EMPLOYEE ENGAGEMENT: A QUALITATIVE STUDY OF INSIDE SALES

REPRESENTATIVES

A Dissertation

by

ANDREW JACOBS LORING

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Chair of Committee,	Jia Wang
Committee Members,	Khalil Dirani
	Janet Parish
	Laura Stough
Head of Department,	Mary Alfred

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ABSTRACT

The topic of employee engagement has attracted increasing attention from both scholars and practitioners given its well-recognized benefits such as higher performance and lower turnover. While ample studies were conducted to explore the antecedents and consequences of engagement, few were situated in the context of professional selling. As a result, we have limited understanding of how to engage a critical group in the workforce— inside sales representatives who are projected to be in greater demand in the coming years. For a field such as human resource development (HRD) whose core mission is developing people, no research attention has been given to inside sales professionals either. Therefore, the purpose of this study was to explore employee engagement from the perspective of inside sales representatives. Specifically, two research questions guided this inquiry: first, *what are inside sales representatives' perceptions of work engagement?* and second, *what engaging behaviors do inside sales representatives display at work*?

To address these questions, I employed a generic, qualitative research approach. Informed by this design, I recruited 15 individuals who had experience working in inside sales roles. I conducted two rounds of in-depth, individual interviews with each participant. To collect concrete examples of engagement behaviors, I relied on the critical incident techniques (CIT) technique. The interviews generated 203 pages of data and 89 critical incidents, which I analyzed using the thematic analysis (TA) method.

This study revealed three major findings. First, what is perceived by inside sales representatives as an engagement booster does not necessarily lead to engaging behaviors. Second, engagement varies by job role. Specifically, those in the business development role were less engaged than those in the account manager role. Lastly, engagement for inside sales representatives is more extrinsically than intrinsically driven.

The findings of this study provided some major implications for HRD practice and research. For leaders, managers and HRD professionals working in inside sales organizations, this study proposed a new engagement process model with actionable strategies that can guide the effort towards effectively engaging inside sales representatives in the entry-level business development role. For HRD scholars who are interested in the phenomenon of employee engagement, this study opened the door to an uncharted territory (professional selling) and outlined a new agenda for future engagement research.

DEDICATION

I dedicate this dissertation to my family and friends. Without their support, I wouldn't be where I am today. Most importantly, I want to thank my wife, Hannah, who was incredibly supportive of me throughout the entire PhD program. While I had many late nights and weekends filled with classes and writing, you always supported me and tended to the children. On countless occasions, you also helped me think strategically about the structure of my writing and research. Simply put, you make me better. I also want to thank my three girls (and soon to be 4th child, a boy) for their compassion and understanding when I had to say no to the playground because of schoolwork deadlines. Now that I'm finished, I promise we will spend more time at the playground.

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This work was supervised by a dissertation committee consisting of Professor Dr. Jia Wang [advisor] and Professor Dr. Khalil Dirani of the Department of Educational Administration and Human Resource Development and Professor Dr. Janet Parish of the Department of Marketing, and Professor Dr. Laura Stough of the Department of Educational Psychology.

All work conducted for the dissertation was completed by the student independently.

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

CHAPTER I

INTRODUCTION

Engagement is a critical factor in an employee's happiness, performance, and willingness to stay at the organization, regardless of their field. This chapter presents a brief introduction to the phenomenon of employee engagement in the workplace, followed by a brief description of the research context for this study: inside sales. In addition, the chapter presents the research purpose and questions, as well as the research methodology used to guide the study.

Employee Engagement

The average American spends one third of their life at work, which is about 90,000 hours (Cronan, 2009). With so much time at work, scholars and practitioners have made substantial efforts to examine the impact of work on employees. One of the most extensively studied phenomena is employee engagement (Borah & Borah, 2018; Kahn, 1990). Employee engagement has been defined in different ways by different researchers (Shuck, 2011); however, William Kahn (1990) is commonly recognized as the first to conceptualize this phenomenon. He defined engagement as "the harnessing of organization member's selves to their work roles; in engagement, people employ and express themselves physically, cognitively, and emotionally during role performances" (Kahn, 1990, p. 694). Since Kahn's conception, countless scholars and practitioners have proposed their own definition of engagement, which led some to argue that engagement has become faddish (Borah & Borah, 2018; Saks, 2006; Shuck & Wollard, 2010).

Schaufeli and Bakker (2010) went further by describing such effort as putting "old wine in a new bottle" (p. 12).

Despite the myriad of definitions that exist, engagement is considered a "distinct and unique construct" (Saks, 2006, p. 602) compared to other related constructs such as organizational commitment (Robinson et al., 2004), job involvement (May et al., 2004), and organizational citizenship behavior (Robinson et al., 2004). According to Saks (2006), engagement "consists of cognitive, emotional, and behavioral components that are associated with individual role performance" (p. 602). In fact, employee engagement is widely recognized as an important organizational construct because of its positive effects on employees and the organization. Organizations with engaged employees see positive downstream impacts, for instance, higher performance, more job satisfaction, higher productivity, better retention, fewer accidents, and 21% higher profitability (Harter, 2018; Kahn, 2006).

Despite these well-identified positive effects, only 31% of American employees are found to be engaged at work (Harter, 2020). The remaining employees are either not engaged (54%) or actively disengaged (15%) (Harter, 2020). Employees who are not engaged are psychologically disconnected from the organization; they show up to work but without passion or energy (Harter, 2020). Similarly, employees who are actively disengaged are miserable at work and spread their unhappiness to colleagues. If it were purely a financial decision, organizations would be better off paying actively disengaged employees to stay home rather than let them go to work and spread toxic behavior

(Harter, 2018). Research shows that it takes four engaged employees to make up for one actively disengaged employee (Harter, 2018).

Due to the positive impact that engaged employees have on organizations, scholars and practitioners have been actively exploring factors (antecedents) that will boost individual engagement at work. Using primarily quantitative methodologies, researchers have tested hypotheses using self-report instruments to determine the factors that influence engagement (Borah & Borah, 2018; Motyka, 2018). Among various factors identified, many can be classified into two categories: organizational support (e.g., training programs, mentorship, company benefits), and individual attributes (e.g., level of risk aversion, entrepreneurship, competitiveness) (Borah & Borah, 2018).

While ample quantitative evidence supports the positive outcomes of engagement, scholars also noted that employee engagement is not a 'one-size-fits-all' construct (Saks, 2006). Therefore, several concerns about previous engagement studies have been raised. First, most scholars collected data at one point in time using a self-report questionnaire, which led to validity concerns about the likelihood an employee is going to answer the questions honestly. Sambrook et al. (2013) raised the question: "How can responses to an annual one-off self-report questionnaire augment our understanding of what it means to be engaged, who and what facilitates this, and why and when an employee engages at/with work?" (p. 176).

Second, some researchers consider engagement to be static and unchanging (Medhurst & Albrecht, 2016), but others do not. For example, Saks (2006) argued that since employees are unique from one another, a factor that increases engagement in one

employee might not work in another (Saks, 2006). Additionally, an employees'

engagement level could vary from day to day and hour to hour throughout the workday

(Sambrooke et al., 2013; Sonnentag, 2011). Therefore, treating engagement as a stable

construct as many scholars did can be misleading or problematic.

Third, to generalize to larger populations, scholars have heavily relied on

quantitative methods and grouped employees of different ages and occupations together

without counting for the variances of engagement in different occupations (Bailey et al.,

2017; Jaworek, 2017, Schaufeli, et al., 2006). This approach is concerning because

employees in different industries and roles likely receive different amounts of resources

and support (e.g., wages, sense of safety, personal development); as a result, their

engagement level may differ. For example, Bargogliotti (2012) found some behavioral

differences of emergency medical responders due to the challenging and complex

situations they encountered. Thus, they might require or need different job resources

compared to people in other occupations. By the same token, those working in

professional selling often experience high stress and intense competition, both of which

can create barriers to their career success. Nevertheless, very little research attention has

been paid to employees in this industry (Matthews et al., 2016). This study is an attempt

to fill in this knowledge gap.

The Research Context

The context for this study is the inside sales profession. Inside sales is unique

from other types of selling and the nature of the role creates challenges for both

4

organizations and their employees. For this reason, I begin this section with a brief introduction to inside sales.

Salespeople, also known as sales representatives, are often revered as the backbone of business-to-business (B2B), for-profit organizations due to their responsibility for customer acquisition and revenue generation (Meintjes & Mofmeyr, 2018; Rapp & Baker, 2017). As Downey et al. (2011) noted, "without sales, a terrible thing happens in business: Nothing" (p. 31). However, sales roles are not created equal; major differences exist between the different types of sales roles.

Two of the most common B2B sales roles are field sales and inside sales (SEF, 2020; Zoltners, Sinha, & Lorimer, 2019). Field sales representatives often work autonomously, outside of the office, selling to customers in a face-to-face environment. Whereas, inside sales representatives work on a fixed schedule, inside an office, selling to customers over the telephone or online (Sleep et al., 2020). Organizational popularity of inside sales is increasing due to the overall cost reduction (between 40-90%) when compared to field sales (Chriqui, 2019; Zoltners et al., 2019). Inside sales representatives can call more customers daily than field sales representatives who must travel to customers. As a result, in the United States, more than 260,000 people currently assume inside sales roles and this number is expected to grow 300% with more than half of all college graduates getting ready to enter the field of professional selling (SEF, 2020; U.S. Bureau of Labor Statistics, 2019).

Inside sales is often a starting point for new sales representatives and college graduates because little previous sales experience is needed for this position. In this role,

new sales representatives are taught the selling process and how to effectively sell to customers. Aggressive sales goals are often set to boost competition amongst individual sales representatives and to determine promotions to managerial roles. Due to the stress associated with achieving ambitious goals, many inside sales representatives opt to quit. Sixty percent of all first-time salespeople burnout and quit within one year (SEF, 2020). In fact, at any given time, 24% of inside sales representatives are actively looking for new jobs (Gartner, 2019).

To reduce inside sales representatives' intention to quit and to boost engagement, human resource development (HRD) practitioners working in inside sales organizations are constantly providing interventions. For example, training and mentoring programs are developed and implemented to help new sales representatives adjust to the role and build self-efficacy. Additionally, inside sales organizations are designed in such a way that representatives and their mangers sit in proximity (Motyka, 2018; Verbeke et al., 2010). This physical closeness is hoped to allow for the sales managers to provide immediate feedback and help their sales representatives address challenging situations (Loveland et al., 2013; Motyka, 2018).

Significance of the Study

This study expands the engagement literature by focusing on a population and context that have received little attention. Considering the large number of people (260,000) who currently work as inside sales professionals in the United States, as well as the reduced cost associated with inside sales compared to field sales (Chriqui, 2019), it is necessary and beneficial for organizational leaders and sales managers to have a

6

solid understanding of what affects inside sales representative's engagement and how engagement is manifested at work. My review of the literature to date illuminates two glaring gaps in the current knowledge about employee engagement and inside sales. First, while previous employee engagement literature included the field of professional selling, little is known about the field of inside sales specifically. The unique characteristics of inside sales organizations has been largely overlooked, thus warranting further investigation. By focusing on inside sales representatives, this study fills in a void in our current knowledge base. Second, while the phenomenon of employee engagement has been widely studied, it has been investigated mainly using quantitative approaches. As a result, we have limited understanding of the contextual influence on employee engagement within the profession of inside sales. By adopting a qualitative design, this study will generate richer and additional insights that might not have been captured in current engagement literature.

Furthermore, this study contributes to the field of HRD. HRD professionals carry the mission of developing people and organizations for performance improvement (Swanson & Holton, 2009). Although previous research indicates that engaged employees are more likely to be higher performers and less likely to quit, there is still a great deal of work to be done to ensure that HRD professionals have deep knowledge they need to effectively address engagement with inside sales representatives. This study is one attempt towards this goal. By exploring the meaning of engagement and specific behaviors of engagement from the perspective of inside sales representatives, this study provides much needed insights that will enable HRD practitioners to design targeted

7

interventions that will lead to desired engagement outcomes and reduced turnover (Shuck & Wollard, 2010).

Purpose and Research Questions

The purpose of this study was to explore employee engagement from the perspective of inside sales representatives. Two research questions guided this inquiry:

1. What are inside sales representatives' perceptions of work engagement?
2. What engaging behaviors do inside sales representatives display at work?

Overview of the Research Methodology

Methodology involves the strategy for executing a research study (Hesse-Biber, 2017). Methodologies guide the choice of methods and link paradigms, theoretical perspectives, and research questions (Hesse-Biber, 2017). To answer the two research questions, I adopted a generic, qualitative approach (Merriam, 2009). This design is appropriate when the research questions and researcher's beliefs do not fit within established methodologies (Kahlke, 2014), which was the case of my study.

The study sample consisted of 15 inside sales representatives who work in the United States. Semi-structured, in-depth interviews were the primary source of data collection. The interviews averaged 42 minutes in length and generated 203 pages of transcripts for analysis. I used critical incident technique (CIT) to collect concrete examples of engagement behaviors from the participants (Flanagan, 1954). In total, I collected 89 critical incidents of engagement and disengagement. For data analysis, I utilized the thematic analysis (TA) technique (Gibson, 2019).

To ensure rigorous data collection and analysis, I followed the four strategies proposed by Lincoln and Guba (1985). They are: (a) conducting member checking of the data to increase credibility, (b) providing thick description of the phenomenon to increase transferability, (c) using an external researcher to increase dependability, and (d) keeping an audit trail to increase confirmability. Detailed discussion is included in Chapter III.

My Philosophical Assumptions

Epistemology is defined as "a philosophical belief system about who can be a knowledge builder" (Hesse-Biber, 2017, p. 6). Specifically, epistemology concerns the relationship between the research and the researcher (Hesse-Biber, 2017). I hold an interpretive epistemological view that the researcher and participants are co-creators in the knowledge-building process (Hesse-Biber, 2017). In this study, I focus on understanding participants' perspective; together we will co-generate the meaning of engagement.

Delimitations

All research is bounded by many factors, regardless of the chosen research methodologies. For this study, I set two boundaries considering the identified gaps in the literature.

First, the study focuses on employee engagement and no other related constructs (e.g., organizational commitment, job involvement). By no means does this delimitation indicate that other organizational constructs are unimportant; rather, employee engagement is known as a unique organizational construct among others (Saks, 2006).

Second, the context of this study is bound to inside sales specifically. This exclusive focus does not imply that engagement is not vital to outside sales. This choice is informed by discovery that inside sales has not been given much research attention (Sleep et al., 2020).

Definitions of Key Terms

Since engagement is studied by researchers in a variety of disciplines, it is important to clarify related core concepts and constructs to avoid potential confusion. For my study, I will adopt the following widely recognized definitions.

Employee engagement: "The harnessing of organization member's selves to their work roles; in engagement, people employ and express themselves physically, cognitively, and emotionally during role performances" (Kahn, 1990, p. 694).

Professional selling: "Direct communications between paid representatives and prospects that lead to transactions, customer satisfaction, account development, and profitable relationships" (Ingram et al., 2008, p. 3).

Inside Sales: "Inside sales is remote sales, where outside sales or traditional field sales is done face-to-face" (Krogue, 2013, p. 2).

Organization of the Dissertation

This dissertation contains five chapters. Chapter I introduces the topic, provides background information, identifies the context and problem, presents the purpose and research questions, as well as describes the significance, and design for the study. Chapter II provides an overview of the literature on employee engagement, the context of inside sales, and the research and practice gap. Chapter III describes the research

methodology and methods utilized for the study, including the research design, sampling procedures, data collection method, data analysis techniques and strategies to ensure research rigor. Chapter IV reports major findings from two rounds of in-depth interviews with the 15 inside sales representatives. Chapter V discusses the findings in relation to existing engagement literature, and offers implications for practice, theory, and research.

CHAPTER II

REVIEW OF THE LITERATURE

The purpose of this chapter is to review literature related to employee engagement in general and in the field of inside sales in particular. This chapter is organized into three sections. The first section provides an overview of employee engagement. The second section describes the research context—inside selling. The third section discusses employee engagement literature from an inside sales perspective. The chapter concludes with the knowledge gaps that exist in current engagement literature.

Restatement of Purpose and Research Questions

The purpose of this study was to explore employee engagement from the perspective of inside sales representatives. Two research questions guided this inquiry:

1.   What are inside sales representatives' perceptions of work engagement?

2.   What engaging behaviors do inside sales representatives display at work?

Research on Employee Engagement

Employee engagement has gained significant popularity amongst scholars and practitioners over the past three decades (Saks & Gruman, 2014; Shuck, 2011; Schaufeli & Bakker, 2010). This is largely because of the belief that employee engagement is key to an organization's success (Rich, LePine, & Crawford, 2010). Organizations with engaged employees see higher productivity, better retention, fewer accidents, and 21% higher profitability (Harter, 2018). However, research indicates that a growing number

of employees are disengaged in their role or are experiencing job burnout (Saks & Gruman, 2014). Disengaged employees usually show up at work and do the bare minimum required, and they will leave their employer for a better offer elsewhere (Harter, 2018). Although extensive burnout literature exists, burnout is more related to health outcomes whereas employee engagement is more related to motivational outcomes (Bakker, Demerouti, & Sanz-Vergel, 2014). Therefore, Saks (2006) argued that organizations should focus on the factors that increase an employee's engagement rather than reducing burnout.

In attempts to study engagement, scholars and practitioners from several disciplines (e.g., psychology, human resource development/HRD, human resource management/HRM, healthcare) have their own definition of engagement, which creates confusion as to what employee engagement actually involves (Shuck & Wollard, 2010). Additionally, a multitude of measurement instruments and theoretical underpinnings adds further difficulty for practitioners who seek ways to increase the engagement of their employees. Thus, Shuck (2011) recommended that the "approach used to study engagement should match the question, definition and chosen measurement tool" (p. 17). To enable a holistic understanding of employee engagement, I will discuss four key areas below. They are: (1) Kahn's conceptualization of engagement; (2) other definitions; (3) antecedents of engagement; and (4) consequences of engagement.

Kahn's Conceptualization of Engagement

William Kahn is regarded as the first scholar to conceptualize engagement. He noted that people occupy roles at work and "they are the occupants of the houses that

roles provide" (Kahn, 1990, p. 692). According to Kahn (1990), although the events surrounding work roles are relatively understood, researchers had given less attention to the varying degrees of which an employee can devote themselves to the role they perform. To better understand 'self-in-role' processes, Kahn (1990) conducted two qualitative studies and used a grounded theory approach to conceptualized personal engagement and personal disengagement. According to Kahn (1990), personal engagement is "the harnessing of organization members' selves to their work roles; in engagement, people employ and express themselves physically, cognitively, and emotionally during role performances" (p. 694). Personal disengagement is defined by Kahn (1990) as "the uncoupling of selves from work roles; in disengagement, people withdraw and defend themselves physically, cognitively, or emotionally during role performances" (p. 694).

Kahn's (1990) definition of engagement was developed on the premise that people express themselves physically, cognitively, and emotionally in work roles— often, to varying degrees. He came to this conclusion by studying the behaviors, experiences, and perceptions of summer camp counselors (Kahn, 1990). Through his observations at the summer camp, Kahn (1990) identified three psychological conditions that are associated with engagement or disengagement. Each condition is paired with an underlying question. They are: (1) meaningfulness: How meaningful is it for me to bring myself into this performance? (2) Psychological safety: How safe is it to do so? And (3) availability: How available am I to perform?

Meaningfulness

Meaningfulness involves a feeling that one is receiving a return-on-investments of oneself in a currency of physical, cognitive, or emotional energy (Kahn, 1990). Meaningfulness occurs when an employee feels valued to give and receive. Often, tasks that involve creativity, a challenge, autonomy, and clear delineation of procedures and goals are perceived as more meaningful. Meaningful roles can also provide a preferred self-image, personal status, and influence within an organization (Kahn, 1990).

Safety

Safety refers to a sense of being able to show and employ one's full self without fear of negative consequences of self-image, status, or career (Kahn, 1990). Safe situations are trustworthy, secure, and predictable. Kahn (1990) found that leaders who are supportive, resilient, consistent, and competent heightened psychological safety in their workers. Therefore, to engage employees, organizational leaders must build psychological safety by offering support, trust, openness, flexibility, and a lack of threat (Kahn, 1990).

Availability

Availability involves the physical, emotional, and psychological resources necessary for investing oneself in role performances (Kahn, 1990), specifically, the level of physical, emotional, and psychological self that one has available to give (Kahn, 1990). As Kahn (1990) noted, individuals are constantly "bringing in and leaving out various depths of their selves during the course of their workdays" (p. 693).

Other Definitions of Engagement

Besides Kahn's (1990) conceptualization of engagement, the construct did not spark interest from other scholars and practitioners until the early 2000s (Shuck & Wollard, 2010). This is because some argue that the traditional focus of psychology during the 1990s was on negative affective states such as burnout (Maslach, Schaufeli, & Leiter, 2001). It was not until the early 2000s when more attention was given to 'positive psychology' and the study of human strengths and optimal functioning (Bakker, Demerouti, & Sanz Vergel, 2014; Fragoso, Holcombe, McCluney, Fisher, McGonagle, Friebe, 2016; Maslach et al., 2001).

The attractiveness of employee engagement lies within an organization's ability to understand and subsequently increase their employees' engagement level; however, each definition represents a unique perspective of the construct based on the time and field under study (Shuck & Wollard, 2011). Furthermore, consulting firms claim to have developed engagement interventions without a working definition (Shuck & Wollard, 2011). The lack of consistency raises the concern about the complexities of employee engagement and highlights the need to further explore the construct.

The most widely accepted definitions (see Table 1) demonstrates that there is no clear consensus; rather, each definition represents a unique focus on many different aspects of engagement. For example, engagement is understood as a psychological state, a behavior, and a cognitive ability (Kahn, 1990; Rothbard, 2001; Schaufeli & Bakker, 2010). Engagement can be observed at the individual, team, and organizational levels (Macey & Schneider, 2008; Saks, 2006; Salanova et al., 2005). Although perspectives may differ by researchers, there is a clear and unanimous agreement among them that

16

engagement has the potential to significantly impact individuals and organizations

(Shuck & Wollard, 2010).

Table 1
Definitions of Employee Engagement

Author	Aspect(s) of Engagement	Definition
Schaufeli et al. (2002)	Emotional state	Employee engagement is "a positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption" (p. 74)
Kahn (1990)	Physical, cognitive, and emotional states	Personal engagement is "the harnessing of organization members' selves to their work roles; in engagement, people employ and express themselves physically, cognitively, and emotionally during role performances" (p. 692)
Saks (2006)	Cognitive, emotional, and behavioral states	Job engagement is "the extent to which an individual is psychologically present in his role as a member of an organization" (p. 602)
Shuck and Wollard (2011)	Cognitive, emotional, and behavioral states	Employee engagement is "an individual employee's cognitive, emotional, and behavioral state directed toward desired organizational outcomes" (p. 103)
Maslach and Leiter (2016)	Positive affective-motivational state	Burnout is "a psychological syndrome emerging as a prolonged response to chronic interpersonal stressors on the job. The three key dimensions of this response are an overwhelming exhaustion, feelings of cynicism and detachment from the job, and a sense of ineffectiveness and lack of accomplishment" (p. 104)
Robinson et al. (2004)	Attitude	"Engagement is a positive attitude held by the employee towards the organization and its value. An engaged employee is aware of business context, and works with colleagues to improve performance within the job for the benefit of the organization. The organization must work to nurture, maintain and grow engagement, which requires a two-way relationship between employer and employee" (p. 9)
Maslach et al. (2001)	Motivational state	Employee engagement is "a persistent, positive, addictive-motivational state of fulfillment in employees that is characterized by high levels of activation and pleasure" (p. 417)
Rothbard (2001)	Attention and absorption	"Engagement in a role is defined as the attention devoted to and absorption in a role" (p. 5)
Macey and Schneider (2008)	Trait, state, and behavior	They defined *trait engagement* as "the inclination or orientation to experience the world from a particular vantage point" (Macey & Schneider, 2008, p. 5); *psychological state engagement* as an antecedent to behavioral engagement; and *behavioral engagement* as the amount of discretionary effort put into a role

Theoretical Context of Engagement

17

In addition to varying definitions, several theoretical frameworks and models are used to guide empirical studies of employee engagement (Bailey et al., 2017; Saks & Gruman, 2014). The most commonly used include the job demands-resources (JD-R) model (Demerouti, Bakker, Nachreiner, & Schaufeli, 2001) and social exchange theory (SET) (Saks, 2006). While the JD-R model and SET explain individual level engagement, several leadership theories are also used to explain engagement between the individual and their direct supervisor, including leader member exchange theory (LMX) (Patnaik & Dubey, 2019; Saks & Gruman, 2014), transactional leadership theory (Shuck & Herd, 2012), transformational leadership theory (Shuck & Herd, 2012), and organizational culture theory (Aktar & Pangil, 2018). Below I will briefly discuss each theory or framework.

JD-R Model

This model was first proposed by four researchers—Demerouti, Bakker, Nachreiner and Schaufeli in 2001 as an occupational stress model that suggests strain is a response to imbalance between demands on an individual and the resources he or she has to deal with these demands. Job demands focus on physical, psychological, social, or organizational aspects of the job that requires sustained physical and/or psychological effort or skills, for example, work pressure and emotional demands. Job resources refer to physical, psychological, social, or organizational aspects of the job that are (a) functional in achieving work goals, (b) reduce job demands and the associated physiological and psychological costs, or (c) stimulate personal growth. Examples of job resources are career opportunities, role clarity, autonomy, and supervisor coaching.

18

The JD-R model was introduced as an alternative to other models of employee well-being (e.g., the demand-control model and the effort-reward model), to address the limited sets of predictors that may not be relevant for all job positions (Bakker & Demerouti, 2007, p. 309). As a result, this model takes into consideration a wider range of working conditions when it comes to analyzing organizations and employees. In addition, instead of focusing exclusively on the negative outcome variables such as burnout and job strains, the JD-R model considers both positive and negative indicators and outcomes of employee well-being.

Today, the JD-R model is one of the most widely used models to understand burnout and engagement (Schaufeli & Taris, 2014). With the assumption that long-term job demands lead to exhaustion and burnout, it is believed that adding additional job resources could mitigate burnout effects and increase engagement (Schaufeli & Taris, 2014).

Three years after the JD-R was first introduced, Schaufeli and Bakker (2004) proposed an updated model, which included the positive-psychological attribute of work engagement. Their updated model included the factors of vigor, dedication, and absorption. The JD-R model is revered as being broader than other models as it includes all job demands and job resources (Schaufeli & Taris, 2014). It is also more flexible and can be used in a wide variety of work settings, which has been appealing to practitioners (Schaufeli & Taris, 2014).

Although the JD-R model is widely popular, it is often met with criticism (Bailey et al., 2017). First, the JD-R model is linear and assumes that individuals will respond in

rational ways based on specific organizational resources or demands (Bailey et al., 2017). However, in a study of emergency medical responders, Bargagliotti (2012) found that the model did not explain behavior in challenging and complex situations such as responding to a medical emergency. Bailey et al. (2017) further noted that the JD-R "fails to take account of heterogeneous, micro-level contextual factors, interpersonal interactions and emotional or irrational responses. It fails to address issues of power and politics within the workplace, and the question of who controls the resources and demands experienced by workers" (p. 37). Similarly, Bargogliotti (2012) noticed that employees who receive additional job resources may not be more engaged; rather, they might remain in a neutral state or even perceive additional resources as a job hindrance.

Social Exchange Theory (SET)

Khan (1990) detailed the psychological conditions necessary for engagement; however, his research did not fully explain why employees respond to certain conditions with varying levels of engagement (Saks, 2006). A stronger theoretical explanation of why employees differ in terms of engagement is found in SET (Aktar & Pangil, 2018; Saks, 2006), whose roots can be traced back to the 1920s (Mauss, 1925). SET is the second most widely used framework next to the JD-R model (Bailey et al., 2017) and one of the most influential conceptual paradigms in understanding workplace behavior (Cropanzano & Michell, 2005).

As a sociological and psychological theory that examines the social behavior in the interaction of two parties, SET also involves economic relationships—the cost-benefit analysis occurs when each party has goods that the other party values. SET

suggests that these calculations occur in romantic relationships, friendships, professional

relationships, and ephemeral relationships as simple as exchanging words with a

customer at the cash register. According to SET, if the costs of the relationship are

higher than the rewards, then the relationship may be terminated or abandoned

(Emerson, 1976).

SET has been utilized by scholars in several disciplines (Bordia, Restubog, &

Bordia, 2017). Through a systematic literature review, Cropanzano and Mitchell (2005)

posited that SET is a social exchange comprising of actions contingent on the rewarding

reactions of others, "which over time provide for mutually and rewarding transactions

and relationships" (p. 890). Specifically, within SET, obligations are generated through a

series of interactions between parties who are in a state of reciprocal interdependence

(Cropanzano & Mitchell, 2005). One-way individuals repay their organization is by

being engaged. Employees choose to be more or less engaged by the level of varying

degrees and in response to the resources they receive from their organization (Saks,

2006). From a SET perspective, relationships develop overtime into trusting, loyal, and

mutual commitments (Aktar & Pangil, 2018; Cropanzano & Mitchell, 2005). An

example of SET is when an individual receives economic and socioemotional resources

from their organization and then they feel obligated to respond in kind and repay the

organization (Saks, 2006). The reciprocal nature of SET is consistent with Robinson et

al.'s (2004) definition of engagement as a two-way street. HRD practitioners design and

implement programs to support employees in hopes that they reciprocate with higher

levels of engagement (Chaudhuri & Ghosh, 2012; Shuck, Twyford, Reio, & Shuck, 2014).

Despite its popularity, SET is not free of critiques. For example, scholars have challenged the following assumptions underpinning this theory: (a) SET reduces human interaction to a purely rational process rooted in economic theory; (b) SET places relationships in a linear structure; and (c) SET assumes the ultimate goal of a relationship is intimacy when this might not always be the case (Miller, 2005).

Leader-Member Exchange (LMX) Theory

The relationship between employees and their supervisors plays an important role in engagement and is often called leader member exchange (LMX) (Patnaik & Dubey, 2019; Saks & Gruman, 2014). The goal of LMX theory is to explain the effects of leadership on members, teams, and organizations. According to this theory, leaders form strong trust, emotional, ad respect-based relationships with some members of the team, but not with others (Bauer & Ergoden, 2015). Similar to SET, leader member exchange (LMX) involves a type of reciprocal exchange, in which resources are provided to employees (Saks & Gruman, 2014); however, LMX lies specifically within the relationship between leaders and followers.

LMX is a process centered on the dyadic relationship between leaders and followers (Northouse, 2016). The assumption of LMX is that a leader's time and resources are limited; therefore, time and resources are allocated based on the relationship between the leader and follower (Patnaik & Dubey, 2019). Within LMX, two groups of followers exist: the in-group, and out-group (Northouse, 2016). In-group

followers are those with similar personality characteristics and have a special

relationship with the leader; as result, they often receive greater attention, more

mentorship, and more opportunity for advancement (Northouse, 2016). On the contrary,

those in the out-group have less access to the leader, have different personality

characteristics, and "operate strictly within their prescribed organizational roles"

(Northouse, 2016, p. 144). Research shows that employees who had higher quality LMX

relationships and were in the in-group, were more inclined to be engaged at work

(Patnaik & Debey, 2019).

The leader-follower relationship is vital to successful leadership (Patnaik &

Debey, 2019). HRD practitioners often implement mentoring and reverse mentoring

opportunities between employees and supervisors to help develop their relationship

(Chaudhuri & Ghosh, 2012).

Transactional Leadership Theory

Transactional leadership is found to increase engagement (Shuck & Herd, 2012).

As a style of leadership in which leaders promote compliance by followers through both

rewards and punishments, it pertains to the set of behaviors that motivate and guide

followers in a clear direction and with clear expectations for the completion of their

work (Northouse, 2016). Clear expectations and resources to accomplish work are the

foundations of transactional leadership (Shuck & Herd, 2012). However, once the basic

job expectations are set, there is little personal relationship development or emotion

between the leader and the employee (Shuck & Herd, 2012).

Unlike transformational leaders, transactional leaders are concerned with processes rather than forward-thinking ideas; thus, they are not actively seeking to make changes in the workplace. Since transactional leaders use reward and punishments to gain compliance from their followers, they are not concerned with the well-being of the employees compared to transformational leaders. Transactional leaders are extrinsic motivators and accept goals, structure and the culture of the existing organization. They tend to be directive and action oriented. They are willing to work within existing systems and negotiate to attain goals of the organization. In addition, they likely think inside the box when solving problems. This type of leadership is effective in crisis and emergency situations (Odumeru & Ogbonna, 2013), as well as for projects that need to be carried out in a specific way.

Transactional leadership generally has three dimensions: (a) contingent reward; (b) management-by-exception: active; and (c) management-by-exception: passive. Contingent reward, also known as contingent positive reinforcement, is viewed as both an efficient and constructive relationship between the leader and the followers. In this relationship, the followers get bonuses, merits, or recognition from their organization when they meet certain goals expected of them (Bycio, Hackett, & Allen, 1995)—they are rewarded for effort and good performance. These rewards are solely based on an agreement between the leader and follower. Within management-by-exception, there are two routes: active or passive. Active leaders continuously monitor performances of their employees and take immediate corrective action when something goes wrong. Passive

leaders only assess employee performance after the task is complete and will only let their followers know about problems after they occurred (Howell & Aviolio, 1993).

Transformational Leadership Theory

Like transactional leadership, transformational leadership is also an important factor in an employee's engagement (Agrawal, 2020; Edelbroek, Peters, & Blomme, 2019; Shuck & Herd, 2012). It is a theory of leadership where a leader works with teams to identify needed change, creating a vision to guide the change through inspiration, and executing the change in tandem with committed followers. In short, transformational leadership is a process that changes and transforms people (Northouse, 2016). This style of leadership is concerned with the emotions, values, ethics, and long-term goals of human beings (Northouse, 2016). Employees who have a leader who mentors, encourages, and coaches them to consistently develop are more engaged (Shuck & Herd, 2012).

Unlike transactional leaders who exchange tangible rewards for the work and loyalty of their followers, transformational leaders engage with followers, emphasize intrinsic motivation and positive development of followers, and raise awareness of the significance of specific outcomes, promote cooperation and harmony, provide individual coaching and mentoring, allow freedom of choice, and inspire people to achieve unexpected or remarkable results through new ideas (Bass, 1990). Transformational leaders give employees autonomy over specific jobs, as well as the authority to make decisions once they have been trained. Unlike transactional leaders who operate within the organizational culture, transformational leaders actively work to change the culture

by implementing new ideas. With all the distinctive features, transformational and transactional leadership theories are considered the opposite approaches to leadership (Afsar, Badir, Saeed, & Hafeez, 2017).

Research shows that implementing transformational leadership has many positive outcomes. It evokes positive emotions and outcomes in the workplace as well as in team projects performed online (Brewer et al., 2016; Kahai, Jestire, & Rui, 2013; Zineldin, 2017). One recent study indicates that transformational leadership is significantly associated with higher job satisfaction and the effectiveness of the employees, as well as a higher degree of positive emotions in the workplace such as enthusiasm, happiness, and a sense of pride in the follower's work (Zineldin, 2017).

Organizational Culture Theory

Organizational culture theory involves the shared set of characteristics, including the beliefs, values, and behaviors of employees (Aktar & Pangil, 2018). These beliefs and expectations influence the way employees think, feel, and act in the workplace (Goodman et al., 2001). Although culture is believed to be situated at the center of human resource management (HRM) practices and influence employee's motivation, engagement, and morale, it is often challenging to identify culture due to the unconscious and taken-for-granted nature of the construct (Goodman et al., 2001). Nonetheless, studies have shown that organizational culture is positively related to employee engagement (Timms, Brough, O'Driscoll, Kalliath, Siu, Sit, & Lo, 2014).

Within organizational culture theory, different types of cultures exist (e.g., bureaucratic, innovative, supportive, collectivist, individualist) (Aktar & Pangil, 2018;

Khewsomboon, Tayko, & Mullin, 2017; Rutishauser & Sender, 2019). However, individualism-collectivism is by far the most widely studied culture construct by researchers (Lamoreaux & Morling, 2011). Organizational culture of collectivism involves a group having a single identity, whereby the group has a purpose to achieve goals (Khewsonboon et al., 2017). Conversely, a culture of individualism emphasizes personal goals and autonomy (Hofstede, 1980). Although studies (Knewsonboon et al., 2017) have indicated that organizational culture of collectivism increases engagement, in the United States, collectivism is quite low (Hofstede, 1980). In fact, the United States is the country ranked the highest for individualism (Hofstede, 2020).

The variety of theories used to guide previous empirical engagement studies highlight the uniqueness of employee engagement relative to the specific context in question. Instead of identifying any specific theories for my study, I plan to keep an open mind and allow insights to emerge from the data. This is in line with the thinking of scholars who recommend qualitative approaches when studying employee engagement (Bailey et al., 2017; Sambrook et al., 2013).

Antecedents of Engagement

Some argue that knowing how to increase an employee's engagement at work is more important than the definition itself (Saks, 206). Since Kahn's (1990) conception, scholars and practitioners have explored and tested a multitude of factors that lead to higher engagement. Most often, employee engagement is viewed as a mediator between certain antecedent factors and consequences (Saks, 2006). For example, Kahn (1990)

27

posited that the specific psychological conditions of meaningfulness, safety, and availability lead to engagement.

In a narrative synthesis of employee engagement, Bailey et al. (2017) found that 150 empirical studies mentioned antecedent factors. Examples of the antecedents consist of psychological states (e.g., self-efficacy, resilience), leadership characteristics (e.g., perceived supervisor support), job design factors (e.g., autonomy, role-clarity, empowerment), team and organizational factors (e.g., organization fit, trustworthiness), and organizational interventions (e.g., training, development) (Bailey et al., 2017; Kwon & Kim, 2020).

Psychological States

Research shows that a person's psychological states affect their engagement level. Specifically, employees with self-efficacy, resilience, and personal resources (e.g., self-esteem or optimism) often have increased engagement (Bailey et al., 2017; Xanthopoulou et al., 2008). Employees who believe that they have the ability and knowledge to perform in their role (e.g., self-efficacy) are likely to be more engaged (Del Libano et al., 2012). Similarly, employees with higher self-esteem complete job demands with confidence and are more engaged (Chen et al., 2018). Finally, employees who are resilient and can bounce back quickly from challenging workdays are more engaged (Bailey et al., 2017).

Leadership

Studies have shown a link between positive forms of leadership and employee engagement (Bailey et al., 2017; Karatepe, 2012). For example, Saks (2006) identified

perceived supervisor support (PSS) as a leadership trait that increases engagement. In other words, leaders or managers who provide coaching and display supportive behaviors generally have more engaged employees (Bailey et al., 2017; Bakker & Xanthopoulou, 2013). Trust and supportive behaviors are also a form of psychological safety, in which employees who feel comfortable trying new things without the fear of consequences will be more engaged (Saks, 2006).

Job Design

Employees who feel a sense of return on investment or meaningfulness from their work will be more engaged (Saks, 2006). Additionally, antecedents surrounding autonomy, role clarity, empowerment, and developmental opportunities were also found to be positively associated with engagement (Bailey et al., 2017; De Spiegelaere, Van Gyes, De Witte, Niesen, & Van Hootegem, 2014). Collectively, employees who have meaningful work and clear expectations are more engaged (Bailey et al., 2017; Saks, 2006).

Team and Organizational Factors

Antecedents encompassing team and organizational factors pertain to employee-organization level issues (Bailey et al., 2017). For example, employee-organization fit has been linked to engagement (Bailey et al., 2017). Also, employees who perceive the organization and HRM functions to be trustworthy are more engaged (Alfes et al., 2012).

Organizational Interventions

Training and development opportunities and career development pathing increase engagement (Frank, Finnegan, & Taylor, 2014; Jenkins & Delbridge, 2013). However,

ambiguous training and development interventions can lead to disengagement (Bailey et al., 2017). Therefore, employees who view training as a necessary part of their job are more likely to be engaged (Bailey et al., 2017).

<div align="center">*Consequences of Engagement*</div>

Organizational popularity surrounding employee engagement is due to the potential business outcomes or consequences of being engaged (Saks, 2006). Practitioners at Gallup Inc. found that engaged employees are more profitable and less likely to quit (Harter et al., 2002). In addition, engagement affects other types of performance outcomes such as process performance, task performance and, outcome performance (Matthews et al., 2016; Motyka, 2018; Rich, Lepine, & Crawford, 2010). Due to the proven association of engagement and performance outcomes, researchers consider employee engagement itself to be a downstream consequence (see Meintjes & Hofmeyr, 2018; Sange & Srivasatava, 2012) and spend more time in identifying the factors that lead to engagement (e.g., antecedents).

Although a variety of antecedents exist, engagement is not a one-size-fits-all approach (Saks, 2006). Rather, engagement is found to differ by occupation (Demerouti et al., 2015; Jaworek, 2017; Kwon & Kim, 2020; Schaufeli et al., 2006). For example, sales representatives, teachers, and police officers were found to be more engaged than phone operators and blue-collar workers (Jaworek, 2017; Schaufeli et al., 2006). Typically, blue collar workers and phone operators receive fewer resources (e.g., wages, development opportunities, and prestige) and thus are less engaged (Jaworek, 2017). Whereas sales representatives, whose sales performance are often based on their ability

to build relationships with customers, are likely to be more engaged at work (Medhurst & Albrecht, 2016).

The various antecedents known to increase engagement, coupled with the differences across industries and jobs, create an opportunity for more precise exploration about employee engagement within specific industries and jobs. Motyka (2018) called for future research that takes into consideration the contextual aspects of engagement for employees who work in proximity to their peers and the effects on the team performance and engagement.

The Research Context: Inside Selling

Approximately 15 million people or 5% of the United States population work in various sales roles (e.g., retail sales, sales engineer, field or outside sales, inside sales, technical sales) and sell to different customers (e.g., businesses or individuals) (U.S Bureau of Labor Statistics, 2019; SEF, 2020; Zoltners, Sinha, & Lorimer, 2019). Among the different types of sales roles, business-to-business (B2B) inside sales has received very little scholarly attention despite that approximately 260,000 people work in those roles (Chriqui, 2019; Sleep, Dixon, DeCarlo, & Lam, 2020; Zoltners et al., 2019).

B2B inside sales is often misconstrued with telemarketing (Tuttle, 2015). Although representatives in both roles are responsible for connecting with customers via telephone versus face-to-face, that is where the similarities end. Telemarketing "uses a scripted, single-call close, usually offering a small-ticket, business-to-consumer (B2C) product. Telemarketers are infamous for making their unsuspecting victims say 'no' seven times before letting them hang up" (Tuttle, 2015, p. 1). Conversely, B2B inside

31

sales is professional sales, in which representatives make unscripted calls to prospects in attempts to solve problems (Tuttle, 2015). Often, multiple calls or interactions is required as the sale is often more complex.

B2B inside sales roles exist across many different industries (e.g., finance, logistics, healthcare, insurance, technology), however, across the different industries the role remains similar. Organizations can reduce operating costs by 40-90% with the use of a B2B inside sales force compared to a field (outside) sales force (Chriqui, 2019; Zoltners et al., 2019). The cost reduction of inside sales is largely due to the lower travel costs compared to field sales (Gessner & Scott, 2012). Inside sales representatives physically work inside an organization and sell to businesses over the telephone or web, whereas field sales representatives travel to customers for face-to-face meetings (Gessner & Scott, 2012). Although both groups are responsible for communicating to customers and generating revenue, an inside sales representative can call a customer in New York and then immediately call a customer in Los Angeles, whereas a field sales representative would have to travel to each customer. Thus, the cost-per-contact for inside sales is much lower (i.e., $25 to $30) compared to field sales ($300 to $500) (Thaichon et al., 2018).

Because inside sales representatives physically work inside an organization, it is easier for supervisors to monitor their performance and encourage competition between individual representatives. For several decades, sales performance was a focal point for researchers and practitioners (Charoensukmongkol & Suthatorn, 2020). However, research indicates that as sales organizations push aggressive goals performance

decreases and sales representatives experience burnout and eventually quit (Matthews et al., 2016). In fact, over 60% of first-time sales representative's experience burnout and quit their job within a year of employment (SEF, 2020). Additionally, at any given time, 24% of inside sales representatives are actively looking for new jobs (Assemi, 2019). Consequently, many organizations chose to focus on reducing burnout. However, according to recent research, to ensure an organization's success, increasing employee engagement is more critical than reducing their burnout (Matthews et al., 2016).

Research on Employee Engagement in Inside Sales

Measuring the downstream consequences of engagement against engagement influencers is of great interest to scholars and practitioners who are charged with increasing revenues and reducing turnover (Harter, 2018). Unlike Kahn's (1990) qualitative approaches to study engagement, most engagement researchers have adopted quantitative approaches (Sambrook, Jones, & Doloriert, 2013) to test specific antecedents in order to determine its effectiveness in engaging employees. Engagement researchers commonly utilize self-report questionnaires, structural equation modeling, and linear regression techniques to test hypotheses and predict antecedents of engagement (Motyka, 2018).

Antecedents that Affect Sales Representatives

Although antecedents known to increase engagement exist, researchers rarely differentiate sales roles when considering the study population; instead, they use a general term-salespeople. This is problematic because not all sales roles are created equal (Thaichon, Suracharkumtonkun, Quach, Weaven, & Palmatier, 2018). Field sales

is vastly different from inside sales. The following section will highlight the antecedents known to increase engagement and the potential differences with inside sales roles. Specifically, I will discuss three antecedents: resilience, autonomy, and developmental opportunities.

Resilience

Sales representatives often execute their sales process flawlessly, yet this does not necessarily lead the customer to buy their product or service. Situations like this require sales representatives to be resilient, especially considering the competitiveness between many sales representatives and teams (Meintjes & Hofmeyr, 2018). Unlike field sales representatives who might not know how they are performing compared to their peers, inside sales representatives are almost always aware of their current performance. As a result, to be successful, inside sales representatives must have higher levels of resilience.

Autonomy

There is a drastic difference in job design between inside sales and field sales. First, sales representatives who have the autonomy to make independent decisions tend to be more engaged than those who do not (Medhurst & Albrecht, 2016). Field sales representatives often have more autonomy than inside sales representatives. Inside sales representatives are typically required to work in the office between business hours (e.g., between 8am and 5pm) and take structured breaks throughout the day; whereas field sales representatives have full autonomy to create their own work schedule.

Developmental Opportunities

Developmental opportunities, known to increase engagement, are more prevalent in inside selling than field sales, because inside sales representatives work in the same location and their sales calls are recorded. The physical proximity and the telephone records enable sales managers to provide daily face-to-face training and feedback to inside sales representatives. Unlike the case of inside sales, field sales representatives do not have recorded calls and might be away from the office for days or weeks before they can receive training and feedback (Thaihon et al., 2018).

The differences between the identified antecedents known to increase engagement and inside selling roles highlight the need to further explore employee engagement from the context of inside sales specifically. Additionally, validity concerns exist when leveraging quantitative research methods to predict or associate an antecedent with engagement (Byrne, Peters, & Weston, 2016). Most quantitative studies employ a cross-sectional design and collect data at one point in time with the use of a self-report questionnaire, which raises validity concerns about the likelihood an employee is going to answer honestly (Byrne et al., 2016; Kulikowsky, 2017; Motyka, 2018; Saks, 2019). Sambrook et al. (2013) raised the question: "How can responses to an annual one-off self-report questionnaire augment our understanding of what it means to be engaged, who and what facilitates this, and why and when an employee engages at/with work?" (p. 176). To address the validity concerns, scholars have conducted longitudinal studies and measured engagement at multiple points in time (Alessandri et al., 2018; Xanthopoulou & Bakker, 2008). While using multiple measurements of the same

variables increases the likelihood of a causal link between them, there remain concerns about reduced responses that could alter the results (Motyka, 2018).

Qualitative Studies of Engagement

Generalizability is a common goal of quantitative studies; however, engagement is not created equal (Saks, 2006); thus, any generalizations must be made with caution. In addition to the differences with specific sales roles (e.g., inside sales versus field sales), employee engagement is found to change throughout the day and week (Saks, 2006). Therefore, to capture such dynamics and gain a holistic picture of engagement requires different approaches, such as qualitative methodologies (Bailey et al., 2017; Creswell, 1994).

Qualitative methodologies could shine a light on the complexities that are known to exist within the role of inside selling. However, based on a thorough literature search, I identified only two qualitative studies of sales representatives, one of which focuses on inside sales representatives (Medhurst & Albrecht, 2016; Sleep, Dixon, DeCarlo, & Lam., 2020). Medhurst and Albrecht (2016) conducted an interpretative phenomenological study to explore the detailed perspectives of B2B field sales representatives. Their findings revealed that engagement was a self-regulated state of energy aimed at accomplishing tasks, inside sales representatives might differ based on level of autonomy (Medhurst & Albrecht, 2016).

Sleep et al.'s (2020) study adopted a generic qualitative design focusing specifically on B2B inside sales representatives and the individual capabilities required for success. Although their study was not grounded in the engagement literature, they

found certain dimensions that differentiate inside sales representatives from field sales representatives. Specifically, the most productive inside sales representatives accumulate more resources by building internal relationships, which allow them to mobilize social capital when necessary.

Research Gaps

Although scholars have identified a number of engagement antecedents that can enhance employee engagement, they have made little effort to empirically investigate the phenomenon in light of the complexities of inside sales. My review of previous literature pertaining to employee engagement and inside sales illuminates two glaring gaps: (a) the lack of engagement research situated in the context of B2B inside sales; and (b) the lack of qualitative approaches to generate understanding and capture the complexities of engagement. To address these two research gaps, this study focuses on exploring employee engagement from the perspective of inside sales representatives. A qualitative study of engagement will generate rich information that can inform HRD practitioners who seek ways to reduce turnover and improve performance within their inside sales organization.

Summary

A thorough review of the literature points to glaring gaps in current knowledge about the phenomenon of employee engagement. First, despite the long history of employee engagement research, few studies qualitatively explore the rich context of engagement. Additionally, the occupation of inside sales has largely been overlooked although they account for a significant number of professionals in the United States.

Doing so will provide tools for HRD practitioners who seek to increase the engagement of their employees. Finally, while HRD scholars and practitioners recognize the importance of employee engagement, they have not adequately explored the construct from an inside sales perspective. With these three gaps identified, this study is an attempt to advance current research and practice in employee engagement.

CHAPTER III

METHODOLOGY AND METHODS

This chapter introduces the methodology and methods employed to conduct this study. It begins with a restatement of the research purpose and questions, followed by a brief discussion about different philosophical perspectives in co-existence, and my philosophical stance. This chapter also provides a detailed description of the research design and methods for data collection, data analysis. The chapter concludes by addressing the issue of trustworthiness, the role of the researcher, and ethical considerations.

Restatement of Purpose and Research Questions

The purpose of this study was to explore employee engagement from the perspective of inside sales representatives. Two research questions guided this inquiry:

1. What are inside sales representatives' perceptions of work engagement?

2. What engaging behaviors do inside sales representatives display at work?

Philosophical Perspectives

A researchers world view often stems from the philosophical perspectives they hold about social reality (Hesse-Biber, 2017). Below, I briefly describe the philosophical framework for research inquiry, including ontology and epistemology.

Ontology

Ontology is defined as "a philosophical belief system about the nature of social reality—what can be known and how" (Hesse-Biber, 2017, p. 6). There are three major

ontological positions: positivism, interpretive, and critical (Hesse-Biber, 2017).

Positivists believe that social reality is patterned; there are answers can be derived from

strategic tests, and that there is an objective reality (Hesse-Biber, 2017). Interpretivists

believe that the social world is constantly constructed by social actors in the form of

meaning making activities (Hesse-Biber, 2017).

Finally, critical researchers are like interpretivists in that they believe in a world

that is constantly constructed; however, they also believe that the social world is affected

and shaped by power dynamics (Hesse-Biber, 2017).

Epistemology

Epistemology is a philosophical belief system about how knowledge is created

(Hesse-Biber, 2017). Epistemologies "provide a philosophical grounding for deciding

what kinds of knowledge are possible, and how researchers can ensure they are both

adequate and legitimate" (James & Busher, 2009, p. 7). There are a range of

epistemologies that pertain to knowledge generation. Crotty (1998) noted three

epistemological perspectives: objectivism, constructivism, and subjectivism.

Objectivism

Objectivist epistemologists believe that "meaning, and therefore meaningful

reality, exists as such apart from the operation of any consciousness" (Crotty, 1998, p.

8). That is, objective realities exist in an object independent of a subject (Moon &

Blackman, 2014). Crotty (1998) noted "that a tree in the forest is a tree, regardless of

whether anyone is aware of its existence or not" (p. 8). Researchers that hold objectivist

epistemological beliefs find that there is a distinguishable difference between objective

facts and subjective meaning. Thus, they are careful in crafting well-defined hypotheses and systematic analyses to ensure results from their studies truly illuminate the nature of a participant's psychology (Crotty, 1998).

Objectivism is commonly grounded in the context of positivism and post-positivism (Crotty, 1998). Within these two contexts, research, done systematically, can provide objective knowledge, which is superior to other types of knowledge (e.g., beliefs or common sense) (Sullivan & Forrester, 2019).

Constructivism

Constructivism rejects the objectivist view of human knowledge (Crotty, 1998). Rather, meaning is constructed by the interplay of a subject and object (Crotty, 1998; Moon & Blackman, 2014). In this sense, people construct meaning in different ways—even in relation to the same social situation or phenomena (Crotty, 1998). Crotty (1998) posed the question "isn't this precisely what we find when we move from one era to another or from one culture to another? In this view of things, subject and object emerge as partners in the generation of meaning?" (p. 9). Therefore, the researcher plays a critical role in the co-construction of meaning because no unmediated grasp of the social world can exist independently of the researcher (Moon & Blackman, 2014).

Subjectivism

Within subjectivism, meaning does not emerge from an interaction between a subject and object; rather, it is imposed on the object by the subject (Moon & Blackman, 2014). The object makes no contribution to the generation of meaning; instead, meaning comes from other places like dreams or religious beliefs (Crotty, 1998).

My Philosophical Stance

My philosophical stance is grounded in interpretivism. I believe that reality is co-constructed in a particular moment in time and is open to re-interpretation through conversation (Thanh & Thanh, 2015). Unlike positivists who believe there is one truth, I believe that humans are far too complex to fit in a one-size-fits-all approach to a social reality; rather, intricacies make humans unique. Ontologically, I am an interpretivist with a belief that reality is constantly constructed through group interactions (Hesse-Biber, 2017). I believe that many social realities exist due to the varying human experiences based on their knowledge, views, interpretations, and experiences. Epistemologically speaking, I am a constructivist. I believe that meaning is created between the interplay of the researcher and participants. Informed by this line of thinking, researchers focus on the language and context to co-create reality by way of meaning-making activities. Specifically, researchers must focus on the perspectives of the participants while attempting to make sense of the participants' social world (Lincoln & Guba, 1985)

Research Paradigms

A research methodology is defined as a strategy for how a study will be executed (Hesse-Biber, 2017). Researchers' philosophical assumptions often drive their selection of the methodology and methods. Methodologies can be viewed as a bridge, connecting a researcher's philosophical assumptions to research questions and to specific methods to answer the proposed questions.

There are often two types of research methodologies: quantitative and qualitative. Quantitative methodologies involve the observation and measurement of something

(Antwi & Hamza, 2015; Glesne & Peshkin, 1992). Often, quantitative methodologies follow the confirmatory scientific method and focus on testing hypotheses (Antwi & Hamza, 2015). Whereas, qualitative methodologists take an exploratory approach to the scientific method, seeking a means to exploring and understanding a social or human problem (Antwi & Hamza, 2015; Creswell, 1994). Generally, qualitative researchers believe that reality is socially constructed—thus, embracing constructivist epistemological perspectives (Guba & Lincoln, 1985). For several decades, scholars have debated on which approach reigned supreme—quantitative or qualitative (Antwi & Hamza, 2015). The debate among scholars stemmed from the differences in worldviews and philosophies concerning each methodology (Antwi & Hamza, 2015). However, Bryman (2001) posited that the distinction between quantitative and qualitative methodologies need not be a debate; rather, the selection is a technical matter that is rooted in the suitability to answer the specific research question(s) posed.

Influenced by my interpretivist philosophical beliefs and constructivist epistemological stance, I adopted a qualitative methodology to answer my research questions. A qualitative design is particularly useful when the topic has never been addressed with a certain group of people or the social phenomenon under investigation is unique (Creswell, 1994). My study concerns the experiences of engagement from the perspective of inside sales representatives. My interpretivist paradigm allowed for multiple perspectives from participants and an understanding that there is not one truth (Thanh & Thanh, 2015). Previous research has indicated that the construct of

engagement can be broad and encompasses many unique factors; therefore, I was open to the participants' perspectives of engagement.

Methodology for the Study

Several qualitative methodologies exist (e.g., phenomenology, ethnography, and case study), each of which would benefit researchers studying the engagement of inside sales representatives; however, what I found particularly helpful for this study is a generic qualitative design. A generic qualitative design is most appropriate when the research question(s) or the researcher's beliefs do not fit within established methodologies (Kahlke, 2014). Following this logic of thinking, below I briefly discuss different qualitative approaches to facilitate a better understanding of the rationale for my methodological choice.

Phenomenology

Phenomenology focuses on the commonality of a lived experience with a particular group (Creswell, 2013). A phenomenologist is interested is in the cognitive processes surrounding a lived experience, not the external context that may trigger a cognitive process (Percy, Kostere, & Kostere, 2015). In the context of my study, employees may not feel engaged or may not have experienced engagement at all. Additionally, external forces (e.g., managers, peers, organizational design) are known to affect one's engagement. Therefore, my research questions focus on understanding how business-to-business (B2B) inside sales representatives perceive engagement and how they demonstrate engaging behaviors given the context of inside sales. I am interested in how inside sales representatives perceive the concept of engagement and how they

demonstrate engagement behavior-wise (Percy et al., 2015). Additionally, it is my epistemological belief that meaning is co-created between the researcher and the participant. Therefore, I could use my previous experience as a salesperson to build a stronger rapport with my participants (Kahlke, 2014). This is very different from the practice of Phenomenologists who work hard to bracket their personal experiences during data collection.

Ethnography

Ethnographic research aims to "get a holistic understanding of how individuals in different cultures and subcultures make sense of their lived reality" (Hesse-Biber, 2017, p. 183). Ethnographers go inside the social world of individuals for extended periods of time and observe them in their natural setting. Ethnographers use thick narratives to describe the everyday practices and customs of the observed culture. Although ethnography would allow for a deep exploration into the culture of an inside sales organization, the prolonged nature of data collection is not feasible for my study. Many inside sales organizations would not allow me to become a part of their organization for an extended period of time, nor grant me access to their customer data which is confidential. Additionally, the cost associated with prolonged engagement on site would make an ethnographic study unrealistic.

Case Study

Case study research "investigates a contemporary phenomenon (the 'case') in depth and within its real-world context, especially when the boundaries between the phenomena and context may not be clearly evident" (Yin, 2018, p. 45). Case study

researchers rely on multiple sources of data to holistically understand a problem, issue, or phenomenon (Hesse-Biber, 2017). For my study, I focus exclusively on one single level—inside sales representatives, and their perspectives, thus multiple sources of data are not needed to accomplish the goal of the study.

While each of the three methodologies I described above has its own strength, none of them will best serve the purpose of my study. Further, considering my philosophical assumptions and the gaps I identified in the engagement literature, each design presents certain limitations. Taken all together, a generic qualitative design would provide me with the greatest flexibility. Nevertheless, I am reminded of the importance of congruency from the epistemological level down to the specific methods for data analysis (Crotty, 1998) to achieve methodological rigor (Kahlke, 2014). Taking this caution into consideration, I explain below how I have ensured methodological alignment called for by researchers.

Research Methods

In this section, I describe the sampling strategy used, followed by methods for data collection and analysis. I will also discuss strategies I used to address the issue of trustworthiness and ethics throughout the research process.

Sampling Strategy

Sampling involves the process of systematically selecting what will be examined in a study (Hesse-Biber, 2017). There are two types of sampling: (a) probability sampling—often used in quantitative research in which the sample is randomly selected; and (b) nonprobability sampling—often used in qualitative research where sampling is

not random (Patton, 2002). Hesse-Biber (2017) noted that nonprobability sampling is also called judgement or purposive sampling. Purposive sampling is popular with qualitative researchers because they can focus on a population of interest who can help answer their research question (Hesse-Biber, 2017). Strong research designs incorporate several sampling strategies driven by the research question and resources available to the researcher. Of the purposive sampling techniques outlined by Patton (2002), I employed three for my study. They were: (a) criterion sampling, (b) convenience sampling, and (c) maximum variation sampling.

Criterion Sampling

First, I used criterion sampling, which involves selecting participants based on predetermined criteria of importance (Patton, 2002). For my study, I developed two inclusion criteria: (a) Participants must work full-time in a business-to-business (B2B) inside selling role; and (b) participants must have worked in an inside selling role for at least 12 months. Participants with at least 12 months of experience in an inside selling role will have a greater understanding of their job and thus likely provide richer information than those who with less experience. All the participants in this study were working in a B2B inside sales role and had a minimum of 12 months of experience at their company.

Convenience Sampling

Second, I used convenience sampling to identify participants who fit the predetermined criteria. Convenience sampling involves the selection of participants based on accessibility, ease, speed, or low cost (Hesse-Biber, 2017). In my study, I

leveraged my personal network to identify individuals who work in inside selling roles. To reduce the potential for systematic bias with convenience sampling, I also used maximum variation sampling (Paton, 2002).

Maximum Variation Sampling

Maximum variation sampling is a technique used to capture heterogeneity—that is, a range of perspectives from different participants to identify common themes (Patton, 2002; Willis, 2007). This strategy helps reduce potential biases from a convenience sample. There are two ways I leveraged maximum variation sampling. First, I invited participants from different organizations and industries to participate in my study. In order to have a diverse participant pool, I did not set an industry parameter. Second, I invited participants with different levels of experience in their inside sales role. By involving organizations from different industries and sales representatives with various levels of experience, I sought to capture greater heterogeneity with the participants. In total, the participants represented nine unique industries. Their work experience ranged from 13 months to 3 years and 7 months with an average of 1 year and 11 months.

Sample Size

Unlike quantitative research where the goal is to identify patterns and make generalizations from larger sets of data, qualitative research is more concerned with in-depth exploration into an individual's thoughts, feelings, or perceptions towards a certain social situation (Hesse-Biber, 2017). Often, qualitative researchers understand the social phenomenon in question with smaller sample sizes when compared to quantitative

researchers (Hesse-Biber, 2017). Additionally, unlike quantitative research that has stringent methods to determine the sample sizes, the samples size in qualitative research is largely a matter of judgement (Sandelowski, 1995). Typically, researchers will collect and analyze data until they have reached informational redundancy or saturation—the point when no new information is generated during data collection and analysis (Hesse-Biber, 2017; Lincoln & Guba, 1985). Therefore, to effectively determine a sample size and to achieve data saturation in my study, I recruited 32 participants. Of the 32 I recruited, 15 agreed to participate. I took an iterative approach that involved moving back and forth between sampling and data analysis until redundancy occurs (Hesse-Biber, 2017; Lincoln & Guba, 1985). During the 14th and 15th participant interviews, the stories became repetitive and no new information emerged, which indicated that I reached the point of saturation.

Study Population

In qualitative research, a population consists of a complete set of participants who share common characteristics established by the researcher (Lincoln & Guba, 1985). My study population consisted of 15 business-to-business inside sales representatives who had worked in the United States for at least 12 months.

COVID-19

Due to the COVID-19 pandemic, many organizations have forced their employees to work from home (Huang et al., 2020). Although they are still connected to their peers, customers, and manager via technology, the dynamic (including engagement) of working-from home could differ from working in the office. Because it

is unknown how long B2B inside sales representatives will work from home due to COVID-19, I did not include or exclude participants based on their current work location (i.e., home or the office). However, for the participants who were working from home, I asked a specific question about the differences in their engagement while compared to working in the office.

Recruitment Procedure

I recruited participants by way of a convenience sample. I leveraged my professional connections on the LinkedIn social networking site. First, I scrolled through my LinkedIn home page and identified people who had the title 'inside sales representative.' Second, within LinkedIn I searched for people with the title 'inside sales representative.' Third, I visited their LinkedIn page and confirmed that they had worked in an inside sales role for at least 12 months. In total, 32 people met the criteria for my study. Next, I contacted each of the 32 people via a private message on LinkedIn and invited them to participate in my study. If they were interested in participating, I asked them to share their email so I could send the study information sheet and informed consent letter prior to the interview (see Appendix A). Fifteen people responded to my message and agreed to participate. I emailed the participants a Zoom interview link, study information sheet, and the informed consent letter prior to the actual interview. The informed consent letter explained the purpose of the study and participant's rights. I continued this recruiting process until I reached the point of data saturation with interviews (meaning, no new information emerged from individual interviews).

Participants

Fifteen American men and women participated in this study (10 men and 5 women). All of them were college graduates and two had master's degrees. They were in the early stage of their professional careers. Their work experience ranged from one year to three years and seven months with an average of one year and eleven months. The participants represented 14 different companies in 9 industries (e.g., technology, media, SAAS, FinTech). All the participants, except one, began their career in a business development role. Participants' characteristics are described in-depth in the first section of Chapter IV (Table 10).

Data Collection

Researchers who embrace constructivist epistemological beliefs argue that there is no single valid method in science; rather there are a diversity of useful methods (Crotty, 1998; Lincoln & Guba, 1985). In this generic qualitative study, I relied on in-depth interviewing as the primary data collection method. In addition, I used critical incident techniques (CIT) to collect specific stories and accounts that illuminated the two research questions (Flanagan, 1954).

In-Depth Interviewing

Researchers use in-depth interviews to collect rich information from participants through a process of deep attentiveness of empathetic understanding (Hesse-Biber, 2017). Often considered to be a meaning-making partnership between the researcher and participant, in-depth interviews yield exploratory and descriptive data (Hesse-Biber, 2017). This data collection method is aligned with my interpretivist and constructivist views, where the reality is co-constructed between the researcher and participant and any

form of research conducted is critical to the interpretation of the data gathered (Thanh &

Thanh, 2015). In addition, to generate specific examples of engagement behavior from

the inside sales representatives, I utilized CIT (Flanagan, 1954). CIT is an interview

technique in which the researcher asks the participant to share specific instances that

have occurred rather than asking direct questions (Stough, Sharp, Decker, & Wilker,

2010). I asked participants to share events or situations when they felt engaged at work.

I conducted all the interviews virtually using Zoom, a Voice over Internet

Protocol (VoIP) technology (Lo Iacono, Symonds, & Brown, 2016). Lo Iacono et al.

(2016) noted that VoIP technologies were just as good, if not better, than data collected

in face-to-face environments. Using VoIP technology offers another advantage—the

researcher does not have to take notes thanks to the recording capability, and hence, they

can pay more attention to body language and social cues (Lo Iacono et al., 2016).

Although the use of VoIP technologies can be useful, poor internet connections can lead

to missed information and frustrations with the participant (Lo Iacono et al., 2016).

Therefore, prior to the interview, I checked with the participants to make sure they had

strong internet connection.

I conducted two rounds of interviews with each participant. This was necessary

for three reasons. First, in the pilot study I conducted, when I asked the participants to

share their definition of employee engagement, they were not familiar with this concept,

nor could they share specific examples. Learning from this pilot experience, I decided to

use the first interview to build rapport, get to know the participant, and explain the

concept of engagement. Second, the first-round interview also served another purpose: to

prepare my study participants for the second interview and allowed them sufficient time to reflect on their experience so that they could recall specific examples. During the second interview, I focused on collecting critical incidents of engagement. Because of the preparation time the participants had and the quality of interview accounts collected, I did not need to conduct a third follow-up interview to further probe or ask for clarifications. Having two rounds of interviews, instead of just one, allowed for building greater rapport between my participant and me, which led to the generation of more candid and meaningful responses. Third, conducting two rounds of interviews gave me an opportunity to perform the initial data analysis, and follow up on certain thoughts shared by the participants during the first interview.

Throughout both interviews, I actively listened and showed a genuine interest in the participant's unique stories. I maintained eye contact with the participants and used appropriate gestures to signal that I was attentive and cared about their responses. I used probes and clarification questions to elicit deeper or additional thoughts when needed (Hesse-Biber, 2017).

First Interview

The first interview focused on the first research question: What are inside sales representatives' perceptions of work engagement? The interviews averaged 45 minutes in length. Prior to each interview, I reviewed the participants' LinkedIn profile to familiarize myself with their work and education history. I started each interview by reviewing the informed consent letter with the participant and asking if they still wanted to participate in the study. When they agreed, I shared the Demographic Information

Sheet (Appendix B) and collected some basic personal information from the participant. Then, I took time to build rapport and trust with the participant (see Interview Guide #1 in Appendix C). I hoped that if the participant felt as if he or she could trust me as a researcher, they would be more open to share candid thoughts. Additionally, I attempted to establish the insider status by sharing my personal background in sales and my motivation for this study. I concluded the first interview by scheduling a time for the second meeting. During the time between the first and second interview, I asked the participant to recall five specific examples (critical incidents) of when they were engaged in their role, along with the context and outcome of their engaging behaviors.

Second Interview

The second interview was scheduled approximately one week after the first interview and focused on the second research question: What engaging behaviors do inside sales representatives display at work? In total, 14 of the 15 participants agreed to participate (one participant said they were too busy and could not participate in a second interview). The interviews averaged 42 minutes in length. I started the second interview by reviewing the informed consent letter and asking the participant if they still agreed to participate in the study. When they agreed, I asked the participants to share five incidents of engagement in their role (see Interview Guide #2 in Appendix D). Although I asked for specific examples of engagement, 13 participants also volunteered examples of disengagement. For each incident, I asked for the context surrounding the incident and the outcome of the incident. I took notes of each critical incident in an Excel spreadsheet that consisted of four columns as follows:

Column 1.   Engagement or disengagement? Is the incident an example of engagement or disengagement?

Column 2.   Context: what is the circumstance or situation?

Column 3.   Critical Incident: What exactly happened? What was the specific event?
What part of the event did you perceive to be engaging?

Column 4.   Consequence/Outcome: What was the behavioral outcome of the event? How did the event resolve?

During the interview, I read each incident back to the participant for accuracy. In doing so, several participants added additional context and clarity to the incident. The second interview was recorded via Zoom; however, since the critical incidents were verified by the participants during the interview, transcription was not necessary. At the end of the second interview, I thanked the participant and asked if I could contact them via email for any additional clarification or follow-up questions.

Data Analysis

Data analysis is the process of making sense of the data (Merriam, 2009). Denzin and Lincoln (2000) noted that there is no one right way to analyze and interpret qualitative data; however, a series of methodological steps should be taken to ensure that "what has been learned [can be transferred] into a body of textual work that communicates these understandings to the reader" (Denzin & Lincoln, 2000, p. 313). Across both rounds of interviews, I performed thematic analysis (TA) to identify patterns within and across the interviews (Hesse-Biber, 2017). TA can be used with many theoretical standpoints and is often regarded as a useful technique for researchers (Gibson, 2019). I analyzed each set of interview data following the same four steps

recommended by Hesse-Biber (2017): (a) data preparation; (b) data exploration; (c) specification and reduction of data; and (d) interpretation. However, the analytic procedures carried out in each interview varied, which I describe separately.

Steps for Analyzing the First-Round of Interviews

Step 1: Data Preparation

The first step is data preparation, in which the researcher considers the type of data to analyze and how to go about the analysis process (Hesse-Biber, 2017). Informed by my interpretivist and constructivist views, I took five steps to ensure that I captured multiple levels of meaning. First, I conducted a thematic analysis to identify patterns in the data (Hesse-Biber, 2017). Second, because the interviews were recorded, I was able to analyze non-verbal cues and pauses after each interview and follow-up in the second interview with anything that stood out. Third, I utilized a 'playscript' transcription method, where I captured the script of the conversation (Hesse-Biber, 2017). I did this by downloading each interview recording from Zoom and uploaded it to the Otter.ai transcription website. Once the transcription was complete, I audited the transcript for accuracy. Forth, I assigned pseudonyms to the participants to protect their identity. I kept the names of the corresponding pseudonyms in an encrypted folder on my Texas A&M University computer. Fifth, I utilized member checking by emailing the edited 'playscript' transcript to each participant via a secure and encrypted website (TAMU Filex) and asked if they wished to change or edit any of their responses. In total, three participants responded and said that they did not wish to make any edits.

Step 2: Data Exploration

The second step is data exploration, which usually takes place throughout the data collection process where the researcher takes notes in the form of a memo (Hesse-Biber, 2017). Memoing enables the researcher to begin uncovering meaning in textual data by creating metaphors, comparing and contrasting, and clustering data (Hesse-Biber, 2017). Throughout the interview process, I kept a memo on a yellow legal pad where I recorded my thoughts and mood prior to the interview and the major themes and takeaways after the interview. I also took note of any questions that the participant did not understand and identified areas where I needed to follow up in the second interview. I took an iterative approach to memoing, which allowed me to continuously draw potential connections between emerging themes in each of the interviews.

Step 3: Specification and Reduction of Data

The third step in the data analysis process involves the specification and reduction of data, which is often done by coding (Hesse-Biber, 2017). Coding is a method of assigning meaning to chunks of text, which can be a single word, multiple words, or phrases (Hesse-Biber, 2017). For analysis, I used all three forms of coding outlined by Hesse-Biber (2017): (a) descriptive codes, (b) categorical codes, and (c) analytical codes.

To prepare interview data for analysis, I began by creating a word document after each interview that consisted of three columns: (a) themes; (b) sub-themes; and (c) best direct quotes (see Table 2). Next, I read through the edited transcript and created descriptive codes, which I called sub-themes in the word document, where I assigned a label or tag to the participant's words. I also added the participant's direct quote(s) that

correlated with the sub-theme. Once the sub-themes were created, I grouped the sub-themes into themes that went beyond the descriptive word(s). I continued this process with the 15 interview transcripts. I took an iterative approach and frequently went back to previous transcripts to note themes and sub-themes across participants. I kept memos of emerging analytical codes (i.e., themes) that I created each of the word documents corresponding to each interview.

Table 2
Example of the Themes, Sub-Themes, and Direct Quotes from each Interview

Themes	Sub-Themes	BEST Direct Quotes
What interested you in sales?	Relationship Building	I'm a very people-oriented person. And I like to build relationships. And I feel like I'm pretty good at it immediately off the bat. And I can build relationships pretty quickly. It's just something that I love to do. So I think that's what originally drew me to sales and just having that people, one on one with a person or like a group setting, and building a relationship.
What I like about the Organization	Supportive Co-Workers	But the main thing I love is just like the people in the company. They're some of my best friends and they're always supportive.
	Manager cares about me as a person	I have a really good relationship with my manager. We have a very good personal relationship. And he's helped me through a lot of things personally. He's helped me step out of my comfort zone, and made me vulnerable, which is what I want to do, because I'm constantly wanting to learn and grow.
	Added Responsibilities	He [my manager] has given me the opportunity to onboard, I think, seven new hires now. So, I've had that experience. Which kind of leads me into wanting to be more of like a sales management role, and like managing like the sales team. So, it's kind of helped open my ideas there.
	Autonomy in Role	I like the freedom of my role. I basically have my own choice on how I want to go about my day; how I want to do my tasks. There's no set guideline or structure to how to get it done. As long as I get it done by the end of the week.
	Transparent Leadership	I think the core values of the company are critical. I mean, I think one of them is being able to be vocal with any person in the company and calling them out and having a conversation about that. What do you think needs to change? Transparency is very, very big. I think that's pretty crucial. Especially from the CEO; when he's able to tell everyone exactly what's going on.

Next, I created a thematic map of the sub-themes. A thematic map is a visual representation of the sub-themes that acts as a way to identify themes in the data (Birks

& Mills, 2015). I did this by printing and cutting out the 140 unique sub-themes (duplicates were removed) on paper and arranged them in different ways to see patterns and potential themes and levels in the data. Through this mapping process, I identified a total of 11 themes.

Once the themes and sub-themes were created, I reduced the data in two steps. First, I combined the similar sub-themes and added a frequency column (i.e., the total number of times each sub-theme was mentioned by the participants) (see Table 3 for an example of the frequency column). The frequency column gave me an idea, visually, how important a specific theme was. Second, I removed all sub-themes that were mentioned by five or fewer participants. Because I utilized an iterative approach to data analysis, there were several times I changed the name of certain themes as I was reducing and collapsing the data.

Table 3

Example of the Levels, Themes, Sub-Themes, and Frequency of the Data

Theme	Sub-theme	Frequency
Motivations		
	Building trust with coworkers (don't want to let them down) and prospects/customer focused/not aggressive	5
	Create daily wins	
	When given additional responsibilities	5
	Positive belief in product/company/mission	9
	Full sales cycle	
	Doing quality work	
	Interacting with senior leaders	2
	Competitive	3
Times of engagement	Product/industry expert	5
	Making commission/success/incentives	5
	Closing/short sales cycle/following deal	8
	When the company is successful/working for the best company/recession proof/company future	6
	When prospect gets excited	3
	Being busy with multiple deals/fast pace	3
	Strategic thinking/creativity (in role)	4
	Helping/bringing value to customers/trusted advisor/pleasing/problem solving/fixing	13
	Internal selling	
Individual Needs	Continued growth/development (can come from multiple places); continued education (Duke); learning; Manager gives me constructive feedback/helps me professionally/coaches/honest	20
	Continued responsibility (mentorship)/ownership/quota/of career too	10
	Enablement (help sales org be successful)	
	Guaranteed money (salary)	
	Fun to work with high performing salespeople	
	Alignment between quota and what's achievable	
	Complex products that make you think/challenged	2
	Long training	
	Positive feedback about product from customers	8
	Autonomy of daily tasks/every day is different/autonomy of sales process	7
Team		
	Supportive co-workers/dependability/friendly/collaborative/cohesive	12

Next, I created analytical codes (i.e., levels) (Hesse-Biber, 2017) that capture a broader range of meaning beyond themes. The three levels I created were: (a) organizational level; (b) job level; and (c) personal level (see Table 4). Next to each sub-

theme, I added the frequency (i.e., the number of participants who mentioned each sub-

theme).

Table 4
Example of the Levels, Themes, and Sub-Themes

Level	Theme	Sub-Theme(s)
Organizational Level	Managerial Support	Commitment to employee development (15) Empathy (11)
	Continuous Training & Development	Self-directed learning (15)
	Organizational Resources	In-role resources (6) Work perks (5)
	Open Communication	Transparency (5)
Job Level	Job Control & Ownership	Additional responsibilities (15) Ability to close sales (8) Autonomy (7)
	Coworker Support	Collaboration opportunities (12)
Personal Level	Relationship Building	Ability to build relationships (13)
	Positive Outlook on the Organization	Belief in the organization (6) Belief in the product (9)
	Self-Efficacy	Feedback from the customer (8) Product expertise (5)

Step 4: Interpretation

Although interpretation is regarded as the final step in the data analysis process, I

simultaneously collected and interpreted data (Hesse-Biber, 2017) as a commonly

adopted practice in a qualitative study. Upon completion of each interview, I conducted

a within-case analysis and considered emerging themes; all of which I wrote in my

memo (Hesse-Biber, 2017). At this point, I also consulted with my dissertation chair and

my research methodologist to ensure I had an accurate interpretation of the data.

Steps for Analyzing the Second-Round of Interviews

Step 1: Data Preparation

For the second interview, I followed the same four data analysis steps (i.e., data preparation, data exploration, specification and reduction of data, and interpretation) as the first interview. As previously mentioned, I utilized CIT (Flanagan, 1954) and asked each participant to share five incidents of engagement in their role. I recorded the critical incidents into four columns in an Excel spreadsheet (see Table 5). I verified each incident with the participants during the interview, so transcription was not necessary. By asking the participants to elaborate or provide clarity on the context, incident, and consequence of each incident, I was able to ensure the trustworthiness of the data collected. In total, I recorded 89 critical incidents.

Table 5
Example of Critical Incidences Recorded in the Second Interview

Engagement or disengagement?	What is the circumstance or situation? (context)	What exactly happened? What was the specific event? (Incident)	What is the outcome of the event? How did this event resolve? (consequence)
Engagement	Given more responsibility: Manager allowed them to facilitate organizations cultural group for national Asian org.	Manager reached out to him to see if he wanted to be a part of this cultural org. that supported Asian businesses. His company paid for his membership, involvement, and travel associated with the org. "Gives me the opportunity to give back to my community during the pandemic. I delivered food from Asian restaurants to the local hospitals to help them stay afloat. I was helping support the frontline workers and that felt great."	Because the company gave him additional responsibilities, he made extra calls when he was working.
Disengagement	Had a cutthroat manager who was unsupportive towards employees and made unethical decisions.	Won a competition and had to go to lunch with this manager… he did not want to go; stressed about going to lunch. At the time, he was not performing, and he didn't want to get reprimanded. Manager was not sympathetic to me being new and I did not want to talk to him.	Avoids interacting with manager; makes more calls out of fear.
Engagement	His company gave him extra responsibilities: mentoring new reps.	Loves mentoring others. He "has their back." He wants to help them develop and find their career path. Likes talking to mentees and helping them be successful and being a resource for them.	Develops coworkers; communicates with coworkers
Engagement	Launched partnership (added responsibility) that would help him in his role; specifically onboarding new reps.	Company gave him extra responsibility to onboard new reps. He trains and develops new reps on how to have effective calls.	Collaborates with coworkers; develops coworkers

Step 2: Data exploration

Similar to the first interview, I utilized a yellow legal pad for memoing purposes—to track my thoughts as potential themes emerged in the data before and after the interviews, I took an iterative approach and considered how each second interview related to the previous interviews. I also consulted with my dissertation chair on my emerging themes throughout the data exploration phase.

Step 3: Specification and Reduction of Data

Coding the data in the second interview occurred in four steps. First, I identified the consequential behavior(s) of each of the 89 incidents. Each incident included one or more positive (e.g., makes more calls) or negative behaviors (e.g., makes fewer calls) demonstrated by each participant. In total, I identified 200 behaviors (133 engaging behaviors and 67 disengaging behaviors).

Second, I collapsed similar behaviors and added a frequency column to denote the number of times the behaviors were mentioned by the participants (see Table 6). Often, the participants demonstrated the same behavior in different instances. For example, two different instances (e.g., autonomy and managerial development) often resulted in the same behavioral outcome (e.g., making more calls). In total, I recorded 25 unique engaging behaviors (see example in Table 6) and 20 unique disengaging behaviors (see example in Table 7).

Table 6

Example of Engaging Behaviors with Frequency

Engaging Behaviors	Frequency
Makes more calls	23
Works after hours/when off work	20
Focuses on performance when there is a prize	14
Trains/develops/struggling co-workers without additional pay	11
Collaborates with co-workers	10
Takes initiative to solve problems for customer	9
Takes initiative to solve organizational problems	6
Seeks development from manager	5
Talks positively about the company/products	5
Seeks training opportunities from organization	4
Uses company perks (e.g., gym)	4
Follows through on managers orders	4
Socializes with co-workers in non-work setting	2

Table 7

Example of Disengaging Behaviors with Frequency

Disengaging Behaviors	Frequency
Does not listen to/communicate with/interact/respect manager	13
Makes fewer calls / Avoids making calls	11
Talks negatively about changes/organization/product to co-workers	9
Looks for jobs during lunchbreak/on clock	6
Shows no respect/questions changes for upper management	5
Does not put in extra hours / leaves early	5
Does not collaborate with co-workers	3
Does not seek additional training/development	2

Third, I created an Excel spreadsheet with each behavior and the correlating incidents that led to the behavior (See Table 8). Next, I modified the frequency of the behavior to denote the number of participants that demonstrated the behavior (e.g., 14 participants make extra calls as a result of being engaged) (See Table 8). I continued this process for each behavior that was mentioned by five or more participants. In total,

7 engaging behaviors and 5 disengaging behaviors were mentioned by six or more

participants (see Chapter IV for the full list of engaging and disengaging behaviors).

Table 8
Example of the Behavior and Incident that Led to the Behavior

Behavior	Incident
Makes extra calls (14)	Organization allows autonomy to solve customer problems (3)
	Organization encourages coworker collaboration (2)
	Manager cares about employees personal and professional goals (2)
	Organization trusts employee to take on additional accounts to help a coworker who was on leave
	Organization adjusts quota during COVID
	Organization regularly communicates status of potential layoffs during COVID
	Organization recognized employee in front of entire organization for hard work
	Organization offers individual sales incentives
	Organization allowed employee to interview for an advanced role despite not having required seniority
	Organization provides weekly training opportunities
	Organization allowed employee to break typical procedure (meet with customer face-to-face) to make a sale
	Organization provides in-office perks
	Manager protects employee from red tape and scrutiny from upper management
	Organization does not pressure employee to perform when they have personal emergency
	Organization empowers employee to solve organizational problems
	Organization provides in-depth product training
	Manager has done BDR role and has credibility
	Organization allows employee to see the entire sales process

Fourth, within each behavior, I collapsed the instances by creating sub-themes,

themes, and levels (see example in Table 9). In total, I categorized the incidents into

three levels: (a) job level factors; (b) organizational level factors; (c) and personal level

factors. Again, I continued this process for each of the behaviors.

Table 9

**Example of the Sub-Themes, Themes, and Levels of the Engaging Behavior;
Makes Extra Calls**

Level	Theme	Sub-Theme	Incident
Job Level	Job Control & Ownership	Autonomy	• Organization allows autonomy to solve customer problems
			• Organization allowed employee to break typical procedure (meet with customer face-to-face) to make a sale
			• Organization empowers employee to solve organizational problems, Organization allows employee to see the entire sales process
		Continued Responsibility	• Organization trusts employee to take on additional accounts to help a coworker who was on leave
	Coworker Support	Collaborative	• Organization encourages coworker collaboration

Step 4: Interpretation

Similar to the first interview, I took an iterative approach to data collection and analysis, which helped illuminate the themes that emerged. I kept the memo that included drawings of potential connections between behaviors and incidences. Again, I consulted with my dissertation committee chair for feedback on the emergent behaviors.

Once data analysis from the two rounds of interviews was complete, I compared the findings across interviews. In addition to the tables that consist of the most frequently mentioned behaviors, I also created a table, based on the second interview, to present the collapsed incidents (i.e., antecedents) that led to the specific engaging behaviors. Doing so allowed me to compare the perceptions of engagement from the first interview with the manifestations of engagement from the second interview. Such comparison is provided in Chapter V (Table 26).

Issues of Trustworthiness

Regardless of whether researchers deploy qualitative or quantitative methods, ensuring trustworthiness in all types of research is vital (Lincoln & Guba, 1985). As Frost and Bailey-Rodriguez (2019) reminded, conducting research that is impactful and useful to others requires a demonstration of rigor and evaluation of the research process. Therefore, to establish the highest levels of trustworthiness in qualitative research, I applied Lincoln and Guba (1985) four evaluation criteria to guide my study. They are (a) credibility, (b) transferability, (c) dependability, and (d) confirmability.

<div align="center">Credibility</div>

Credibility involves the level of truth in the research findings (Frost & Bailey-Rodriguez, 2019). Lincoln and Guba (1985) recommended certain techniques to increase credibility and levels of truth. For my study, I used member checking (Lincoln & Guba, 1985) because it is often considered to be the most crucial technique for establishing credibility (Lincoln & Guba, 1985). Member checking, which can be done formally or informally throughout the data collection process, affords participants the opportunity to correct errors, challenge interpretations, and volunteer additional information with regards to the data collected (Lincoln & Guba, 1984). After I transcribed each interview, I sent the transcript to the participants for review and verification. Three participants replied and mentioned that they did not want to make any changes to the transcript.

<div align="center">Transferability</div>

Transferability involves the applicability of findings in other contexts (Lincoln & Guba, 1985). Different from quantitative research where external validity can be

established and studies can more easily be replicated, qualitative research is more difficult to replicate (Lincoln & Guba, 1985). Specifically, achieving similar qualitative findings might not be possible given the differences in time, setting, and context of the data collection (Lincoln & Guba, 1985). The primary method for achieving external validity in qualitative research is by using thick description (Lincoln & Guba, 1985). Thick description involves a detailed account of the phenomenon where conclusions can be potentially transferable to different times, settings, and contexts (Lincoln & Guba, 1985). For my study, I used thick description and detailed the interview process and findings.

Dependability

Dependability involves an examination of the research process by an external inquirer or external researcher who is not involved in the study (Lincoln & Guba, 1985). The external researcher acts as a metaphorical auditor as Lincoln and Guba (1985) noted. In this sense, the auditor challenges the process and findings of the research study, thus, increasing the dependability (Lincoln & Guba, 1984). In addition, auditors can also provide important feedback that could lead to additional data gathering or stronger themes (Lincoln & Guba, 1985). On multiple occasions throughout data collection and analysis, I consulted with my dissertation committee chair who is an experienced qualitative researcher and provided constructive feedback as an external auditor.

Confirmability

Similar to dependability, confirmability involves auditing; however, confirmability adds specificity to auditing (Lincoln & Guba, 1985). This is often called an audit trail, which requires that the researcher keep a detailed report of the data collection and analysis process (Lincoln & Guba, 1985). Malterud (2001) stressed the importance of audit trails in that simply stating that themes emerged when analyzed by one or more researchers is not sufficient, rather "the reader needs to know the principles and choices underlying pattern recognition and category foundation" (p. 486). To aid in the creation of a detailed audit trail, Halpern (1983) recommended six categories for reporting information. They involve reporting: (1) raw data, (2) data reduction and analysis products, (3) data reconstruction and synthesis products, (4) process notes, (5) materials relating to intentions and dispositions, and (6) instrument development information (Halpern, 1983). I followed and reported on the first five steps outlined by Halpern (1983) during data analysis.

Role of the Researcher

In qualitative research, the researcher is often the main research instrument. Compared to quantitative research where researchers are objective and separate from the research, qualitative researchers are intimately involved in the research process—often with their thoughts, feelings, and experiences (Frost & Bailey-Rodriguez, 2019). Such personal involvement requires the researchers to be aware of what they bring to the research process and any influence they may have on it (Frost & Bailey-Rodriguez, 2019). A common way for a researcher to acknowledge their subjectivity in relation to their study and any impact it may have is called reflexivity or positionality (Frost &

Bailey-Rodriguez, 2019). Therefore, it is important that I share my background, experiences, and professional career that can facilitate the understanding of this study and my positionality as a researcher.

My Positionality

I was born in the late 1980s and was raised by my parents in a small city in the state of Maine, U.S.A. Growing up in a middle-class household through the 1990s and 2000s was peaceful; my parents rarely had to worry about me because the crime rate was very low in our city, and we had supportive and involved friends.

After college, I worked in an inside sales role for a large organization in Maine. After 12 months, I realized that the role did not fit my personality. Specifically, I wanted more autonomy and flexibility than I was afforded. Therefore, I resigned from the organization and pursued a graduate degree in Human Development. I knew I enjoyed the training aspect of sales more than the actual role. Two years later, I accepted a position at Texas A&M University and began teaching sales classes.

I believe that everyone is unique. People come from different backgrounds and have different goals. My experiences working with a diverse group of people have led me to be open-minded and considerate of all interests, strengths, and goals. In the workplace, I believe there is no 'one-size-fits-all' approach to employee happiness and productivity; rather, organizations need to be more aware of the differences in people. Thus, my research interests involve learning about the different thoughts and feelings employees have in regard to their happiness and engagement at work.

Based on my background in sales and interest in wanting employees to be engaged in their work, I was able to empathize with the participants in my study and keep an open mind to their workplace needs and requirements. Therefore, I consider myself an emotional supporter, a good communicator, and a salesperson beyond a researcher.

Insider/Outsider Stances

My prior work experience as an inside salesperson makes me an insider to this study—that is, I share a similar stance and have a similar background to my study participants (Dwyer & Buckle, 2009). However, it has been over a decade since I worked in an inside sales role; as a result, I am no longer a member of the inside sales population (Dwyer & Buckle, 2009). I may still understand the foundation of the sales roles in which the participants work, but I addressed the preconceptions I have towards the inside sales role—prior to my study. Nevertheless, my prior experience with inside sales enabled me to better relate to my participants and facilitate trust building between us.

Bracketing

Bracketing is a process to increase rigor, in which the researcher draws attention to any presuppositions related to the research context (Hesse-Biber, 2017). Because of my previous experience as an inside salesperson, I have preconceptions about inside sales. To increase rigor and bracket myself from the data, I asked open ended interview questions and did not lead with any personal opinions or experiences. In addition, I acknowledged my preconceptions in my memo.

Ethical Considerations

Researchers who desire to make a positive impact on society through research need to consider ethical challenges that can have negative repercussions. In qualitative research, there is proximity between the researcher and participants, thus, potential ethical dilemmas may arise. Therefore, ethical issues are critical considerations not just during the data collection process but throughout the entire research process—from the inception of the problem to the interpretation of findings. In addition to adhering to the guidelines set forth by the Texas A&M University Institutional Review Board (IRB), I have faithfully followed the 'ethics checklist' created by Patton (2002). They include: the following: (a) explain the purpose of the research; (b) promises and reciprocity; (c) risk assessment; (d) confidentiality; (e) informed consent; (f) data access and ownership; (g) interviewer's mental health; (h) have a go-to person for ethical advice; (i) data collection boundaries; and (j) ethical vs. legal considerations.

Explain the Purpose of the Research

In addition to explicating the research purpose in the information sheet for recruiting purposes, I clearly explained the purpose and potential research contribution to the participants, their workplace and society prior to each interview. In doing so, I strived to use accurate and jargon- free language when I was communicating with my study participants.

Promises and Reciprocity

To maintain a level of understanding, I did not promise anything that I could not deliver. I made it clear to the participants that their participation may not have any

direct effect on their workplace or role; however, their participation could contribute towards the advancement of knowledge in the field. I mentioned that it might also provide them with an opportunity for some critical reflection and career assessment.

Confidentiality

Since I was the one who interviewed the participants, anonymity was not possible. However, in a qualitative study, maintaining confidentiality is critically important (Patton, 2002). Doing so would hopefully allow participants to speak truthfully and freely without repercussions from the interview. To protect their identity, I give each participant a pseudonym and removed any identifiable information associated with the participants from the report of the findings. Additionally, I stored all the recorded interviews on a password protected computer on the Texas A&M University campus and these interviews will be deleted after three years.

Informed Consent

Prior to the study, I emailed an informed consent letter to each participant to provide them with a holistic understanding of my research project and their right as participants. . Additionally, at the start of each interview, I reviewed the consent form with the participants and addressed any questions or concerns they had.

Data Access and Ownership

I have stored any data associated with the study on a password protected computer owned by Texas A&M University. I only shared findings with my dissertation chair or research committee.

Interviewer's Mental Health

Although I was not negatively impacted by the study, I was prepared to go to my dissertation chair if I had any concerns. Also, if there was a need to talk about the experience, I was ready to communicate with my dissertation chair and committee.

Advice

Patton (2002) recommended that researchers have someone they can go to for ethical advice during the research process. My dissertation chair was the main person I went to when ethical issues arose.

Data Collection Boundaries

I made a concerted effort to remain sensitive throughout the interviews and pay close attention to each participant's comfort level. I did not press for information if I sensed that the participant was feeling uncomfortable.

Ethical vs. Legal

Patton (2002) recommends that the researcher develop an ethic philosophy that goes beyond what is required by law. Similarly, Hesse-Biber (2017) stated that knowing your own ethical standpoint as a researcher is an important first step. Following their advice, I have developed my ethic philosophy statement as follows:

> It is my responsibility to leave this world better than when I came in. With this commitment, I will conduct my research with the highest standard of morals, even if it means that my research is compromised or does not lead to the desired outcomes. Furthermore, I will not do anything that could potentially harm anyone involved in the research process. It is my goal to improve society and I will do so in an ethical manner.

Summary

In this chapter I detailed the research process. I started with a disclosure of my philosophical stance as a researcher and how my ontological and epistemological views influenced my selection of a generic qualitative design for this study. Next, I described the methods I used for participant recruiting, data collection, and data analysis. Finally, I addressed the issues of trustworthiness, my role as a researcher, and ethical considerations, all of which are critical to maintaining rigor of a qualitative study.

CHAPTER IV

FINDINGS

The purpose of this generic qualitative study was to explore employee

engagement from the perspective of inside sales representatives. The study addressed

two research questions:

1.   What are inside sales representatives' perceptions of work engagement?

2.   What engaging behaviors do inside sales representatives display at work?

To address these questions, I interviewed 15 inside sales representatives who

were employed in various sales organizations across the United States. The interviews

generated 206 pages of data, which I transcribed with the assistance of Otter.ai.

This chapter presents major findings related to the two research questions. I

begin with a description of the participants, including their general characteristics, work

experience, and career path. Following that, I present the participant perceptions of

engagement on inside sales, which provides the context in which the major themes

emerged through the data analysis process. Finally, I report the behavioral

manifestations of engagement based on the critical incidences I collected during

interviews.

The Participants

Fifteen inside sales representatives participated in this study, and Table 10

provides their profiles. For confidentiality, I assigned each participant a pseudonym.

The participants work for a variety of United States sales organizations and have a

minimum of one year of work experience at their current organization. This section

includes a description of their general characteristics, work experience, and career path.

Table 10
Participant Profiles

Name	Gender	Age	Industry	Job Title	Work Experience*	Work Location
Dan	Male	24	Technology	Account Manager	1 year 7 months	Remote
Robert	Male	23	Finance	Account Executive	1 year 10 months	In office
Brad	Male	26	Technology	Sales Representative	3 years 1 month	Remote
Jennifer	Female	26	Technology	Enterprise Account Manager	2 years 6 months	Remote
Macy	Female	24	HVAC*	Inside Sales Representative	2 years	In office
Lewis	Male	27	Finance	Account Executive	3 years 7 months	Remote
Beau	Male	22	FinTech*	Business Development Representative	1 year 1 month	Remote
Colby	Male	25	Technology	Inside Sales Representative	2 years 1 month	Remote
Maurice	Male	26	IT Tech	Sales Specialist	1 year 8 months	Remote
Mathew	Male	26	Sports	Account Executive	3 years 1 month	In office
Emily	Female	24	FinTech*	Enterprise Technology Representative	1 year 1 month	Remote
Megan	Female	23	Manufacturing	Marketing and Sales Representative	1 year 1 month	In office
Jessica	Female	25	Technology	Account Executive	1 year	Remote
Martin	Male	26	Media	Account Executive	1 year 1 month	In office
Calvin	Male	26	Legal Services	Inside Sales	2 years 5 months	Remote

*Note. Work experience = experience at the participant's current organization; HVAC = heating, ventilation, and air conditioning; FinTech = the combination of finance and technology

General Characteristics

My study sample included 15 inside sales representatives, ten males (66.6%)

and five females (33.3%). Participants' age ranged from 22 to 27 years with an average

age of 24 years. In terms of education, all participants are graduates of a four-year university in the United States. Thirteen participants (86.6%) hold a bachelor's degree and two (13.3%) hold a master's degree.

Work Experience

All the participants could be considered early career professionals based on their years of full-time work experience (less than five years). Of the 15 participants, seven (46.6%) were still working for their first post-college company, seven (46.6%) were working for their second post-college company, and one (6.6%) for their third post-college company.

Eight participants (53.3%) worked in a technology or related industry, such as FinTech (the combination of finance and technology). Other industries included finance, heating, ventilation, and air-conditioning (HVAC), sports, manufacturing, media, and legal services. The work experience of participants at their current organization ranged from one year to three years and eight months, with an average of one year and eleven months.

At the time of the interviews, ten participants were working remotely from home and the other five were working in the office. All 15 participants were working in the office prior to the COVID-19 pandemic.

Career Path

All the participants started their career as a business development representative (BDR) except one who started in a sales support role. Of the 14 participants who started as a BDR, 11 (78%) had been promoted. Despite their similar career paths, the

participants had unique perspectives about their experience in the entry level BDR role. This section presents the collective story of the participants and their individual career path, starting with their interest in the field of sales through the matriculation of the entry level BDR role.

Interest in Inside Sales

Nine participants (60%) cited their extroverted personality and desire to build relationships as the reason for starting their career in an inside sales role. Maurice was the only one to credit a sales internship he had in college as the trigger for his interest in the tech sales industry specifically. He shared,

> the easiest thing to highlight here is the importance of a strong internship. I was lucky enough to do some research when I was close to graduating and I decided that I wanted to try tech sales and ended up getting an internship, which got my foot in the door because as soon as I graduated, I was able to immediately start with the company.

Emily always knew she liked pleasing people. Whether it was the parents of a child she babysat, or her boss at a small boutique where she worked during college, Emily enjoyed winning people over. She excelled at the boutique, gaining loyal customers and selling clothes. After earning several bonuses, her boss recommended that she consider a career in sales after college. The affirmation from her boss solidified her interest in sales. She started at a FinTech company after graduation, and within the first 13 months of her employment, Emily received two promotions.

Emily credited her boss as the one to get her excited with sales, but most other

participants chose inside sales due to their personality and interest in working with

people. Both the youngest participant (Beau, 22) and the oldest (Lewis, 27) specifically

mentioned that their personality and desire to build relationships led them to choose

inside sales as a career.

> I'm a very people-oriented person and I like to build relationships. I feel like I'm
>
> pretty good at it immediately—it's just something that I love to do. I think that's
>
> what originally drew me to sales… and having the ability to be one on one with
>
> a person building a relationship. (Beau)

Lewis mentioned how his competitive nature and the reward system offered in sales

made for an attractive career option compared to some other careers (e.g., engineering),

in which there are fewer rewards. However, after working in sales for almost four years,

he realized that it was personal connections he made with customers and his coworkers

that had kept him in inside sales.

> My personality and the way that I respond to the reward system is what makes
>
> me passionate about sales. I'm an extrovert and when it comes to running a
>
> really well-done sales presentation, or when a meeting goes smoothly and I'm
>
> able to connect with that customer, I feel great, and I get this incredible energy.
>
> That's the reward for me and that's why I love sales. (Lewis)

Brad started his career in a field (outside) sales role, but his organization required him

to relocate multiple times in his first year, which led to him quitting to be closer to

family. His current role, a BDR at a tech company, which he found to be easier than

field sales. His ability to 'hide' behind a phone gave him confidence and he has thrived in the role.

> Inside sales is less intimidating, especially when you are young. It's tough to sell to people who are two or three times your age. So, being in inside sales gives me more opportunity to focus on my knowledge and talk to the person rather than being devalued for being young as soon as I walked through the door. Sometimes your voice resonates more than when you walk through the door and they see that you're fresh out of college. Inside sales gives me more of the opportunity to use what I know, rather than just being checked off immediately as I walk through the door. (Brad)

The BDR Role

The business development role is a common entry point in people interested in a post-college sales career. BDRs are typically responsible for making about 100 cold calls to perspective customers daily with a goal of setting appointments. Fourteen of the participants worked in a BDR role. The participants had similar stories of their experience in the role and their motivation to move to the next role.

Prior to starting, some participants knew the expectations and challenges of the BDR role and others did not realize the difficulty until they started. Jessica had graduated with her master's degree two months prior to starting at a major tech company. She knew the importance of understanding the role before accepting the position.

I did a lot of research beforehand and I asked people that already worked there what it was like. So, I knew, going in, that it was a lot of cold calling. I knew that, and I was okay with it. That's what I was signing up for. (Jessica)

However, Jessica did not realize the difficulty of the BDR role until she made hundreds of calls.

[In my role] as a BDR, I was on a team of nine reps cold calling. I did that for ten months, every day. I think it was about four or five months in when I was like, I really hate what I'm doing. I knew what I was getting myself into, but this is awful. That's when I had my first life crisis…what am I doing? Did I go to school to do this? I messed up. (Jessica)

Similarly, Jennifer worked at a major tech company, and she also understood the challenge of making so many calls every day.

In the BDR role, you're held to high metrics to get you acclimated to the fast pace of sales. Honestly, I think it's to thicken your skin…making 100 dials a day. But once you make an appointment, you pass the customer off to the inside [sales] rep who covers that specific territory. Same if it is a larger enterprise account, they would just take those leads from you. That's your role as a BDR…to call, set appointments, and pass them on, then it's up to the inside rep to close the deal. (Jennifer)

Making 100 calls per day took a mental toll on many participants. Jessica chose inside sales because of her desire to build relationships, but she was unable to do that in the BDR role. As a result, she was often yelled at by customers.

83

I'm a very talkative, outgoing person, and I was calling these people who don't

communicate well. They don't want to chat; they say no; they hang up on you

and you get no gratification. Even if they're interested and you get to pipe an

opportunity in the system, the BDR role isn't gratifying because there's no true

benefit. You aren't closing revenue; you're literally setting these arbitrary

meetings for someone else to close. (Jessica)

Robert started in a BDR role after he graduated college, but the repetitiveness of the

calls led to increased frustration, and he quit after three months.

I started in an BDR role, but I got bored with it because it was just call, set up a

meeting, hang up, call, set up a meaning, hang up. You just set the appointment

then hand it off to an account manager and they handle the relationship. (Robert)

Robert was one of the six participants who quit their post-college BDR role before

being promoted. For the others, they found motivation that pushed them to persevere

through the challenges of the role. For Jennifer, it was about getting through the role as

quickly as possible.

I did well pretty quickly through the demand generation [business development]

phase. The way that that role works is you typically serve between six months to

a year doing the demand generation BDR type of role. Then you move over into

the inside sales for about a year. As a BDR, all I could think about was getting

out of the role and into more of an actual selling role. The actual selling role is

where you are really incentivized to work harder. (Jennifer)

Dan was motivated by his coworkers and his competitiveness. He mentioned that "I got hired with a lot of people who were my age. Not all of them work here anymore but it was a good community of people my age." Even though he considered the entry level BDR role one of the toughest at the company, his competitiveness and coworkers drove him to perform in the top five [of about 40 people] for nine consecutive months. Similarly, Jennifer drew upon her competitiveness, which she knew would lead to a faster promotion.

> For me, I was trying to be at the top of the rank because if you hit your metrics consistently, you'll be up for a promotion. Based on how high you rank; you have a better opportunity to place in an inside sales role or leadership. So, for me, I focused on hitting my metrics consistently and I worked ten times harder, so I could get a better placement or just lessen the amount of time I had to do the BDR role. (Jennifer)

For Matthew, his motivation was his mental fortitude.

> I think you just have to do things that you don't want to do. You have to push yourself to do things that other people don't want to do, like cold calling. We all knew going in that it was gonna be cold calling, but if you have the ability to pick up the phone and smile and dial and just not worry about it, and work hard and stay focused, I think that gives you the best chance of getting promoted quickly. (Matthew)

Unlike many other participants in this study, Martin and Colby thought the BDR role was easy. Martin stated that the people he was calling were responsible for taking his call, which was not the same experience for the other participants. Martin explained:

> Starting out as a BDR, I accelerated through that really quickly by making cold calls. It was fine… you're talking to network admins and the people whose job is to take my call and determine if there's a need. So, I feel like there was some underlying professionalism between the customer and me. (Martin)

Like Martin, Colby seemed to get into a flow with the BDR role very quickly, which led to him thinking it was easy.

> The initial role was straightforward. Once you got a hold of the actual products themselves and the way that the company wants you to handle the sales process, it was pretty easy. It wasn't too taxing. Sometimes when you get your work done, you feel pretty good about what you've done that day, which was nice. (Colby)

After the BDR Role

Participants were promoted out of the BDR role as early as six months after they started, but some were still in the role after two years. In most cases, an account manager (or account executive) type role followed the BDR role. Account managers were responsible for following and closing leads generated by the BDR's. In Dan's case, he was given the choice of career path following the BDR role and he chose account management. For Dan, the freedom of career path gave him a greater purpose.

I'm in a position where I'm able to choose where to go [within my company] and there're a lot of opportunities where you can go. I'm very glad…It's one of the few times in your career where you get to choose your own manager, choose your own director, and choose your own product. I like the career path and the freedom of choice. (Dan)

As an account manager, Dan finally felt he was making a difference.

Everything that I do feels important. I am bringing deliverables and closing deals, which is money for the organization; versus in the business development role where I was just setting appointments. [In the account management role] I'm truly trying to help the customer. I'm truly trying to build relationships internally but also externally. That's the beauty of sales so far, and [through] account management, I get the opportunity to not only make relationships, but also get to dive deeper. (Dan)

Dan further explained how he was finally able to close the sale that he started in the first place.

You don't really get to see [the product of] the work you've done [in the BDR role]. Once you make that appointment, you're done. It's the account executive…it's the field representative who is responsible for nurturing that lead. Now, the little monotonous things that I do for the customer, everything means something. Versus before, in business development when you're sending that 1,000th LinkedIn message, it's kind of like, "wow, what am I doing?" And that's

what I tell people who are in business development that the grass is so much

greener. (Dan)

Despite the challenges and difficulties Dan faced in the entry level BDR role, he finally found his place and was making a difference in his customers' lives. He viewed himself as a "trusted advisor" and someone who was always there for his customers, no matter what. Similarly, Jennifer viewed her enterprise account manager role as one where she was able to solve customer problems, which led to a greater investment in the role. She said,

[The] problem solving aspect allowed me to just really get more invested in a

customer and in a deal, because in my head, I'm like, "Okay, this is a problem

for them, they might not see it, but the things in this proposal will outline that

for them."

Jessica felt that she had greater responsibility in the account executive role. The increase in ownership led to her feeling empowered and eventually higher pay.

I'm motivated because I have a quota attached to my name. I actually have to

close business to be successful and I'm in control of it. When I was making those

calls [in the BDR role], there was no end goal. Now, every cold call, every cold

email I make is leading me to meetings, which will lead me to close business,

which will get me to my number, which will get me paid. (Jessica)

Maurice was promoted to a hybrid role that was a blend of BDR and account management responsibilities. He considered the role a "steppingstone" that helped him succeed.

I got an opportunity to move to the junior account management team, which was

somewhere between the skills that you would learn as a BDR and a typical

account management sales closing role. It was your goal to talk to self-serve

customers and upsell them to enterprise plans. It was a quota carrying role based

on a specific amount of monthly recurring revenue dollars closed in Salesforce,

but you were still doing a lot of research, which was like cold calling. So, I did

that role for about six to eight months. So that was a nice steppingstone.

(Maurice)

The added responsibilities of the account management role also motivated Colby. He

said, "there're more expectations and more responsibility. Also, my quota has now

become the aggregate sum of all my reps that are underneath me."

Lack of Career Advancement

When Megan and Calvin were promoted out of the BDR role, they realized that

the advancement opportunities did not align with their career goals, which eventually

led to them quitting.

I looked around the office and realized that I don't want to be the office head and

I don't want to be the top salesperson. There is a lot of stress and anxiety no

matter the position… at the bottom or top, wherever. It wasn't for me. If I

looked around and wanted to be like those people, I would have been a little

more motivated, but I didn't. (Megan)

Similarly, Calvin, who was currently working as an account manager, expressed his

concern about the next role in his career, field sales.

I don't know if the traveling salesman is what I want to do and that's pretty much

the only opportunity for growth within this role or within this company. So that's

where I'm at right now…I don't know if I want to move up to that role, because I

don't know if that's the role that I want. (Calvin)

Reflecting on the BDR Role

The BDR role proved difficult for many of my study participants. Specifically,

46% of them noted that the role was repetitive, monotonous, and boring. Despite the

challenges and negative feelings incurred by the BDR role, all the participants reflected

on their time as a BDR with positivity and appreciation. Six participants (40%) noted

that the BDR role was necessary for their future development.

I personally wouldn't do it again, but it definitely gives you thicker skin,

especially if you don't have any sales experience or haven't gone through that

type of job in general. It was great because you get to talk to a lot of different

types of people and you become resilient to the fact that these people don't want

to talk to you. It's similar to when a telemarketer calls you and you just hang up.

You start to empathize for people that are doing this demand generation and you

carry that on into the inside role. (Jennifer)

Jennifer's competitive nature, combined with her training in the BDR role, led to her

tenacity in her next role.

I don't like to lose. So, I made it a personal challenge to learn resiliency in the

BDR role. We heard people say the worst things to us, and because of that I can

compete against anyone and I'm going to win, because I will figure out some

way to be the one that they pick. So, that part of it has kept me on my toes and it

makes it a lot more fun. The commission aspect is also a driving factor because

you don't go into sales for the base salary; you go in for the commission.

(Jennifer)

Colby also acknowledged that the skills he had learned in the BDR role would help him

in his future.

These are skills that I'm going to need, no matter what. In my professional life, I

will have to craft email responses and get on the phone with people. So, that's

why I've been working so hard to get better… making sure I can get out of my

comfort zone and having more effective conversations with people on the phone.

(Colby)

Collectively, the participants shared similar experiences throughout their early

career as a BDR. Thirteen of the participants started as a BDR and were now in the next

role. Although they each faced different challenges in the BDR role and channeled

different motivational tactics to get themselves through, they all managed to find

purpose and enjoyment as a BDR.

Perceptions of Engagement

This section reports the perceptions of engagement shared by the study

participants in response to the first research question: What are inside sales

representatives' perceptions of work engagement? Table 11 summarizes the relevant

themes and sub-themes. Also included are the number of participants that mentioned

each sub-theme, which is indicated by the number in the table (e.g., all 15 participants

mentioned commitment to employee development). Only those themes that were

mentioned by five or more participants were included.

Table 11
Summary of the Perceptions of Engagement

Level	Theme	Sub-Theme(s)
Organizational Level	Managerial Support	Commitment to employee development (15) Empathy (11)
	Continuous Training & Development	Self-directed learning (15)
	Organizational Resources	In-role resources (6) Work perks (5)
	Open Communication	Transparency (5)
Job Level	Job Control & Ownership	Additional responsibilities (15) Ability to close sales (8) Autonomy (7)
	Coworker Support	Collaboration opportunities (12)
Personal Level	Relationship Building	Ability to build relationships (13)
	Positive Outlook on the Organization	Belief in the organization (6) Belief in the product (9)
	Self-Efficacy	Feedback from the customer (8) Product expertise (5)

Level One; Organizational Factors

This level focuses on the role of the employer in enhancing individual

engagement level as identified by all the 15 sales professionals interviewed. While the

participants mentioned a number of organization-level engagement boosters, they can

be categorized into four themes: (a) managerial support; (b) continuous training and

development; (c) organizational resources; and (d) open communication.

Theme One; Managerial Support

According to the participants, their manager had a profound impact on their

perceived engagement. All 15 participants discussed how their manager played an

important role to engage them at work, especially when they were in the entry level BDR role. Macy said, "[Your manager] plays a big part in your first job because you know, it's hard once you get out into the real world. .…[If] you don't have a great boss that's leading you, it's really easy to just give up." The participants described situations where their managers were either supportive or unsupportive of them. In some cases, the participants' manager's support was so strong that they followed their manager to a new organization. For example, Martin acknowledged that "the reason I went to my current company is because I followed this guy [my previous manager]. He's a great, great manager." In Jessica's case, her manager continued to support her even after he had been laid off by the company.

> My company just did layoffs; 300 people and my manager got let go. My
> manager is like 89% of the reason that I'm obsessed with the company; he
> interviewed me. From the interview, I knew if I work at this place, I want that
> guy to be my manager. He was my manager. And then he got let go, just
> recently. So, even though he doesn't work for the company anymore, I am still
> able to call him. In fact, I just got off with him right before I got on here with
> you. I was on the phone with him for 20 minutes, just talking about career
> progression [and] he's still willing to be a mentor. (Jessica)

Five participants credited their managers for their increased engagement and willingness to do more for the organization. Martin put it this way:

> It's having managers that trust you to handle your business; they trust you to
> contribute to the team…that makes me want to do more for the company. That

93

makes me want to close business for my manager. I respect the hell out of that

dude. I want him to be successful. I want to be a star player on his team. Yeah, I

mean, he's earned it; He's earned it and I care so much about contributing to and

helping the team because of the respect that they've shown me.

Thanks to continuing managerial support, the bond between the manager and participant

grew stronger over time. The two most common managerial traits highlighted by my

participants were (a) commitment to employee development and (b) empathy.

Theme one; Sub-theme one; Commitment to Employee Development

The aggressive goals in the BDR role require that representatives learn how to

sell to customers quickly and effectively. The participants rely on their direct manager

to provide specific feedback and coaching to help them improve. Lewis explained:

[My manager] was all about feedback, constructive feedback. She wasn't shy;

but she wasn't mean, she wasn't. She had expectations, but she knew that I

needed to grow into those. And she wasn't shy to tell me, "hey, look, this is what

you need to do to improve." She had the opportunity in that role to listen to my

calls. That was a role where our calls were audited. They were able to hear our

call flow, how we handled customers, how we approached them, and

deconstruct that. And she was really good about saying, "hey, you're great at

this, you're fantastic at this, these are where you're checking the boxes, but your

call time is really long and that's affecting you." She was also very clear with

where I excel and what I should continue doing but just tweaking it a little bit.

Jessica's manager made sure she was going to be successful when she was calling

customers. Jessica described her manager's approach in great detail:

> He was very willing to sit in the trenches with me and help me, but was also
> hands off whenever I needed him to be. He expected a lot, but he was always
> available, but he wasn't micromanaging. He made sure I was doing X, Y, and Z
> every day. My personal favorite thing about him is that he would join calls with
> me sometimes at the beginning, when I was new and I didn't really know exactly
> what I was doing, or what I was saying sometimes, and he would let me make
> my mistakes, which, in those moments, where mock calls and your face gets hot,
> you literally don't know what you're doing and you just start saying words. Do
> they make sense? No. Then afterwards, he'd be like, "alright, what just
> happened? Let's talk about it." I learned a lot quicker that way, by failing upfront
> and then working from it. He was always super encouraging, even if we weren't
> bringing in the deals that were expected to come in or like that.

Similarly, Jennifer shared that her manager took the time to understand her

developmental needs and adjusted his coaching style accordingly:

> For him, [development] was more so of I am going to get you to where you need
> to be and I'm going to make you a better rep. So, [he] adapted himself to every
> individual on the team based on what they needed. And that worked out well
> because any rep that came from him, everyone knew "oh, that person's good."

Theme one; Sub-theme two; Empathy

95

In the BDR role, it is common to have both successful and unsuccessful days. In some cases, participants went several days without setting an appointment. However, the stress of underperforming was reduced when the manager was empathetic and demonstrated care and compassion towards the participants. For Macy, her manager built a foundation of empathy from when she first started.

When I first started in my role, about once every other week, we had a meeting and we talked about how it was going. He asked if I needed anything. Then there were other instances where something is going on at home and I have an emergency and he didn't make it a big deal. There's a lot of trust between our boss and the team. He doesn't make you feel like you should be scared for your job. He makes you feel like you are the team, you know, and you are important. (Macy)

Martin was working for his second post-college organization when his wife was hospitalized due to complications with their newborn child. Despite his high sales goals, his manager "knew that the priority was my wife's health and my baby's health and so he understood that my position right now is one where the kiddo is the priority." The extended hospitalization forced Martin away from work longer than expected, which led him to achieve zero deals for the quarter or "0% attainment" as he described. Normally, this would be a dire situation for any sales representative, but Martin was not stressed for a good reason.

The most underlying feeling is that I'm not stressed, and I know I don't have to be stressed. I know my manager; I know my leadership. I know the team and

they know me; they know I perform. So, when I'm really down, they know that

there's a reason; they know why I'm out of the office. And I do not fear for my

job security. (Martin)

Martin was so thankful for his management teams' support and empathy while he was

out of the office that he sent an email to his manager and VP on New Year's Eve to

express his gratitude. During our interview, Martin offered to read this email to me,

which goes as follows:

Hey, guys, so my wife had the baby on Christmas Eve, (this is New Year's

Eve), and we've been in the hospital five out of those seven days; very, very

stressful time; to update you, both my wife and I were able to return home late

last night. She and the baby are both very healthy and we couldn't be happier to

be in our own house again. This last week has been incredibly stressful,

especially these last couple days. And as my wife and I have been speaking,

there are a few key things that we are grateful for, one of which is this company

and you [my managers] as my leadership. As we've been wrapping up this

calendar year, it is common knowledge that this is the ultimate crunch time for

sales organizations. So many sales orgs only see numbers and forego the human

element, which is so important. And thankfully, on our team, not once did either

one of you guys even hint at me getting online for a call, or asking me to close

deals.

Like Martin, Beau was also grateful that his manager cared about him personally; not

just the metrics he was responsible for.

97

I have a really good relationship with my manager. We have a very good

personal relationship. And he's helped me through a lot of things personally.

He's helped me step out of my comfort zone, and made me vulnerable, which is

what I want to do, because I'm constantly wanting to learn and grow. (Beau)

In Emily's case, even when she was underperforming, her manager maintained calm

and empathetic, which ultimately contributed to her success. Emily explained:

I had a new manager who didn't stress out if I went one week and didn't [set an

appointment]. She would just always approach it as, 'Okay, no problem, not a

big deal. Let's see what you're doing. Let's go through the emails that you sent,

pretend I'm a customer. What would you say to me if I was on the phone?' She

would pull up random people and she would go through my process and help

me. The fact that she never guilted me made me want to work even harder,

because I liked her…Because I wasn't stressed out. I could take a few steps back

and look at my process and the tiny details and figure out what works the best.

The lack of stress helped a lot. I immediately started enjoying my job.

While the participants provided ample examples of the support they received

from their manager, five of them also described specific situations where their manager

was unsupportive of them. Although I did not identify it as a major theme, it is worth

reporting, because these accounts provide additional insights into the topic of my study

by showing illuminating factors that lead to employee engagement. To these five

participants, the lack of support made them feel like they were "just a number;" if they

were not selling, they should fear for their job. Megan tried to look at the bright side

and teach herself, but she still ended up feeling stressed. She stated that "a lot of it is stressful, because I either have to figure it out, or find another way to do it, or learn myself, or go teach myself."

For Maurice, not only was his manager unsupportive, but he also intimidated his DBR's. He shared the following observation:

He smoked two packs of cigarettes a day. And he would always be wandering between the smoker's area of the parking garage and his desk. And he had a baseball and a little baseball bat on his desk that he would toss up; he loved typical management intimidation tactics. He was really a terrible person to work for. He didn't really seem to care about the individual people in the [organization] or even how to make the organization more successful. (Maurice)

Emily, who was 13 months into her career, recollected the lack of support from her first manager. When Emily was new in the role, she needed support more than ever; however, her manager's developmental advice was to "make more calls" rather than help her improve.

I had managers who used more of a 'I'm gonna sit here and make you worry and make you think that your job is at stake …so get higher numbers, get higher numbers,' and that never really helped. When I would come to him with a question, 'Hey, I know that I didn't make as many calls or as many as I wanted to, what can I do that would make it better?' He would always just give us the same answer, 'Oh, you just need to call more.' So, I doubled my calling, and while everyone else was making 80 to 100 calls I was making 250 calls. I'm not

kidding, because I want to be good at this and I was the newest person. So, I did

what they told me to do, which was call more but it didn't work. (Emily)

Calvin was working for his third post-college company and had interacted with

both supportive and unsupportive managers since graduating from college four years

prior. He shared a similar experience with Emily. His manager recommended that he

should 'work harder.' He added that, "Those [managers] are very much like, 'bro, just

sell, just make the sale, …just get on the phone and make the sale.' And we're like,

"we're trying to do that, but the [prospect] list you gave us wasn't good."

Matthew felt uncomfortable showing weakness to his manager, so anytime he

needed help, he went to someone else.

I guess his door wasn't open. I wasn't available to him. Or he wasn't to me. But I

didn't necessarily want to show him my weaknesses; things that I really need

help with. So, if there was something that I personally wanted to work on, or

something that I wasn't comfortable with yet, I would go and talk to someone

else. (Matthew)

In summary, managerial support was the most frequently mentioned among all

the emergent themes. Specifically, the developmental opportunities offered by the

manager and the empathy displayed by the manager are perceived by the participants as

the two most important influencers on individual engagement. Conversely, according to

the participants, the lack of support from the manager would lead to their

disengagement at work.

Theme two; Continuous Training and Development

Different from managerial development, the participants also highlighted the importance of continuous training and development provided by their organization. All 15 participants had little previous experience prior to starting their career, so they relied on the organization to train them. Megan shared that:

> I don't think I would have been as engaged in this role if I wasn't trained because when I started, I knew nothing. But I felt confident right off the bat because during the initial training they said that we're going to teach you everything you need to know, and you can come to us if you don't understand something…there will always be somebody that will help you. (Megan)

For most participants, the initial training was similar and consisted of classroom training to learn about the product/service/organization and mock role-playing exercises with managers or coworkers. Calvin was given a script to practice from, which he felt was helpful for training purposes.

> They were pretty big on scripts; they wanted you to read their way of doing it. I prefer not going off a script, but I also understand the importance of the script for training purposes, it is helpful, and it makes a little bit easier to get in the groove. (Calvin)

Macy worked in the HVAC industry and her training was a yearlong, which was different from the other participants.

> It was a yearlong training process. There were nine of us all over the country, and we'd meet at the corporate office once every other week to receive product training and sales training. It was during the training program that I decided I

wanted to be an inside sales rep because I would get to work closely with the

territory managers and that's what I wanted my next role to be. During training

[the organization] focused on what you wanted your future to be, and they

wanted to help you get there and grow. So that was my biggest thing—working

for an organization that was invested in us and our growth. And they would take

us around and point out that person's been here for 40 yours and they started in

your position, so you can be them. (Macy)

Theme two; Sub-theme one; Self-Directed Learning

The participants viewed training and development as continuous and needed for

their success.

I think a sales bootcamp and continued education is so important. How else are

you supposed to check in with those people's efficacy? The leaderboard doesn't

tell you a lot about how they're actually going to progress in the following

quarter, so you have to constantly teach them. (Maurice)

The participants shared various methods on how they received continuous

training and development. Jessica, who was working for her second post-college

organization, explained how the self-directed nature of her organization gave her the

ability to continuously train on her own.

The product at my current company is very intuitive and easy to learn. So, I

spent a lot of time after training, getting into my demo environment, learning it

myself. Because I was able to use the demo environment and practice, after two

to three months, I was prospecting into my own business, setting my own

meetings, running demo calls, helping with implementation, and seeing and

understanding the benefit that I was bringing to customers. (Jessica)

Similar to Jessica, Megan's organization left it up to her to find and recommend

additional training opportunities. Megan realized she needed additional analytics

training, so she found a continuing education course and her organization paid for it.

I know that I don't know everything… and I'll never know everything about this

industry. For example, I created a website and there were things in the analytics

portion that I knew were lacking as far as search engine optimization went. So, I

found a class and I presented it to the owner. And he paid for me to take an

online course so that I could do all the analytics in house versus reaching out to

somebody and paying them ten grand every six months. So, there are a lot of

things that I don't know because I don't have that much experience. But if I can't

figure it out on my own, I just ask for the support, or I go find it and teach

myself. (Megan)

Matthew sought continuous training and development from anywhere he could.

He mentioned that training comes from different places, including his manager, other

coworkers, and outside sales training organizations.

[My manager] was really big on training, but if he wasn't personally helping us,

we had two more guys who used to be in the role I'm in now. They were trying

to get promoted to a managerial role. So, every two weeks we would do our own

in-house training through them. Interestingly, they weren't my manager or

director; they were just people in the role above me who wanted to take the next

step in their career, which helped me a ton. Having either my direct manager or

the people above me helping me every two weeks, we do role plays, we read

through scripts, read some type of article. And then beyond that, we have an

outside sales training group that comes in twice a year. (Matthew)

While the participants provided examples of the continuous training and

development they received from their organization, four of them described situations

when their organization failed to provide training and development beyond the initial

new-hire training. Although I did not identify it as a major theme, it is worth reporting,

because the accounts provide additional insights into the engagement of the participants.

The lack of training and development led to stress, boredom, and frustration. At

Megan's first organization, she explained that "a lot of it is stressful; I either have to

figure it out myself or find another way to do it." When Beau asked for additional

training, his organization did not respond.

We don't have any development or trainings. We don't have anything like that.

We've literally asked about it because we want it, whether that be like LinkedIn

training, call training, even having emailing workshops. Now it falls to us—it's

put all on us. The only way I think I have grown and developed is because of the

onboarding I do with new interns. (Beau)

In summary, continuous training and development offered at the organization-

level was mentioned by all 15 participants as an important influencer on their

engagement. After the initial training at the start of the role, all participants sought

opportunities for professional development. Some took a self-directed approach and

found opportunities to learn on their own, while others leaned on others in the organization. A lack of continuous training and development led to stress and disengagement.

Theme three; Organizational Resources

Eleven participants shared various ways in which their organization provided resources that contributed to their success and engagement. The two most common resources identified were in-role resources and work perks.

Theme Three; Sub-Theme One; In-Role Resources

In-role resources include subject matter experts, tools, software's, and pieces of hardware that the organization provides that help employees do their job effectively. Dan describes several resources he received to get his job done.

> [My organization] has so many resources. When you go to the enterprise and key account levels there are different people that exist simply to support you—acting as hands-on accounts. I think it's pretty remarkable. You have technical people; the customer staff people that support me in my role. It is remarkable how many tools and experts I have to work with. (Dan)

When the pandemic forced Colby to work from home, his company allowed him to bring his computer peripherals home, which he appreciated. He said, "A month after we started working from home, they let us go back into the office and take additional monitors and our office chair—we already had docking stations and laptops for working from home before COVID."

Brad was given a stipend from his organization to buy additional office equipment and computer peripherals. The stipend helped him create a home office set-up, for which he was very thankful.

> The big thing was that they gave us a stipend for work from home. They knew we were all working from home, but I personally didn't have a desk, I was working for the first two to three months from my kitchen table or from my dining room table. So, they gave us a stipend to get a desk. They also let us borrow computer monitors and chairs from the office. So they made sure we were set up at home. I think getting a desk and borrowing a computer chair helped me in my job. Before, I was literally sitting at my dining table sprawled out—I have a second monitor now and it's helping me do my job better. It's better than sitting on a laptop in front of your TV. So, I think they knew that if they want to get the best bang for their buck, while we're all remote and not missing opportunities to stay productive, they have to dish out a little bit. I think they knew that, and it's helped us; it's helped me immensely. So, I can't thank them enough for the decision to do that. (Brad)

In addition to the home office set-up, Brad's company also adjusted his quota and pricing packages that he sold to his customers. His organization knew that the pandemic would negatively impact his customers purchasing decisions, so they made an adjustment so that the inside sales representatives would be able to effectively sell.

> They adjusted some of our pricing and packages for our customers so we could still pitch them, but we could be empathetic to their situation if they were

financially impacted. We were pretty much taking a hit [financially] in some of

these packages, but the organization knew that year over year we were going to

get the return on investment for the time they were helping us be able to actually

sell. So that was a big thing. (Brad)

Theme Three; Sub-Theme Two; Work Perks

Different from in-role resources, work perks include non-work-related company

benefits. According to Emily, work perks were provided to build culture. Interestingly,

during the 13 months of work since graduation, Emily had spent only two months

working in the office. She was forced to work from home when the COVID-19

pandemic began. Despite her short time in the office, she spoke highly of the work

perks her organization (a FinTech start-up) provided, such as a beer fridge, free lunch,

and a ping pong table.

There's an office happy hour every Friday; a beer fridge that's fully stocked full

of every kind of liquor, beer, champagne…whatever you want; you can also put

in requests. There's ping pong and mini golf. There are board games

everywhere; there're all kinds of stuff you can do. [The organization] is very

purposeful in making sure that we create bonds with our fellow employees. [The

organization] does a lot of things to make you want to work hard and make you

want to stay with the company—like being able to enjoy your coworkers and

random little things like that make it fun. It's the little things that make it such a

fun environment and makes me want to stay at the company. (Emily)

Colby's organization allowed him to work from home one day per week once he passed a certain goal as a BDR. He looked forward to working from home one day each week.

> You can sleep in for one. So, it's nice being able to roll out of bed and open your laptop up at 8:00am. Obviously, you get off [work] and you're already at home. So, you just leave the house to go straight to the gym. Not having to deal with traffic, being able to cook at home, and take a nap at lunch were benefits. (Colby)

Dan's organization allowed him to spend a workday volunteering each month. Dan knew that the organization was losing eight hours of worktime, but he appreciated that his organization gave him the opportunity to give back to the community. Dan likened volunteering to stress relief and was "what gives me the drive to not get burnt out in the role."

While the participants shared examples of the organizational resources they received, two of the participants mentioned the lack of organization resources, which affected their engagement. Although I did not identify it as a major theme, it is worth reporting. Beau's company did not adjust his quota or product pricings despite that fewer people were buying. The lack of resources made it difficult for him to do his job effectively.

> No one is hitting quota. No one is getting anywhere near it. We've had one girl who started when I started, who hit quota since COVID. Everyone else is nowhere close. So, we've been trying to get that restructured, how quotas are

made, because we feel like no one is hitting anywhere near their commission

checks. No one is hitting anywhere near quota. And with us being a high-

performance culture, that's what our performance reviews are focused on. And

now they're trying to say we can't blame things on COVID. I feel like you can't

have an accurate depiction of how our performance has been this year and in

these performance reviews due to that aspect of COVID. (Beau)

Martin recalled a vivid example of a time when he was denied a new software
system that would benefit him in his role. He eventually left the organization.

We were using HubSpot as our CRM [customer relationship management

software], but it's not really intended to be a CRM; it's intended to be a

marketing tool. So, we consistently asked, 'can we get on Salesforce?' Our team

is small and [the amount I would have to spend] is limited. We had two different

folks [in the organization] who both said, 'we want Salesforce,' and we had two

different marketing leaders both saying that they want Salesforce, and [the

organization] just said no. What it came down to was them saying, 'if you can't

perform well with the tools you're given, then why would we give you different

tools?' I think of the kitchen example…it's like a great chef can cook with

anything, but why not give them a good chef's knife? It's the all-purpose tool.

Gordon Ramsay could make a great meal with a butter knife and a spoon, but

he'd have a much easier time with a chef's knife, right? So, if you have the

proper tools and if you have the means to adopt the proper tools, then why

wouldn't you? So, that was extremely frustrating. (Martin)

In summary, according to my study participants, work perks and in-role resources increased their perceived engagement. Whether it was a beer fridge, an opportunity to volunteer during work, a stipend to buy home office furniture, or a quota adjustment, the resources provided to participants led to their higher engagement at work. On the contrary, a lack of resources resulted in increased stress, frustration, and disengagement.

Theme Four; Open Communication

Five participants mentioned the importance of open communication between upper management and the lower-level B4DRs. Since a manager often acted as a liaison between the BDR and upper management, the participants specifically noted the importance of transparency and accuracy of information when it flows from upper management down to the BDR.

Theme Four; Sub-Theme One; Transparency

Participants noted that transparency was most important at the height of the COVID-19 pandemic as they feared they would lose their job. Beau described that "transparency is very big. I think that it's pretty crucial, especially from the CEO; when he's able to tell everyone exactly what's going on." Brad shared that his organization was transparent throughout the pandemic and it increased his engagement in his role.

> They kept us up to date and informed on information. At the peak of COVID, we had weekly all-company meetings from our CEO who gave us updates on the situation, where we're at with opening offices, etc. There wasn't a lot of information being hidden, which was really nice. So, we didn't have to guess and

check. There weren't a lot of rumors going around and they were very upfront

and transparent about everything that was going on with the company and just

the industry in general. I'm really appreciative for how they've responded to

COVID internally for their sales team, because a lot of us were worried that, I'm

not going to make any money this year, or I'm going to be living off my base, or

I'm gonna be in a situation where I'm not going to be able to hit quota. I think

they've set it up in a way that's really empathetic to us. And I think that really

helped me. I want to stay engaged because they're giving me something; I want

to give them 110% and I feel like I fulfilled that. Even going forward, I'm going

to continue to do that when we do return to some sense of normalcy, because

they were so resonant to our pains at this point. (Brad)

 In addition to transparency from upper management, Beau, Megan, and

Maurice all mentioned that upper management should be open to listening to

recommendations from BDRs. Beau called this an open-door policy, which was a core

value at his organization: "I think the core values of the company are critical. I think

one of them is being able to be vocal with any person in the company and calling them

out and having a conversation about what needs to change." Similarly, Megan

acknowledged that open communication helped her succeed. She said, "it's open

communication. If you don't understand something, there's somebody that will help

you."

Maurice thrived when upper management listened to recommendations and

improvements he had with certain internal processes.

I'm pretty open to recognizing problems and presenting solutions. So, there have

been four or five times, in the last year and a half or so, that I felt like there was

a process that was either ineffective, wrong, or backwards, and I was able to say,

"Look, I think that we should be doing things differently," and then we made the

change, and we were better off for it. Any company that fosters any sort of

open-door policy for you to be able to actually say what the company lacks is

important. I started recognizing some very severe problems with the launch that

we just had, and I wrote a ten-page memo that got circulated within our product

organization and got three out of five problems fixed within six weeks, which

was very empowering. (Maurice)

While the participants provided examples of open communication within their

organization, more participants (40%) described situations when their organization

lacked open communication. Although I did not report it as a major theme, the accounts

provide additional insights into employee engagement. Beau thought that the CEO of

his organization was transparent about the future of the company; however, a

breakdown in communication occurred with middle management.

I think there's transparency coming down from the CEO to the company as a

whole. We know that in the next three years, we're expected to grow three times

our current size and we're hiring like crazy. They told us how many people they

want to hire this year, but the transparency falls from my manager. Ultimately,

that's where the decisions about our promotions fall. So, I think there's great

transparency between the CEO and everyone in the company. But I think when

it all comes down from mid management to us, there is disconnect. (Beau)

Beau was supposed to receive a promotion, but the pandemic forced his organization to freeze hiring and promotions. Although he understood the reasoning behind the freeze, he received little communication from upper management about when the freeze would be lifted. Additionally, he noticed that the organization was still growing, and they were hiring externally, which increased his frustration.

The target time to be promoted to the next role is six to eight months. That's what they tell us when interviewing. You're supposed to move up that fast because you're able to hit quota, especially with how the company has grown. But COVID delayed everything because they did a hiring freeze and promotion freeze. That's the side of things that has been irritating as well, because we started realizing that the company's still doing well under the circumstances and they started hiring externally. So, now we have people filling roles that we were supposed to get, which, as you can imagine, irritated quite a few people. Even my manager doesn't know about things. Sometimes we learn things from the account executives that [my manager] doesn't know. And he's like, I don't know why I'm just finding out about this. I feel like that's something that I should be telling my team. So that's where the disconnect falls. (Beau)

Jennifer also experienced a lack of communication between her lower-level position and upper management. Specifically, she mentioned that upper management was unaware of the issues she faced in her role.

113

I've had conversations with leaders in the organization… I even expressed this to

the VP just to bring it full circle and to provide more context as to what's going

on. Usually, if you're that high up, you might not know what's really going on

behind the curtain. And until people leave, they're not going to believe it

because they have blinders and think that everything is fine, everything is

perfect. But now we're starting to see more and more reps are leaving [the

organization] and I think those at the top of the leaderboard are not happy that

they're being passed up for a promotion. That's when a light bulb moment will

hit to those particular like VP'S, and either something will change, or someone

will step down. (Jennifer)

The lack of communication throughout the organization led to Maurice to quit

his first job. He reflected on his experience:

It was a very fragmented [organization] as well. I was one of the top salespeople

in the company year over year and I never felt like I had the platform to go to

the product org and say, "hey, I'm seeing these issues. What are your thoughts

on these? Do you care about these the product or it was kind of like a separate

nebulous entity?" I think that should have been a much bigger red flag at the

time. (Maurice)

Colby was frustrated every time his organization made a change without

explaining the rationale for the change. In the back of his mind, he was sure the change

was warranted, but it was never communicated.

I definitely like having insight behind why they're making decisions. I'm not necessarily really good at being told something and being gung-ho about doing it just because you said so. I believe there's insight and reason behind why we're doing something even if it's not something I like, as long as it makes sense, I don't have any problems doing it. And it doesn't have to make sense…I'm not gonna say "no," I'm gonna follow the rules, but the more insight that you can provide, the better. (Colby)

Colby further elaborated this point by sharing a few specific cases where changes were made without any explanation. For example,

A lot of the time, almost all rules they add, there is this sense across the [sales] floor of, well, now you're handcuffing me and expecting me to sell even more in the next quarter. We have certain ways that have proven effective to be able to find customers and make sales, but when you finally start getting into a groove, they're like, "hey, we're going to increase your quota by 30%, and by the way, you can't do any of the things that you were just doing to find customers." So, overall, it kind of hinders us more than it helps us when they start adding rules. (Colby)

As for Martin, although he was in an entry-level position, he had no problem raising concerns to upper management when he thought there was an issue.

I was vocal about anything that bothered me if I saw something in the company that didn't make sense. I feel like [the organization] was dishonest and that they were trying to pull the wool over our eyes. I'm sure people observe that

behavior from their employer all the time, but I feel like people don't speak up

because they're afraid. (Martin)

However, speaking up can lead to serious consequences such as losing the job. At an

all-company meeting, Martin raised a concern to upper management—specifically, the

CEO, who did not appreciate his candor. up.

I was pretty vocal about their ridiculous sales growth goals. Finally, I spoke up

and I said, "I see these numbers of how we're supposed to grow month over

month, and we're not even close. Is this a realistic figure, even remotely?' I said

this in front of the whole company and the CEO said, "no," so, I said, "then why

are we even talking about it?" Again, in front of the whole company, and my

CEO did not really appreciate that, and that was expressed when I got fired.

(Martin)

In summary, my participants provided more examples of poor communication

within their organization than examples of open communication. Participants who

worked for organizations that had open communication were more engaged and were

more willing to 'do extra' in their role. They also were less concerned about negative

repercussions from COVID-19. Conversely, participants who did not believe their

organization openly communicated with them were disengaged. In addition, open

communication was described by the participants as a two-way street in that employees

felt engaged when they could openly communicate and provide recommendations to

upper management. Beyond communicating relevant and updated information

transparently and opening, organizations that had alignment from upper management

through middle management and down to the lower-level positions saw employees with higher engagement.

Level Two; Job Factors

This level focuses on the job factors that enhance individual engagement identified by all the 15 inside sales professionals interviewed. While the participants mentioned different job-level engagement characteristics, they can be categorized into two themes: (a) job control and ownership; and (b) coworker support.

Theme Five; Job Control and Ownership

Although the participants had an average of one year and eleven months of work experience, gaining control and ownership of their job was vital to their perceived engagement. However, the BDR role—where 14 of the 15 participants began their career is typically more structured and provides less control and ownership. Some participants understood the reasoning for structure in the entry-level role—to learn and develop, while others disagreed with the structure. Regardless of their thoughts about structure in the BDR role, all 15 participants shared stories of how they sought additional job control and ownership. The three most commonly mentioned sub-themes related to job control and ownership were (a) additional responsibilities, (b) ability to close sales, and (c) autonomy.

Theme Five; Sub-Theme One; Additional Responsibilities

It was no secret that the participants considered the BDR role monotonous and boring. Jessica described this role as "arbitrary," and Maurice called it "repetitive." The monotony of the role prompted all 15 participants to find ways to do more beyond their

job requirements. For example, Calvin took it upon himself to re-craft the script for the BDR role. He said, "I was the one who put together a lot of the scripts and figured out everything I could about the product, how to position ourselves, learn how to put together a script and make the calls and kind of figure out how we differentiate ourselves from some of our competitors."

The lack of responsibility in the role Dan said that the BDR role was only 10% of the sales cycle.

I think a lot of people in business development especially, kind of realizes that it's a very monotonous job, right? No one likes cold calling. No one likes bothering people on LinkedIn. Right? But that's not what the BDR role really is; it's just 10% of the sales cycle. (Dan)

Other participants including Robert, Colby, Maurice, and Beau, chose to invest their time into mentoring and coaching fellow coworkers. Robert saw it as an opportunity to cross-train coworkers so they could send him prospects. He did this in addition to fulfilling his job responsibilities, but he recognized that he did it alone.

I'm the only one that does this; no other account executive gets to handle these relationships. And that's really cool. Knowing the direct impact I have on the business is the part that I like.

Like Robert, Colby also coached his fellow coworkers. He noted that it was worth his time when he witnessed growth and development of his colleagues.

I think one of the most enjoyable parts is just watching them develop. I started talking to three reps on their first day and I've watched them go from nothing,

knowing nothing, having tons of questions to being pretty good at their job. So,

that's definitely rewarding to be able to just teach them things, help them be

more efficient, help them be more effective at their job, and then watching the

results of that. (Colby)

Maurice enjoyed teaching his coworkers to be "an expert",

I really love teaching anyone else to be an expert about what I'm doing because

right now one of the problems is that there are too many sales folks at the

company who are not yet invested in this. (Maurice)

Beau was thankful that his manager gave him the opportunity to onboard new

BDR's, which was his favorite part of the role. He said,

He [my manager] has given me the opportunity to onboard seven new hires now.

So, I've had that experience, which leads me into wanting to be more of like a

sales management role and managing the sales team eventually. (Beau)

My participants like Lewis, Robert, and Jessica, believed that it was their

responsibility to take control of their career. So, they took it upon themselves to find

innovative ways to sell, which would lead to advancement opportunities.

I had the flexibility to approach [strategy] in certain ways. As you progress

through to the account executive role, there's a greater expectation that you need

to do this on your own. You have to figure it out, figure out what you think it's

gonna work best. They weren't going to tell you exactly what you should do. It

was your plan. Because of my effort, advancement opportunities have opened

up. Seeing the plans that I set out at the start of a role result in new opportunities

is nice. (Lewis)

Theme Five; Sub-Theme Two; Ability to Close Sales

The main objective of a BDR is to set an appointment for another inside sales

representative to close the sale. Jennifer described the typical path of a BDR in great

detail:

So, the way [the BDR] role works is you typically serve between six months to a

year doing the BDR type role. Then you move over into the inside sales type of

model where typically, they like you to be inside for about a year. So as a BDR,

it was about getting out of that role and into more of a selling role. What I

wanted to start doing after getting a lot of these leads populated, was to take a

lot more ownership of them, and that's really what starts incentivizing the

ownership of finalizing those different deals and also the commission aspects

that you can get in the inside role. (Jennifer)

The ability to close the sale was engaging to the participants. Maurice said, "I

think the full sales cycle role is just so much more engaging, and you have so much

more opportunity to take the conversation wherever you want." Matthew added that

"you get a rush when you close a good account. I feel like I'm kind of into the chase of

it all. It's rewarding when you know you did your own prospecting." Calvin's favorite

part of sales was closing; he shared, "my favorite part is when I close; closing big deals

and positioning ourselves compared to our competitors; trying to figure out why you

should stick with us or why you should come over to us." Like other participants,

Jessica also liked closing because she knew she would get paid. She explained, I'm motivated because I have a quota attached to my name… every cold call, every cold email I make and send is leading me to meetings, which will lead me to close business, which will get me to my number, which will get me paid."

> When Maurice was in the BDR role, he took every opportunity to follow deals.
> I was an SDR for about six months. Six months is about the time it takes for the
> SDR to master it if you have a good understanding of what you're doing; a good
> understanding of the discovery process, and the criteria that you're working
> with. Because it got repetitive towards the end of those six months, I was
> following deals wherever I could because anything was better than sitting on the
> phone waiting for the next lead. (Maurice)

During the interview, I asked Maurice if his organization allowed him to follow deals or if he did it on his own. He said:

> At the time, it was a small enough company— there were about 10 to 12 SDRs
> and probably 15 to 20 [account executives] and a couple expansion folks. So, if
> you wanted to follow a deal, you could. And if you had something come through
> that was super interesting or seemed like a super quick sales cycle, then I would
> follow it along, and he [my manager] would sit in on the call and let BDRs sit in
> and continue to do discovery and effectively work the deal together as practice.
> And that's something that I liked to do a lot once I became an account executive.
> (Maurice)

Theme Five; Sub-Theme Three; Autonomy

Seven participants mentioned the importance of autonomy in their day-to-day tasks and with the way they sell. Although the BDR role was often structured with little flexibility, the participants were more engaged when they could deviate from the script and control their sales process. Lewis understood the importance of the script, but he looked forward to the day when he could be more creative.

I absolutely think that it's important to have that structure [in the BDR role] that gives you the cadence to the point where it becomes muscle memory. So, when you get into the next role, you know what the company wants you to do, and then you can kind of get creative from there. I've seen it before when I've been stuck in a role where they control most of what you're doing and when you're there for too long you start fizzling out; you start losing interest; you start getting frustrated; you feel like you're in a rut. From a career progression perspective at a certain point, you're feeling like they're not letting me grow. They're not letting me get creative. (Lewis)

Lewis went on to share that creativity was natural and organizations should encourage inside salespeople to be creative.

Being creative in sales is so important. If you're just transactional, you eventually get to the point where it's just monotonous. I think humans are a creative species in general… we love to be creative and come up with new solutions. Maybe somebody didn't approach it this way before, maybe you should talk to your manager or your executive leadership about doing something different or think of all the new things that you can do. (Lewis)

Robert echoed that he enjoyed the control of his sales process.

> I like the control. That's really what it comes down to is the control over the
> whole channel like it's mine. It's great. You see the direct effects of what's
> happening. Getting a one-time-sales is one thing, but if you see that I grew this
> company from sending in one referral to now where I'm ingrained in their sales
> staff and they're keep sending me referrals, that's the cool part about my job.
> (Robert)

Martin did not understand why organizations would stifle creativity if you were
still selling and making money.

> Through my sales career profession I've realized that I truly do value my
> autonomy. If I'm not doing my job, then yeah, beat me up all day. But if I'm
> hitting my numbers and if I'm closing business, then what does it matter if I'm
> doing it my way, as long as I'm not stepping on toes or doing anything wrong?
> (Martin)

Megan, Beau, and Macy appreciated the autonomy of their day-to-day tasks and
their schedule. They shared similar sentiments about having each day be different.

> At the end of the day, I look back and like that I did something totally different
> than yesterday. I wear five different hats sometimes, which is fun and keeps it
> exciting, because it's not like I'm coming in and doing again, it's different each
> day. So, I think that's my favorite part. (Megan)

> I like the freedom of my role. I basically have my own choice on how I want to
> go about my day; how I want to do my tasks. There's no set guideline or

structure to how to get it done. As long as I get it done by the end of the week. (Beau)

I don't want to be at a desk all the time. I like things that are different every single day. And I think that's why I went into sales because I knew I didn't want to be sitting at a desk every day. (Macy)

Having job autonomy had a very positive impact on the participants. For Macy, it gave her a more positive outlook on her organization.

I would say probably what I like most about what I do right now isn't really my job as much as my company. I really do like the company that we work for. But probably what I like most is that there's a lot of freedom in my schedule. There's a lot of autonomy with my schedule—how I work, what things I do first in the day, what things I do last in the day, I mean, even so far as how many people I decide to reach out to. (Macy)

Similarly, being granted autonomy by her manager (as long as she was meeting her goal) made Emily more engaged at work and willing to stay with her company.

Working from home, my manager doesn't really care. She's said, 'Look, if you hit all of your weekly stuff Monday through Thursday, you get all of your numbers done, and you just want to take an easy Friday, fine by me." She's super laid back. I would say it makes me enjoy my job more, it makes me want to stay here, it makes me work harder, because I want to stay here on a job where I have that freedom. (Emily)

124

Brad was also given autonomy. His manager let him set his own schedule, which subsequently allowed him to create his own structure.

> Even though every day is different, I like consistency in my day… you have your day set out, for the most part, so there isn't a lot of ambiguity. So, it makes it very easy to stay structured and focused on the task at hand. (Brad)

While the participants shared examples of the autonomy they received in their role, five of the participants shared examples of the lack of job control and ownership provided by their organization. Although I did not report it as a major theme, their accounts provide insights into employee engagement. For example, Martin did not agree with the specific processes he had to follow in his role; and because he deviated from the organization's processes, he was fired.

> We had a very small sales team, and every quarter I was at the very top— I made the most money for them. Every quarter that I was there, I was ethical, and I did everything very well. But they had a list of procedures that I had to follow to qualify what was 'good' business. For me, if the deal is closed and if the data that I'm entering is solid, then why does it matter what I'm entering in the system. I was fired when I was making revenue for the company. However, [the CEO] said that's not valuable. To the organization, they were saying that data hygiene was more important than what deals close. So, could I have marched to the beat of that arbitrary, ridiculous drum and kept my job? Yes. Do I wish I had? No. I was not happy there. (Martin)

125

Maurice disagreed with upper management at his organization about following their prescribed strategy. Maurice eventually quit the organization.

>I butted heads pretty directly with the VP of sales. I was very fortunate that I kept hitting quota. So, I kept getting to do that [my own strategy]. I watched people try to do that, and the second they slip and miss for a month, he [the VP of sales] says that "you're doing it my way now, and you don't have a lot of choice in the matter." (Maurice)

Several other participants lost motivation because they did not have the opportunity to sell the product/service after they generated the lead. Instead, they gave the lead to the account manager who would complete the sale.

>In the BDR role, you're held to very high metrics and it's really to get you acclimated to the fast pace of sales. And honestly, I think it's to thicken your skin to make 100 dials a day. And then ultimately, once you do find an appointment, you actually set those up for an inside rep that covers that specific territory. And then if it's a much larger enterprise account, then they would also just take those leads from you. And so that's kind of your role as a BDR, is to find and hunt, and then you pass them on. Then it's up to the inside rep to close the deal. (Jennifer)

Beau elaborated the similar point:

>Typically, you're not getting responses via email, you're not getting a hold of them, maybe you call and have a ten- minute conversation, but then my role is to

just introduce the account executive on the call. And then I'm done. So I don't

get any contact with the person. I don't get to keep the relationship going. (Beau)

The result of not seeing the full sales cycle led some of my participants feeling

frustrated.

I still believe in the products that I'm selling. It's just right now, it's just hard,

because I'm not actually selling them. I'm just assisting on them. I had told my

manager so many times, I was like, I didn't come here to be a professional

assistant. I could have done that literally anywhere. I came here to be a really

good sales rep. I am really good in my role, I know how to sell and I'm pretty

good at it. I was like, you guys are wasting talent right now. (Jennifer)

Robert eventually got bored, and Jessica was "getting no gratification" from

setting appointments. Jessica said, Even if you do have a good call, they're interested,

and you get to pipe an opportunity in the system, the BDR role is not gratifying because

there's no true benefit; you aren't closing revenue, you're literally setting these arbitrary

meeting." Consequently, after 14 months in the role, Jessica "started looking outside of

the company for an actual closing role."

In summary, job control and ownership was a significant job factor that affect

inside sales representatives engagement. Inside sales representatives who were

encouraged to take on additional responsibility with the autonomy throughout the full

sales cycle felt more engaged and gave more effort in their role and towards their

organization. On the contrary, in organizations where inside sales representatives had

127

little job control and ownership, they tend to be more disengaged, more apt to leave the organization, and more defiant to management and upper leaders.

Theme Six; Coworker Support

The pressure of the business development role is stressful for many inside sales representatives. To cope with the stress, BDRs often turn to their coworkers for support. Twelve participants described situations where they relied on their coworkers to uplift them during challenging times. In Dan's case, having co-workers who were also recent college graduates at around his age made him feel connected. He said, "nobody is old; I have so many peers that I'm growing up with right now." As for Beau, his coworkers "are what gets me through my tasks, because I know that if I need to, I can text someone and they can hop on a call with me and get me in the right mindset and back to work. We're all going through the same thing." He further explained why his coworkers rely on each other.

> My small team of coworkers provide me support. I can call them. We have zoom calls every day. One, for talking to each other, catching up, making sure we're all doing okay but also to hold each other accountable. We're all going through the same thing. Since working from home, we've gotten close to where they're my best friends. And that's really what I love. It's the people. (Beau)

Similarly, Macy likened her coworkers to "family".

> A lot of people that work here in this office started out here, so I guess they're like family…a lot of them have been here for 15 plus years, so they're well rounded and know a lot of things. They're really good people to go to whenever

128

you're trying to figure out something, or you need help or advice. And the whole

team is very willing to help you with anything. So, if one person is struggling

with one thing, we'll all jump in and help them figure out their problem that

they're trying to fix. I want to stand out and I want to grow. I want to be good for

my coworkers. I don't like disappointing them or letting them down, and

whenever you mess up, it's not a good feeling. So it's pretty easy to stay

motivated, I think. (Macy)

Despite the individualistic nature and competitiveness within the business

development role, many BDRs collaborate with one another. Jessica explained that the

'healthy competition' led to her engagement.

It's very collaborative, I feel the culture, for me is a huge piece of where I work;

it's very easy to get caught up in the grind, and sometimes companies don't put a

big emphasis on culture. For me, I think knowing that the people you're going to

work with every day, or getting on the computers because of COVID, they like

what they're doing; they want to be there, and they're willing to help you

succeed, too. I think there's a very healthy level of being competitive, but also

encouraging team success. And so, knowing that we're all going for our own

individual goals, but at the same time, everybody would jump on a call if I

needed help or anything like that. So, I think just the culture and the people I

work with make a huge difference for me. (Jessica)

It was clear that the participants relied on their coworkers for mental support and

accountability while in the BDR role. Once they were promoted out of the BDR role,

the participants relied on their coworkers for collaboration. Lewis described that in large organizations, there are many people on a sales team working together.

> Often, when you're in sales, especially at large organizations, you might have a whole account team. And if you can run a meeting well, and your colleagues are on that, and they hear you do that, the trust goes up, and then they trust you. And that's another reward. That's another win for me. (Lewis)

> Jennifer acknowledged that she would not be able to hit her quota without her team.

> I put all my time and effort into this account, and [the team] closed a large multi-million dollar deal a few weeks back. It was because we were willing to put in the work for it. We all have a servant mindset: I can only do so much alone. Without you guys, I can't hit my quota. (Jennifer)

Macy knew that her coworkers depended on her, which drove her to work harder. She said, "I want to do good [work] because I respect the people I work with. If I'm not doing my job, someone else has to do it; it has to get done. I respect my coworkers enough to get my job done, so they can do theirs."

In summary, coworker support was an important job factor that led to the participants engagement. The participants developed a bond with their coworkers while going through the challenges of the BDR role. For some, they became best friends with their coworkers. The participants also relied on the coworkers even more as they progressed to the account manager role.

Level Three; Personal Factors

130

This level focuses on the personal factors that contribute to higher engagement. Four main themes emerged from this level: (a) relationship building; (b) competitiveness; (c) positive outlook on the organization; and (d) self-efficacy.

Theme Seven; Relationship Building

Thirteen of the participants reported that they felt more engaged when they were able to build relationships with potential customers. However, the ability to build relationships did not come until the participants were promoted out of the BDR role. Dan struggled through the BDR role, however, he flourished when he became an account manager.

> The little monotonous things that I do for the customer, everything means something. Versus before, in business development when you're sending that 1,000th LinkedIn message, it's kind of like, "Wow, what am I doing?" And that's what I tell people who are in business development that the grass is so much greener…Now [in account management], I'm truly trying to help the customer. I'm truly trying to build relationships and I think that's the beauty of sales so far, and account management. I get the opportunity to not only make relationships, but also get to dive deeper. I'm a trusted advisor. I'm someone that my customers can go to if they need more information or want best practices. I will be there for them. (Dan)

Jessica also enjoyed the account management role more than the BDR role. As account manager, she finally felt like she was providing value to her potential customers.

At my last company, I was just calling these people and I could care less about what I needed to set this meeting because I need to check this off. In my new role, I know that I'm providing value for the customer; and if they find it to be beneficial, then we'll make a deal. It is cool and gratifying to see that I actually like building relationships, and I'm closing business, and I'm helping these people. It's not just, 'take my call, thanks, check, move on.' (Jessica)

For Dan, account management enabled him to shift his focus from hitting sales goals to helping the customers.

There's nothing aggressive; I think that's another beauty of account management. It's very intentional. It's not like I don't want to hit my number, but at the same time I don't want to come off as the sleazy salesman. Rather, it's about the customer. I think that's what I like a lot about account management. Because I think if you take care of the customer, you end up hitting your number. I made a promise to the customer. If you need to get something done, you need to get it done, you know, not only for the sake of the company, but for the customer. (Dan)

In addition to helping his customers, Dan also loved collaborating with them.

I'm not trying to fight the [chief marketing officer] saying, "hey, please buy our product." No. I'm collaborating with them, you know, helping them. I'm working with them very closely. And it's kind of cool for being 24 years old. And I'm in, I guess, zoom conversations with people who are senior to me. (Dan)

For Lewis, building relationships with the potential customer was more important than closing the sale. He described the heightened energy he felt after a good conversation with a potential customer.

When it comes to running a well-done sales presentation, or running a meeting that goes smoothly, and I connect with that customer, I feel great. I get this high of energy when you crush it and you get it done. I love it. I may not have actually closed that business, but I connected and was able to build a rapport. That's the reward for me. That's why I love sales…you start realizing where you stand from a personality perspective, and I realized that I was driven from an emotional standpoint with personal connections. (Lewis)

Maurice enjoyed the complexity of problem solving with the potential customer as a way to build relationships.

I really like talking to customers, I think, it's a fun dance. The process of spending all day on the phone with people who are trying to solve problems and the chess match of whether or not we can solve those problems and how you can make solving those problems really attractive is like the best thing about inside sales. What I find a lot is that customers typically get on the topic of what they're trying to do by accident. A customer conversation will start because they indicated interest in something, or we got the opportunity to talk to them some good value prop about some specific thing. Then they turn around and say, "This was a good talk, but can you solve this?" And then we'll have a whole

133

separate conversation about what this is and why this matters to them, and

whether or not we can solve it. (Maurice)

Macy enjoyed helping people, and she said, "If my customer is doing good, then

we're doing good. It's just a partnership." Jennifer's mindset was to fix problems for the

customer. She developed proposals to demonstrate issues the customer was facing,

which made it easier for her to build relationships. She shared, "For me, the problem-

solving aspect allowed me to get more invested in the customer and in a deal. In my

head I think, Okay, this is a problem for them, they might not see it, so I will build a

proposal that will outline their problems for them.

Theme Eight; Positive Outlook on the Organization

The participants' positive belief in their organization and the product/service

they sold was a major factor that contributed to their engagement. All 15 participants

mentioned that they had strong positive feelings either towards their organization or

towards the product/service they sell.

Theme Eight; Sub-Theme One; Belief in the Organization

The participants felt more engaged in their role when they believed that they

worked for the best company. Dan was happy that he worked for the "industry leaders";

as he put, "the only reason you can't buy us is because you can't afford us." Matthew

felt privileged and excited to work for his organization in the sports industry. Jennifer

was proud that her company was known as the best within their industry. She used the

industry credentials to help sell.

The program that I'm in has a track record for being the best within its industry. So it's essentially something that can sell itself, if you sell that vision to a customer. Also, you're not working on small deals; you're working on multimillion-dollar deals for the software, which is rewarding. (Jennifer)

Macy felt like her job was secure because the products she sold would always be needed. She said that "I knew I wanted to go into an industry where the product or service is always going to be needed. I'm glad I thought about that because of COVID. Thankfully, I wasn't one of the people that lost their jobs because my company is always going to be essential."

Other participants including Megan, Maurice, and Brad, were all optimistic about their organization's future. Megan specifically mentioned that the reason she was "more self-motivated in this role" was "because I'm interested in the growth of the company and what we can do." Maurice enjoyed seeing his organization receive positive reviews from financial analysts.

It's a lot easier to be engaged when it feels like what you're doing is working towards a higher purpose, or a purpose that is referenceable, outside of your immediate circle. Watching analysts commend your company or your product line, or the way that you do things in the market is something that I get excited about. (Maurice)

Theme Eight; Sub-Theme Two; Belief in the Product

Similar to a positive belief in the organization, the participants also had faith in the products they sell and the benefits to customers.

I think what we do is interesting; I think we are the best provider on the market.

So, I don't feel like I'm lying when I talk to customers. We're also the only

provider that does what we do, so I think what we do is really cool, and I like

learning more about our products as they continue to evolve. (Emily)

Brad mentioned that it took him some time to understand the benefits of the

product, but when he did, it made it easier to sell.

It took me a couple of months of talking about the product in-between trainings,

using it on my own, and actually seeing the product used by customers to help

me see how important it is, especially, in the day to day for our customers.

When you work for a company where you believe in the product and you see

what you're trying to do with it, makes me want to talk about it, and talking is

kind of my thing. (Brad)

While the participants provided examples of their positive belief in the

organization, three participants described situations where they did not believe in the

product they were selling—which impacted their engagement. Although I did not report

it as a major theme, it is worth mentioning, because these accounts provide additional

insights into the topic of employee engagement.

Megan wanted to believe that her product benefited her customers, but even

after training, she still felt unsure.

In training they brainwash you because it is their product and they want you to

believe in it to sell it, but they just really keep pushing the narrative that other

products are bad and ours is the best. At the end of the day, I knew someone that

136

had our competitor's product, and I never tried to sell to them because I guess I

didn't believe in it as much as I should have. I think I would have had an easier

time selling to people if I really believed it would benefit them, but I didn't. So, I

think that's why I had a hard time with selling it. (Megan)

Martin lost interest in the finance industry where he started his sales career. He

said, "I hate this… I don't really care about my own finances; I don't care enough about

accruing all this wealth for myself enough to do it for other people." Meanwhile, Jessica

thought her products were too complicated and she did not care to acquire more

training. She ended up quitting for another organization that sells a less complicated

product.

I realized the company was an amazing place to start my career, but I don't care

about their product—it makes me so confused. I don't get it. I could never run a

sales call and get to the point where it really mattered, like is this actually going

to help you? I wouldn't be able to speak to it; I would need a sales engineer on

the call. I wanted to be closing sales, but to do that, I needed to know the

product forwards and backwards from prospect to close. I want to be confident

that I know the product I'm selling, and not rely on someone else to talk about

all the technical stuff for me. So that was really what pushed me to get out and

into a company where I felt comfortable with what I was selling. (Jessica)

In summary, a positive attitude towards the organization and its product was a

contributing factor to the participants engagement. The participants who thought of their

company and product positively were excited to talk about them to their customers,

coworkers, and friends. For those who did not believe that their product would benefit

their customers, they were less engaged and more likely to quit the organization.

Theme Nine; Self-Efficacy

Inside sales representatives start their career in business development roles with

little prior knowledge about the product/service they are responsible for selling.

Additionally, entry-level BDRs begin with little previous sales experience. The

combination of unfamiliarity with new products/services and the high pressure of sales

often results in low self-efficacy (belief in oneself that they can execute their job).

Thirteen participants shared that they were engaged when their customers provided

positive feedback to them and when they felt like they were a product expert.

Theme Nine; Sub-Theme One; Feedback from the Customer

The participants with less experience did not feel like a product expert, but they

were engaged when their customers gave them positive feedback about their

product/service. As a part of his job, Colby makes recommendations and builds quotes

for customers and then receives feedback on the accuracy of the recommendation. He

feels engaged when he receives positive feedback from the customer about the accuracy

of his recommendations.

Brad talks to his past customers who share testimonials about their experience

using his product. The positive testimonials keep him excited to talk to more customers.

Sometimes I will talk to people who've already used it or have something

similar. Hearing them talk about it made me really understand how important

the software is. When I get on a roll and I get [on the phone with a prospect]

who's really engaged and likes what they're hearing, it gives me that serotonin release. (Brad)

Finally, Lewis proactively asks the customer for feedback after a product presentation. He does this so he can improve. He said, "I absolutely do like getting feedback from customers, and I'm able to do that a lot in my role—getting direct, immediate feedback from customers."

Theme Nine; Sub-Theme Two; Product Expertise

The two participants with the most experience (Maurice and Lewis) both felt like product experts, which increased their engagement. Maurice's interest in complex products led him to a sales role in IT Tech, where he could think strategically and present customized solutions to customers. Overtime, he learned more about his company's products and eventually became a product expert. His expertise empowered him and made him more engaged.

> In my role, you act as a subject matter expert. I had to go from being completely non-technical and non-strategic to knowing the ins and outs of this product that we were trying to sell. Today, I know more about my product and my market and my customer than anyone else on the planet. I'm the only person that has this many customer conversations, and it's empowering to be able to meet a customer where they are. It's easy in sales to say, "well, talking to similar customers like you" … but that is something that your sales manager tells you to say to make your customer more comfortable. In reality, I have talked to 50 other customers that look just like you and I actually know what they've been

going through—and that's empowering. It's really, really, really, really fun. But

what I really like is being a genuine product expert for something and being able

to fully understand not only the product, but the product space, the market, all

the competitors, and all the possible reasons that someone would want this.

What's really fun is that when you're an expert at something, you can get to the

point where customers are asking questions, but you know they're asking a

question that pertains to a different problem. And that's when it gets really,

really exciting to say, hey, usually when people ask me this question, they're

actually worried about this, is that right? (Maurice)

Like Maurice, Lewis's expertise also grew overtime; and as he learned more

about his product, he enjoyed solving the puzzle. He said, "I've gotten to the point

where I am extremely knowledgeable and can navigate through like it's a puzzle and

we're gonna solve the puzzle in some way."

In summary, within the level of personal factors, three themes were prominent.

They were the ability to build relationships, positive outlook on the organization, and

self-efficacy. The participants had an innate desire to build relationships with their

customers and those that were able to do so were more engaged. Next, the participants

that had positive feelings towards their organization and those who had high self-

efficacy were more engaged.

Manifestations of Engagement

This section presents the manifestations of engagement reported by the 15 study

participants in response to the second research question, what engaging behaviors do

140

inside sales representatives display at work? I asked each participant to recall at least

five incidents of when they either felt engaged or disengaged at work. Through

interviews, I recorded 89 total critical incidents (57 incidences were labeled as

engagement and 32 incidences were labeled at disengagement). I collapsed the 57

critical incidences of engagement and connected them to sub-themes, themes, and levels

(see Table 12). Next, I ranked them based on the number of times they were mentioned

by the participants (see Table 12).

Table 12
Summary of the Manifestations of Engagement

Levels	Theme	Sub-Theme (i.e., antecedent)	Number of participants
Organizational Level	Managerial Support	Commitment to employee development	13
		Empathy	8
		Manager's credibility	3
	Continuous Training & Development	Self-directed learning	11
	Organizational Resources	Work perks	1
		In-role resources	1
	Open Communication	Transparency	2
Job Level	Job Control & Ownership	Additional responsibilities	10
		Ability to close sales	5
		Autonomy	15
	Coworker Support	Peer collaboration	10
Personal Level	Extrinsic Motivation	Recognition/incentives	10

Engaging Behaviors

Each of the 89 total incidences resulted in one or more positive (e.g., makes

more calls) or negative behaviors (e.g., makes fewer calls) demonstrated by each

participant. From the 89 incidences, I identified 200 total behaviors (133 engaging

behaviors and 67 disengaging behaviors). After collapsing similar behaviors, I was left

with 25 unique engaging behaviors and 20 unique disengaging behaviors. This section

141

discusses each of the engaging and disengaging behaviors mentioned by five or more participants.

Six of the twenty-five engaging behaviors were mentioned by five or more participants (see Table 13). Behaviors are presented in order of frequency of mentioning. The remaining 18 behaviors were mentioned by less than half of the participants and thus excluded from common themes. For each of the seven behaviors, I created levels, themes, and sub-themes based on each incident. The levels, themes, and sub-themes mirrored those that I created from the perceptions of engagement.

Table 13
Behaviors of Engagement

Behaviors of Engagement
1. Makes extra calls
2. Works extra hours
3. Talks positively about the organization
4. Collaborates with coworkers
5. Seeks development from the manager
6. Takes initiative to solve customer problems

Makes Extra Calls

Making extra calls was the most frequently mentioned behavioral outcome of the incidents described by the participants. In total, 14 participants made extra calls when they were engaged. There were several unique incidents that led to the participants making extra calls (see Table 14); however, 9 of the 14 participants made extra calls because of their job control and ownership. Overwhelmingly, when the participants were given autonomy of their day-to-day tasks and sales process, they were more engaged. In some cases, the organization allowed the inside sales representatives

142

to meet the customer face-to-face, despite that they worked in an inside sales role. Breaking protocol empowered the participants and motivated them to make more calls.

In addition, 8 of the 14 participants made extra calls when both individual and team-based rewards or incentives were offered. For the most part, the rewards and incentives offered by the organization were separate from the inside sales representative's monthly or quarterly quota and were more easily achievable. Participants described how the one-off bonuses and rewards were instant and that it felt good to get quick pay. Matthew mentioned that he felt the urge to make more calls to win a contest as it added fun and competition to his team environment.

Table 14

Engaging Behavior; Makes Extra Calls

Level	Theme	Sub-Theme	Incident
Job Level	Job Control & Ownership	Autonomy	• Organization allows autonomy to solve customer problems • Organization allowed employee to break typical procedure (meet with customer face-to-face) to make a sale • Organization empowers employee to solve organizational problems • Organization allows employee to see the entire sales process
		Continued Responsibility	• Organization trusts employee to take on additional accounts to help a coworker who was on leave
	Coworker Support	Collaborative	• Organization encourages coworker collaboration
Organizational Level	Managerial Support	Manager develops employee	• Manager cares about employees personal and professional goals • Manager protects employee from red tape and scrutiny from upper management
		Manager is empathetic	• Organization does not pressure employee to perform when they have personal emergency
		Manager is Credible	• Manager has done BDR role and has credibility
	Organization Resources	In-role resources	• Organization adjusts quota during COVID
		Work perks	• Organization provides in-office perks
	Open Communication	Transparency	• Organization regularly communicates status of potential layoffs during COVID
	Continuous Training & Development	Weekly training	• Organization provides weekly training opportunities • Organization provides in-depth product training
Personal Level	Extrinsic Motivation	Recognition	• Organization recognized employee in front of entire organization for hard work • Organization allowed employee to interview for an advanced role despite not having required seniority
	Competitiveness	Incentives	• Organization offers individual sales incentives • Organization provides reward trips • Organization provides team-based incentives

Works Extra Hours

Fourteen participants work extra hours when they are engaged (see Table 15). The participants who were given autonomy to solve customer and organizational problems enjoyed working extra hours. The participants described how they would respond to customer calls and emails at night and over the weekend if they knew it would benefit the customer.

Although Jennifer was an inside sales representative, her organization allowed her to go on site to meet with a potential customer. She recalled that she took the customer to their favorite barbecue restaurant, and it helped build the relationship and eventually the sale. Jennifer said that because the organization allowed her to take a unique approach to selling, she was willing to work extra hours and do whatever it takes to close the sale.

Table 15

Engaging Behavior; Works Extra Hours

Level	Theme	Sub-Theme	Incident
Job Level	Job Control & Ownership	Autonomy	• Organization allows autonomy to solve customer problems • Organization empowers employee to solve organizational problems
		Continued Responsibility	• Organization allowed employee to interview for an advanced role despite not having required seniority
	Coworker Support	Collaborative	• Organization empowers coworkers to collaborate
Organizational Level	Managerial Support	Manager develops employee	• Manager cares about employees personal and professional goals
		Manager is empathetic	• Organization does not pressure employee to perform when they have personal emergency
		Manager is credible	• Manager has done BDR role and has credibility
	Organization Resources	Work perks	• Organization provides perks (e.g., gym membership, equity in the company)
	Open Communication	Transparency	• Organization regularly communicated status of success potential layoffs during COVID
Personal Level	Extrinsic Motivation	Recognition	• Organization recognized employee in front of entire organization for hard work

Talks Positively about the Organization

Ten participants talked positively about their organization to coworkers and friends when they are engaged. They talked about how they work for "the best company" and sell "the best product(s) on the market." Their positivity towards their organization was a result of the support they received from their direct manager and organization (see Table 16). Participants who had managers who care about their personal and professional goals and organizations that provide in-depth training were more likely to talk positively about the organization.

Table 16
Engaging Behavior; Talks Positively about the Organization

Level	Theme	Sub-Theme	Incident
Organizational Level	Managerial Support	Manager develops employee	• Manager cares about employees personal and professional goals
	Continuous Training & Development		• Organization provides in-depth product training
Job Level	Coworker support	Collaborative	• Organization encourages cross functional collaboration
	Job Control & Ownership	Continued responsibility	• Organization allowed employee to interview for an advanced role despite not having required seniority
			• Organization empowers employee to lead team meetings
			• Organization allows employee to interview for an advanced role despite not having required seniority

Collaborates with Coworkers

Inside sales representatives that were engaged were more likely to collaborate with coworkers. At times, collaboration happened naturally. For example, some relied on each other for support as they matriculated through the BDR role. However, others mentioned that their organization also encouraged collaboration by implementing systems for inside sales representatives to easily communicate, whether they were working from home or in the office (see Table 17).

Table 17

Engaging Behavior; Collaborates with Coworkers

Level	Theme	Sub-Theme	Incident
Job Level	Coworker support	Collaborative	• Organization encourages collaboration
	Job Control & Ownership	Continued responsibility	• Organization allows employees to mentor new hires
			• Organization empowers employee to lead team meeting
Personal Level	Competitiveness	Recognition	• Organization provides team-based incentives
Organizational Level	Managerial Support	Manager develops employee	• Manager provides weekly coaching
	Continuous Training & Development		• Organization provides in-depth product training

Seeks Development from the Manager

Engaged employees seek continued development from their direct manager.

Development in this case is not a onetime training; rather it is ongoing, sometimes on a

weekly basis. The participants sought both personal and professional development

opportunities (see Table 18).

Table 18

Engaging Behavior; Seeks Development from the Manager

Level	Theme	Sub-Theme	Incident
Organizational Level	Managerial Support	Manager develops employee	• Manager provides weekly coaching
			• Manager cares about employees personal and professional goals
		Manager is credible	• Manager has done BDR role and has credibility
	Continuous Training & Development		• Organization provides in-depth product training
Job Level	Job control & ownership	Continued responsibility	• Organization empowers employee to solve organizational problems
Personal Level	Extrinsic Motivation	Incentives	• Organization provides reward trips

Takes Initiative to Solve Customer Problems

Eight participants took initiative to solve customer problems when they were

engaged and granted autonomy to execute the sales process in their own way. Maurice

sold complex products that required him to have strategic conversations with customers

to effectively provide solutions. His organization gave him the autonomy to solve

customer problems, which enhanced his engagement (see Table 19).

Table 19
Engaging Behavior; Takes Initiative to Solve Customer Problems

Level	Theme	Sub-Theme	Incident
Job Level	Job Control & Ownership	Autonomy	• Organization gives employee autonomy to solve customer problems • Organization encourages creativity with sales process • Organization allows employee to see whole sales process
	Coworker Support	Collaborative	• Organization encourages collaboration across functional units

Disengaging Behaviors

Participants recalled instances where they were disengaged at work. Some of the

disengaging behaviors were opposite to the engaging behaviors (e.g., makes fewer

calls). Four of the 20 disengaging behaviors were mentioned by six or more

participants, thus included for the following discussion (see Table 20).

Table 20
Behaviors of Disengagement

Behaviors of Disengagement
1. Ignores manager
2. Does not make extra calls
3. Searches for other jobs while at work
4. Talks negatively about the organization

Ignores Manager

Ignoring the manager is a disengaging behavior described by nine participants

(see Table 21). The participants blamed the organization for their disengagement and

subsequent lack of respect of their manager. The participants mentioned organizational

problems such as a lack of communication when it came to job changes,

miscommunication from upper management to the lower-level employee, a lack of

managerial support, and unethical promotion practices.

Table 21
Disengaging Behavior; Ignores Manager

Level	Theme	Sub-Theme	Incident
Organizational Level	Lack of communication	Organizational changes	• Organization makes changes to employee processes without providing clear rationale
		Miscommunication between upper management and direct manager	• Upper manager has different expectations compared to employee's direct manager
		Lack of support	• Organization does not support open door policy
	Unethical practices	Unethical promotion process	• Organization is gender biased in promotion process • Manager lies about potential employee promotions
	Lack of managerial support	Lack of coaching	• Manager does not provide adequate training and development
		Lack of credibility	• Manager had not done BDR role and was not credible
		Unethical	• Manager is sexist

Makes Fewer Calls

Seven participants admitted that they made fewer calls when they were

disengaged. In Megan's first BDR role, she was unmotivated to make calls because she

felt unprepared. Megan and other participants shared instances when they received little

to no training or development. Jessica eventually quit her first BDR organization

because the product she sold was too complex and she was not provided adequate

training. At first, she made fewer calls because she dreaded being on the phone, but

when it became too difficult, she opted out (see Table 22).

Table 22
Disengaging Behavior; Makes Fewer Calls

Level	Theme	Sub-Theme	Incident
Organizational Level	Lack of training & development		• Organization does not provide adequate training and development
	Lack of communication	Organizational changes	• Organization makes changes to employee processes without providing clear rationale
	Lack of resources	Compensation	• Organization does not provide adequate compensation
	Lack of work		• Organization does not give enough work
	Lack of managerial support	Credibility	• Manager had not done BDR role and was not credible

Looks for Other Jobs While at Work

Six participants looked for other jobs while at work. The most frequent reason

for job searching was fear that they would be laid off. When the participants witnessed

their coworkers losing their jobs, they became concerned that they would be next, so

they began their job search. The lack of transparency between the organization and

inside sales representatives on the status of potential layoffs directly led to

disengagement. The participants shared that transparency was critical regardless of

whether the organization shared positive or negative news (see Table 23).

Table 23

Disengaging Behavior; Looks for Other Jobs While at Work

Level	Theme	Sub-Theme	Incident
Organizational Level	Lack of communication	Organizational status in hard times	• Organization does not regularly communicate status of potential layoffs due to COVID
	Lack of training & development		• Organization does not provide adequate training and development
	Lack of managerial support	Lack of coaching	• Manager does not provide coaching or development
		Does not listen to problems	• Organization does not listen to organizational problems found by employees

Talks Negatively About the Organization

Five of the participants confessed that they talked negatively about their

organization to coworkers and friends when they felt disengaged. The most frequent

incidence that led to participants talking negatively was when the organization made

changes to their role without providing a rationale for the change (see Table 24). The

participants described the changes as a teacher giving busy work; once they understood

how to perform a task, the organization made them change.

Table 24

Disengaging Behavior; Talks Negatively about the Organization

Level	Theme	Sub-Theme	Incident
Organizational Level	Lack of communication	Organizational changes	• Organization makes changes to employee processes without providing clear rationale
	Lack of training & development		• Organization does not provide adequate training and development
	Lack of resources	Compensation	• Organization asks employee to onboard new representatives without additional compensation
	Unethical practices		• Organization is gender biased in promotion process
	Lack of support		• Organization does not support open door policy

Emerging Behaviors

The participants were asked to share their perceptions of engagement and specific incidents of when they were engaged in the workplace. As such, the major perceptions and behaviors of engagement were reported; however, there are three themes, while not directly related to the research questions, provide additional insights into employee engagement. They are: (a) making extra calls is not always an engaging behavior; (b) using company perks is a double edge sword; and (c) inside sales representatives who socialize with coworkers in non-work settings were engaged.

Making Extra Calls

The most frequently mentioned engaging behavior was making more calls. However, on three occasions, the participants described that they also made extra calls when they were disengaged. Dan's manager was unempathetic to underperformers, therefore, Dan made extra calls out of fear that he would otherwise be reprimanded by his manager. In Dan's case, making more calls was not correlated with engagement For Emily and Beau, their managers did not provide coaching or development, rather their managers insisted that they just 'make more calls' to improve. Despite the lack of training and development, Emily and Dan made more calls, and they were disengaged in the process. According to Emily, she doubled her call volume, but she did not any improvement, which led her to question whether she was meant for inside sales.

Company Perks

The participants took advantage of several perks offered by their organization, such as an on-site gym, free lunch, a beer fridge, stipend for exercise equipment, pool

153

table/games in the office, and the ability to work from home one day per week (prior to COVID-19). Although the participants were engaged when they felt the organization provided additional resources, they often took advantage of the perks, which impacted their performance. For example, Colby's organization allowed him to work from home one day per week, but he saw it as an opportunity to sleep-in late, take an extended lunch, and end his day early, all of which affected his productivity and work performance. In Colby's case, he benefited from the company perks, but the organization suffered because of his lower performance on the day's he worked from home.

Coworker Socialization

Throughout the BDR and account management roles, many participants relied on each other for collaboration and support. Emily participants mentioned that their coworkers were "like family'" and that they would do anything for each other. Interestingly, many of the perceptions and incidents of engagement that the participants shared relating to coworker collaboration took place prior to the COVID-19 pandemic—when they were working side-by-side in the office.

Emily's passion for her company was the culture; she socialized with her coworkers, played pool in the office, and drink beer and played games on Friday evenings. However, when the COVID-19 pandemic forced her to work from home, she was no longer able to socialize with her coworkers in the same way. The virtual happy hours turned into a burden and added to her already long day starring at a computer

screen. Eventually, Emily dreaded participating in virtual social events with their coworkers.

Chapter Summary

This chapter presented the perceptions and behaviors of engagement that 15 inside sales representatives demonstrated at work. These inside sales representatives worked at different organizations and had less than five years of post-college sales experience. First, each of these inside sales representatives discussed their perception of engagement, which consisted of organizational level, job level, and personal level factors. Second, they described instances when they were engaged and disengaged at work. Such incidents had positive and negative impact on the participants and prompted them to behave in various ways in response to the incident. The most common engaging behaviors were (a) makes more calls; (b) works after hours; (c) talks positively about the organization; (d) collaborates with coworkers; (e) seeks development from the manager; and (f) takes initiative to solve customer problems. The most common disengaging behaviors were (a) ignores manager; (b) does not make extra calls; (c) searches for other jobs while at work; and (d) talks negatively about the organization.

CHAPTER V

DISCUSSION, RECOMMENDATIONS, AND CONCLUSION

The purpose of this generic qualitative study was to explore employee engagement from the perspective of inside sales representatives. The study addressed two research questions:

1. What are inside sales representatives' perceptions of work engagement?
2. What engaging behaviors do inside sales representatives display at work?

This chapter discusses the findings in relation to the relevant literature and theoretical framework presented in Chapter II. It also presents a newly developed process model for understanding job engagement of inside sales representatives. The chapter concludes with recommendations and implications for practice and research.

Discussion

Research on employee engagement has been a major focus in HRD over the past three decades as many HRD professionals are tasked with increasing employee performance and reducing turnover (Argawal et al., 2012; Sleep et al., 2020). Although engagement research has been conducted in several different sectors such as health care (Bargogliotti, 2012), education (Jaworek, 2017), and manufacturing (Schaufeli et al., 2006), little attention has been given to the 260,000 people who currently assume business-to-business (B2B) inside sales roles in the United States (SEF, 2020; U.S. Bureau of Labor Statistics, 2019). B2B inside sales organizations are growing 300% faster than field (outside) sales due to the 40-90% reduction in operating costs of inside

sales (Chriqui, 2019; Harris, 2019; Zoltners et al., 2019). Despite the high growth rate, at any given time, 24% of inside sales professionals are actively searching for new jobs (Gartner, 2019).

Previous research illuminates the specific interventions (i.e., antecedents) that organizations can implement to yield higher engagement and lower intention to quit (Argawal et al., 2012; Bailey et al., 2017; Shuck et al., 2014); however, engagement is known to vary across occupations and job roles (Jaworek, 2017; Saks, 2006). Therefore, this study sought to address the paucity of engagement research within the context of B2B inside sales to aid sales managers and HRD practitioners in increasing engagement and reducing turnover.

Guided by the two research questions and the context of B2B inside sales, in the following sections I discuss my study findings in relation to the previous engagement research. First, I will compare the participants' perception of work engagement (the first research question) to the engaging behaviors they manifested (the second research question). Second, I will discuss the behavioral outcomes of engagement from an inside sales representative's perspective (the second research question).

Engagement Perception vs. Engaging Behavior

The findings from my study suggest that the participants perceived work engagement as extra role behaviors—going above and beyond in their role. As Colby stated, an engaged employee is 'a key player in what is going on at work.' My participants' perception is in line with Kahn's (1990) conceptualization of engagement, that is, "the harnessing of organization member's selves to their work roles;" and when

157

engaged, individuals "employ and express themselves physically, cognitively, and emotionally during role performances" (Kahn, 1990, p. 694). However, the degree to which my participants devoted themselves to work varied due to different factors (antecedents).

The most significant contribution of this study is identifying the discrepancies of engagement antecedents by perception and in practice. In other words, the antecedents reported by the study participants did not necessarily lead to engaging behaviors. For a better understanding, Table 25 provides a comparison of engagement antecedents perceived versus manifested based on the major findings reported in Chapter IV (see Tables 11 and 12). In the remainder of this section, I discuss separately, the areas that show the biggest and smallest discrepancies.

Table 25
Perceptions of Engagement Versus Behavioral Manifestations of Engagement

Level	Theme	Sub-Themes (Antecedents)	Perception (# of participants who mentioned the antecedent)	Manifestation (# of participants who mentioned the antecedent)
Organizational Level	Managerial Support	Commitment to employee development	15	13
		Empathy	11	8
		Manager's credibility	0	3
	Continuous Training & Development	Self-directed learning	15	11
	Organizational Resources	In-role resources	6	1
		Work perks	5	1
	Open Communication	Transparency	5	2
Job Level	Job Control & Ownership	Additional responsibilities	15	10
		Ability to close sales	8	5
		Autonomy	7	15
	Coworker Support	Peer collaboration	12	10
Personal Level	Relationship Building	Ability to build relationships	13	0
	Positive Outlook on the Organization	Belief in the product	9	0
		Belief in the organization	6	0
	Self-Efficacy	Feedback from the customer	8	0
		Product expertise	5	0
	Extrinsic Motivation	Recognition/Incentives	0	10

Areas of Discrepancy

As depicted in the table above, there are varied degrees of discrepancies between perception and behavioral manifestation. In this section, I discuss six most prominent differences: (a) ability to build relationships; (b) recognition/incentives, (c) autonomy, (d) belief in the product; (e) feedback from the customer, and (f) in-role resources and work perks.

159

Ability to Build Relationships

The biggest difference between the participants' perception of engagement and their manifestations of engagement is their ability to build relationships. In my study, 13 of the 15 participants claimed that they were intrinsically motivated to build relationships with customers; nevertheless, none of the incidences of engagement shared by the participants relate to their ability to build relationships with customers. This discrepancy can be partially explained by the fact that the participants view relationship-building as a necessary means to achieving their end goal—to close the sale. In other words, established customer relationship means increased likelihood of closing the sale and subsequently, getting paid.

Recognition/Incentives

Recognition/incentives is the second biggest difference between the participants' perception of engagement and their manifestations of engagement. Interestingly, while no participants recognized the role of extrinsic motivation in engagement, ten of them provided specific examples of how the company-initiated recognition programs and incentives drove them to work harder. In fact, based on the interview accounts, more often than not, the participants became engaged because they knew the efforts they invested would be returned by their employer through recognition and incentives (e.g., weekly awards, gift cards, and extra pay). As one participant (Brad) said, "I received an award for my hard work at a weekly meeting with the whole company. It was a very special award to me, and it made me feel like answering emails after six or seven[pm] more worth it." In this sense, engagement in this study is transactional and externally

driven; it is an outcome of social exchange if understood by Saks' (2006) social

exchange theory (SET). Involving the cost-benefit analysis of economic relationships,

SET posits that when individuals receive economic resources (e.g., incentives mentioned

above), they feel obligated to pay back to their organization—in this study, in the form

of engagement (e.g., working longer hours and making more calls as reported by my

participants).

Autonomy

Autonomy was the third biggest difference between the participants' perception

of engagement and their manifestations of engagement. The participants did not perceive

autonomy as important to their engagement; however, when they shared examples of

engagement, autonomy was mentioned by all 15 participants. To them, autonomy means

having the freedom and flexibility of managing both daily tasks and the sales process.

The participants' desire for autonomy is not surprising considering the nature of the

inside sales role. Inside sales representatives are often tasked with aggressive individual

sales goals (Sleep et al., 2020), and in order to meet these goals, inside sales

representatives need freedom to complete their daily tasks at their own pace as well as

flexibility to manage the sales process. For example, some of my participants preferred

to call customers in the morning, and others waited until the afternoon. Based on the

findings from this study, it is clear that individuals with autonomy at work are more

engaged than those without. This finding is consistent with previous literature in that

autonomy is a key job design factor (Medhurst & Albrecht, 2016) and contributes to the

engagement of salespeople overall (Bailey et al., 2017). However, my study adds further clarification to employees holding inside sales positions specifically.

Belief in the Product

The fourth biggest difference between the participants' perception of engagement and their manifestations of engagement was their belief in the product that they sell (for the sake of this study, services are also considered products). While nine participants associated their work engagement to their faith in their company's product, none of them provided supporting examples. One possible explanation for this discrepancy is that the participants do not fully believe in the product they sell. Five participants described situations where they did not believe in the product they were selling, which led to them eventually quitting the organization. Previous literature has not considered the belief in the product as an antecedent of engagement.

Feedback from the Customer

The fifth biggest difference between the participants' perception of engagement and their manifestations of engagement was the feedback from customers. Similar to the belief in the product, eight participants perceive feedback from the customer as important to their engagement; however, none of them provided specific examples to support their perception. One explanation for this is that inside salespeople in the business development role are responsible for setting appointments and then moving on; they are not responsible for continuing the relationship with the customer after the initial appointment has been set. The previous literature has not considered feedback from the customer as an antecedent of engagement.

In-Role Resources and Work Perks

The sixth biggest difference between the participants' perception of engagement and their manifestations of engagement was in-role resources and work perks. Interestingly, findings from this study indicate that tangible organizational resources are not a significant contributing factor to the participants' engagement. In the context of my study, these tangible resources consist of work perks (e.g., in-office pool table, free food at lunch, beer in the fridge) and in-role resources (e.g., extra computer monitor, docking station for laptop). Although the participants utilized work perks when they were working in the office and appreciated the extra in-role resources when they were working from home, these added benefits were not so important to their engagement.

This finding challenges current literature that highlights the value of organizational resources to employee engagement. For example, in the JD-R model, the broader rhetoric that organizational resources (e.g., desirable office perks) were identified as an important engagement booster (Demerouti et al., 2001). Perhaps this partially explains why so many organizations invest substantial resources to create unique employee experiences to foster engagement. However, this is not the case in my study. According to my 15 participants, additional tangible job resources are nice to have, but they are not as valuable as intangible resources such as continuous training and development opportunities. A similar finding was also reported by Bargogliotti's (2012) study.

Areas of Consistency

163

Despite the six major areas of discrepancies discussed above, there are some areas where the participants' perceptions are consistent with or supported by their behaviors. Among them, two stand out: (a) managers' commitment to employee development; and (b) peer collaboration.

Managers' Commitment to Employee Development

The greatest consistency between the perception of engagement and the manifestation of engagement involves the managers' commitment to employee development. In this study, all the 15 inside sales representatives reported that they were engaged at work when their direct manager invested in their professional and personal growth by providing ongoing one-on-one job coaching and career guidance. Among them, 13 provided specific examples for illustration. It is this type of managerial support that has helped the participants stay on track to achieve their sales goals and pursue advanced education. In some cases, the bond between the participants (e.g., Jessica and Martin) and their manager was so strong that when the manager left the organization, the participant followed. On the contrary, participants with unsupportive managers (e.g., Megan and Calvin) were more apt to be disengaged and more likely to leave the organization.

The manager's commitment to employee development, often referred to as managerial support, is widely established in the engagement literature (Bailey et al., 2017; Bakker & Xanthopoulou, 2013; Karatepe, 2012; Saks, 2006). The three theoretical constructs that have previously explained the manager's role in employee engagement are (a) perceived supervisor support, (b) transformational leadership, and (c) leader-

164

member exchange. However, the findings in this study suggest that out of the three constructs, perceived supervisor support (PSS) (Bailey et al., 2017; Bakker & Xanthopoulou, 2013; Saks, 2006) is most applicable to inside sales representatives in their early career. The participants who received greater support from their manager were more apt to give back in the form of engagement.

Peer Collaboration

The second area that shows great consistency between participants' perception of engagement and their manifestations of engagement lies in collaboration opportunities between the participants and their coworkers. My findings reveal a positive association between peer collaboration and engagement. In other words, those who had collaborative coworkers were more engaged than those who did not. In this study, the participants sought collaboration with their colleagues for two primary reasons. First, they collaborate with each other for emotional support at times of low self-efficacy— typically while they are in an entry-level business development role. Second, as they progress past the business development role, they rely on each other for collaboration in solving problems related to the sales process.

The finding of peer collaboration as an engagement booster contributes to current literature in two ways. First, the finding adds to existing research on inside sales representatives. For example, Sleep et al.'s (2020) study showed that inside sales representatives built internal relationships and mobilize social capital when necessary. My study has generated similar insights. Second, findings from my study expands current understanding that the individualism/collectivism organizational culture impacts

165

team-member exchange. In other words, organizations with a highly collectivistic culture (i.e., employees work as a group to achieve goals) witness higher team-member exchange, compared to organizations with a more individualistic culture (i.e., employees have individual goals and greater autonomy to work on their own) (Rutishauser & Sender, 2019). In my study, regardless of the organization's stance on coworker collaboration or whether the participants were working independently from home, they still found ways to connect and collaborate, many times on their own.

Engagement Outcomes

Although the findings from this study focus on behavioral outcomes of engagement, they also indicate that perceived engagement and the subsequent behaviors vary by roles. Specifically, the participants were less engaged in the entry-level business development role and more engaged in the following account management role. This section discusses the general behavioral outcomes of engagement and role-specific engagement behaviors

General Behavioral Outcomes of Engagement

Given the identified association between engagement and performance (Bailey et al., 2017; Meintjes & Hofmeyr, 2018; Saks & Gruman, 2014; Sange & Srivasatava, 2012), researchers generally treat engagement itself as a downstream consequence, that is, if employees are high performers, then they are perceived as engaged in their work. However, my findings suggest that this assumption can be problematic because high performance does not necessarily mean that the employees are engaged in their work. Rather, as revealed by this study, some participants performed at higher levels because

166

of their fear of failure or fear of their direct manager—in those cases they were not

engaged. Therefore, sales managers and HRD professionals need to pay more attention

to behaviors than performance to obtain an accurate understanding of individual

engagement. However, the population of many previous engagement studies consist of

people in a wide variety of occupations and roles, which makes it challenging to pinpoint

specific behaviors of engagement. To address this issue, this study focused on one

specific group of professionals—inside sales representatives; by doing so, it is hoped

that informed by the context-specific findings, managers and HRD professionals

working in sales organizations are better prepared to engage their salesforce. Figure 1

below presents the most frequently demonstrated engagement behaviors (i.e.,

consequences) based on this study. Each of the consequences in Figure 1 is listed in

order of frequency of mentioning (i.e., the number of times the consequence was

reported by the participants), and color coded to the specific antecedents that led to the

consequence.
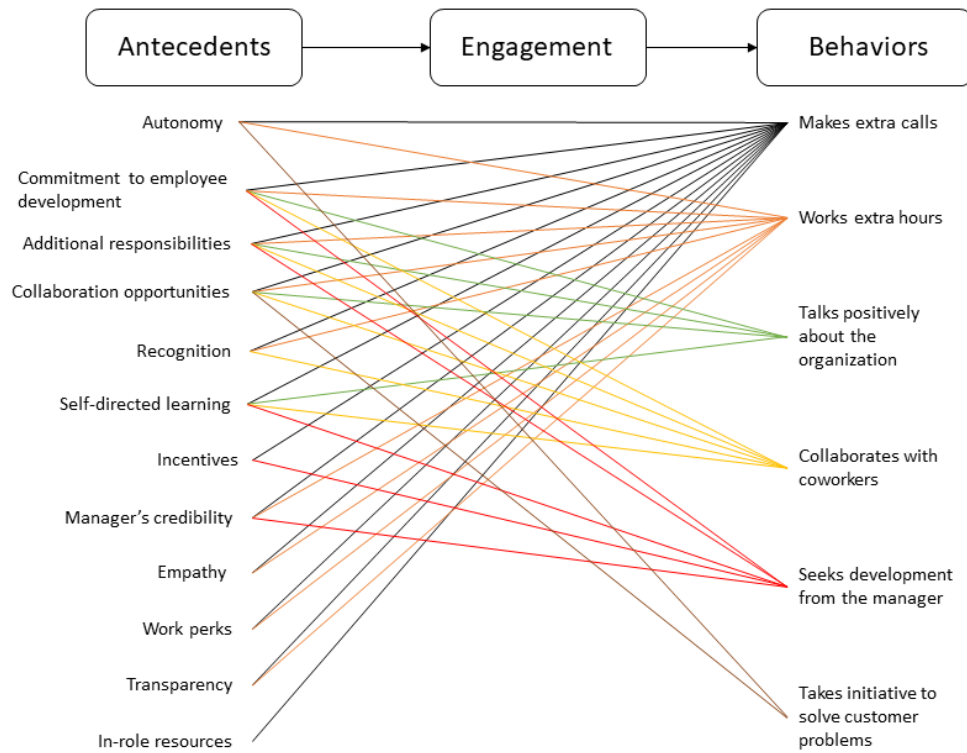
Figure 1
Antecedents and Behaviors of Engagement

Findings from this study highlight extra role behaviors (makes extra calls and works extra hours) as the most common consequences of engagement. As part of their job, inside sales representatives are expected to make a high number of calls to perspective customers (Sleep et al., 2020), which is already very challenging. Nevertheless, when engaged, inside sales representatives likely go above and beyond— making additional calls and working extra hours. What motivated them most to do so is having autonomy. When the participants were given autonomy to manage both the sales process and the timing of when they schedule calls with perspective customers, they

were willing to do more in their role. With such support, they are also more likely to speak positively about their organization.

Other frequently displayed behaviors (the last three in Figure 1) reflect the proactive nature of the participants. Usually when business development representatives (BDRs) are new in their role, they receive inquiries from customers that they are unfamiliar with or that they cannot solve. However, when they are engaged at work, they are more than likely to take it upon themselves to collaborate with coworkers, seek development from the manager, and take initiative to solve customer problems.

Role-Specific Behavioral Outcomes of Engagement

The findings in this study indicate that inside sales representatives demonstrate specific behaviors that are desired by sales organizations when they are engaged (e.g., making extra calls, putting in extra hours); however, the level of their engagement varies by role not by industry. Interestingly, although the participants came from diverse industries, their job role mattered most. This finding is in line with previous research (e.g., Kahn, 1990; Saks, 2006) that has identified occupations and job roles as engagement impact factors. Within the context of my study (the occupation of B2B inside sales), the participants held different roles and demonstrated varying degrees of engagement within each role. The two most common roles held by the participants were the entry-level business development (BDR) role and the account management (or equivalent) role. My study indicates that sales professionals in the entry-level business development role tend to be less engaged than those in account management; consequently, the former group is less likely to display positive engaging behaviors than

169

the latter. In the subsequent paragraphs, I explain the role-oriented difference with a specific focus on the business development role. This is because the business development role is a common entry point for recent college graduates, and it prepares them to become B2B inside sales representatives.

At the time of the interviews, all my participants had already worked in the business development role for 6-18 months, thus had a fairly good understanding of the job expectations. While the aggressive sales goals required of them could make the job challenging and exciting, the business development representatives (BDRs) described their role as monotonous, boring, and frustrating. In fact, they attributed their feeling of disengagement to the lack of autonomy and additional responsibility provided by their organization.

Autonomy

Autonomy is known as a booster for engagement (Kahn, 1990); however, within the professional selling field, autonomy has a different impact depending on the job roles (Medhurst & Albrecht, 2016). For example, professionals in field sales roles can dictate their own work schedule, but those in entry-level business development roles have to work on fixed schedule (8:00 AM to 5:00 PM). In addition, BDRs are expected to use the pre-developed script as a selling aid. While the script is provided as a tool to increase their self-efficacy, the BDRs often prefer to interacting with customers in their own way. In other words, with increased self-efficacy in the business development role comes with stronger desire for autonomy. Furthermore, some organizations in this study support and encourage BDRs to inject their own creativity into the sales process, and others do not.

Such differences in organizational practices lead to different outcomes of engagement. Based on my study, BDRs with autonomy and creativity are more engaged at work, and BDRs who are prohibited from deviating from the script are more apt to quit their job. These findings suggest that the level of autonomy in work scheduling does not affect sales representatives' engagement level as much as autonomy of managing daily tasks and sales processes. This discovery is refreshing in that it sheds light on the nuances of autonomy in relation to job engagement.

Additional Responsibility

BDRs repeat the process of making calls and setting appointments for at least six months before they are eligible for promotion. During this process, they often become bored, thus likely seeking additional responsibility to break the monotony. Some organizations in this study provide BDRs with additional responsibilities such as mentoring new hires and allowing them to follow deals past the initial appointment. These added responsibilities empower BDRs to be more engaged and subsequently make more calls. This strategy, also known as job enlargement or horizontal restructuring, is a frequently used job design technique, which has a long-standing theoretical background (Gichuki & Munjuri 2018; Tumi, 2021). By increasing the scope of one's job quantitatively at the same level, this strategy has major benefits to both the job performers and the organization (e.g., reduced monotony and increased work flexibility), while requiring no additional skills training. My finding that job enlargement is a key organizational strategy for engagement is significant because to the best of my

knowledge, current engagement research has not identified job enlargement as a contributor to engagement.

Although autonomy and additional responsibility are two of the most commonly mentioned engagement antecedents in this study, they are not typically offered to BDRs until they are promoted out of the entry-level business development role. Therefore, it is not surprising to me that my participants in this role rarely made extra calls or desired to earn extra incentives; instead, they opted out. In fact, 8 of the 15 participants quit their first business development role before they were promoted. This finding aligns with our conventional belief that at any given time, 24% of inside sales representatives are actively seeking other opportunities (Gartner, 2019).

Taken together, findings from this study remind us that engagement is not a one-size-fits-all construct (Saks, 2006), therefore, organizations must customize their approaches to engage sales professionals in different roles. Furthermore, this study provided empirical evidence that job autonomy, managerial support, peer collaboration, and job enlargement are effective engagement boosters within the context of B2B inside sales. These evidence-based insights led to a new operating definition of employee engagement.

> *Employee engagement is a positive behavioral state of mind, in which individuals go above and beyond at work due to a combination of organizational, job, and personal level factors.*

This definition considers the positive behavioral outcomes of engagement (e.g., go above and beyond) as the anchor to engagement. Going above and beyond result from

a combination of organization, job, and personal level factors (e.g., job autonomy, managerial support, peer collaboration). This definition is helpful to HRD practitioners because it adds clarity to the industry of inside sales while remaining flexible for future scholarly research.

Implication for Practice: A New Engagement Process Model

Engaged employees perform at higher levels (Bailey et al., 2017) and have a lower intention to quit (Argawal et al., 2012; Shuck et al., 2014). However, the turnover rate among first-year inside sales representatives is found to be a staggering 24% (Gartner, 2019) while the field of inside selling is projected to grow (Sleep et al., 2020). To address this issue, I propose a new evidence-based model (see Figure 2), which can benefit multiple stakeholders within sales organizations, including organizational leaders, sales managers, and HRD practitioners. By mapping out the engagement process and implementation strategy, this model serves as a reference tool to guide day-to-day practice of engaging inside sales representatives in entry-level business development roles. Specifically, the framework outlines the specific antecedents necessary to increase engagement at three stages of the business development role. It also offers interventions that HRD practitioners can enact to boost engagement and reduce turnover.

Managerial support
- Promote former BDR to manager
- Provide time management training
- Provide emotional intelligence training

- Offer weekly prizes/rewards
- Offer continuous organizational training
- Provide continuous managerial support
- Discuss career progression plan

- Begin to increase autonomy and responsibility (if goals are met)
- Offer weekly prizes/rewards
- Offer continuous organizational training (at BDRs discretion)
- Provide continuous managerial support
- Revisit career progression plan

- Begin coaching for post BDR role
- Begin to increase autonomy and responsibility (if goals are met)
- Offer weekly prizes/rewards
- Offer continuous organizational training (at BDRs discretion)
- Provide continuous managerial support
- Revisit career progression plan

Post BDR Role Options

Sales Management

Enterprise Sales

Account Management

Beginning of BDR Role
(0-3 months)

Middle of BDR Role
(3-9 months)

End of BDR Role
(9 + months)

Figure 2
Process Model of Engagement Within Inside Sales Business Development Roles

Prior to Starting the BDR Role

Prior to new BDRs starting in their role, HRD practitioners should ensure that sales managers are equipped with knowledge and skills to provide effective coaching and development to their sales representatives. Evidence from this study reinforces that the direct manager is vital to the BDR's success, especially early in their career. To foster a trusting relationship between the manager and BDR, organizations should consider promoting from within so that sales managers can build credibility (i.e., the manger has previously done the BDR role) when coaching and developing their BDRs. In this way, new sales representatives are more likely to listen and follow through on their managers' guidance and recommendations because their manager knows firsthand, what their role entails.

Second, organizations should ensure that sales managers have adequate time to devote to each BDR for their development. HR professionals can take a leading role in establishing a performance review system where coaching and mentoring are built in as part of managerial responsibility, thus recognized and rewarded. In addition, HR professionals can help design managers' job in the way that it gives them freedom to invest in people development.

Third, HRD professionals can offer sales managers emotional intelligence training on topics such as empathy. As acknowledged by the participants in this study, when their manager was empathetic to the intersection of their personal and professional lives, they were more engaged. Meanwhile, at times, personal emergencies arose with the participants, which required them to step away from work despite their busy

schedules and aggressive sales goals. The participants were more engaged when their

manager showed empathy and understanding of their personal situation.

Beginning of the BDR Role (0-3 months)

In addition to the typical new hire training provided at the start of the role

(lasting approximately two weeks), organizations should specify the anticipated timeline

to matriculate through the business development role and share post-business

development role opportunities. As this study reveals, inside sale representatives tend to

be more engaged when their organization clearly communicates career pathing and

timelines.

Second, managerial support and organizational training are vital at this stage for

two reasons: (a) to increase the BDRs' self-efficacy; and (b) to ensure that BDRs receive

positive feedback from customers about their pitch and/or product/service. Having

positive beliefs in the product/service of their company likely leads to higher level of

engagement for BDRs.

Third, organizations should consider offering weekly incentives and encourage

friendly competition among BDRs; doing so will help BDRs develop a sense of

achievement or satisfaction at a time when their role can be very boring and most

challenging. Many BDRs struggle from the monotony and lack of success in the role;

therefore, offering constant recognitions and rewards helps build self-efficacy and

empower the BDRs to be engaged.

Finally, organizations should provide resources to allow for coworker

collaboration. As shown in this study, BDRs rely on their coworkers for support and

encouragement throughout the role. For this reason, it is important that leaders and managers of the sales organization make a concerted effort to support and engage BDRs, for example, by allocating time each week for BDRs to build camaraderie and creating opportunities for BDRs to collaborate on work projects.

Middle of the BDR Role (4-9 months)

At this stage, BDRs are more comfortable with the expectations in their role and gaining self-efficacy. However, this is also the stage where monotony increases. To help BDRs to stay engaged at work, here are a few strategies for consideration once BDRs meet key performance indicators (KPIs). First, grant BDRs with autonomy. One way to do so is stop requiring the use of the scripts as a selling aid; instead, encourage BDRs to be creative in managing the sales process and their daily schedule. Second, adopt job enlargement as an engagement strategy. For example, slowly increase BDRs' job responsibilities by allowing them to shadow account managers and follow a few of their deals through the pipeline and to the close of the sale. Meanwhile, give BDRs the freedom to choose additional responsibilities (e.g., mentoring interns or new hires) and autonomy (e.g., following a deal through the pipeline or shadowing an account manager). At this stage, managerial support that focuses on alignment with the employee's career progression plan is also important because it will help BDRs to have a successful transition out of the BDR role. To achieve this goal, sales organizations should continue to offer weekly incentives and promote coworker collaboration.

End of the BDR Role (9+ months)

By this time, the BDRs' self-efficacy should be high, and they should have a clear career development plan. In addition to general coaching, managerial development should also involve post-business development role coaching and career preparation. For example, if the BDRs desire to go into account management after the business development role, then they should be given the opportunity to shadow current account managers.

Towards the end of the business development role (9+ months), BDRs who have met necessary KPI's should be granted more job autonomy and additional responsibilities. They should have a clear idea about when they will be promoted into a post-business development position. At this stage, leaders and managers should consider diversifying post-business development opportunities such as account management, enterprise sales, and sales management, because not all BDRs follow the same career path. Just as some participants in my study, they realized, while in the BDR role, that their career goals changed. This requires organizations to make time to understand individual BDRs' career aspirations, needs and wants, so that they can provide work opportunities that are aligned with their unique interests.

Work from Home

The COVID-19 pandemic has quickly and drastically changed the dynamics of inside sales organizations. At the time of this study, ten of the 15 participants were working remotely (from home) and had mixed feelings about this new work arrangement. Most of them want to return to the office because it is easier to collaborate with their coworkers and to receive developmental feedback from their manager. Despite

that organizations provide technologies for digital communication (e.g., Slack, Microsoft Teams, and Zoom), those working in the office found it easier to ask questions and develop relationships with their coworkers and manager because of the physical proximity.

As many inside sales representatives will continue to work from home for the foreseeable future, HRD professionals and sales managers who are responsible for managing and developing these inside sales representatives should be cognizant of any behavioral changes of their representatives. For example, if sales managers notice that work-from-home employees are doing less in their role (e.g., making fewer calls), or if they are not proactively seeking development opportunities (e.g., not collaborating with coworkers or not seeking additional training), then they should check in with their subordinates so that they can collectively identify the issues and address them in a timely manner.

Theoretical Implications

In addition to providing specific guides for practice, findings from this study also have implications for engagement related theory. First, this study contributes to the engagement literature by highlighting the specific antecedents and consequences required for engagement of an understudied group – inside sales representatives. My findings challenge the conventional belief that engagement amongst salespeople varies by industries (e.g., pharmaceutical or technology) (Meintjes & Hofmeyr, 2018), not by different types of sales roles (e.g., BDR role versus account management).

179

Further, this study supports social exchange theory in the context of engagement (Saks, 2006)—when the organization provides resources, employees would return their appreciation by being more engaged at work. It also expands and deepens our understanding of the impact of social exchange by differentiating the effect of different types of resources by external incentives rather than internal motivation. In my study, inside sales representatives are more engaged with intangible resources (e.g., training and managerial support) compared to tangible resources such as organizational perks (e.g., pool table or food in the fridge). This knowledge is important as it helps HRD practitioners and sales leaders make informed decisions and pinpoint strategies that will maximize the benefits to both organizations and BDRs.

Despite the myriad of leadership theories, findings from this study illuminate that transformational leadership (Agrawal, 2020; Edelbroek, Peters, & Blomme, 2019; Shuck & Herd, 2012) is most effective to enhance the engagement of their inside sales representatives. Specifically, sales leaders who are committed to the long-term development of their employees stand a better chance to engage and empower their BDRs to achieve both job goals and career success.

Study Limitations and Recommendations for Future Research

As any empirical study, this study has its own limitations. Therefore, I begin this section by discussing four of them. Then I offer suggestions for HRD scholars to address these limitations.

First, this is a qualitative study of 15 inside sales representatives in the United States. Therefore, the findings are limited to such a context and cannot be generalized to

other populations and other industries or countries (Marriam, 2009). While my participants represented a variety of inside sales industries, future research is needed to investigate different inside sales industries (e.g., technology, manufacturing, or healthcare) and the engagement of their employees. Also, comparative studies of engagement between inside sales and outside sales representatives will enrich our understanding of role-specific engagement factors.

Second, there is a limitation related to selection bias. For this study, I recruited the participants through my personal LinkedIn network; as a result, I know some of them on a personal level. Having an established rapport prior to the interview helped create a safe environment where the participants would share information they might not with a stranger. Future qualitative studies should consider participants who are selected at random.

Third, ten of the 15 participants were working from home at the time of the study because of the COVID-19 pandemic. These participants had different experiences compared to those working in the office. Specifically, those working at home could not use organizational resources such as work perks. In addition, they were not able to collaborate with coworkers or receive developmental feedback from their manager in the same way as those working in the office. Although findings from this study did not indicate substantial differences in engagement between these two groups of employees, more studies are needed to help determine if the work location impacts employee engagement, and if so, how and to what degree.

Lastly, the engagement constructs revealed by this study were based on 15 participants' perceptions and experiences, thus their applicability to a larger population is yet to be validated. Quantitative studies are needed to test the study findings on a larger scale. In addition, quantitative studies will be useful in identifying patters of engagement across different variables such as age, industry, or gender, which are not considered in this qualitative inquiry.

Conclusion

The purpose of this generic qualitative study was to explore employee engagement from the perspective of inside sales representatives. The study addressed two research questions:

1. What are inside sales representatives' perceptions of work engagement?
2. What engaging behaviors do inside sales representatives display at work?

A sample of 15 inside sales representatives in the United States participated in this study. Two rounds of individual interviews resulted in a total of 203 pages of transcripts for analysis. I used the critical incident technique to uncover specific behaviors of engagement demonstrated by the inside sales representatives. In total, 89 behaviors were identified. The data analysis revealed three interesting findings. First and most important, what is perceived by inside sales representatives as an engagement booster does not necessarily lead to engaging behaviors. Therefore, sales managers and HRD practitioners must observe actual behaviors in order to accurately assess the engagement level of their employees. Secondly, engagement varies by job role. Findings from this study suggest that sales professionals in the business development roles are

less engaged compared to those in account management roles. This finding has important implications for sales organizations when they consider what strategies and practices to adopt to effectively engage their employees in the BDR role. Thirdly, engagement for the inside sales representatives is more extrinsically than intrinsically driven; and among the external motivators, in-role resources (autonomy and additional responsibilities) matter more than organizational resources (work perks). This finding is refreshing in that it challenges existing engagement literature that supports the idea that more resources likely lead to higher level of engagement.

Finally, this study fills a void in current literature. Although numerous empirical studies of engagement exist, few have considered salespeople as the study population; and to the best of my knowledge, none has focused on inside sales representatives specifically. This qualitative study allowed me to explore the contextual influences of engagement on inside sales representatives. With the new knowledge of the antecedents and behavioral consequences identified by this study, an operating engagement definition, and the newly developed engagement process model, sales managers and HRD practitioners are better prepared to attract, engage, and retain their inside sales representatives.

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APPENDIX A

IRB OUTCOME LETTER

December 08, 2020

TEXAS A&M
UNIVERSITY

EXEMPTION DETERMINATION
(Common Rule –Effective January, 2018)

Any study that requires in person or face-to-face study visits may not begin or resume until your site has an approved plan that adheres to the re-opening guidelines posted on the Division of Research's VPR website: https://vpr.tamu.edu/covid-19. This plan is to be sent to your Department Chair and Dean, then forwarded to the Clinical Research, Education and Service Advisory Committee for approval.

Type of Review:	Initial Review Submission Form
Title:	EMPLOYEE ENGAGEMENT: A QUALITATIVE STUDY OF INSIDE SALES REPRESENTATIVES
Investigator:	Jia Wang
IRB ID:	IRB2020-1439M
Reference Number:	118459
Funding:	Internal Funds
Documents Reviewed:	Employee Engagement Study Informed Consent Document 1.2 Interview #2 Guide and Questions 1.0 Interview #1 Guide and Questions 1.0 Recruitment Script 1.0 Dissertation Proposal 1.0
Review Category	Category 2: Research that only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior (including visual or auditory recording) if at least one of the following criteria is met: i. The information obtained is recorded by the investigator in such a manner that the identity of the human subjects cannot readily be ascertained, directly or through identifiers linked to the subjects; ii. Any disclosure of the human subjects' responses outside the research would not reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, educational advancement, or reputation; or iii. The information obtained is recorded by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or

	through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make the determination required by .111(a)(7).

Dear Jia Wang:

The HRPP determined on December 08, 2020 that this research meets the criteria for Exemption in accordance with 45 CFR 46.104.

This determination applies only to the activities described in this IRB submission and does not apply should any changes be made. Please use the reviewed, stamped study documents (available in iRIS) for applicable study procedures (e.g. recruitment, consent, data collection, etc…). If changes are needed to stamped study documents or study procedures, you must immediately contact the IRB. You may be required to submit a new request to the IRB.

Your exemption is good for three (3) years from the Approval Start Date (12/08/2020). Thirty days prior to that time, you will be sent an Administrative Check-In Notice to provide an update on the status of your study.

If you have any questions, please contact the IRB Administrative Office at 1-979-458-4067, toll free at 1-855-795-8636.

Sincerely,
IRB Administration

APPENDIX B

INFORMED CONSENT

Project Title:
Employee Engagement: A Qualitative Study of Inside Sales Representatives
Investigator:
Dr. Jia Wang, Professor, Texas A&M University
Andrew Loring, PhD student, Texas A&M University
Funded by:
This research is not funded by any external body outside Texas A&M University.
However, Texas A&M University is supporting this study. Texas A&M University is
allowing the use of time and resources of the university faculty and students.
Financial interest disclosure:
The researchers have no financial interests conducting this study.
Why are you being invited to participate in this study?
You are being asked to be in this study because:
- You currently work in a business-to-business (B2B) inside selling role and
- You have worked in your current role for at least 12 months
Who can I talk to?
If you have questions, concerns, or complaints, or think the research has hurt you, talk to
the research team at aloring@mays.tamu.edu or jiawang@tamu.edu.
 You may talk to TAMU IRB at 1-979-458-4067, toll free at 1-855-795-8636, or by
email at irb@tamu.edu. If the research team is not being responsive to you and your
questions to your satisfaction.
Why is this research being done?
The purpose of this study is to understand employee engagement from the perspective of
inside sales representatives. The study will help organizations to support inside sales
representatives' engagement.
How long will the study last?
You will be asked to participate in two virtual interviews, each 45-60 minutes long.
How many people will be asked to be in this study?
A total of 20 will be identified as potential participants of the study. I expect to include
at least 15.
What happens if I say "Yes, I want to be in this research"?
If you agree to participate in this study, you will be invited to participate in two virtual
interviews lasting between 45-60 minutes conducted over Zoom. The interview will be
video recorded with your consent. The audio recording of the interview will be
transcribed with the use of Otter.ai transcription service (the privacy policy for Otter.ai
can be found here: https://otter.ai/privacy). Otter.ai will not collect any information on
you as the participant. After the audio recording is transcribed, I will email the transcript
to you via Texas A&M Filex, which is a secure way to transfer files. You will have the

opportunity to verify and make edits to the transcript. The research data collected during this interview will be destroyed after three years.

What happens to the information collected for the research?

The records of this study will be kept private and confidential. Your information will not link you to this study or will be included in any sort of report that might be published. Research records will be stored securely, and only the Principal Investigator and Advisor will have access to the records. Information about you will be stored in locked file cabinets, and computer files protected with a password. This consent form will be filed securely in an official area at the Texas A&M Campus, College station, TX, USA. If there are any reports about this study, your name will not be in them. Information about you and related to this study will be kept confidential to the extent permitted or required by law.

Is there any way being in this study could harm me?

There are no sensitive questions in the interview that should cause discomfort. However, you can skip any question you do not wish to answer or stop participating in the interview at any point.

What happens if I do not want to be in this research?

You can withdraw your participation at any time during the study without any consequences.

What happens if I say "Yes", but I change my mind later?

You can withdraw your participation at any time during the study without any consequences.

Who May I Contact For More Information?

You may contact the Principal Investigator, Andrew Loring, at ajloring@tamu.edu to tell him about a concern or complaint about this research.

For questions about your rights as a research participant, or if you have questions, complaints, or concerns about the research, you may call the Texas A&M University Human Subjects Protection Program office at +1-979-458-4067 or irb@tamu.edu.

APPENDIX C

DEMOGRAPHIC INFORMATION SHEET

Project Title: **Employee Engagement: A Qualitative Study of Inside Sales Representatives**

Direction: Please provide as much information as you can and as you deem applicable to your situation.

Name: [   ]

Email: [   ]

Gender: ☐ Male   ☐ Female   ☐ Other

Age: ☐ 20-30   ☐ 31-40   ☐ 41-50   ☐ over 50

Current Working Location: Home   Office   Hybrid

Highest Degree: [   ]

Current Occupation and Position:

    Years: [   ]

    Position (industry): [   ]

THE INTERVIEW GUIDE #1

Project Title: **Employee Engagement: A Qualitative Study of Inside Sales Representatives**
Interviewee(s):
Interviewer(s):
Interview Date:
Duration:
Opening Script:
"Thank you for your willingness to participate in this research project. The Informed Consent Form was emailed to you, here it is again, which provides you more detailed information about my project and your rights as a study participant. Please take a few minutes to read it and ask met any questions you may have. Thank you"

Once the participant signs the form, share the **Demographic Information Sheet** and ask the participant to answer the demographic questions.

When the demographic information sheet is complete, share personal background with participant. When finished, ask "now I would like to learn about you…"

START INTERVIEW RECORDING

Questions for the Individual Interview:

1. Tell me about your career path
2. What got you into an inside sales job?
3. Tell me about a typical day for you as an inside salesperson
4. What do you like most about working in an inside sales role?

After the fourth question, ask: "When I use the word engagement, what comes to your mind? What does that mean to you?" If the participant is unable to answer, then share the definition of engagement (Kahn, 1990) and/or give personal example of engagement.
Closing Script:
Thank you again for your willingness to participate in this research project. The next part of the project is to schedule a second interview. Say "for the next round of interview, we will discuss the specific engagement behaviors. Between now and next meeting, I would like for you to reflect on your role and recall specific times when you felt engaged or disengaged" I am going to ask you to recall 5 specific examples when you were engaged (cognitively, emotionally, or physically happy about work).
Thank the participant again.

THE INTERVIEW GUIDE #2

Project Title: **Employee Engagement: A Qualitative Study of Inside Sales Representatives**
Interviewee(s):
Interviewer(s):
Interview Date:
Duration:
Opening Script:
"Thank you for your willingness to participate in the second part of this research project. The Informed Consent Form was emailed to you, here it is again, which provides you more detailed information about my project and your rights as a study participant. Please take a few minutes to read it and ask met any questions you may have. Thank you!"

START INTERVIEW RECORDING

Share "For the interview today, I would like you to recall 5 specific examples (critical incidents) of when you were engaged at work. Can you think of situations when you were engaged?" If the participant cannot recall any situations when they were engaged, ask if they can recall situations of disengagement or share personal example of engagement.

Questions for the 2nd Individual Interview (for each critical incident):

1) What is the circumstance or situation? (context)
2) What exactly happened? What was the specific event? (Incident)
3) What is the outcome of the event? How did this event resolve? (Consequence)

After asking about the 5 specific examples of engagement ask the final 4th question:
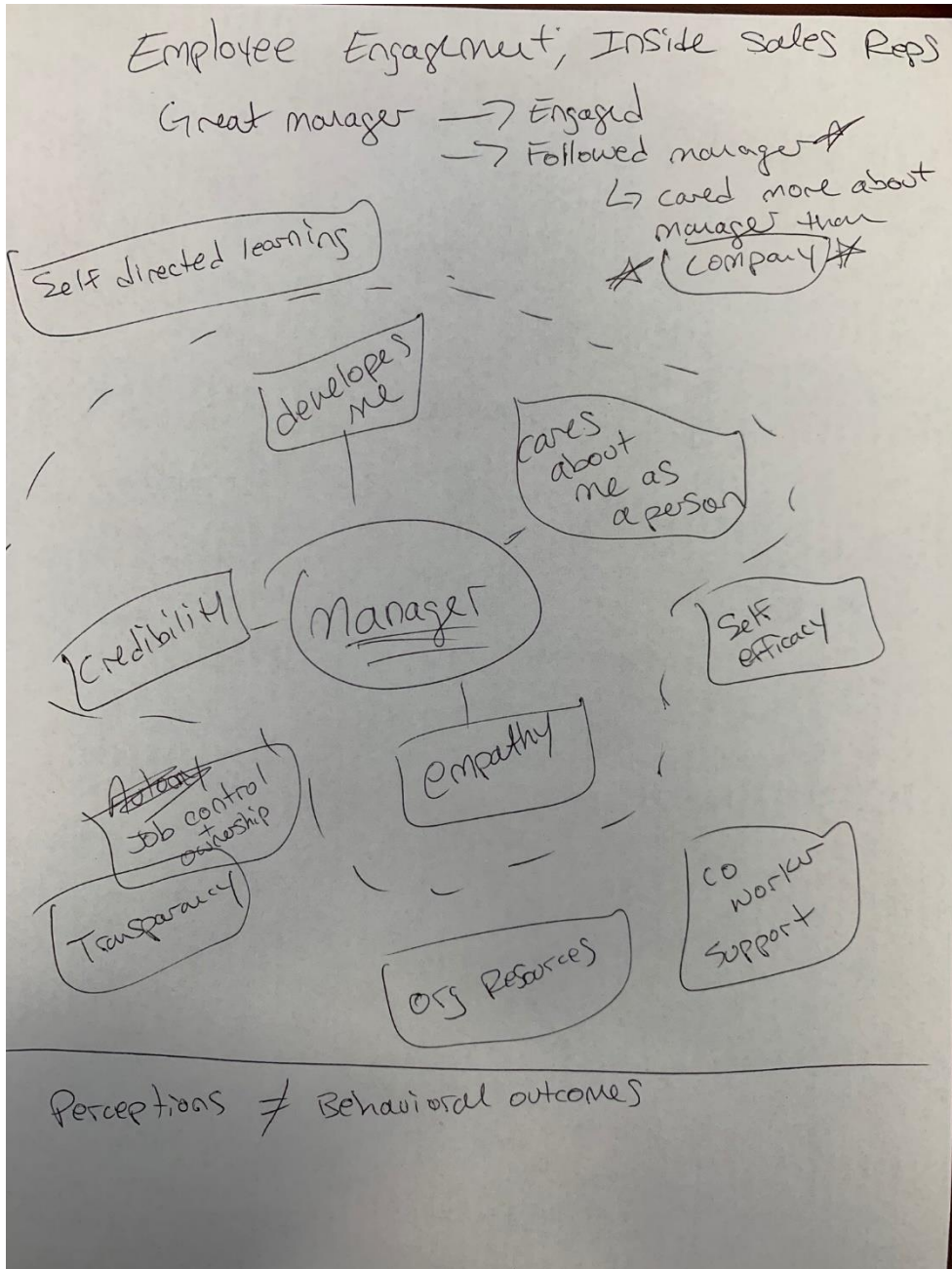4) Given the pandemic, how does that change you as a salesperson? How have you changed physically, emotionally?

Closing Script:
"Thank you again for your willingness to participate in this research project. Is it okay if I reach out via email to ask any clarifying or follow-up questions?"
Thank the participant again.

Table 8
Example of the Behavior and Incident that Led to the Behavior

Behavior	Incident
Makes extra calls (14)	Organization allows autonomy to solve customer problems (3)
	Organization encourages coworker collaboration (2)
	Manager cares about employees personal and professional goals (2)
	Organization trusts employee to take on additional accounts to help a coworker who was on leave
	Organization adjusts quota during COVID
	Organization regularly communicates status of potential layoffs during COVID
	Organization recognized employee in front of entire organization for hard work
	Organization offers individual sales incentives
	Organization allowed employee to interview for an advanced role despite not having required seniority
	Organization provides weekly training opportunities

Table 9
Example of the Sub-Themes, Themes, and Categories of the Engaging Behavior; Makes Extra Calls

Category	Theme	Sub-Theme	Incident
Job Factors	Job Control & Ownership	Autonomy	• Organization allows autonomy to solve customer problems • Organization allowed employee to break typical procedure (meet with customer face-to-face) to make a sale • Organization empowers employee to solve organizational problems, Organization allows employee to see the entire sales process
		Continued Responsibility	• Organization trusts employee to take on additional accounts to help a coworker who was on leave
	Coworker Support	Collaborative	• Organization encourages coworker collaboration

Table 6

Example of Engaging Behaviors with Frequency

Engaging Behaviors	Frequency
Makes more calls	23
Works after hours/when off work	20
Focuses on performance when there is a prize	14
Trains/develops/struggling co-workers without additional pay	11
Collaborates with co-workers	10
Takes initiative to solve problems for customer	9
Takes initiative to solve organizational problems	6
Seeks development from manager	5
Talks positively about the company/products	5
Seeks training opportunities from organization	4
Uses company perks (e.g., gym)	4
Follows through on managers orders	4
Socializes with co-workers in non-work setting	2

Table 3

Example of the Categories, Themes, Sub-Themes, and Frequency of the Data

Theme	Sub-theme	Frequency
Motivations		
	Building trust with coworkers (don't want to let them down) and prospects/customer focused/not aggressive	5
	Create daily wins	
	When given additional responsibilities	5
	Positive belief in product/company/mission	9
	Full sales cycle	
	Doing quality work	
	Interacting with senior leaders	2
	Competitive	3
Times of engagement	Product/industry expert	5
	Making commission/success/incentives	5
	Closing/short sales cycle/following deal	8
	When the company is successful/working for the best company/recession proof/company future	6
	When prospect gets excited	3
	Being busy with multiple deals/fast pace	3
	Strategic thinking/creativity (in role)	4
	Helping/bringing value to customers/trusted advisor/pleasing/problem solving/fixing	13
	Internal selling	