, Consulting Services, Manufacturing of High Technology products. The participant must be an internal promotion with prior sales role experience minimum of twelve (12) months and less than five (5) years of sales experience.

Participants must provide at least one manager and one subordinate contact for potential survey or interview interactions for the research schedule duration.

(b) Sampling

Data collection centers upon an effort of random sampling, but the nature by which candidates engage may yield a convenience sampling due to my network, employer's

Executive leadership support, or other forces unknown, unconsidered, or uncontrollable.

All data will be anonymized to ensure participants' anonymity, participant employer, and the integrity of data analytics.

Participants will engage in demographic and role-based surveys to acquire an initial candidate pool meeting minimum viable sampling, meeting selection criteria. During my thesis, I will refine the survey methods, data collection, and data analytics. Initial efforts will utilize basic best practices and recognized research methods to optimize results. The Delphi method with Likert scales is suitable for multiple surveys and assurance of data pool viability. The surveys are a social research form, aligning well with the self-selection method of candidate recruiting and participation. I will seek peer and thought leadership influence in the social media recruiting stage and survey response engagement. The themes, questions, and response mechanisms design improve participant engagement, retention during the research cycle, and data quality. Questions will cover self-identification of activities, feelings, and preferences across the sales role continuum to sales management's selection process to sales manager experience. There will be a minimum of two surveys; 1) focused on selection criteria validation and participant self-assessment of willingness to participate, 2) a long-form survey that may be delivered in one distribution or segmented to accommodate participant time and reduce respondent fatigue.

The surveys will comprise of questions to derive data across multiple facets; firmographic, geographic, anonymized participant demographic, educational, experience, industry, etc. Survey questions will be structured to allow several statistical analysis methods; descriptive and inferential. The choice and structure of questions can lead to use of Regression, Cluster or Factor analysis and I will design the surveys to simplify the analysis process.

Once participants complete the surveys, the interview phase follows. Qualitative interview research methods allow me to explore in-depth, perceived experiences of the participants. Engaging in this method, I will garner insights not easily pulled from a survey and provide context, subjective perspectives of the participants' behavioral experiences. Employing the interview method furthers the intent to add knowledge from the FLSM's point of view – noted as a gap in research – and extends the depths of perception and expectations of the FLSM. Construction of the interview method will be structured, ensuring coverage of the participants' role lifecycle and specificity of the role, experience in each position, and give voice to the participants' part.

Industry articles, books, and practitioner content are reviewed during the design, development, and execution stages of the surveys and interviews. External data utilization will serve as guides and reference points but will not be included in the research data or results. These secondary data sources present an opportunity to frame the results and serve as a guide to question development, targeting participant pools and validating research focus. Dickie's CSO Insights is an example of prior industry research supporting this research's orientation but not relevant secondary data to include in my data analysis.

Surveys and Interviews will add to existing research by understanding the FLSM's framing of their experience and perceived value or quality of their experiences individually and collectively. The study will seek to refine the FLSM's experience and add to the research as provided from subordinate or manager point of views, missing the depth of the FLSM's perspective.

As I seek to assess the FLSM's environments' maturity, I will ask respondents to provide artifacts about the processes, methods, guides, or verbal directions from the participants'

organizations. The use of artifacts will be a challenge in this research, with a high probability of becoming anecdotal at worst or with limited contextual value. Intentional design for artifacts may yield several results, extending the value of the data and another perspective. Refining the artifact sampling defines the probability of value and mitigates a massive amount of content not relevant to the primary research or subordinate questions. Artifacts of focus will be job descriptions for sales and sales managers, FLSM job posting description, onboarding content provided to FLSM's pre or post-job promotion specific to the role of FLSM. Use of a tool like NVivo allows multiple qualitative analysis methods across the interviews and artifacts, normalizing unstructured data to identify patterns or themes.

Gathering these artifacts will yield perspectives on organizational maturity and influences on the FLSM's perceptions discovered during surveying and interviewing participants. I reserve the option to remove this data if it negatively affects sample size or creates a risk to data sampling requirements. The use of artifacts will help refine future research considerations, regardless of inclusion in the primary research objective.

All interviews are recorded and transcribed. Surveys, interviews, and artifacts collected are anonymized, protecting the identity of participants and their employers. All personal or identifiable data is encrypted and destroyed post anonymization of collection or in keeping with the University of Wales Trinity Saint David policies and applicable local, regional, or international law.

Section 3.03 Proposed Research Schedule

Research Phase	Objectives	Deadline
Advisory & Approvals	- Select and meet with Advisor. Review strategy and process with scheduled milestone reviews. - PG1 Approved - Ethics Approved	January 1, 2022
Secondary Research Review Research Question Refined	- An exhaustive review of literature & research. - Refinement of the research question and subordinate questions.	April 15, 2022 April 30, 2022
Research Design	- Create participant recruiting plan - Develop survey content - Develop semi-structured interview template - Design data collection, storage, and analysis tools - Review with Advisor, Sales Industry Leaders	May 30, 2022
Participant Recruiting	- Develop marketing strategy - Create communication content - Select tool for distribution and collection of responses - Select and configure survey tool(s)	June – September 2022
Survey & Interview Collection	- Collect survey content & normalize - Conduct semi-structured interviews - Refine analytical processes and data analysis	October – November 2022
Research Analysis & Content Creation	- Generate model(s) and framework - Review with Advisor and Sales Industry Leaders	December – February 2023
Draft	Deliver first complete draft for review	March 30, 2023
Edits and Corrections	Deliver second complete draft for review	April 30, 2023
Research Paper – Final Copy	Professional print and finish paper for Academic Board	May 24, 2023

Section 3.04 Limitations

In all research, there are varying limitations considered and presented to the reader. The research design seeks to reduce limitations while recognizing that risks persist throughout the research project. My literature review has recognized a gap in prior literature, creating an

inherent risk to the research. Literature is abundant from roles around the FLSM, and by seeking a perspective from the FLSM, I am directly bringing research knowledge without significant prior research for supportive context. This issue is recognized and further refined during my thesis.

Mixed Methods bring various risks and inherent limitations to acknowledge while working to minimize or fully mitigate. Mixing multiple methods adds complexity to data collection, sampling, and comparative analysis. My research methods intend to build upon the topics and data but may yield incongruent results or results that I may not reconcile. Refining my participant pool could lead to either too little data or, conversely, too much data. Maintaining focus and hierarchical organization is needed to maintain alignment and offset risks with the methodology.

Access to participants and reasonable size of participant pool brings potential limitations to research validity. It may be an output that further research into diverse and inclusive groups is suggested due to the final data samples' demographics. Bias in hiring and influence of participant unconscious bias is a current concern with research. The research design will take biases into consideration and acknowledgement in the results. I may find the methods described to recruit participants provides less randomization as designed, necessitating future research recommendations unfulfilled by my project. Recruiting participants will require a level of effort and support from multiple parties without control and use of influence to garner engagement. Ineffective participant pools and data sampling may make cause an inability to generalize my findings for broader applicability.

Surveys are a mature research method with plenty of research, best practices, and guides to ensure successful execution. After executing surveys, I may have missed a question or provided poor clarity constructing the research question(s).

Interviews add another dimension of limitations due to the Observer as Actor issues noted (Arbnor, Bjerke 2009). Ineffectual creation of the structured interview if misaligned with prior survey constructs could lead to data incongruence. Adding review of artifacts can further exacerbate the risk profile of survey or interview structures.

Mitigation of noted limitations requires rigorous quantitative and qualitative analysis as separate yet equal elements of the research project. Analysis and refinement of selected methods utilized for research reduce risks to the thesis project's limitations.

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