

**DETERMINING COMPETENCIES FOR FRONTLINE  
SALES MANAGERS IN FOR-PROFIT  
ORGANIZATIONS**

A Dissertation

by

TINA KILLOUGH BUSCH

Submitted to the Office of Graduate Studies of  
Texas A&M University  
in partial fulfillment of the requirements for the degree of  
DOCTOR OF PHILOSOPHY

May 2012

Major Subject: Educational Human Resource Development

Determining Competencies for Frontline Sales Managers in For-Profit Organizations

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May 2012

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**ABSTRACT**

Determining Competencies for Frontline Sales Managers in  
For-Profit Organizations. (May 2012)

Tina Killough Busch, B.A., Baylor University;

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Chair of Advisory Committee: Dr. Larry M. Dooley

Practice in the sales profession and current competency research indicate salesperson competence is key to organizational competitive advantage. With models of selling evolving to respond to the marketplace, there are changes in the competency requirements and roles people must play for future success, resulting in the emergence of new kinds of sales professionals. While there has been research in the area of entry-level salesperson competency, there is a gap in the literature regarding sales manager competence. Despite potential for sales managers to influence salesperson performance in the evolving sales models, research focusing on sales manager selection, development, and performance is limited. The purpose of this research was to synthesize sales manager competency perceptions, propose an inventory of competencies for frontline sales managers (FLSMs) in for-profit organizations that can assist in improving individual, team, and organizational performance, and generate recommended uses of the competency model that could serve as a guide for human resources initiatives to increase levels of sales force effectiveness.

The Delphi technique was the chosen research method for this study, with an expert panel of 35 nominated Chief Sales Officers (CSOs) and FLSMs. Through a three-round electronic questionnaire series, the panel reached consensus on 34 competencies in eight clusters in the following three categories considered essential for exemplary performance by FLSMs: team effectiveness, personal effectiveness, execution and results. All numerical data were analyzed using descriptive statistics. Spearman's rank order correlation coefficient was used to determine the degree of agreement among respondents, and the constant comparative method of data analysis was used to synthesize panelist's input.

The findings of this study resulted in the following conclusions: Exemplary performance in FLSMs requires competence in developing and sustaining inter- and intrapersonal skills excellence as compared to the functional selling skills required for high individual contributor performance; There was agreement in how CSOs and FLSMs perceive competency importance; There was strong disagreement in how CSOs and FLSMs perceive FLSM competence; Both groups report they would use the FLSM Competency Model as a coaching tool; FLSMs noted the primary use of the competency model would be to benchmark their skills.

## DEDICATION

This study is dedicated to my family and friends who provided encouragement and motivation to achieve this goal.

Dan, you have been my steadfast support and fiercest advocate for more than half my life. I am so fortunate to share this life journey with you, and Rachel, at 13, you do not remember a time when I was not going to school. Thank you for being the light of my life and for your patience, encouragement, and prodding question, “Mommy, when are you going to finish that paper?” I knew I had to finish for many reasons, and one very important one was as an example for you.

To my father, Floyd Killough, whose life lessons have made me the person I am today, one of which is that through education and work ethic, anything is possible. My mother, Glenda Killough, is the most nurturing person I know. Thank you for being the wonderful mother you are and for your unconditional love and support. To my brother, Aaron Killough, who taught me the true meaning of never giving up and what grace looks like in the face of adversity. I have such deep admiration for my grandmother, Ruby Killough. Thank you for being my role model for strength, pride, and hard work.

To my parents-in-law John and Susie Busch, thank you for your encouragement and love these many years. You have taken me in as a daughter, and I cannot thank you enough for your wisdom and support. To my godparents, Bear and Huggy Nelson, thank you for your lifelong friendship. And to all the family and friends who have shared this experience, thank you for enriching my life. I am truly blessed.

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Dr. Larry Dooley, thank for your unwavering support and guidance. I will never forget our meeting at the AHRD conference in Knoxville, Tennessee. You jump started my motivation to complete the final requirements by encouraging me to shape the study around something meaningful to the field and applicable in my work. I am deeply grateful for your guidance that day and for your ongoing coaching and feedback throughout the process.

Thank you to Dr. Lauren Cifuentes, a committee member, and an individual I credit with getting my foot in the private sector door. The knowledge gained through your classes in ISD has formed a cornerstone in my career, beginning with the interview for my first role at Pitney Bowes when I was asked the question, “What do you think of the Dick and Carey model?”

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## TABLE OF CONTENTS

	Page
ABSTRACT .....	iii
DEDICATION .....	v
ACKNOWLEDGEMENTS .....	vi
TABLE OF CONTENTS .....	viii
LIST OF TABLES .....	x
LIST OF FIGURES.....	xiii
 CHAPTER	
I INTRODUCTION .....	1
Statement of the Problem .....	4
Purpose of the Study .....	4
Research Questions .....	5
Operational Definitions .....	6
Assumptions of the Study .....	7
Limitations of the Study .....	8
Significance of the Study .....	9
Organization of the Study .....	9
II REVIEW OF RELATED LITERATURE.....	10
What is a Competency? Three Main Approaches .....	10
Competency Models.....	18
Sales Profession Evolution.....	23
Sales Manager Competency .....	27
Summary .....	30
III METHOD .....	33
Rationale for the Use of the Delphi Technique.....	33
Development of the Delphi Panel .....	38
Expert Panel Characteristics.....	39
Delphi Rounds.....	45

CHAPTER	Page
IV RESULTS .....	49
Analysis of the Research Questions .....	52
Summary of the Data Analysis.....	102
V SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS .....	105
Summary of the Study.....	105
Conclusions .....	110
Recommendations .....	112
REFERENCES .....	117
APPENDIX A .....	125
APPENDIX B .....	127
APPENDIX C .....	131
APPENDIX D .....	142
APPENDIX E.....	144
APPENDIX F .....	163
APPENDIX G .....	165
APPENDIX H .....	176
APPENDIX I.....	178
APPENDIX J.....	183
APPENDIX K .....	187
APPENDIX L.....	191
APPENDIX M.....	195
APPENDIX N .....	200
VITA .....	202

## LIST OF TABLES

TABLE		Page
1	Action Verb Classification in America .....	22
2	Contrasting Transactional and Solutions Selling Models .....	27
3	The Roles of Sales Managers .....	31
4	Response Rate for Each Round .....	39
5	Demographic Characteristics of All Respondents .....	41
6	Consensus Ranking of Competencies by All Respondents.....	54
7	Primary Competencies: Competencies With a Mean of 4.0 or Above and a Range of 1.0 or Less Indicating a High Level of Importance and High Level of Congruity Between Groups .....	59
8	Secondary Competencies: Competencies Rated With Importance Ratings Over 4.0 Showing High Importance, but a Range of 2.0 or Higher, Indicating a Lack of Congruity in the Answers Across All Respondent Groups .....	61
9	Cluster Rankings by Importance .....	64
10	Essential Primary and Secondary Competencies Within the Category of Execution and Results and Manages the Sales Process Cluster .....	65
11	Essential Primary and Secondary Competencies Within the Category of Execution and Results and Builds and Maintains Relationships Cluster .....	66
12	Essential Primary and Secondary Competencies Within the Category of Team Effectiveness and Coaches for Sales Results Cluster .....	67
13	Essential Primary and Secondary Competencies Within the Category of Team Effectiveness and Manages Performance Cluster.....	67
14	Essential Primary and Secondary Competencies Within the Category of Team Effectiveness and Builds Talent Cluster .....	68

TABLE		Page
15	Essential Primary and Secondary Competencies Within the Category of Personal Effectiveness and Manages as a Leader Cluster .....	69
16	Essential Primary and Secondary Competencies Within the Category of Personal Effectiveness and Develops Self to Achieve Goals Cluster .....	70
17	Essential Primary and Secondary Competencies Within the Category of Personal Effectiveness and Influences to Achieve Goals Cluster....	70
18	Spearman's Rank Order Correlation Coefficient for Competency Relationships Between CSOs and FLSMs .....	71
19	Importance Competency Ranking by CSOs and FLSMs .....	72
20	Spearman's Rank Order Correlation Coefficient for Cluster Relationships Between CSOs and FLSMs .....	79
21	Competency Cluster Rankings by CSOs and FLSMs .....	80
22	Cluster Rankings by Importance and Mean Competence .....	81
23	Competency Rankings by Perceived Competence .....	82
24	Spearman's Rank Order Correlation Coefficient for Perceived Competence Relationships Between CSOs and FLSMs .....	88
25	Perceived Competence Rankings by CSOs and FLSMs .....	89
26	Spearman's Rank Order Correlation Coefficient for Perceived Competence Cluster Relationships Between CSOs and FLSMs .....	97
27	Perceived Competence Cluster Rankings by CSOs and FLSMs .....	98
28	Perceived Competence Cluster Rankings for CSOs and FLSMs by Mean Competence .....	99
29	Rankings by CSOs and FLSMs for Importance and Competence .....	100
30	Spearman's Rank Order Correlation Coefficient for Perceived Importance and Competence Clusters by CSOs and FLSMs .....	101

TABLE	Page
31	How CSOs and FLSMs Would Use a FLSM Competency Model ..... 102

**LIST OF FIGURES**

FIGURE		Page
1	Bloom's Taxonomy (Anderson, as cited in Bloom, 1956; Schultz, 2005).....	12
2	Defining a Competency (McLagan, 1997).....	17
3	An Evolution in Selling (Hodge & Schachter, 2006).....	26
4	Human Capital Role Complexity (CEB, 2007).....	29
5	Delphi Process Flowchart.....	34
6	Round One Questionnaire Example .....	47
7	Round Three Questionnaire Example .....	48

## CHAPTER I

### INTRODUCTION

According to Becker's (1993) classic human capital theory study, investing in a person's knowledge and skills is similar to business investments in equipment. There are economic effects of investment in competence, providing incentive to both the individual and organization. An increasing number of organizations are realizing the role that the knowledge residing in their human capital plays in creating economic power and value. As HRD professionals sit at the intersection between the organization's strategic goals and the capabilities of its workforce, we are in a unique position to identify and develop human competence, leveraging intellectual capital to drive growth and spur innovation (Cardy & Selvarajan, 2006; McLagan, 1997; Prokopeak, 2008). Since the 1980s, McLagan has challenged the field to identify clear competency criteria to help select, manage, train, and plan for the careers of individuals engaged in driving the outputs of an organization. While some fields, such as finance, marketing, and training and development have risen to the competency challenge set forth by McLagan, the sales profession has not kept pace with other occupations' advancement in human resource development (Lambert, 2009).

According to the U.S. Department of Labor's, Bureau of Labor Statistics (2010), there are close to 14 million people working in sales, or about 11% of the United States workforce. The sales generated by this labor pool are the revenue engine in for-profit organizations, which powers the economy of the country (United Professional

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This dissertation follows the style of *Advances in Developing Human Resources*.

Sales Association [UPSA], 2002). The sales landscape has changed dramatically in the last 30 years and is evolving rapidly in response to a changing marketplace. The rate of technology transfer is increasing and the number of competitors has grown considerably due to globalization of markets. A Harvard Business Review survey of chief sales officers (CSOs) concluded that 85% of companies report increases in their product-line breadth, product complexity, and participation in new markets (Trailer & Dickie, 2006). With new models of selling evolving to respond to the marketplace, new kinds of sales professionals, sales managers, and sales leaders are emerging. Innovations in how suppliers and customers interact have necessitated changes in the way sales forces are structured, compensated, developed, and evaluated in order to sustain a high-performance sales culture capable of achieving success in today's highly competitive and global business economy (Cron & DeCarlo, 2009; Sujan, Weitz, & Sujan, 1988).

Salespeople play a critical role in organizations in delivering customer value, and the way they fulfill this role is directly influenced by sales managers, the most critical element in a productive sales force (Babakus, Cravens, Grant, Ingram, & LaForge, 1996; Guest & Meric, 1989; Piercy, Cravens, & Lane, 2009). However, despite the potential for sales managers to influence salesperson performance in the evolving sales model given visibility into their employees' daily workflow, research focusing on sales manager selection and performance is limited. Increasingly manager competence proves challenging because companies tend to promote salespeople to first-line manager positions based on strong performance in the individual contributor role. In fact though, the skills inherent to and displayed by effective managers differ from those of high-

performing salespeople given the role is multi-faceted with unique needs that require aligning competencies (Deeter-Schmelz, Goebel, & Kennedy, 2001; Dubinsky & Ingram, 1983; Sujan et al., 1988; Zallocco, Pullins, & Mallin, 2009). Sales management has always played a critical role in organizations. Managers lead a team, respond to customers, continually improve products and services, and turn policies into action. The impact of high-performing managers on revenues and profits is well-documented. Hence, competent sales managers are one of the key assets needed to outperform competitors (Cron & DeCarlo, 2009; Wickramasinghe & Nimali, 2009). Given this importance, there are numerous studies cited in the literature on manager competence; and while there is an assumption of similar competencies in management functions across organizations and levels of management, it has been determined that not all competency items or behaviors are equally useful for all jobs, job levels, business segments, or regions (Schippmann et al., 2000). Practice in the sales profession and current research on competencies indicate that sales person competencies are key to organizational competitive advantage. While there has been research in the area of entry-level sales person competency, there is a gap in the literature among other professional sales levels, e.g., sales management (Lambert, 2009). What is needed now is a more coherent understanding of the competencies of frontline sales managers in for-profit organizations to grasp what is needed to achieve new levels of individual, team, and organizational performance.

### **Statement of the Problem**

As indicated in the previously cited literature, new models of selling demand new skills sets. There is a disproportionate amount of published research available to assist organizations in the identification of core competencies to drive sales effectiveness. The limited research available concentrates on broad traits or characteristics related to sales manager selection from the perspective of sales executives or general managers. However, to accept these general competencies as significant for the role of sales managers, one must infer that the salient characteristics of sales executives or general managers are similar to the characteristics of sales managers, which is not supported with empirical evidence (Dubinsky & Ingram, 1983). By defining sales manager competencies, employees, managers, and leaders can grasp what is required to reach new levels of performance (Learning Organization, 1997). Therefore, this research aims to partially fill the gap in literature by investigating the competencies required for optimum frontline sales manager performance in the for-profit context. It is expected that this research will contribute to the understanding of effective HRD strategies to address competency needs of sales managers.

### **Purpose of the Study**

The purpose of this study was to: (a) investigate the perceived competencies considered essential for frontline sales managers in for-profit organizations, providing employees, managers and leaders with a competency inventory that assists in informing the sales profession and HR solutions to increase levels of sales force effectiveness; (b) identify perceived levels of competence for frontline sales managers in for-profit

organizations (Pelham & Kravitz, 2008); (c) ascertain what relationships exist (if any) between frontline sales managers and CSOs regarding competencies believed to be important and perception of levels of competence for frontline sales managers in for-profit organizations; and (d) provide recommended uses of the competency model that could serve as a guide for human resources initiatives to increase levels of sales force effectiveness. For the purposes of this study, frontline sales managers are defined as individuals who often have their own sales and account responsibilities and are managing mainly non-managerial sales personnel, and CSOs are responsible for all sales/revenue within an organization or business unit (Cron & DeCarlo, 2009; Dubinsky & Ingram, 1983).

### **Research Questions**

This study sought to answer the following research questions:

1. What competencies of frontline sales managers in for-profit organizations are perceived to be important by frontline sales managers and chief sales officers?
2. What relationships exist (if any) between frontline sales managers and chief sales officers regarding competencies believed to be important for frontline sales managers in for-profit organizations?
3. What are the perceived levels of competence of frontline sales managers in for-profit organizations by frontline sales managers and chief sales officers?

4. What relationships exist (if any) between frontline sales managers and chief sales officers regarding perceived levels of competence frontline sales managers in for-profit organizations?
5. What uses of a competency model for frontline sales managers are perceived to be most important by frontline sales managers and chief sales officers?

### **Operational Definitions**

For the purposes of this study, the following operational terms were used:

*Chief Sales Officer (CSO):* Responsible for all sales/revenue within an organization or business unit (Cron & DeCarlo, 2009).

*Coaching:* Continual, constructive reinforcement of selling behavior (Carter, 2006; Zallocco et al., 2009).

*Competency:* Observable or measurable knowledge, skills, and attitudes (KSA) which underlie effective job performance (McLagan, 1980).

*Competency Identification:* The process of identifying job competencies (Rothwell & Lindholm, 1999).

*Competency Model:* Decision tools that describe the key capabilities required to perform a job (McLagan, 1980).

*Consensus:* General agreement or a tendency toward group solidarity on an issue or belief.

*Delphi Technique:* An iterative multistage group communication process designed to transform opinion into group consensus on an issue or problem (Hasson, Keeney, & McKenna, 2000).

*Exemplary Performer:* A person who is exceptionally talented and outstandingly competent at their work (Dubois & Rothwell, 2004).

*Frontline Sales Manager (FLSM):* Individual managing mainly non-managerial sales personnel who often have their own sales and account responsibilities (Dubinsky & Ingram, 1983).

*Personal Selling:* Direct communications between paid representatives and prospects that lead to transactions, customer satisfaction, account development, and profitable relationships (Cron & DeCarlo, 2009).

*Salesperson:* An individual engaged in the process of personally representing a selling organization while uncovering and satisfying the needs of individuals within a buying organization to the mutual, long-term benefit of both firms (UPSA, 2002).

*Sales Manager:* Individuals responsible for generating sales that meet corporate objectives through the process of planning, staffing, training, directing, and controlling the efforts of sales people (Futrell, 1988).

*Skill:* The ability to perform a certain physical or mental task (Spencer & Spencer, 1993).

### **Assumptions of the Study**

This study was organized into the following basic assumptions:

1. Respondents to the study were the persons who agreed to engage in the study.
2. Individuals responding to this survey could use personal perception to identify the competencies needed within the occupation.

3. The instrument was an appropriate evaluation tool for determining competencies.
4. The competencies, once identified and rated, were in suitable form for use in developing a competency model for frontline sales manager in for-profit organization performance improvement purposes.

### **Limitations of the Study**

The limitations of the study were:

1. The data gathered represented the experience, expertise, and opinions of respondents during a specific period in time. As selling continues to evolve rapidly, the accuracy of the data may not remain relevant.
2. There was a decline in response rate at each round, resulting in a delay in achieving results.
3. There was no interaction with the participants, so the researcher did not know rationale behind the responses, resulting in potential that researcher bias might affect the interpretation of the results.
4. Panel experts may not be able to see the vision or the big picture in which they are involved.
5. The limitations of the Delphi approach were a precursor to the use of a self-administered survey. The limitations of the design method are identified in Chapter III of this research.

### **Significance of the Study**

New models of selling demand new skills sets. The limited research available concentrates on broad traits or characteristics related to sales manager selection from the perspective of sales executives or general managers. However, to accept these general competencies as significant for the role of sales managers, one must infer that the prominent characteristics of sales executives or general managers are similar to the characteristics of frontline sales managers, which is not supported with empirical evidence (Dubinsky & Ingram, 1983). This research aims to partially fill the gap in literature, contributing to the understanding of effective HRD strategies to address competency needs of frontline sales managers, providing employees, managers, and leaders with a competency model that assists in informing HR programs to increased levels of sales force effectiveness (Pelham & Kravitz, 2008).

### **Organization of the Study**

Chapter I contains a statement of the problem, the purpose of the study, the research questions, the operational definitions, the assumptions and limitations, the significance of the study, and the organization of the study. Chapter II provides a selected review of relevant literature. The research methods used in this study are described in Chapter III. Chapter IV reports the results of this research, and Chapter V provides a summary of the study, including conclusions and recommendations for further research.

## CHAPTER II

### REVIEW OF RELATED LITERATURE

The purpose of this chapter is to provide a comprehensive overview of the research and writings relative to competency building in the sales profession. The following themes surfaced in review of the relevant literature and each is discussed in the following sections:

1. What is a Competency? Three Main Approaches
2. Competency Models
3. Evolution of the Sales Profession
4. What Makes a Competent Sales Manager?

#### **What is a Competency? Three Main Approaches**

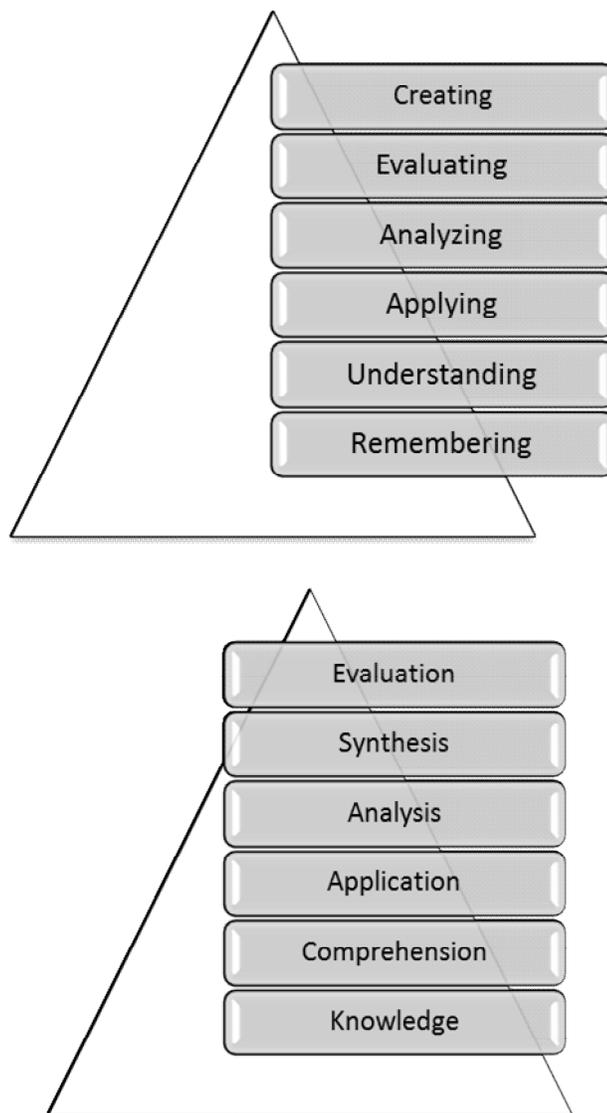
The numerous published definitions of the term ‘competency’ or plural ‘competencies,’ makes it is difficult to identify a standard definition. The lack of consensus is not surprising, given the prevalence of the term across multiple domains. To provide context for the breadth of literature and review the theoretical perspectives that have informed the competency movement, this section is grouped into three distinct approaches: (a) educational, (b) psychological, and (c) business competencies (Markus, Cooper-Thomas, & Allpress, 2005; Schippmann et al., 2000).

#### **The Educational Approach (Skills Development, Achievement of Standards, and Credentialing)**

Competence in the education context was defined narrowly as a demonstrated outcome or a minimum standard (Bourke et al., Elam, as cited by Markus et al., 2005).

The modern competency movement originated from the educational discipline and is attributed to Benjamin S. Bloom who led a series of conferences from 1949 to 1953 with subject matter experts to build consensus on identifying, prioritizing, and assessing educational goals or outcomes. The result was the *Taxonomy of Educational Objectives: Book 1, Cognitive Domain*, a theoretical framework to create a common language and facilitate communication of learning outcomes and assessment goals among educators. The taxonomy specifically focused on the cognitive domain, which includes a person's ability to remember or recognize knowledge and the development of intellectual abilities and skills (Bloom, 1956; Lambert, 2009). The taxonomies have provided a basis for assessment and curriculum development in the United States as well as throughout the world, including state and federal mandated levels of competency in school-aged children in the United States. These regulations provided an impetus for competency-based educational approaches in schools and federally regulated and/or funded institutions (e.g., health care) (Lambert, 2009; Markus et al., 2005).

In the mid-1990s, Lorin Anderson, a former student of Bloom's, led a team of educational psychologists revising the cognitive domain taxonomy to reflect modern advances in educational theory, specifically (a) changing the names of the six categories from noun to verb forms and (b) reversing the top two levels of the taxonomy (Schultz, 2005) (see Figure 1).



*Figure 1.* Bloom's Taxonomy (Anderson, as cited in Bloom, 1956; Schultz, 2005).

While Bloom's work created a taxonomy for objectives, Gagne and Briggs' (1974) efforts took a behaviorist approach, using taxonomies to clarify objectives, specifying outcomes for individual development. In combination with behaviorist elements that are defined in the next section, these new models of education were especially popular in the industrial, military, and corporate training worlds.

### **The Psychological Approach (Behavioral Repertoires)**

The individual competency construct was introduced by McClelland (1973) who asserted traditional intelligence and aptitude tests were irrelevant to important life outcomes. By even the most conservative estimates, approximately 75% of the variance in real-world performance was not accounted for by intelligent test performance (Schippmann et al., 2000; Sternberg, Wagner, Williams, & Horvath, 1995). According to McClelland, competencies were the knowledge, skills, abilities, traits, or motives related to a job or job performance or some other important life outcome. He proposed “competency testing” as an alternative approach to traditional intelligence and aptitude testing in order to predict academic and occupational success, i.e., assessment against individual functional and behavioral competency clusters. Challenging traditional testing methodologies, McClelland led the competency assessment movement, introducing a new construct, “practical intelligence,” and redesigning the teaching-learning process based on competencies in order to achieve individual behavioral and functional performance improvement. The work was influential; particularly the idea that the factors or inputs associated with individual success could be identified and then taught to others (Markus et al., 2005).

McClelland and Boyatzis (1980) developed a method for identifying competencies that differentiate superior from average performers. The differential or behavioral approach described competencies as the characteristics shown by superior performers that are not shown by average performers, i.e., “a generic body of knowledge, motives, traits, self-images, social roles, and skills that are causally related

to superior or effective performance in the job” (McClelland & Boyatzis, 1980, p. 369). The science of individual differences focused mainly on innate abilities, while the educational psychology perspective was on performance outcomes and shaping behaviors to drive individual success (Schippmann et al., 2000).

Through the dynamic interaction and combination of explicit and tacit knowledge, new knowledge was generated (Nonaka & Takcuchi, as cited in Lam, 2000). The concept of “practical intelligence” stemmed from tacit or informal knowledge, which is highly useful, personal, and acquired without direct help from others, making it difficult to articulate. Explicit knowledge, however, was formal, systematic, and easy to communicate and share. Given the importance of combining explicit and tacit knowledge in the generation of new knowledge, it was concluded that measuring both cognitive-academic ability and practical intelligence results in more effective prediction of performance success than reliance on either one alone (Nonaka, 1998; Sternberg et al., 1995).

### **The Business Approach (Organizational Competencies for Competitive Advantage)**

McLagan (1997) stated, “Creating wealth is increasingly a matter of competency” (p. 44), as “every time a new initiative affects a business, it changes the competency requirements and roles people must play for future success” (p. 45). Tangible (monetary) and intangible (human) capital drives the business growth process, with recent realization that intangible human capital contributes as much as physical capital to an organization’s success. The recent emphasis on the importance of knowledge capital stems in part from the recognition that intangible capital contributes

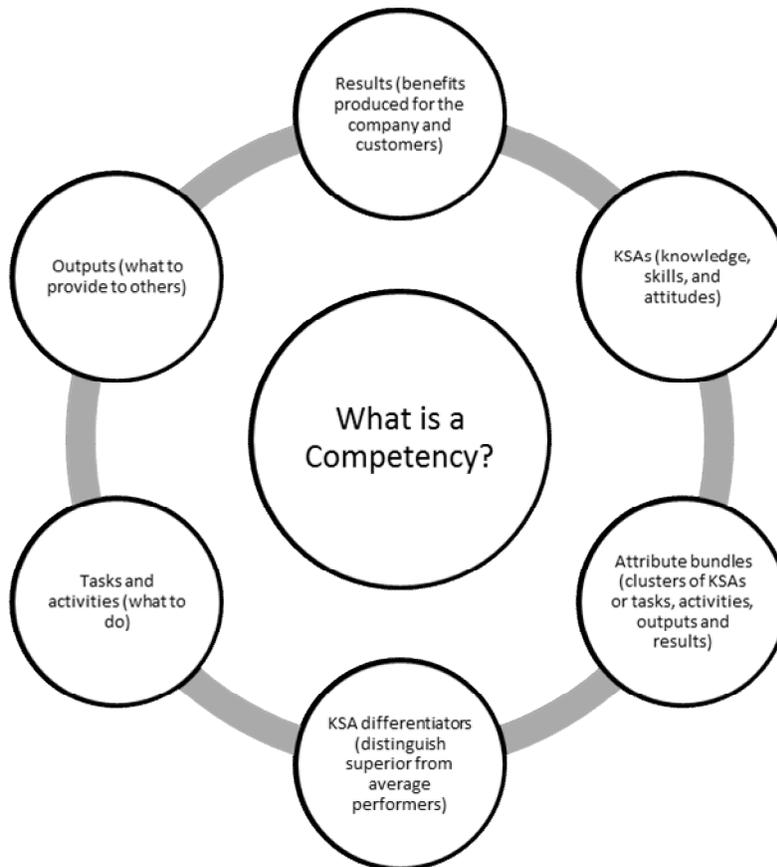
as much as physical capital does to a firm's success, with the competencies of a firm coming directly from its knowledge and organizational capital. With market value becoming increasingly reliant on human capital intangibles such as knowledge and customer satisfaction, the wealth of businesses is becoming more dependent on the knowledge and skills of their people being central to an organization's strategy for survival and growth (Baldwin & Gellatly, 2006; McLagan, 1997).

McLagan predicted that one of the great HRD accomplishments of the 1980s was the integration of individual competency thinking and action with organizational strategy. She argued competency identification could act as a driver of organizational growth and success in an increasingly tumultuous business environment, providing the criteria to help select, manage, train, and plan for the careers of individuals engaged in accomplishing the outputs of the organization. Over the past three decades, multiple fields, such as marketing and finance, have leveraged competencies, systematically improving the profession in order to keep pace with the rapid changes facing practitioners in today's global economy (Lambert, 2009; McLagan, 1997).

Prahalad and Hamel (1990) furthered McLagan's prediction by stating the success of executives would no longer be judged on the ability to "restructure, declutter, and delayer" (p. 79) their organizations but would be judged instead on their ability to "identify, cultivate, and exploit the core competencies" (p. 79) that make growth and prevailing in global competition possible. Core competencies were considered the immediate predecessor to competency modeling and considered design components of an organization's competitive strategy rather than individual-level attributes. Prahalad

and Hamel's (1990) use of the term competency referred mainly to "the collective learning in the organization" (p. 82). Their work identified the competencies that drive an organization's ability to rapidly change and innovate in response to new and changing markets. The concept of "core competency" has had significant influence on the human resources field and American business. Prahalad and Hamel's 1990 Harvard Business Review article is the most reprinted in the journal's history, and their ideas for human resource development and management created a market for methods to identify "human skills that embody core competencies" (Schippmann et al., 2000, p. 712). To understand the competency requirements needed for various occupations, multiple countries have developed occupational information systems and provide this service publicly, such as O\*NET OnLine developed by the U.S. Department of Labor, National Training Information Systems (NTIS) developed by Australia National Training Authority (ANTA), and the Occupation Information Systems (OIS) developed by the Bureau of Employment and Vocational Training of Taiwan (Ven & Chuang, 2005).

In the business context, competency has many definitions and can be grouped into two categories: (a) functional competencies, also called vocational or technical competencies, are visible and define the work – tasks, results, and outputs and (b) individual or behavioral competencies are not visible or specific to a job but are applicable to the business setting as a whole (Figure 2). These are characteristics of the people doing the work – knowledge, skills, and attitudes.



*Figure 2.* Defining a competency (McLagan, 1997).

Attribute bundles are a combination of behavioral and functional competencies creating a hybrid form of competency using terms such as ‘problem solving,’ which requires technical knowledge and problem-solving techniques. While attribute bundles provide comforting competency labels, such as ‘leadership skills,’ they do not define the underlying factors required for performance and thus are difficult to use in implementing HR strategies such as selection, development, or performance management (Lambert, 2009; McLagan, 1997). The delineation between visible (functional) and hidden (behavioral) competencies poses a dilemma for the sales profession especially when

sales or sales-related professionals attempt to define those competencies required for superior performance. Given the sales profession is more understood at a profession-wide or vocational level than through the identification of functional or behavioral competencies, salesperson competency contains a complex hierarchy of interrelated and interdependent factors and abilities that must be understood in relation to influencing the performance of an individual within a unique job or setting (Lambert, 2009).

For the purpose of this research, ‘competency’ was defined as the observable or measurable knowledge, skills, and attitudes (KSA) which underlie effective job performance. Knowledge and skills give a person the ability to perform tasks, while attitudes give a person the desire to perform tasks (Ven & Chuang, 2005; McLagan, 1997).

### **Competency Models**

The history of competency modeling has taken a circular path similar to competencies given the multiple domains that have contributed to the evolution of the practice. The foundational building blocks can be attributed to Drucker’s (1959) work in which he coined the term “knowledge worker” as one who works primarily with information or develops and uses knowledge in the workplace. Knowledge is increasingly regarded as the sure source of lasting competitive advantage in an environment where markets shift, technologies proliferate, competitors multiply, and products become obsolete overnight. Most recently, the focus has been on the importance of “tacit knowledge” for sustaining an organization’s competitiveness, and its role in technological innovation and organizational learning (Lam, 2000; Nonaka,

1998). Knowledge jobs are defined by their capability requirements rather than tasks or discreet activities performed, just as competencies can be defined as abilities or the state or quality of being able to perform tasks. Knowledge jobs require high levels of creativity, judgment, and tolerance of ambiguity, and describing the jobs of knowledge workers may be best accomplished through competency models (Lam, 2000; Nonaka, 1998).

In the past few decades, we have witnessed a rapid progression taking some of the greatest companies from iconic to irrelevant. Those that have survived and reinvented themselves have done so quickly, in the face of ever-changing conditions. Companies like IBM have shown that in order to adapt quickly and intelligently, knowledge creation and management must be a central part of the business strategy for survival and growth. Visionary CEOs, such as Lou Gerstner, who understood the importance of wisely managing knowledge, people, and resources, have met the changing demands of the marketplace. On facing globalization and rapid information and technology changes, IBM had to find its core competencies and efficiently expand them as part of the company's strategic business objectives. The result was the creation of a knowledge organization, which dramatically changed the company's financial performance (Collins, 2009; Plescan, Borza, Bordean, & Mitra, 2010).

In 1980, McLagan developed the concept of competency models, defining them as "decision tools which describe the key capabilities required to perform a job" (p. 23). These decision tools were correlated to a specific group of activities describing key knowledge, skills, and abilities for performing those activities (Dooley, Lindner, Dooley,

& Alagaraja, 2004). Competency models can be used (a) for recruitment and selection; (b) for assessment; (c) for individual development planning; (d) as a tool to develop curricula and other training material; (e) as a coaching, counseling, and mentoring tool; (f) as a career development tool; and (g) as a succession planning tool (McLagan, 1980; Yeung, Woolcock, & Sullivan, 1996). Competency models help align the HR system vertically with the organization's strategic objectives and horizontally with other HR functions. The importance given to competencies in the organizational context is continually increasing driven by business and human resources agendas to deliver business performance by improving the performance of individual managers (Wickramasinghe & Nimali, 2009). The increased demand combined with the extensive use of the term "competency" in multiple, highly visible domains (education, psychological, and business) has resulted in the practice for identifying job requirements (Prahalad & Hamel, 1990).

Operationally defining taxonomic categories with illustrative, observable behaviors is similar to the tactics in most competency modeling approaches, which provide descriptions of individual level competencies that are core for an "occupational group, entire level of jobs, or for the organization as a whole. The focus is on broad applicability and leveraging what is common or universal" (Schippmann et al., 2000, p. 727). In the practice of competency modeling, there has been an emphasis on core competencies, the competencies that drive an organization's ability to rapidly change and innovate in response to new and changing markets (Prahalad & Hamel, 1990). The

downside is the creation of models using general competencies tends to look alike, despite being developed for different jobs, functions, or organizations.

When a competency modeling approach includes technical skills, there is an added job analysis focus, which can combine the long-term organizational fit of competency modeling with the shorter-term job match content resulting in descriptions. Job analysis can be defined as a set of procedures designed to identify and describe aspects of performance that differentiate between superior and poor workers (Schippmann et al., 2000). This is similar language used to define competency modeling, so the primary differentiator between job analysis and competency modeling is in the approach or method. Competency modeling typically includes various review sessions and focus groups to ensure the descriptive content captures the essence of the client organization or profession. The result is a consumer who identifies themselves in the resulting descriptions, an outcome that most job analysis approaches cannot emulate. This is one hypothesis for the rise in popularity of competency modeling. The descriptions in a competency model are competency statements.

In a fascinating study in 2005, Ven and Chuang conducted a comparative study of competency statements (see Table 1), using Bloom's cognitive taxonomy, namely: knowledge, comprehension, application, analysis, synthesis, and evaluation; from the lowest level of the simple recall or recognition of facts (knowledge), to the highest level of critical thinking (evaluation) (Bloom, 1956).

Table 1. Action Verb Classification in America

<b>Level</b>	<b>Action Verbs</b>
Knowledge	read, provide, attend, obtain, recheck
Comprehension	observe, clarify, convert, define, discuss
Application	direct, perform, maintain, implement, control, enter, retrieve, store, visit, answer, assign, correct, execute, insert, interview, manipulate, operate, repair
Analysis	analyze, identify, train, calculate, document, inspect, investigate, solicit, survey
Synthesis	develop, confer, coordinate, modify, design, conduct, consult, plan, write, establish, expand, setup, administer, compile, configure, create, devise, encrypt, erect, make, manage, prepare, produce, refer, replace, rewrite, set, specify, update
Evaluation	monitor, review, evaluate, determine, recommend, resolve, test, assess, diagnose, interpret, regulate, revise, select, study, suggest, work

*Note.* From Ven and Chuang (2005).

The study concluded that the most needed information competency belongs to the synthesis category and the average percentage rating is 45%. The second most needed competencies are application and analysis, and the percentage rating is around 20%. In the knowledge and comprehension level, the percentage is only up to 5%.

Competency statements must describe the result of activity in performance terms, achieved first by using an action verb which describes the action or behavior which will produce the outcome. Secondly, the competency statement must also describe the focus of the action grammatically and the object of the action – to what or to whom the action is directed. If necessary, for clarity, the competency statement may also describe any conditions which qualify the action – the context in which performance takes place. To sum up, the competency statement has the form of “action verb + action object + condition,” and should be in natural language texts and in grammatical sentences. For example, in the competency statement “monitor, adjust and check variables to meet product specifications,” the action verbs are “monitor, adjust, and check,” the object is “variables,” and the condition is “to meet product specifications.” The action verbs which indicate explicit meaning of competency are also called competency verbs. Action verbs must reflect the level of competency outcomes. (Ven & Chuang, 2005, p. 136)

Every single business goal is dependent on underlying people issues – knowledge, skills, and abilities. Serving as the foundation of the employee lifecycle, competency models provide a platform of information that can be used to support a broad range of applications in the HR system (a) from recruitment and selection; (b) assessment; (c) individual development planning; (d) as a tool to develop curricula and other training material; (e) as a coaching, counseling, and mentoring tool; (f) as a career development tool; and (g) as a succession planning tool (McLagan, 1980; Schippmann et al., 2000).

### **Sales Profession Evolution**

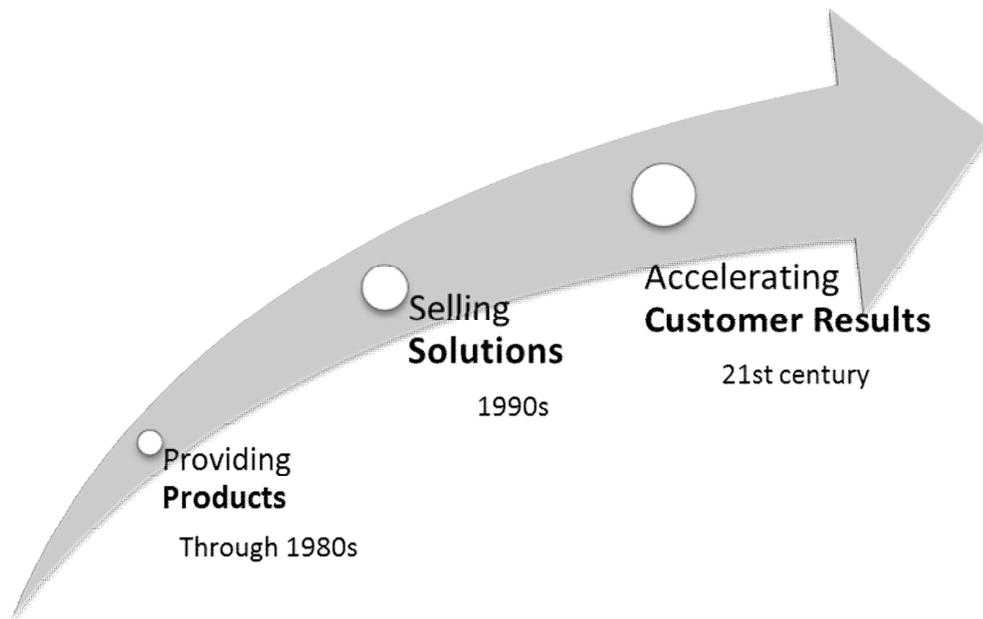
A Harvard Business Review survey of Chief Sales Officers (CSOs) concluded that 85% of companies report increases in their product-line breadth, product complexity, and participation in new markets (Trailer & Dickie, 2006). As customers change, the art and science of selling evolve. Two generations ago, success in sales depended on the strength of personal relationships. This rapport-based approach to selling defined a generation of salespeople. Today knowledge (fact-based selling) is essential but not sufficient. During the 1990s, most sellers repositioned and repackaged their products into “solutions,” and the bar was raised again. While the 1980s and 1990s were generally a seller’s market, a salesperson can no longer simply build relationships, describe features and benefits, and talk about solutions and maintain levels of successful performance. Now, each purchase has to meaningfully improve the customer’s business and provide return on investment (ROI). Buying must accelerate the purchasing company’s success in achieving its goals, and the salesperson has to become an expert

business consultant. As the sales landscape changes, new kinds of sales professionals, sales managers, and sales leaders are emerging. Innovations in how suppliers and customers interact have necessitated changes in the way sales forces are structured, compensated, developed and evaluated. New models of selling demand changing skills sets, a better understanding the customers' business, and the ability to work collaboratively to solve business problems rather than sell products (Cron & DeCarlo, 2009; Hodge & Schachter, 2006; Page, 2002). The changing marketplace is altering the way sales people and sales managers understand, prepare for, and accomplish their jobs. This section reviews the competitive and customer-related changes to the marketplace and the resulting changes to the selling process required by organizations to maintain survival and growth.

The number of competitors in the marketplace has grown exponentially over the past two decades due to globalization of markets, shorter product cycles, and proliferation of market boundaries. World trade accounts for more than 20% of the U.S. gross national product given 95% of the world's population and 75% of its purchasing power are outside the United States. CSOs know that their companies' growth is likely dependent on the management of customer relationships in global markets. This results in expanded geographies/territories, defining new roles and responsibilities, hiring against the new skill sets and developing a global perspective in driving an increasingly diverse sales force (Cron & DeCarlo, 2009). The rate of technology transfer is increasing, creating shorter product life cycles and narrowing the window of product differentiation. The implications for sales managers are that sales and customer

relationship skills are more critical in the beginning and end of the product life cycle. With the time gap between getting increasingly smaller, personal relationships and deep customer knowledge become a primary point of differentiation and leverage for the supplier. The advances in technology, information and communications, and distribution have created significant changes in sales and service channels, media, products, and brands (Cron & DeCarlo, 2009; Eades, 2004; Hodge & Schachter, 2006). The increase in competition calls for new selling and sales management approaches given new customer developments such as globalization, offshoring expansion, population growth shifts, and widening regulation. This results in customers purchasing from fewer suppliers, increasing expectations and power (Cron & DeCarlo, 2009; Hodge & Schachter, 2006).

For decades, a salesperson's main challenge was to differentiate the features of products from those of the competition (see Figure 3). As customer expectations shifted, the sales force had to understand the businesses' issues faced by the customer in implementing the products purchased. This began the solutions selling era, when the key was understanding the customer's business and the needs of the customer's customer. For most products there were distinct implementation issues, and the best salespeople mastered a territory. The selling landscape was in the midst of yet another shift, which demanded speed and an increased depth of understanding of a customer's business to include the global and industry contexts in which the customer operated. The sales force now finds itself required to accelerate the results of their customers in order to remain relevant (Hodge & Schachter, 2006; Ledingham, Kovac, & Simon, 2006).



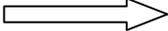
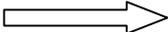
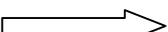
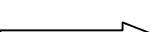
*Figure 3.* An evolution in selling (Hodge & Schachter, 2006).

To illustrate this shift, consider this example: the number of wholesalers in the United States has dropped to one-third the number operating in 1990, resulting in the revenue stream from individual customers becoming so important that survival depends on maintaining the supplier-customer relationships. Despite the increased focus and dependence on quality and service, customer satisfaction remains low, primarily due to increasing expectations. The power has also shifted in the customer's favor in the last decade. Fewer than 10% of all retail stores account for more than half of U.S. retail sales, creating organizations bigger and more powerful than the manufacturers that supply them. This increase in customer power creates a dramatic impact on suppliers. One supplier, for example, has well over 65 people located in Rogers, Arkansas, to sell and service Walmart. Consumer goods companies are finding that the impact of large accounts requires an integrated approach, with marketing and sales making decisions

jointly about pricing, product, service customization, and merchandising programs (Cron & DeCarlo, 2009; Hodge & Schachter, 2006).

Creating and sustaining a high-performance sales culture is essential in achieving success in today's highly competitive and global business economy. The changing marketplace has eclipsed the traditional or transactional selling model with solutions selling and accelerating customers' results taking its place (see Table 2) (Cron & DeCarlo, 2009; Eades, 2004; Hodge & Schachter, 2006).

**Table 2. Contrasting Transactional and Solutions Selling Models**

<b>Transaction Selling Model</b>		<b>Solutions Selling Model</b>
Selling skills		General business skills
Responsive to customer needs		Engages customer as a collaborative partner
Selling, product, price and service		Selling customer solutions
Differentiation through products		Differentiation through people
Sales revenue focus		Customer lifetime value
Buyer seller relationship		Trusted business advisor

*Note.* Cron and DeCarlo (2009).

### **Sales Manager Competency**

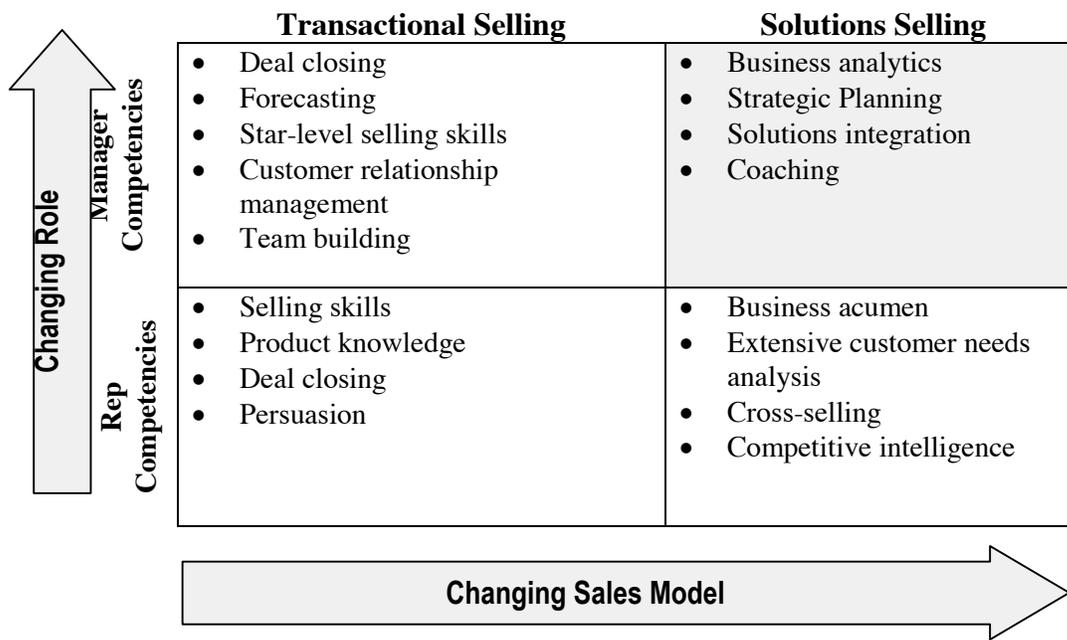
As salespeople evolve from selling traditional products to fully integrated solutions, the skills required to execute on deals change. Similarly, while traditional manager promotions have commonly been based on tenure and selling ability, there is a new demand for additional skill sets due to the shift to solutions sales. Key to competitive advantage, employee-level competencies are a catalyst to evolving business

concepts and strategies into realized organizational performance (Cardy & Selvarajan, 2006; Corporate Executive Board [CEB], 2005).

Further, frontline management plays a critical role in organizations. Managers lead a team, respond to customers, continually improve products and services, and turn policies into action. The impact of high-performing managers on revenues and profits is well-documented. Hence, competent managers are one of the key assets needed to outperform competitors (Cron & DeCarlo, 2009; Wickramasinghe & Nimali, 2009). Given this importance, there are numerous studies cited in the literature on manager competence; and while there is an assumption of similar competencies in management functions across organizations and levels of management, it has been determined that not all competency items or behaviors are equally useful for all jobs, job levels, business segments or regions (Schippmann et al., 2000).

As the demands of a frontline manager differ from those of a sales executive, so too must the composition of the respective competency models. Sales managers have two primary responsibilities which are to achieve the organization's goals and develop the people reporting to them. Frontline sales managers are the most important factor in achieving and sustaining success for an organization. They are the power behind transformations, and in the face of an ever-evolving selling landscape, effective sales managers must evolve from the historical super sales performers to business strategists and coaches (Babakus et al., 1996; Cron & DeCarlo, 2009; Hodge & Schachter, 2006). As sales models evolve, so must the skills required to execute on deals. Figure 4 provides an overview of the talent implications in the shift to more complex selling

models. Traditional manager career paths, once commonly based only on the ability to sell, now demand additional skill sets due to the shift to solutions sales. Consequently, internal promotion based on tenure and sales performance often fail because high performance in one role may not translate into high performance in another (Corporate Executive Board [CEB], 2007).



*Figure 4.* Human capital role complexity (CEB, 2007).

According to Cron and DeCarlo (2009), sales management competencies are defined as “sets of knowledge, skills, behaviors, and attitudes that a person needs to be effective in a wide range of industries and various types of organizations” (p. 12).

Following, Table 3 summarizes the roles of sales managers as defined in the literature.

## Summary

Prahalad and Hamel (1990) stated the success of executives would no longer be judged on the ability to “restructure, declutter, and delayer” their organizations but would be judged instead on their ability to “identify, cultivate, and exploit the core competencies that make growth and prevailing in global competition possible” (p. 79). The numerous published definitions of the term ‘competency’ or plural ‘competencies,’ made it difficult to identify a standard definition. The lack of consensus was not surprising, given the prevalence of the term across multiple domains (Markus et al., 2005). There was significant diversity in the scope of competency studies, yet few empirical competency studies have been conducted and even fewer have developed competencies that match job requirements to inform HRD strategies (Barber & Tietje, 2004; Rothwell & Lindholm, 1999). Further, there was little research investigating managerial competency needs and even fewer studies in the sales context. According to Cron and DeCarlo (2009), sales management competencies were defined as “sets of knowledge, skills, behaviors, and attitudes that a person needs to be effective in a wide range of industries and various types of organizations” (p. 12).

Table 3. The Roles of Sales Managers

<b>Cron and DeCarlo (2009)</b>	<b>Zallocco et al. (2009)</b>	<b>CEB (2005)</b>	<b>Deeter-Schmelz, Goebel and Kennedy (2002)</b>	<b>Guest and Meric (1989)</b>
Strategic Action	Technical knowledge	Drive change	Communication/listening skills	Intellectual ability
Coaching	Presentation skills	Promote teamwork	Human relations skills	Motivation
Team Building	Communication skills	Place organization success above individual gains	Possession of knowledge	Human relations skills
Self-Management	Listening skills	Influence decisions and actions	Motivational skills	Perception of threshold social cues
Global Perspective	Supervisory skills	Recognize and develop new business opportunities	Coaching skills	Dominance
Technology	Teamwork	Negotiate in straight-forward selling situations	Organization/time management	Higher than average energy
			Honest/ethical tendencies	Persuasiveness
			Leadership skills	Personal impact
			Willingness to empower	Human interaction
			Credibility	Behavior flexibility
				Ambition
				Tolerance of uncertainty

The history of competency modeling has taken a circular path similar to competencies given the multiple domains that have contributed to the evolution of the practice. When McLagan (1980) developed the concept of competency models, she defined them as “decision tools which describe the key capabilities required to perform a job” (p. 23). These decision tools were correlated to a specific group of activities describing key knowledge, skills, and abilities for performing those activities (Dooley et al., 2004). Competency models helped align the HR system vertically with the organization’s strategic objectives and horizontally with other HR functions, providing a platform of information that can be used to support a broad range of applications from recruitment and selection, assessment, training and development, and career or succession planning. The importance given to competencies in the organizational context was continually increasing driven by business and human resources agendas to deliver organization performance by improving the performance of individual managers; thus, it is expected that this research will contribute to the understanding of effective HRD strategies to address competency needs of sales managers (McLagan, 1980; Schippmann et al., 2000; Wickramasinghe & Nimali, 2009). While there are many approaches to defining competency models, the American Society for Training and Development pioneered the approach (based on McLagan’s work) of using a Delphi technique combined with a quantitative design with descriptive statistical validation methods. The next chapter presents the use of this approach to create a frontline sales manager competency model for performance improvement purposes.

## **CHAPTER III**

### **METHOD**

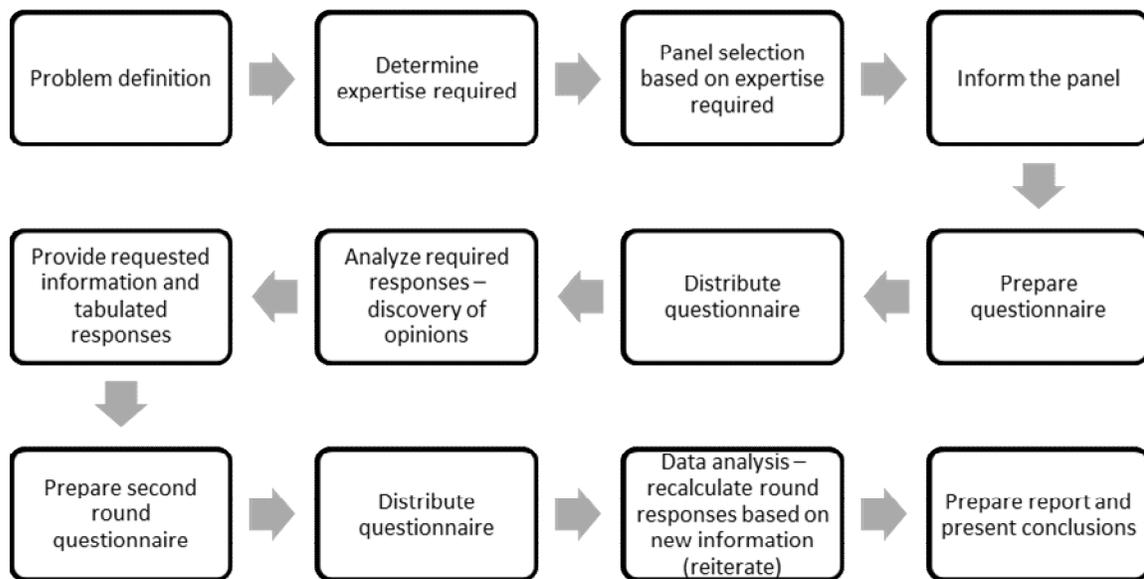
This chapter provides descriptions of the research procedures and method used in the study. It is organized into three sections: (a) Rationale for the Use of the Delphi Technique, (b) Development of the Delphi Panel, (c) Expert Panel Characteristics, and (d) the Delphi Rounds.

In selecting the methods for the study, several factors were considered. First, current research on the topic is limited, yet the demand for informed practice is great. Second, individuals most knowledgeable about the subject are widely dispersed across organizations and geography. Consequently, a systematic approach to inquiry is needed that can collect informed opinions in a timely manner, transcend organization and geographic boundaries in a cost-effective manner, and examine the data in a pragmatic manner.

#### **Rationale for the Use of the Delphi Technique**

The purpose of this study was to develop an inventory of competencies for frontline sales managers in for-profit organizations, providing employees, managers, and leaders with a competency model that can inform HR programs, assisting in improving individual, team, and organizational performance. The Delphi technique was developed in the 1950s by Olaf Helmer and associates at the Rand Corporation for defense technology forecasting (Dalkey, 1969). Named for the ancient Greek oracle at Delphi from which prophecies are given, the technique is an iterative multistage group facilitation process, designed to collect data through questionnaires, synthesize, explain,

and re-synthesize in a way that expert opinion and personal experience are formed into group consensus on important issues (Hasson et al., 2000; Lambrecht, 2007). Through a series of “rounds,” the feedback process allows and encourages the selected Delphi panelists to reassess their initial judgments about the information provided in previous iterations in an anonymous environment (see Figure 5).



*Figure 5.* Delphi Process Flowchart.

In 1969, Dalkey (as cited in Yousef, 2007) identified the following basic characteristics of the Delphi technique:

1. Anonymity – The use of questionnaires or other communication where expressed responses are not identified as being from specific members of the panel allows for anonymity.

2. Controlled feedback from the interaction – Controlled feedback allows interaction with a large reduction in discord among panel members.  
Interaction consists of allowing interaction among group members in several stages, with the results of the previous stage summarized and group members asked to reevaluate their answers as compared to the thinking of the group.
3. Statistical group response – The group opinion is defined as a statistical average of the final opinions of the individual members, with the opinion of every group member reflected in the final group response.

According to Yousef (2007), Delphi appears to be a straightforward approach to performing research in the area of forecasting and for building consensus; however, one must carefully consider the limitations associated with Delphi before designing a Delphi study. Linstone and Turoff (2002) suggested that there are five common reasons for Delphi to fail:

1. Imposing monitor views and preconceptions of a problem upon the respondent group by over specifying the structure of the Delphi and not allowing for contribution of other perspectives related to the problem.
2. Assuming that Delphi can be a surrogate for all other human communications in a given situation.
3. Poor techniques of summarizing and presenting the group response and ensuring common interpretations of the evaluation scales utilized in the exercise.
4. Ignoring and not exploring disagreement so that discouraged dissenters drop out and an artificial consensus is generated
5. Understanding the demanding nature of a Delphi and the fact that the respondents should be recognized as consultants and properly compensated for their time if the Delphi is not an integral part of their job function. (p. 6)

Barnes (as cited in Yousef, 2007) has listed additional disadvantages of the technique:

1. Judgments are those of a select group of people and may not be representative.
2. Tendency to eliminate extreme positions and force a middle-of-the-road consensus.
3. More time-consuming than the nominal group process.
4. Should not be viewed as a total solution.
5. Requires skill in written communication.
6. Requires adequate time and participant commitment (about 30 to 45 days to complete the entire process).

In reviewing the pros and cons of using the Delphi technique as a method, Moore (as cited in Jackson, 2000) states, the Delphi technique represents a preferred choice for conducting research based on pooled judgment” (p. 50). Linstone and Turoff (2002) discussed the technique’s ability to capture collective intelligence about the subject being studied leading to the ability of a group to produce a result of better quality than could an individual in the group acting alone. Lauded as a flexible approach commonly used within the health and social sciences fields, the Delphi technique has been used by ASTD to create competency models for learning and sales professionals, combining a quantitative design with the use of descriptive statistics (McLagan, 1980; Rothwell, 1996). Review of procedural recommendations by Linstone and Turoff (2002) to address

the limitations of the Delphi method resulted in the following procedures to increase the quality and rigor of the study:

1. Creation of the expert panel was conducted through a recommendation process, beginning with FLSMs and CSOs known to the researcher and considered to have expertise in the field. Those CSOs and FLSMs known and selected for participation by the researcher were then asked to provide recommendations for additional panelists who fit the criteria.
2. Motivation to participate was provided through the offer of a final copy of the completed research.
3. Time commitment was made clear at the outset of the study, and considering the expert panel comprised sales professionals, surveys were not launched at the end of a month or the last month of a calendar quarter, which are typically the busiest times for a sales professional.
4. While research states adequate time to complete a Delphi process is about 30 to 45 days, considering the characteristics of the expert panel, a period of about 120 days was provided to complete the process, and non-respondents were pursued through two reminders.
5. Open-ended questions were used in the survey process to allow for contribution of other perspectives related to the study.
6. Standardized scales (Likert) were used so that respondents could qualify responses to specific questions.

7. The use of descriptive statistics to define consensus at a numerical level and a constant comparative method of data analysis were used to apply rigor in summarizing and presenting the group responses.

### **Development of the Delphi Panel**

Panel selection for the Delphi study is the most important step in the process, as it directly relates to the quality of the results generated (Hsu & Sandford, 2007).

According to Scheele (as cited in Jackson, 2000), there are three types of panelists: (a) stakeholders, (b) experts, and (c) facilitators. Stakeholders are individuals directly affected by the study. Experts possess specific knowledge on and in-depth experience with the topic being researched. Facilitators are skilled in clarifying and summarizing views being expressed and offering alternative views as appropriate. For the purposes of this study, it is determined that the *expert* panel member is needed.

The literature suggested an appropriate size for a Delphi panel to be not less than 10 and no more than 30 participants (Linstone & Turoff, 2002). The study used a national scale (United States) with a sample drawn from for-profit organizations. In order to clearly define the universe, organizations with more than 250 people in them and corporate revenues above \$10 million were used. Regarding standards for the selection of Delphi subjects, there is no exact criterion currently listed in the literature; however, to guide the selection of Delphi subjects, the study targeted individuals who had related backgrounds and experiences concerning the target issue, were capable of contributing helpful inputs, and were willing to revise their initial or previous judgments for the purpose of reaching or attaining consensus (Hsu & Sandford, 2007).

### Expert Panel Characteristics

A purposively selected panel of 35 experts, representative of two subpopulations, 18 frontline sales managers and 17 CSOs with expertise in the selling occupation were invited to participate in a consensus study involving three computer-based rounds of a Delphi questionnaire. Despite attempts to minimize attrition, participants dropped out at each stage of the study, with comparable attrition in the FLSM and CSO groups. The initial sample size of 35 was determined, expecting higher attrition in Round One, given the larger percentage of the invited participants being unknown to the researcher. It has been suggested that a 70% response rate is required for each round in order to maintain the rigor of this technique, which was achieved in Rounds Two and Three of the study. Although attrition occurred at each stage of the Delphi study, the final numbers of participants satisfied the need to have 10 or more participants to achieve good reliability. Response rates for this study are comparable to others (Linstone & Turoff, 2002; Sumsion, 1998). The number and percentage for each Delphi round are shown in Table 4.

Table 4. Response Rate for Each Round

Round	Sample Size	Number of Respondents	Percentage
1	N = 35	20	57
2	N = 20	14	70
3	N = 14	10	71

The study involved panelists, representing five global organizations, selected by a nomination process. A list of organizations from which this panel was solicited can be found in Appendix A. Demographic data on the expert panel were collected using the demographic information section (Part 1) of the survey. The demographic characteristics included role, market sold to, number of years in the profession, location, industry, educational background, age, and gender. The expert panel comprised 14 respondents, of which five were Chief Sales Officers (CSOs), seven were Frontline Sales Managers, and two self-identified as “Other” in sales functions that included marketing responsibility.

### **Chief Sales Officers**

Data collected from five CSOs represented five industries, including education, forest and paper products, healthcare: medical facilities, household and personal products, information technology services, medical products and equipment, and network and other equipment. The CSOs all resided in North America (100%) and sold to the business or consumer markets (40% and 60%, respectively). A total of 100% of CSOs had been in the profession for 15 or more years. All CSOs had formal higher education, with 40% being university/college graduates and 60% had some post-graduate education. All CSOs were age 40 or above, with the majority, 60%, between the ages of 40 and 49. The majority (80%) of CSO respondents were male. The percentage distributions of CSOs by demographic characteristic appear in Table 5.

Table 5. Demographic Characteristics of All Respondents

Question	Total	Which of the following roles best characterizes your current job?		
		Chief Sales Officer	Sales Manager	Other
<b>Which of the following markets do you primarily sell to?</b>				
	14	5	7	2
Business markets (B2B)	7	2	3	2
	50.00%	40.00%	42.90%	100.00%
Consumer markets (B2C)	7	3	4	0
	50.00%	60.00%	57.10%	0.00%
Government markets	0	0	0	0
	0.00%	0.00%	0.00%	0.00%
Other, please specify	0	0	0	0
	0.00%	0.00%	0.00%	0.00%
<b>How many years have you been in your profession?</b>				
	14	5	7	2
Less than 1 year	0	0	0	0
	0.00%	0.00%	0.00%	0.00%
Between 1 and 3 years	0	0	0	0
	0.00%	0.00%	0.00%	0.00%
Between 3 and 5 years	1	0	0	1
	7.10%	0.00%	0.00%	50.00%
Between 11 and 15 years	3	0	3	0
	21.40%	0.00%	42.90%	0.00%
More than 15 years	10	5	4	1
	71.40%	100.00%	57.10%	50.00%
<b>In which geography are you based?</b>				
	14	5	7	2
Asia/Pacific (including China, SE Asia, India and Australia/New Zealand)	0	0	0	0
	0.00%	0.00%	0.00%	0.00%
Europe (including EU and Russia)	0	0	0	0
	0.00%	0.00%	0.00%	0.00%
Middle East/Africa	0	0	0	0
	0.00%	0.00%	0.00%	0.00%
Central and Latin America	0	0	0	0
	0.00%	0.00%	0.00%	0.00%
North America (including Canada, Mexico and U.S.)	14	5	7	2
	100.00%	100.00%	100.00%	100.00%

Table 5 (continued)

Question	Total	Which of the following roles best characterizes your current job?		
		Chief Sales Officer	Sales Manager	Other
<b>What is your organization's industry?</b>				
	14	5	7	2
Education	1 7.10%	1 20.00%	0 0.00%	0 0.00%
Forest and Paper Products	4 28.60%	1 20.00%	2 28.60%	1 50.00%
Health Care: Medical Facilities	1 7.10%	0 0.00%	0 0.00%	1 50.00%
Household and Personal Products	3 21.40%	1 20.00%	2 28.60%	0 0.00%
Information Technology Services	1 7.10%	1 20.00%	0 0.00%	0 0.00%
Medical Products and Equipment	1 7.10%	1 20.00%	0 0.00%	0 0.00%
Network and Other Communications Equipment	1 7.10%	0 0.00%	1 14.30%	0 0.00%
Other	2 14.30%	0 0.00%	2 28.60%	0 0.00%
<b>Educational Background (select the highest level of formal education achieved).</b>				
	14	5	7	2
High school diploma	0 0.00%	0 0.00%	0 0.00%	0 0.00%
Some trade/business school training	0 0.00%	0 0.00%	0 0.00%	0 0.00%
Two-year degree	0 0.00%	0 0.00%	0 0.00%	0 0.00%
Some university/college education	1 7.10%	0 0.00%	1 14.30%	0 0.00%
University/college graduate	5 35.70%	2 40.00%	2 28.60%	1 50.00%
Some post-graduate education	4 28.60%	3 60.00%	1 14.30%	0 0.00%
Master's degree	4 28.60%	0 0.00%	3 42.90%	1 50.00%
Advanced graduate or professional degree (e.g., doctorate)	0 0.00%	0 0.00%	0 0.00%	0 0.00%
None of the above	0 0.00%	0 0.00%	0 0.00%	0 0.00%

Table 5 (continued)

Question	Total	Which of the following roles best characterizes your current job?		
		Chief Sales Officer	Sales Manager	Other
<b>What is your age?</b>	14	5	7	2
29 or less	0 0.00%	0 0.00%	0 0.00%	0 0.00%
30 – 39	2 14.30%	0 0.00%	1 14.30%	1 50.00%
40 – 49	7 50.00%	3 60.00%	4 57.10%	0 0.00%
50 – 59	3 21.40%	1 20.00%	1 14.30%	1 50.00%
60 or above	2 14.30%	1 20.00%	1 14.30%	0 0.00%
<b>What is your gender?</b>	14	5	7	2
Female	3 21.40%	1 20.00%	1 14.30%	1 50.00%
Male	11 78.60%	4 80.00%	6 85.70%	1 50.00%

### Sales Managers

Demographic data on sales managers were collected using the demographic information section (Part 1) of the survey. The demographic characteristics of sales managers included market sold to, number of years in the profession, location, industry, educational background, age, and gender. Data collected from seven sales manager respondents represented three industries, including forest and paper products, household and personal products, network and other equipment. The sales manager members of the expert panel included individuals who resided in North America (100%) and sold to the

business or consumer markets (43% and 57%, respectively). A total of 100% of sales managers had been in the profession for 11 or more years, with 57% having more than 15 years of experience. All sales managers had formal higher education, with 14.3% with some university/college education, 28.6% were university/college graduates, 14.3% had some post-graduate education, and 42.9% had a master's degree. All sales managers were age 30 or above, with the majority, 57.1%, between the ages of 40 and 49. The majority (85.7%) of sales manager respondents were male. The percentage distribution of sales managers by demographic characteristic appear in Table 5.

#### **Other (Sales and Marketing)**

An "other" category was used for role self-identification, with two respondents identifying in sales roles that included marketing responsibility, with one individual in a role comparable to a CSO and one in a role comparable to a FLSM. Data collected from the two respondents represented two industries, including forest and paper products and health care: medical facilities. The sales and marketing members of the expert panel included individuals who resided in North America (100%) and sold solely to the business market (100%). One respondent (50%) had been in the profession for three to five years, and one respondent (50%) had more than 15 years of experience. Both had formal higher education. One (50%) had a university/college degree, and one (50%) had a master's degree. One female was age 30 to 39, and one male was between 50 and 59. The percentage distributions of "other" by demographic characteristic appear in Table 5.

## **Delphi Rounds**

The technique is a multistage group facilitation process designed to collect and synthesize data confidentially through a series of questionnaires, resulting in a consensus that reflects the group's expert opinion and personal experience on important issues and evolving trends (Hasson et al., 2000; Lambrecht 2007). As cited in Yousef (2007), three iterations are often sufficient to collect the needed information and to reach a consensus. For the purposes of the study, the first series of rounds established what competencies of frontline sales managers in for-profit organizations perceived to be important by frontline sales managers and CSOs.

Contact with the panel was accomplished via email in order to solicit participation. The significance of panel participation, time requirement, and feedback mechanism (online survey instrument with space for comments) were explained in the recruitment email, which can be found in Appendix B. In the Round One questionnaire, panelists were provided again with an overview and objectives of the study, thanked for their participation, and reminded of the research technique of the study, including confidentiality (Appendix C). A Round One email reminder message was sent to participants, who had not responded within the requested timeframe, which can be found in Appendix D.

### **Round One**

A structured questionnaire was developed based on review of the literature. The literature review conducted in conjunction with a scan of trade magazines and books, revealed a large number of competencies, which were reviewed to identify potentially

relevant to frontline business-to business sales managers. The review included four textbooks in professional selling and over 30 academic journal articles related to competency and professional selling to identify taxonomies of sales manager activity, role identification research, and existing task identification research for inclusion into the preliminary model. At the conclusion of the literature review, competency statements for consideration as being relevant to frontline sales managers were grouped into competency clusters, and an online survey instrument was developed. The panelists were provided with directions, examples, and relevant definitions. The panel was instructed to prioritize each competency statement based on perceived importance to the role of frontline sales managers, using a 5-point Likert scale as shown in Figure 6. Panelists were then instructed to use the open-ended section of the data collection tool as a way to provide input, ask for clarification, and make recommendations. All panelists were instructed to use their position as thought leaders in their area of expertise to ensure that all competencies required for the exemplary performance of a frontline sales manager were represented.

Round One responses were categorized and subcategorized using the constant comparative method of data analysis (Merriam, 1998). If the results of perceived competencies for frontline sales managers were the same as prioritized by frontline sales managers and CSOs, the two panels were combined into one. If the results of perceived competencies for frontline sales managers were different by frontline sales managers and CSOs, the panels remained separate in Round Two.

<b>KEY: Importance Rating</b>		
<b>Scale</b>	<b>Level of Importance</b>	<b>Description</b>
<b>1</b>	<b>Unnecessary</b>	It has little to no importance to the success of frontline sales managers
<b>2</b>	<b>Slightly Important</b>	It has some importance to the success of frontline sales managers
<b>3</b>	<b>Moderately Important</b>	It has a moderate level of importance to the success of frontline sales managers
<b>4</b>	<b>Very Important</b>	It is very important to the success of frontline sales managers
<b>5</b>	<b>Essential</b>	It is essential to the success of frontline sales managers

**Instructions:** As an expert, please rate the competency statements below from (1-unnecessary) to (5-essential) for frontline sales managers.

	No relevancy for exemplary performance				Crucial for exemplary performance
	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Invests time in strategic planning to best position the team for success	1	2	3	4	5

*Figure 6. Round One Questionnaire example.*

## **Round Two**

The second round of the Delphi study provided panelists with the opportunity to view how they rated each statement as compared to the group rating, review comments made in the previous round, and move towards consensus of opinion on individual ratings that deviated significantly from the group rating, or support for their decision to not move towards consensus of opinion on any individual rating that deviated significantly from the group rating for that statement. This round provided opportunity for panelists to revise their judgments. The Round Two correspondence and questionnaire can be found in Appendix E, and an email reminder message is in

Appendix F. The results of Round Two were tabulated and presented as the final statement of group consensus. Group consensus was considered achieved if there was 75% or higher agreement in responses. If Round Two results did not reflect consensus, a third round was added to further establish consensus.

### Round Three

The third round of the Delphi study provided the panelists with a final list of core competencies for frontline sales managers. Using the competencies identified, the panelists were asked to identify perceived levels of competence of frontline sales managers in for-profit organizations. An example follows in Figure 7.

**Instructions:** Please think about the level of proficiency of frontline sales managers in your organization. As an expert, please rate the level of proficiency in each competency for frontline managers on a scale of 1 (very little proficiency) to 5 (exceptional proficiency):

Competency	Level of Proficiency				
	Very Little	Limited	Consistent	Advanced	Exceptional
Invests time in strategic planning to best position the team for success	1	2	3	4	5

Figure 7. Round Three Questionnaire example.

The opinions of the experts who made up the panel were summarized through descriptive statistics. Spearman's rank order correlation coefficient, corrected for tied ranks, was used to determine the degree of agreement among CSO and FLSM respondents. The Round Three correspondence and questionnaire can be found in Appendix G, and an email reminder message is in Appendix H.

## **CHAPTER IV**

### **RESULTS**

The primary purpose of this study was to identify the competencies considered essential for frontline sales managers in for-profit organizations from a broad multi-company perspective. A second purpose was to assess the level of importance assigned to each competency by frontline sales managers and chief sales officers (CSOs) that could assist in establishing priorities regarding knowledge and skills perceived to be important for success in frontline sales management. A third purpose was to identify perceived levels of competence for frontline sales managers in for-profit organizations and fourth to ascertain what relationships exist (if any) between frontline sales managers and CSOs regarding competencies believed to be important and perception of levels of competence for frontline sales managers in for-profit organizations. Lastly, this study was to provide recommended uses of the competency model that could serve as a guide for human resources initiatives to increase levels of sales force effectiveness. It was hypothesized that through the examination of role-based competencies and the delineation of competency significance, a role-specific conceptual framework could be developed that could serve as a benchmark for frontline sales manager selection, performance, and development purposes.

Information about competencies was obtained through responses gathered from three rounds of data collection with an expert panel using the Delphi technique. In Round One, a structured questionnaire of 22 competency statements in four clusters and two categories was used based on review of the literature. Panelists were instructed to

use their position as thought leaders in their area of expertise to ensure that all competencies required for the exemplary performance of a frontline sales manager were represented by providing input, asking for clarification, and making recommendations. Using the constant comparative method of data analysis, Round One resulted in identifying 55 statements essential to exemplary performance by frontline sales managers (Merriam, 1998). Throughout the editing process, all statements were included, although some were combined and/or rewritten into a more concise form. As a result of this process, groups of like statements emerged, comprising new categories and clusters of competency statements. These categories and clusters were named and defined based on the essential competencies each contained and on the existing literature describing functional areas of frontline sales manager performance in order to provide respondents with a richer context from which to analyze and rate the essential nature of each statement in Round Two.

Appendix I includes the competencies for exemplary performance by frontline sales managers identified by one or more panel members in the first round. The statements are organized in three categories and each category has three clusters, resulting in nine clusters, and 55 competencies. The expert panel reached consensus in Round Two regarding the competencies perceived to be important for exemplary performance for frontline sales managers and ranked the competencies in order of importance. The questionnaires used to collect competency importance data from the expert panel in Rounds One and Two appear in Appendices C and E.

In Round Three, the expert panel ranked the 55 competencies by the perceived level of frontline sales manager proficiency in each competency. Data were analyzed to determine (a) the level of agreement and/or differences among the expert panel in regards to level of importance ratings of competencies for frontline sales managers, (b) differences among individuals from two levels or professional experience regarding the perceptions of the importance of competencies, (c) the level of agreement and/or differences among the expert panel in regards to level of perceived competence ratings of competencies for frontline sales managers, (d) differences among individuals from two levels or professional experience regarding the perceptions of frontline sales manager competence, (e) the most highly recommended competencies to include within a frontline sales manager model for for-profit organizations, and (f) the recommended uses of the competency model for human resources initiatives to increase levels of sales force effectiveness.

Data were collected from frontline sales managers and chief sales officers in the United States in the summer/fall of 2011. The study involved panelists, representing five global organizations, selected by a nomination process. The total population of the panel was 35, with 10 members completing all three rounds of the study, 4 CSOs and 6 FLSMs. Full description of the expert panel, including demographic characteristics is included in Chapter III. The results of the study are reported in two sections: (a) analysis of the research questions and (b) summary of data analysis.

### **Analysis of the Research Questions**

The purpose of this study was to (a) investigate the perceived competencies considered essential for exemplary performance by frontline sales managers in for-profit organizations, (b) identify perceived levels of competence for frontline sales managers in for-profit organizations, (c) ascertain what relationships exist (if any) between frontline sales managers and CSOs regarding competencies believed to be important and perception of levels of competence for frontline sales managers in for-profit organizations, and (d) provide recommended uses of the competency model that could serve as a guide for human resources initiatives to increase levels of sales force effectiveness. To fulfill the research purpose, five research questions were developed for this study. Questions were analyzed using descriptive statistics, and Spearman's rank order correlation coefficient, corrected for tied ranks, was used to determine the degree of agreement among CSO and FLSM respondents.

1. What competencies of frontline sales managers in for-profit organizations are perceived to be important by frontline sales managers and chief sales officers (CSOs)?
2. What relationships exist (if any) between frontline sales managers and chief sales officers (CSOs) regarding competencies believed to be important for frontline sales managers in for-profit organizations?
3. What are the perceived levels of competence of frontline sales managers in for-profit organizations by frontline sales managers and chief sales officers (CSOs)?

4. What relationships exist (if any) between frontline sales managers and chief sales officers (CSOs) regarding perceived levels of competence for frontline sales managers in for-profit organizations?
5. What uses of a competency model for frontline sales managers are perceived to be most important by frontline sales managers and chief sales officers (CSOs)?

### **Research Question One**

What competencies of frontline sales managers in for-profit organizations are perceived to be important by frontline sales managers and chief sales officers (CSOs)?

Research Question One was tested in Rounds One and Two of this Delphi study. As a result of Round Two, the competencies were rank ordered for all respondents. The rating scale was based on a Likert scale of 5 (Essential) to 1 (Unnecessary). The means ranged from 4.93 to 3.5 for the 55 competencies. Through the rating process, consensus of opinion was sought among panelists for each statement. For the purposes of this study, consensus was defined as statements rated by at least 75% of the panel members as 5 (Essential) or 4 (Very Important). Thirty-eight competency statements met the criteria of being rated a 5 or 4 by 75% or more of the panelists in Round Two. Table 6 shows the consensus ranking and descriptive statistics of competencies for all respondents.

Table 6. Consensus Ranking of Competencies by All Respondents

Competency	Rank	Consensus	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_2_4_22 Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	1	100%	4.93	1	0.27	0.07	[4.79 - 5.07]
Q_3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	2.5	100%	4.86	1	0.36	0.1	[4.67 - 5.05]
Q_3_7_43 Displays responsibility for own actions and results	2.5	100%	4.86	1	0.36	0.1	[4.67 - 5.05]
Q_2_4_23 Balances corrective with positive feedback to ensure optimum guidance and performance improvement	3	100%	4.71	1	0.47	0.13	[4.47 - 4.96]
Q_3_7_40 Manages with balance, objectivity and respect for the individual	3	100%	4.71	1	0.47	0.13	[4.47 - 4.96]
Q_3_7_41 Demonstrates and inspires confidence	3	100%	4.71	1	0.47	0.13	[4.47 - 4.96]
Q_1_1_1 Invests time in strategic planning to best position the team for success	7.5	93%	4.71	2	0.61	0.16	[4.39 - 5.03]
Q_1_3_14 Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust	7.5	93%	4.71	2	0.61	0.16	[4.39 - 5.03]
Q_2_5_31 Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated	9.5	100%	4.64	1	0.5	0.13	[4.38 - 4.90]
Q_2_6_35 Hires, promotes, and terminates to improve sales performance and address capability gaps	9.5	100%	4.64	1	0.5	0.13	[4.38 - 4.90]
Q_2_5_27 Sets clear expectations for conduct, work activity and performance	11	86%	4.64	2	0.74	0.2	[4.25 - 5.03]

Table 6 (continued)

Competency	Rank	Consensus	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_1_2 Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	13	100%	4.57	1	0.51	0.14	[4.30 - 4.84]
Q_1_3_18 Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs	13	100%	4.57	1	0.51	0.14	[4.30 - 4.84]
Q_3_7_38 Is a role model for high performance	13	100%	4.57	1	0.51	0.14	[4.30 - 4.84]
Q_3_9_53 Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding	15	93%	4.5	2	0.65	0.17	[4.16 - 4.84]
Q_3_7_45 Displays self-control and keeps disruptive emotions and impulses in check	16.5	100%	4.43	1	0.51	0.14	[4.16 - 4.70]
Q_3_9_55 Overcomes objections with skill, using examples, logic, data, or other pertinent information	16.5	100%	4.43	1	0.51	0.14	[4.16 - 4.70]
Q_2_4_24 Motivates individuals to enable sales performance	18	93%	4.43	2	0.65	0.17	[4.09 - 4.77]
Q_1_3_19 Maintains current understanding of customer's business, using this knowledge to widen the breadth and depth of account penetration and achieve exposure to business planning	19	85%	4.43	3	0.94	0.25	[3.94 - 4.92]
Q_2_4_26 Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development	20	100%	4.36	1	0.5	0.13	[4.10 - 4.62]
Q_3_7_46 Demonstrates smart risk-taking in making decisions	21	93%	4.36	2	0.63	0.17	[4.03 - 4.69]
Q_2_5_29 Compares performance to expectations	23	93%	4.29	2	0.61	0.16	[3.97 - 4.61]

Table 6 (continued)

Competency	Rank	Consensus	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_3_7_42 Maintains resiliency to many changes; inputs; or stresses throughout the course of working	23	93%	4.29	2	0.61	0.16	[3.97 - 4.61]
Q_3_7_44 Displays versatility and adaptability at many different tasks and processes	23	93%	4.29	2	0.61	0.16	[3.97 - 4.61]
Q_1_3_17 Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making	25	79%	4.21	2	0.8	0.21	[3.79 - 4.63]
Q_2_6_36 Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	26	100%	4.14	1	0.36	0.1	[3.95 - 4.33]
Q_3_9_54 Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message	27	92%	4.14	2	0.53	0.14	[3.86 - 4.42]
Q_2_5_30 Reinforces efforts and progress using rewards and recognition as appropriate	28.5	86%	4.14	2	0.66	0.18	[3.80 - 4.49]
Q_2_6_34 Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	28.5	86%	4.14	2	0.66	0.18	[3.80 - 4.49]
Q_3_8_48 Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	30	79%	4.14	2	0.77	0.21	[3.74 - 4.55]
Q_1_1_3 Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	32	93%	4.07	2	0.47	0.13	[3.82 - 4.32]
Q_2_5_32 Adheres to organizations' performance management policies and procedures	32	93%	4.07	2	0.47	0.13	[3.82 - 4.32]

Table 6 (continued)

Competency	Rank	Consensus	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_3_9_52 Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others	32	93%	4.07	2	0.47	0.13	[3.82 - 4.32]
Q_1_2_9 Aligns resources with opportunities, leveraging colleagues and technology to ensure optimum opportunity coverage and determining resource allocation to establish pursuit priorities in area of control (e.g., account importance, win probability, opportunity size, etc.)	34	86%	4.07	3	0.83	0.22	[3.64 - 4.51]
Q_2_4_25 Links expected behaviors to strategic sales-related outcomes	35	85%	4.07	2	0.62	0.16	[3.75 - 4.39]
Q_3_9_51 Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions	36	78%	4.00	2	0.68	0.18	[3.64 - 4.36]
Q_3_8_47 Organizes and manages work and resources systematically	37	86%	3.93*	2	0.47	0.13	[3.68 - 4.18]
Q_2_5_28 Holds regular planning and review sessions	38	75%	3.93*	2	0.62	0.16	[3.61 - 4.25]

\*Although the mean score fell below 4.0, at least 75% of the panel members rated the statement a 5 or 4.

While consensus resulted in prioritizing 38 competencies, additional analysis of mean and range resulted in further rank ordering of the competencies. Table 7 shows the 15 competencies that attained an overall agreement rating mean of 4.0 as well as having a range of 1.00 or less. These 15 competencies indicated a strong congruity within the answers given across all groups. Therefore, these competencies were identified as primary competencies because of the strong consensus and congruity among all respondents.

Table 8 shows the 19 competencies rated 4.0 or above, with a range of 2.0 or higher. These competencies were rated as very important, but did not receive a high degree of congruity. They are, therefore, identified as secondary competencies.

Four competencies with a mean of less than 4.0 and/or range of 3.0 or higher were eliminated from the ranking due to low degree of congruity. The result was a total of 34 prioritized competencies, 19 primary and 15 secondary in eight clusters.

Table 7. Primary Competencies: Competencies With a Mean of 4.0 or Above and a Range of 1.0 or Less Indicating a High Level of Importance and High Level of Congruity Between Groups

Competency	Rank	Consensus	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_2_4_22 Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	1	100%	4.93	1	0.27	0.07	[4.79 - 5.07]
Q_3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	2.5	100%	4.86	1	0.36	0.1	[4.67 - 5.05]
Q_3_7_43 Displays responsibility for own actions and results	2.5	100%	4.86	1	0.36	0.1	[4.67 - 5.05]
Q_2_4_23 Balances corrective with positive feedback to ensure optimum guidance and performance improvement	5	100%	4.71	1	0.47	0.13	[4.47 - 4.96]
Q_3_7_40 Manages with balance, objectivity and respect for the individual	5	100%	4.71	1	0.47	0.13	[4.47 - 4.96]
Q_3_7_41 Demonstrates and inspires confidence	5	100%	4.71	1	0.47	0.13	[4.47 - 4.96]
Q_2_5_31 Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated	7.5	100%	4.64	1	0.5	0.13	[4.38 - 4.90]
Q_2_6_35 Hires, promotes, and terminates to improve sales performance and address capability gaps	7.5	100%	4.64	1	0.5	0.13	[4.38 - 4.90]
Q_1_1_2 Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	10	100%	4.57	1	0.51	0.14	[4.30 - 4.84]
Q_1_3_18 Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs	10	100%	4.57	1	0.51	0.14	[4.30 - 4.84]
Q_3_7_38 Is a role model for high performance	10	100%	4.57	1	0.51	0.14	[4.30 - 4.84]

Table 7 (continued)

<b>Competency</b>	<b>Rank</b>	<b>Consensus</b>	<b>Mean</b>	<b>Range</b>	<b>Standard Deviation</b>	<b>Standard Error</b>	<b>Confidence Interval @ 95%</b>
Q_3_7_45 Displays self-control and keeps disruptive emotions and impulses in check	12.5	100%	4.43	1	0.51	0.14	[4.16 - 4.70]
Q_3_9_55 Overcomes objections with skill, using examples, logic, data, or other pertinent information	12.5	100%	4.43	1	0.51	0.14	[4.16 - 4.70]
Q_2_4_26 Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development	14	100%	4.36	1	0.5	0.13	[4.10 - 4.62]
Q_2_6_36 Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	15	100%	4.14	1	0.36	0.1	[3.95 - 4.33]

Table 8. Secondary Competencies: Competencies Rated With Importance Ratings Over 4.0 Showing High Importance, but a Range of 2.0 or Higher, Indicating a Lack of Congruity in the Answers Across All Respondent Groups

Competency	Rank	Consensus	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_1_1 Invests time in strategic planning to best position the team for success	16.5	93%	4.71	2	0.61	0.16	[4.39 - 5.03]
Q_1_3_14 Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust	16.5	93%	4.71	2	0.61	0.16	[4.39 - 5.03]
Q_2_5_27 Sets clear expectations for conduct, work activity and performance	18	86%	4.64	2	0.74	0.2	[4.25 - 5.03]
Q_3_9_53 Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding	19	93%	4.5	2	0.65	0.17	[4.16 - 4.84]
Q_2_4_24 Motivates individuals to enable sales performance	20	93%	4.43	2	0.65	0.17	[4.09 - 4.77]
Q_3_7_46 Demonstrates smart risk-taking in making decisions	21	93%	4.36	2	0.63	0.17	[4.03 - 4.69]
Q_2_5_29 Compares performance to expectations	23	93%	4.29	2	0.61	0.16	[3.97 - 4.61]
Q_3_7_42 Maintains resiliency to many changes; inputs; or stresses throughout the course of working	23	93%	4.29	2	0.61	0.16	[3.97 - 4.61]
Q_3_7_44 Displays versatility and adaptability at many different tasks and processes	23	93%	4.29	2	0.61	0.16	[3.97 - 4.61]
Q_1_3_17 Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making	25	79%	4.21	2	0.8	0.21	[3.79 - 4.63]

Table 8 (continued)

Competency	Rank	Consensus	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_3_9_54 Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message	26	92%	4.14	2	0.53	0.14	[3.86 - 4.42]
Q_2_5_30 Reinforces efforts and progress using rewards and recognition as appropriate	27.5	86%	4.14	2	0.66	0.18	[3.80 - 4.49]
Q_2_6_34 Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	27.5	86%	4.14	26	0.66	0.18	[3.80 - 4.49]
Q_3_8_48 Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	29	79%	4.14	2	0.77	0.21	[3.74 - 4.55]
Q_1_1_3 Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	31	93%	4.07	2	0.47	0.13	[3.82 - 4.32]
Q_2_5_32 Adheres to organizations' performance management policies and procedures	31	93%	4.07	2	0.47	0.13	[3.82 - 4.32]
Q_3_9_52 Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others	31	93%	4.07	2	0.47	0.13	[3.82 - 4.32]
Q_2_4_25 Links expected behaviors to strategic sales-related outcomes	33	85%	4.07	2	0.62	0.16	[3.75 - 4.39]
Q_3_9_51 Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions	34	78%	4	2	0.68	0.18	[3.64 - 4.36]

Table 9 shows the cluster rankings of the final 34 competencies, ranging in clusters with the most primary and secondary competencies to the least. The Personal Effectiveness – Manages as a Leader ranked first. The top five ranked clusters fell in the team or personal effectiveness categories. Only one cluster in the Personal Effectiveness category, Develops Self to Achieve Goals, was ranked in the lower third of clusters. Only one cluster in the Execution and Results category, Builds and Maintains Relationships, ranked above the bottom third of clusters. Execution and Results – Manages Sales Strategy and Results, ranked last, with additional commentary provided by panelists noting that while essential, the lower ranking of competencies was due to expectation that the team and/or administrative support would have accountability for many of the competencies in this cluster and would not be the primary accountability of the frontline sales manager.

Tables 10 through 17 present the essential primary and secondary competencies in each category and cluster. Statements are organized in each table according to their overall rank order. The category of Execution and Results includes three clusters and 21 competencies. Of the 21 competencies, 6 (29%) were ranked as primary or secondary. Table 10 depicts the essential competencies for frontline sales managers within the category of Execution and Results and the Manages the Sales Process cluster, which ranked seventh of nine clusters. The competencies include those required in order for exemplary frontline sales managers to identify, engage, move, close, and protect sales opportunities. Three of the six original statements developed in Round One achieved consensus and congruity in Round Two.

Table 9. Cluster Rankings by Importance

Competency Cluster	Rank	Mean	Competencies	Primary	Secondary	Total	Percentage
Q3_7 Personal Effectiveness Manages as a Leader	1	4.56	9	6	3	9	100
Q2_4 Team Effectiveness Coaches for Sales Results	2	4.5	5	3	2	5	100
Q2_5 Team Effectiveness Manages Performance	3	4.29	6	1	4	5	83
Q3_9 Personal Effectiveness Influences to Achieve Goals	4	4.23	5	1	4	5	100
Q2_6 Team Effectiveness Builds Talent	5	4.16	5	2	1	3	60
Q1_3 Execution and Results Builds and Maintains Relationships	6	4.12	8	1	2	3	38
Q1_1 Execution and Results Manages the Sales Process	7	4.07	6	1	2	3	50
Q3_8 Personal Effectiveness Develops Self to Achieve Goals	8	3.84	4	0	1	1	25
Q1_2 Execution and Results Manages Sales Strategy and Results	9	3.8	7	0	0	0	0
Total		4.17	55	15	19	34	62

Table 10. Essential Primary and Secondary Competencies Within the Category of Execution and Results and Manages the Sales Process Cluster

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_1_1_2 Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	10	4.57	1	0.51	[4.30 - 4.84]
Q_1_1_1 Invests time in strategic planning to best position the team for success	16.5	4.71	2	0.61	[4.39 - 5.03]
Q_1_1_3 Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	31	4.07	2	0.47	[3.82 - 4.32]

The second cluster in the category Execution and Results, Manages Sales Strategy and Results, did not have any competencies that received a primary or secondary ranking; therefore, this cluster is not included in this section and was eliminated from the final competency model.

Table 11 concerns the category of Execution and Results and the Builds and Maintains Relationships Competency Cluster, which ranked sixth of nine clusters. The competencies include those required in order for exemplary frontline sales managers to identify, build, and sustain key business relationships, both internally and externally. Three of the eight original statements developed in Round One achieved consensus and congruity in Round Two.

Table 11. Essential Primary and Secondary Competencies Within the Category of Execution and Results and Builds and Maintains Relationships Cluster

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_1_3_18 Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs	10	4.57	1	0.51	[4.30 - 4.84]
Q_1_3_14 Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust	16.5	4.71	2	0.61	[4.39 - 5.03]
Q_1_3_17 Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making	25	4.21	2	0.8	[3.79 - 4.63]

The category of Team Effectiveness includes three clusters and 16 competencies. Of the 16 competencies, 13 (81%) were ranked as primary or secondary. Table 12 describes the category of Team Effectiveness, Coaches for Sales Results Cluster. This cluster includes the competencies required in order for exemplary frontline sales managers to draw out the best performance of the individual or group through ongoing observation, motivation, and developmental feedback. All five of five competencies were ranked as primary or secondary due to consensus and congruity, resulting in an overall ranking of second among the nine clusters. This cluster also held the highest ranked competency by importance, Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement.

Table 12. Essential Primary and Secondary Competencies Within the Category of Team Effectiveness and Coaches for Sales Results Cluster

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_2_4_22 Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	1	4.93	1	0.27	[4.79 - 5.07]
Q_2_4_23 Balances corrective with positive feedback to ensure optimum guidance and performance improvement	5	4.71	1	0.47	[4.47 - 4.96]
Q_2_4_26 Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development	14	4.36	1	0.5	[4.10 - 4.62]
Q_2_4_24 Motivates individuals to enable sales performance	20	4.43	2	0.65	[4.09 - 4.77]
Q_2_4_25 Links expected behaviors to strategic sales-related outcomes	33	4.07	2	0.62	[3.75 - 4.39]

Table 13 includes the category of Team Effectiveness, Manages Performance Cluster. This cluster includes the competencies required in managing individual and team outputs to proactively and continuously improve sales results. Five of six competencies were ranked as primary or secondary due to consensus and congruity among the panel, resulting in an overall ranking of third among the nine clusters.

Table 13. Essential Primary and Secondary Competencies Within the Category of Team Effectiveness and Manages Performance Cluster

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_2_5_31 Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated	7.5	4.64	1	0.5	[4.38 - 4.90]
Q_2_5_27 Sets clear expectations for conduct, work activity and performance	18	4.64	2	0.74	[4.25 - 5.03]
Q_2_5_29 Compares performance to expectations	23	4.29	2	0.61	[3.97 - 4.61]
Q_2_5_30 Reinforces efforts and progress using rewards and recognition as appropriate	27.5	4.14	2	0.66	[3.80 - 4.49]
Q_2_5_32 Adheres to organizations' performance management policies and procedures	31	4.07	2	0.47	[3.82 - 4.32]

Table 14 describes the category of Team Effectiveness, Builds Talent Cluster. This cluster includes the competencies required in order for exemplary frontline sales managers to continuously assess team capability and capacity, managing hiring, promotion, and termination to improve sales performance. Three of five competencies were ranked as primary or secondary due to consensus and congruity among the panel, resulting in an overall ranking of fifth among the nine clusters.

Table 14. Essential Primary and Secondary Competencies Within the Category of Team Effectiveness and Builds Talent Cluster

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_2_6_35 Hires, promotes, and terminates to improve sales performance and address capability gaps	7.5	4.64	1	0.5	[4.38 - 4.90]
Q_2_6_36 Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	15	4.14	1	0.36	[3.95 - 4.33]
Q_2_6_34 Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	27.5	4.14	2	0.66	[3.80 - 4.49]

The category of Personal Effectiveness includes three clusters and 18 competencies. Of the 18 competencies, 15 (83%) were ranked as primary or secondary. Table 15 lists competencies in the category of Personal Effectiveness, Manages as a Leader Cluster. This cluster includes the competencies required in order for exemplary frontline sales managers to build credibility and trust, achieve aspirations, maintain an appropriate attitude, and lead teams and other individuals. This cluster includes the greatest number of competencies, at nine, and all nine were ranked as primary or

secondary in essentialness to exemplary performance by frontline sales managers. The result was an overall ranking of first among the nine clusters.

Table 15. Essential Primary and Secondary Competencies Within the Category of Personal Effectiveness and Manages as a Leader Cluster

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	2.5	4.86	1	0.36	[4.67 - 5.05]
Q_3_7_43 Displays responsibility for own actions and results	2.5	4.86	1	0.36	[4.67 - 5.05]
Q_3_7_40 Manages with balance, objectivity and respect for the individual	5	4.71	1	0.47	[4.47 - 4.96]
Q_3_7_41 Demonstrates and inspires confidence	5	4.71	1	0.47	[4.47 - 4.96]
Q_3_7_38 Is a role model for high performance	10	4.57	1	0.51	[4.30 - 4.84]
Q_3_7_45 Displays self-control and keeps disruptive emotions and impulses in check	12.5	4.43	1	0.51	[4.16 - 4.70]
Q_3_7_46 Demonstrates smart risk-taking in making decisions	21	4.36	2	0.63	[4.03 - 4.69]
Q_3_7_42 Maintains resiliency to many changes; inputs; or stresses throughout the course of working	23	4.29	2	0.61	[3.97 - 4.61]
Q_3_7_44 Displays versatility and adaptability at many different tasks and processes	23	4.29	2	0.61	[3.97 - 4.61]

Table 16 reports the only competency in the category of Personal Effectiveness, Develops Self to Achieve Goals Cluster out of four developed in Round One. This cluster includes the competencies required in order for exemplary frontline sales managers to stay current, manage time and technology to expedite work, and identify and take advantage of development opportunities to achieve personal and professional goals. This cluster ranked eighth of nine.

Table 16. Essential Primary and Secondary Competencies Within the Category of Personal Effectiveness and Develops Self to Achieve Goals Cluster

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_3_8_48 Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	29	4.14	2	0.77	[3.74 - 4.55]

Table 17 lists competencies in the category of Personal Effectiveness, Influences to Achieve Goals. This cluster includes the competencies required for exemplary frontline sales managers to effectively listen, speak, persuade, question, and write within appropriate business norms based on a solid understanding of needs, using whatever medium is most appropriate. All five competencies in this cluster were ranked as primary or secondary in essentialness to exemplary performance by frontline sales managers. The result was an overall ranking of fourth among the nine clusters.

Table 17. Essential Primary and Secondary Competencies Within the Category of Personal Effectiveness and Influences to Achieve Goals Cluster

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_3_9_55 Overcomes objections with skill, using examples, logic, data, or other pertinent information	12.5	4.43	1	0.51	[4.16 - 4.70]
Q_3_9_53 Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding	19	4.5	2	0.65	[4.16 - 4.84]
Q_3_9_54 Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message	26	4.14	2	0.53	[3.86 - 4.42]

Table 17 (continued)

Competency	Rank	Mean	Range	Standard Deviation	Confidence Interval @ 95%
Q_3_9_52 Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others	31	4.07	2	0.47	[3.82 - 4.32]
Q_3_9_51 Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions	34	4	2	0.68	[3.64 - 4.36]

### Research Question Two

What relationships exist (if any) between frontline sales managers and chief sales officers (CSOs) regarding competencies believed to be important for frontline sales managers in for-profit organizations?

Spearman's rank order correlation coefficient, corrected for tied ranks, was used to determine the degree of agreement among CSO and FLSM respondents regarding competencies. Table 18 shows Spearman's rank order correlation for the relationships between paired rankings of the competencies. On a scale from 0.00 to +1.00, Spearman's rank order correlation coefficient was determined to be 0.784. The calculation showed agreement between CSOs and FLSMs.

Table 19 shows the importance rankings by CSOs and FLSMs for each competency.

Table 18. Spearman's Rank Order Correlation Coefficient for Competency Relationships Between CSOs and FLSMs

<u>CSOs and FLSMs</u>	<u>Rank Order Correlation Coefficient, <math>r_s</math></u>
0.784*	

\*Statistically significant at the .01 level.

Table 19. Importance Competency Rankings by CSOs and FLSMs

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_1_1 Invests time in strategic planning to best position the team for success	11	4.67	2	0.82	0.33	[4.01 - 5.32]	7	4.75	1	0.46	0.16	[4.43 - 5.07]
Q_1_1_2 Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	12.5	4.5	1	0.55	0.22	[4.06 - 4.94]	11.5	4.62	1	0.52	0.18	[4.27 - 4.98]
Q_1_1_3 Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	28	4.17	2	0.75	0.31	[3.56 - 4.77]	37	4	0	0	0	[4.00 - 4.00]
Q_1_1_4 Strategically inserts self into the sales process (e.g., initial presentation and deal closure) where one can best influence deal outcomes	45.5	3.67	1	0.52	0.21	[3.25 - 4.08]	46.5	3.75	2	0.71	0.25	[3.26 - 4.24]
Q_1_1_5 Leverages in-depth knowledge of entire product portfolio to influence solutions integration	53	3.5	2	0.84	0.34	[2.83 - 4.17]	49	3.75	3	1.16	0.41	[2.94 - 4.56]
Q_1_1_6 Recognizes applicable corporate policies and accuracy of records and other documents in sales interactions	45.5	3.67	1	0.52	0.21	[3.25 - 4.08]	50	3.75	3	0.89	0.31	[3.14 - 4.36]
Q_1_2_7 Aligns tactical activities to larger organizational strategies, balancing short term requirements with long term results	50.5	3.67	3	1.03	0.42	[2.84 - 4.49]	46.5	3.75	2	0.71	0.25	[3.26 - 4.24]
Q_1_2_8 Establishes, monitors, and controls costs that impact sales margins	50.5	3.67	3	1.03	0.42	[2.84 - 4.49]	38	4	2	0.93	0.33	[3.36 - 4.64]

Table 19 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_2_9 Aligns resources with opportunities, leveraging colleagues and technology to ensure optimum opportunity coverage and determining resource allocation to establish pursuit priorities in area of control (e.g., account importance, win probability, opportunity size, etc.)	38.5	3.83	1	0.41	0.17	[3.51 - 4.16]	46.5	3.75	2	0.71	0.25	[3.26 - 4.24]
Q_1_2_10 Screens administrative demands and troubleshoots back-office operations to minimize sales disruptions	41.5	3.83	2	0.75	0.31	[3.23 - 4.44]	43	3.88	2	0.64	0.23	[3.43 - 4.32]
Q_1_2_11 Conducts territory/coverage plan tracking, analysis, and reporting	32.5	4	2	0.63	0.26	[3.49 - 4.51]	51	3.62	2	0.74	0.26	[3.11 - 4.14]
Q_1_2_12 Synthesizes team data for reporting purposes, ensuring accurate forecasting while monitoring performance to metrics	32.5	4	2	0.63	0.26	[3.49 - 4.51]	36	4.12	3	0.99	0.35	[3.44 - 4.81]
Q_1_2_13 Monitors competitive activity in territory, creating counter competitive strategies while blocking future competitor inroads	45.5	3.67	1	0.52	0.21	[3.25 - 4.08]	54	3.38	3	1.06	0.37	[2.64 - 4.11]
Q_1_3_14 Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust	14	4.5	2	0.84	0.34	[3.83 - 5.17]	3	4.88	1	0.35	0.13	[4.63 - 5.12]
Q_1_3_15 Develops partnerships and identifies and mines new business opportunities across channels and markets	43	3.83	2	0.98	0.4	[3.05 - 4.62]	28	4.25	2	0.71	0.25	[3.76 - 4.74]

Table 19 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_3_16 Seeks to build a functional extended team both inter and intra-organizationally, effectively engaging and influencing cross-boundary resources within the organization and with supplier, partner organizations to achieve respective goals	32.5	4	2	0.63	0.26	[3.49 - 4.51]	44	3.88	2	0.99	0.35	[3.19 - 4.56]
Q_1_3_17 Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making	36	4	2	0.89	0.37	[3.28 - 4.72]	24	4.38	2	0.74	0.26	[3.86 - 4.89]
Q_1_3_18 Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs	8.5	4.67	1	0.52	0.21	[4.25 - 5.08]	16	4.5	1	0.53	0.19	[4.13 - 4.87]
Q_1_3_19 Maintains current understanding of customer's business, using this knowledge to widen the breadth and depth of account penetration and achieve exposure to business planning	20	4.33	3	1.21	0.49	[3.36 - 5.30]	18.5	4.5	2	0.76	0.27	[3.98 - 5.02]
Q_1_3_20 Protects and expands accounts, ensuring that all contractual deployment or fulfillment obligations are met and customer satisfaction is achieved; monitors account activity to minimize rogue selling and disruptive marketing; monitors competitive activities in accounts and appropriately counters competitive messages	48.5	3.67	2	0.82	0.33	[3.01 - 4.32]	55	3.38	3	0.92	0.32	[2.74 - 4.01]

Table 19 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
while blocking future competitor inroads												
Q_1_3_21 Manages deployment readiness and resource alignment, ensuring accurate understanding of requirements derived from closed opportunities (e.g., terms and conditions, service level agreements) and ensuring knowledge is dispersed amongst personnel engaged in post-sale activity (e.g., fulfillment, delivery); where required, facilitate the troubleshooting essential for successfully launching complex initiatives	54	3.5	3	1.05	0.43	[2.66 - 4.34]	53	3.5	1	0.53	0.19	[3.13 - 3.87]
Q_2_4_22 Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	1	5	0	0	0	[5.00 - 5.00]	3	4.88	1	0.35	0.13	[4.63 - 5.12]
Q_2_4_23 Balances corrective with positive feedback to ensure optimum guidance and performance improvement	4	4.83	1	0.41	0.17	[4.51 - 5.16]	11.5	4.62	1	0.52	0.18	[4.27 - 4.98]
Q_2_4_24 Motivates individuals to enable sales performance	18	4.33	2	0.82	0.33	[3.68 - 4.99]	16	4.5	1	0.53	0.19	[4.13 - 4.87]
Q_2_4_25 Links expected behaviors to strategic sales-related outcomes	32.5	4	2	0.63	0.26	[3.49 - 4.51]	32.5	4.12	2	0.64	0.23	[3.68 - 4.57]
Q_2_4_26 Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development	15.5	4.33	1	0.52	0.21	[3.92 - 4.75]	22	4.38	1	0.52	0.18	[4.02 - 4.73]
Q_2_5_27 Sets clear expectations for conduct, work activity and performance	4	4.83	1	0.41	0.17	[4.51 - 5.16]	20	4.5	2	0.93	0.33	[3.86 - 5.14]

Table 19 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_2_5_28 Holds regular planning and review sessions	38.5	3.83	1	0.41	0.17	[3.51 - 4.16]	39.5	4	2	0.76	0.27	[3.48 - 4.52]
Q_2_5_29 Compares performance to expectations	18	4.33	2	0.82	0.33	[3.68 - 4.99]	26.5	4.25	1	0.46	0.16	[3.93 - 4.57]
Q_2_5_30 Reinforces efforts and progress using rewards and recognition as appropriate	23.5	4.17	1	0.41	0.17	[3.84 - 4.49]	35	4.12	2	0.83	0.3	[3.55 - 4.70]
Q_2_5_31 Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated	8.5	4.67	1	0.52	0.21	[4.25 - 5.08]	11.5	4.62	1	0.52	0.18	[4.27 - 4.98]
Q_2_5_32 Adheres to organizations' performance management policies and procedures	23.5	4.17	1	0.41	0.17	[3.84 - 4.49]	41.5	4	2	0.53	0.19	[3.63 - 4.37]
Q_2_6_33 Continuously assesses and maps team skills and knowledge to market demand	28	4.17	2	0.75	0.31	[3.56 - 4.77]	46.5	3.75	2	0.71	0.25	[3.26 - 4.24]
Q_2_6_34 Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	28	4.17	2	0.75	0.31	[3.56 - 4.77]	32	4.12	2	0.64	0.23	[3.68 - 4.57]
Q_2_6_35 Hires, promotes, and terminates to improve sales performance and address capability gaps	8.5	4.67	1	0.52	0.21	[4.25 - 5.08]	11.5	4.62	1	0.52	0.18	[4.27 - 4.98]
Q_2_6_36 Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	23.5	4.17	1	0.41	0.17	[3.84 - 4.49]	29.5	4.12	1	0.35	0.13	[3.88 - 4.37]
Q_2_6_37 Identifies and/or champions support programs or training (formally and informally) to expand and enrich	48.5	3.67	2	0.82	0.33	[3.01 - 4.32]	32.5	4.12	2	0.64	0.23	[3.68 - 4.57]

Table 19 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
new learning												
Q_3_7_38 Is a role model for high performance	15.5	4.33	1	0.52	0.21	[3.92 - 4.75]	7	4.75	1	0.46	0.16	[4.43 - 5.07]
Q_3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	4	4.83	1	0.41	0.17	[4.51 - 5.16]	3	4.88	1	0.35	0.13	[4.63 - 5.12]
Q_3_7_40 Manages with balance, objectivity and respect for the individual	4	4.83	1	0.41	0.17	[4.51 - 5.16]	11.5	4.62	1	0.52	0.18	[4.27 - 4.98]
Q_3_7_41 Demonstrates and inspires confidence	8.5	4.67	1	0.52	0.21	[4.25 - 5.08]	7	4.75	1	0.46	0.16	[4.43 - 5.07]
Q_3_7_42 Maintains resiliency to many changes; inputs; or stresses throughout the course of working	32.5	4	2	0.63	0.26	[3.49 - 4.51]	16	4.5	1	0.53	0.19	[4.13 - 4.87]
Q_3_7_43 Displays responsibility for own actions and results	4	4.83	1	0.41	0.17	[4.51 - 5.16]	3	4.88	1	0.35	0.13	[4.63 - 5.12]
Q_3_7_44 Displays versatility and adaptability at many different tasks and processes	23.5	4.17	1	0.41	0.17	[3.84 - 4.49]	25	4.38	2	0.74	0.26	[3.86 - 4.89]
Q_3_7_45 Displays self-control and keeps disruptive emotions and impulses in check	12.5	4.5	1	0.55	0.22	[4.06 - 4.94]	22	4.38	1	0.52	0.18	[4.02 - 4.73]
Q_3_7_46 Demonstrates smart risk-taking in making decisions	23.5	4.17	1	0.41	0.17	[3.84 - 4.49]	18.5	4.5	2	0.76	0.27	[3.98 - 5.02]
Q_3_8_47 Organizes and manages work and resources systematically	45.5	3.67	1	0.52	0.21	[3.25 - 4.08]	29.5	4.12	1	0.35	0.13	[3.88 - 4.37]
Q_3_8_48 Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	18	4.33	2	0.82	0.33	[3.68 - 4.99]	39.5	4	2	0.76	0.27	[3.48 - 4.52]
Q_3_8_49 Maintains understanding of technical innovations and uses information technology to align and expedite work	55	3.33	1	0.52	0.21	[2.92 - 3.75]	52	3.62	3	0.92	0.32	[2.99 - 4.26]

Table 19 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_3_8_50 Actively identifies and takes advantage of opportunities for learning, (e.g., through benchmarking, leveraging company development opportunities) and applies newly gained knowledge and skill on the job	52	3.5	1	0.55	0.22	[3.06 - 3.94]	41.5	4	2	0.53	0.19	[3.63 - 4.37]
Q_3_9_51 Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions	41.5	3.83	2	0.75	0.31	[3.23 - 4.44]	32.5	4.12	2	0.64	0.23	[3.68 - 4.57]
Q_3_9_52 Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others	38.5	3.83	1	0.41	0.17	[3.51 - 4.16]	26.5	4.25	1	0.46	0.16	[3.93 - 4.57]
Q_3_9_53 Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding	32.5	4	2	0.63	0.26	[3.49 - 4.51]	3	4.88	1	0.35	0.13	[4.63 - 5.12]
Q_3_9_54 Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message	38.5	3.83	1	0.41	0.17	[3.51 - 4.16]	22	4.38	1	0.52	0.18	[4.02 - 4.73]
Q_3_9_55 Overcomes obj. w/ skill, using ex., logic, data, or other pertinent information	23.5	4.17	1	0.41	0.17	[3.84 - 4.49]	11.5	4.62	1	0.52	0.18	[4.27 - 4.98]

Spearman's rank order correlation coefficient was used to determine the degree of agreement among CSO and FLSM respondents regarding competency clusters.

Table 20 shows Spearman's rank order correlation for the relationships between paired rankings of the competency clusters. On a scale from 0.00 to +1.00, Spearman's rank order correlation coefficient was determined to be 0.783. The calculation showed agreement between CSOs and FLSMs.

Table 21 shows the rankings by CSOs and FLSMs for each competency cluster. In comparison to the cluster ranking of the expert panel as whole, when analyzed separately by CSO and FLSM, the top four ranked clusters fell in the team or personal effectiveness categories versus the top five. However, FLSMs ranked the Personal Effectiveness category, Influences to Achieve Goals cluster as third most important, whereas CSOs ranked it as seventh most important. Both CSOs and FLSMs ranked the Execution and Results category, Builds and Maintains Relationships cluster as the fifth most important. Further, the Execution and Results category, Manages Sales Strategy and Results cluster, which ranked last overall and subsequently eliminated from the final model due to lack of consensus, was ranked last by FLSMs and eighth by CSOs.

Table 20. Spearman's Rank Order Correlation Coefficient for Cluster Relationships Between CSOs and FLSMs

	<b><u>Rank Order Correlation Coefficient, <math>r_s</math></u></b>
<b><u>CSOs and FLSMs</u></b>	
	0.783*

\*Statistically significant at the .01 level.

Table 21. Competency Cluster Rankings by CSOs and FLSMs

CSOs			FLSMs		
Competency Cluster	Importance Ranking	Mean	Competency Cluster	Importance Ranking	Mean
Q2_4 Team Effectiveness Coaches for Sales Results	1	4.5	Q3_7 Personal Effectiveness Manages as a Leader	1	4.63
Q3_7 Personal Effectiveness Manages as a Leader	2	4.48	Q2_4 Team Effectiveness Coaches for Sales Results	2	4.5
Q2_5 Team Effectiveness Manages Performance	3	4.33	Q3_9 Personal Effectiveness Influences to Achieve Goals	3	4.45
Q2_6 Team Effectiveness Builds Talent	4	4.17	Q2_5 Team Effectiveness Manages Performance	4	4.25
Q1_3 Execution and Results Builds and Maintains Relationships	5	4.06	Q1_3 Execution and Results Builds and Maintains Relationships	5	4.16
Q1_1 Execution and Results Manages the Sales Process	6	4.03	Q2_6 Team Effectiveness Builds Talent	6	4.15
Q3_9 Personal Effectiveness Influences to Achieve Goals	7	3.93	Q1_1 Execution and Results Manages the Sales Process	7	4.1
Q1_2 Execution and Results Manages Sales Strategy and Results	8	3.81	Q3_8 Personal Effectiveness Develops Self to Achieve Goals	8	3.94
Q3_8 Personal Effectiveness Develops Self to Achieve Goals	9	3.71	Q1_2 Execution and Results Manages Sales Strategy and Results	9	3.79

### Research Question Three

What are the perceived levels of competence of frontline sales managers in for-profit organizations by frontline sales managers and chief sales officers (CSOs)?

The expert panel were asked to rate the competency statements with a Likert scale of (5) exceptional proficiency to (1) very little proficiency for frontline sales managers. Table 22 shows the mean competency ranking for each cluster. The competency clusters that ranked highest and second highest in importance for frontline sales managers also ranked highest and second highest in perceived competence. Similarly, the competency clusters that ranked least and second least in importance for frontline sales managers also ranked least and second least in perceived competence.

Table 22. Cluster Rankings by Importance and Mean Competence

Competency Cluster	Importance Rank	Mean Importance	Competence Rank	Mean Competence
Q3_7 Personal Effectiveness Manages as a Leader	1	4.56	1	3.63
Q2_4 Team Effectiveness Coaches for Sales Results	2	4.5	2	3.5
Q2_5 Team Effectiveness Manages Performance	3	4.29	7	3.27
Q3_9 Personal Effectiveness Influences to Achieve Goals	4	4.23	4	3.34
Q2_6 Team Effectiveness Builds Talent	5	4.16	5	3
Q1_3 Execution and Results Builds and Maintains Relationships	6	4.12	3	3.4
Q1_1 Execution and Results Manages the Sales Process	7	4.07	6	3.3
Q3_8 Personal Effectiveness Develops Self to Achieve Goals	8	3.84	8	3.2
Q1_2 Execution and Results Manages Sales Strategy and Results	9	3.8	9	3.17

Table 23 shows the ranking of each competency statement and the perceived level of competence possessed by frontline sales managers.

Table 23. Competency Rankings by Perceived Competence

Competency	Rank	Mean	Median	Mode	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	1	4.1	4	4	2	0.74	0.23	[3.64 - 4.56]
Q2_4_26 Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development	2	3.8	4	3,4,5	3	1.03	0.33	[3.16 - 4.44]
Q3_7_45 Displays self-control and keeps disruptive emotions and impulses in check	3	3.7	4	4	2	0.67	0.21	[3.28 - 4.12]
Q_1_3_14 Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust	5	3.7	4	4	3	0.95	0.3	[3.11 - 4.29]
Q_1_3_17 Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making	5	3.7	4	4	3	0.95	0.3	[3.11 - 4.29]
Q2_4_24 Motivates individuals to enable sales performance	5	3.7	4	4	3	0.95	0.3	[3.11 - 4.29]
Q1_1_5 Leverages in-depth knowledge of entire product portfolio to influence solutions integration	7	3.6	4	4	1	0.52	0.16	[3.28 - 3.92]
Q1_1_4 Strategically inserts self into the sales process (e.g., initial presentation and deal closure) where one can best influence deal outcomes	9	3.6	3	3	2	0.84	0.27	[3.08 - 4.12]
Q_1_3_19 Maintains current understanding of customer's business, using this knowledge to widen the breadth and depth of account penetration and achieve exposure to business planning	9	3.6	4	4	3	0.84	0.27	[3.08 - 4.12]
Q3_7_43 Displays responsibility for own actions and results	9	3.6	4	4	3	0.84	0.27	[3.08 - 4.12]

Table 23 (continued)

Competency	Rank	Mean	Median	Mode	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	1	4.1	4	4	2	0.74	0.23	[3.64 - 4.56]
Q1_2_13 Monitors competitive activity in territory, creating counter competitive strategies while blocking future competitor inroads	11	3.5	3.5	3,4	3	0.85	0.27	[2.97 - 4.03]
Q2_4_23 Balances corrective with positive feedback to ensure optimum guidance and performance improvement	12	3.5	4	4	3	1.18	0.37	[2.77 - 4.23]
Q3_7_41 Demonstrates and inspires confidence	14	3.5	3.5	3,4	3	0.85	0.27	[2.97 - 4.03]
Q3_7_42 Maintains resiliency to many changes; inputs; or stresses throughout the course of working	14	3.5	3.5	3,4	3	0.85	0.27	[2.97 - 4.03]
Q3_9_51 Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions	14	3.5	3.5	3,4	3	0.85	0.27	[2.97 - 4.03]
Q2_5_32 Adheres to organizations' performance management policies and procedures	16	3.4	3	3	2	0.7	0.22	[2.97 - 3.83]
Q3_7_44 Displays versatility and adaptability at many different tasks and processes	17	3.4	4	4	2	0.84	0.27	[2.88 - 3.92]
Q3_9_55 Overcomes objections with skill, using examples, logic, data, or other pertinent information	18	3.4	3.5	4	2	0.7	0.22	[2.97 - 3.83]
Q1_2_9 Aligns resources with opportunities, leveraging colleagues and technology to ensure optimum opportunity coverage and determining resource allocation to establish pursuit priorities in area of control (e.g., account importance, win probability, opportunity size, etc.)	19.5	3.4	3	3	3	0.84	0.27	[2.88 - 3.92]
Q2_5_29 Compares performance to expectations	19.5	3.4	3	3	3	0.84	0.27	[2.88 - 3.92]
Q3_7_40 Manages with balance, objectivity and respect for the individual	21	3.4	3.5	4	3	0.97	0.31	[2.80 - 4.00]

Table 23 (continued)

Competency	Rank	Mean	Median	Mode	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	1	4.1	4	4	2	0.74	0.23	[3.64 - 4.56]
Q3_9_53 Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding	22	3.4	3	3	3	1.07	0.34	[2.73 - 4.07]
Q2_4_22 Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	23	3.4	3.5	3,4	4	1.26	0.4	[2.62 - 4.18]
Q2_5_27 Sets clear expectations for conduct, work activity and performance	24	3.4	4	4	4	1.35	0.43	[2.56 - 4.24]
Q3_7_38 Is a role model for high performance	25	3.4	3.5	5	4	1.43	0.45	[2.51 - 4.29]
Q3_8_48 Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	26	3.3	3	3	1	0.48	0.15	[3.00 - 3.60]
Q1_1_6 Recognizes applicable corporate policies and accuracy of records and other documents in sales interactions	27.5	3.3	3	3	2	0.67	0.21	[2.88 - 3.72]
Q2_5_30 Reinforces efforts and progress using rewards and recognition as appropriate	27.5	3.3	3	3	2	0.67	0.21	[2.88 - 3.72]
Q3_7_46 Demonstrates smart risk-taking in making decisions	29	3.3	3.5	4	2	0.82	0.26	[2.79 - 3.81]
Q3_9_54 Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message	30	3.3	3	3	2	0.67	0.21	[2.88 - 3.72]
Q1_2_7 Aligns tactical activities to larger organizational strategies, balancing short term requirements with long term results	31	3.3	3	2,3	3	1.16	0.37	[2.58 - 4.02]

Table 23 (continued)

Competency	Rank	Mean	Median	Mode	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	1	4.1	4	4	2	0.74	0.23	[3.64 - 4.56]
Q_1_3_15 Develops partnerships and identifies and mines new business opportunities across channels and markets	32.5	3.3	3.5	4	4	1.16	0.37	[2.58 - 4.02]
Q_1_3_18 Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs	32.5	3.3	3.5	4	4	1.16	0.37	[2.58 - 4.02]
Q_1_3_16 Seeks to build a functional extended team both inter and intra-organizationally, effectively engaging and influencing cross-boundary resources within the organization and with supplier, partner organizations to achieve respective goals	34	3.3	3.5	4	4	1.34	0.42	[2.47 - 4.13]
Q_1_3_20 Protects and expands accounts, ensuring that all contractual deployment or fulfillment obligations are met and customer satisfaction is achieved; monitors account activity to minimize rogue selling and disruptive marketing; monitors competitive activities in accounts and appropriately counters competitive messages while blocking future competitor inroads	35	3.2	3.5	4	2	0.92	0.29	[2.63 - 3.77]
Q3_8_47 Organizes and manages work and resources systematically	36.5	3.2	3	3,4	2	0.79	0.25	[2.71 - 3.69]
Q3_8_49 Maintains understanding of technical innovations and uses information technology to align and expedite work	36.5	3.2	3	3,4	2	0.79	0.25	[2.71 - 3.69]
Q1_1_2 Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	38.5	3.2	3	2,3,4	3	1.03	0.33	[2.56 - 3.84]
Q1_2_12 Synthesizes team data for reporting purposes, ensuring accurate forecasting while monitoring performance to metrics	38.5	3.2	3	2,3,4	3	1.03	0.33	[2.56 - 3.84]

Table 23 (continued)

Competency	Rank	Mean	Median	Mode	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	1	4.1	4	4	2	0.74	0.23	[3.64 - 4.56]
Q2_6_35 Hires, promotes, and terminates to improve sales performance and address capability gaps	40	3.2	3	3	3	0.92	0.29	[2.63 - 3.77]
Q1_2_8 Establishes, monitors, and controls costs that impact sales margins	41.5	3.1	3	4	2	0.88	0.28	[2.56 - 3.64]
Q_1_3_21 Manages deployment readiness and resource alignment, ensuring accurate understanding of requirements derived from closed opportunities (e.g., terms and conditions, service level agreements) and ensuring knowledge is dispersed amongst personnel engaged in post-sale activity (e.g., fulfillment, delivery); where required, facilitate the troubleshooting essential for successfully launching complex initiatives	41.5	3.1	3	4	2	0.88	0.28	[2.56 - 3.64]
Q3_9_52 Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others	43	3.1	3	3	2	0.57	0.18	[2.75 - 3.45]
Q1_1_1 Invests time in strategic planning to best position the team for success	44	3.1	3	2	3	1.1	0.35	[2.42 - 3.78]
Q2_4_25 Links expected behaviors to strategic sales-related outcomes	45	3.1	4	4	3	1.2	0.38	[2.36 - 3.84]
Q2_5_28 Holds regular planning and review sessions	46	3.1	3	3	3	0.99	0.31	[2.48 - 3.72]
Q3_8_50 Actively identifies and takes advantage of opportunities for learning, (e.g., through benchmarking, leveraging company development opportunities) and applies newly gained knowledge and skill on the job	47	3.1	3	3,4	3	0.99	0.31	[2.48 - 3.72]
Q1_2_11 Conducts territory/coverage plan tracking, analysis, and reporting	48	3	3	2,4	2	0.94	0.3	[2.42 - 3.58]
Q2_6_37 Identifies and/or champions support programs or training (formally and informally) to expand and enrich new learning	49	3	3	3	2	0.67	0.21	[2.59 - 3.41]

Table 23 (continued)

Competency	Rank	Mean	Median	Mode	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	1	4.1	4	4	2	0.74	0.23	[3.64 - 4.56]
Q1_1_3 Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	50	3	3	2	3	1.05	0.33	[2.35 - 3.65]
Q2_6_34 Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	51.5	3	3	4	3	1.05	0.33	[2.35 - 3.65]
Q2_6_36 Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	51.5	3	3	4	3	1.05	0.33	[2.35 - 3.65]
Q2_5_31 Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated	53	3	3	3	4	1.15	0.37	[2.28 - 3.72]
Q2_6_33 Continuously assesses and maps team skills and knowledge to market demand	54	2.8	3	3	4	1.32	0.42	[1.98 - 3.62]
Q1_2_10 Screens administrative demands and troubleshoots back-office operations to minimize sales disruptions	55	2.7	3	3	3	0.82	0.26	[2.19 - 3.21]

#### Research Question Four

What relationships exist (if any) between frontline sales managers and chief sales officers (CSOs) regarding perceived levels of competence for frontline sales managers in for-profit organizations?

CSOs had an average mean perceived competence for all 55 competencies of 2.82, whereas FLSMs had an average mean perceived competence for all 55 competencies of 3.65, showing that CSOs had less confidence in the competence of FLSMs than the FLSMs themselves. In comparison, CSOs had an average mean perceived competence for the final 34 competencies of 2.86, whereas FLSMs has an average mean perceived competence of 3.73.

Spearman's rank order correlation coefficient, corrected for tied ranks, was used to determine the degree of agreement among CSO and FLSM respondents regarding the perceived levels of competence against the 55 competencies. Table 24 shows Spearman's rank order correlation for the relationships between paired rankings of the competencies. On a scale from 0.00 to +1.00, Spearman's rank order correlation coefficient was determined to be 0.225. The calculation showed strong disagreement between CSOs and FLSMs. Table 25 shows the perceived competence rankings by CSOs and FLSMs for each competency.

Table 24. Spearman's Rank Order Correlation Coefficient for Perceived Competence Relationships Between CSOs and FLSMs

	<b>Rank Order Correlation Coefficient, rs</b>
<b>CSOs and FLSMs</b>	0.225*

\*Statistically significant at the .01 level.

Table 25. Perceived Competence Rankings by CSOs and FLSMs

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_1_1 Invests time in strategic planning to best position the team for success	52	2.25	1	0.5	0.25	[1.76 - 2.74]	30.5	3.67	3	1.03	0.42	[2.84 - 4.49]
Q_1_1_2 Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	41.5	2.5	1	0.58	0.29	[1.93 - 3.07]	30.5	3.67	3	1.03	0.42	[2.84 - 4.49]
Q_1_1_3 Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	52	2.25	1	0.5	0.25	[1.76 - 2.74]	40.5	3.5	3	1.05	0.43	[2.66 - 4.34]
Q_1_1_4 Strategically inserts self into the sales process (e.g., initial presentation and deal closure) where one can best influence deal outcomes	9	3.25	1	0.5	0.25	[2.76 - 3.74]	12	3.83	2	0.98	0.4	[3.05 - 4.62]
Q_1_1_5 Leverages in-depth knowledge of entire product portfolio to influence solutions integration	9	3.25	1	0.5	0.25	[2.76 - 3.74]	10	3.83	1	0.41	0.17	[3.51 - 4.16]
Q_1_1_6 Recognizes applicable corporate policies and accuracy of records and other documents in sales interactions	9	3.25	1	0.5	0.25	[2.76 - 3.74]	45	3.33	2	0.82	0.33	[2.68 - 3.99]
Q_1_2_7 Aligns tactical activities to larger organizational strategies, balancing short term requirements with long term results	52	2.25	1	0.5	0.25	[1.76 - 2.74]	38	3.5	2	0.84	0.34	[2.83 - 4.17]
Q_1_2_8 Establishes, monitors, and controls costs that impact sales margins	52	2.25	1	0.5	0.25	[1.76 - 2.74]	14.5	3.83	2	0.75	0.31	[3.23 - 4.44]

Table 25 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_2_9 Aligns resources with opportunities, leveraging colleagues and technology to ensure optimum opportunity coverage and determining resource allocation to establish pursuit priorities in area of control (e.g., account importance, win probability, opportunity size, etc.)	9	3.25	1	0.5	0.25	[2.76 - 3.74]	30.5	3.67	3	1.03	0.42	[2.84 - 4.49]
Q_1_2_10 Screens administrative demands and troubleshoots back-office operations to minimize sales disruptions	41.5	2.5	1	0.58	0.29	[1.93 - 3.07]	17.5	3.83	3	1.17	0.48	[2.90 - 4.77]
Q_1_2_11 Conducts territory/coverage plan tracking, analysis, and reporting	64	2.5	2	1	0.5	[1.52 - 3.48]	35.5	3.5	1	0.55	0.22	[3.06 - 3.94]
Q_1_2_12 Synthesizes team data for reporting purposes, ensuring accurate forecasting while monitoring performance to metrics	31	2.75	1	0.5	0.25	[2.26 - 3.24]	14.5	3.83	2	0.75	0.31	[3.23 - 4.44]
Q_1_2_13 Monitors competitive activity in territory, creating counter competitive strategies while blocking future competitor inroads	31	2.75	1	0.5	0.25	[2.26 - 3.24]	55	2.67	3	1.03	0.42	[1.84 - 3.49]
Q_1_3_14 Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust	20.5	3	2	0.82	0.41	[2.20 - 3.80]	2	4.17	2	0.75	0.31	[3.56 - 4.77]

Table 25 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_3_15 Develops partnerships and identifies and mines new business opportunities across channels and markets	48.5	2.5	3	1.29	0.65	[1.23 - 3.77]	14.5	3.83	2	0.75	0.31	[3.23 - 4.44]
Q_1_3_16 Seeks to build a functional extended team both inter and intra-organizationally, effectively engaging and influencing cross-boundary resources within the organization and with supplier, partner organizations to achieve respective goals	48.5	2.5	3	1.29	0.65	[1.23 - 3.77]	17.5	3.83	3	1.17	0.48	[2.90 - 4.77]
Q_1_3_17 Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making	9	3.25	1	0.5	0.25	[2.76 - 3.74]	6	4	3	1.1	0.45	[3.12 - 4.88]
Q_1_3_18 Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs	46	2.5	2	1	0.5	[1.52 - 3.48]	20	3.83	3	0.98	0.4	[3.05 - 4.62]
Q_1_3_19 Maintains current understanding of customer's business, using this knowledge to widen the breadth and depth of account penetration and achieve exposure to business planning	9	3.25	1	0.5	0.25	[2.76 - 3.74]	20	3.83	3	0.98	0.4	[3.05 - 4.62]

Table 25 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_1_3_20 Protects and expands accounts, ensuring that all contractual deployment or fulfillment obligations are met and customer satisfaction is achieved; monitors account activity to minimize rogue selling and disruptive marketing; monitors competitive activities in accounts and appropriately counters competitive messages while blocking future competitor inroads	41.5	2.5	1	0.58	0.29	[1.93 - 3.07]	26	3.67	2	0.82	0.33	[3.01 - 4.32]
Q_1_3_21 Manages deployment readiness and resource alignment, ensuring accurate understanding of requirements derived from closed opportunities (e.g., terms and conditions, service level agreements) and ensuring knowledge is dispersed amongst personnel engaged in post-sale activity (e.g., fulfillment, delivery); where required, facilitate the troubleshooting essential for successfully launching complex initiatives	20.5	3	2	0.82	0.41	[2.20 - 3.80]	53	3.17	2	0.98	0.4	[2.38 - 3.95]
Q_2_4_22 Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	20.5	3	2	0.82	0.41	[2.20 - 3.80]	34	3.67	4	1.51	0.61	[2.46 - 4.87]
Q_2_4_23 Balances corrective with positive feedback to ensure optimum guidance and performance improvement	31	2.75	2	0.96	0.48	[1.81 - 3.69]	6	4	3	1.1	0.45	[3.12 - 4.88]

Table 25 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_2_4_24 Motivates individuals to enable sales performance	9	3.25	1	0.5	0.25	[2.76 - 3.74]	6	4	3	1.1	0.45	[3.12 - 4.88]
Q_2_4_25 Links expected behaviors to strategic sales-related outcomes	46	2.5	2	1	0.5	[1.52 - 3.48]	42	3.5	3	1.22	0.5	[2.52 - 4.48]
Q_2_4_26 Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development	9	3.25	1	0.5	0.25	[2.76 - 3.74]	3	4.17	3	1.17	0.48	[3.23 - 5.10]
Q_2_5_27 Sets clear expectations for conduct, work activity and performance	31	2.75	2	0.96	0.48	[1.81 - 3.69]	23	3.83	4	1.47	0.6	[2.66 - 5.01]
Q_2_5_28 Holds regular planning and review sessions	31	2.75	2	0.96	0.48	[1.81 - 3.69]	47	3.33	3	1.03	0.42	[2.51 - 4.16]
Q_2_5_29 Compares performance to expectations	20.5	3	2	0.82	0.41	[2.20 - 3.80]	26	3.67	2	0.82	0.33	[3.01 - 4.32]
Q_2_5_30 Reinforces efforts and progress using rewards and recognition as appropriate	9	3.25	1	0.5	0.25	[2.76 - 3.74]	45	3.33	2	0.82	0.33	[2.68 - 3.99]
Q_2_5_31 Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated	52	2.25	2	0.96	0.48	[1.31 - 3.19]	40.5	3.5	3	1.05	0.43	[2.66 - 4.34]
Q_2_5_32 Adheres to organizations' performance management policies and procedures	9	3.25	1	0.5	0.25	[2.76 - 3.74]	38	3.5	2	0.84	0.34	[2.83 - 4.17]

Table 25 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_2_6_33 Continuously assesses and maps team skills and knowledge to market demand	55	2	2	0.82	0.41	[1.20 - 2.80]	52	3.33	4	1.37	0.56	[2.24 - 4.43]
Q_2_6_34 Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	41.5	2.5	1	0.58	0.29	[1.93 - 3.07]	49.5	3.33	3	1.21	0.49	[2.36 - 4.30]
Q_2_6_35 Hires, promotes, and terminates to improve sales performance and address capability gaps	16.5	3	0	0	0	[3.00 - 3.00]	49.5	3.33	3	1.21	0.49	[2.36 - 4.30]
Q_2_6_36 Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	41.5	2.5	1	0.58	0.29	[1.93 - 3.07]	49.5	3.33	3	1.21	0.49	[2.36 - 4.30]
Q_2_6_37 Identifies and/or champions support programs or training (formally and informally) to expand and enrich new learning	31	2.75	1	0.5	0.25	[2.26 - 3.24]	54	3.17	2	0.75	0.31	[2.56 - 3.77]
Q_3_7_38 Is a role model for high performance	41.5	2.5	1	0.58	0.29	[1.93 - 3.07]	8	4	4	1.55	0.63	[2.76 - 5.24]
Q_3_7_39 Demonstrates unquestionable business ethics and commitment to company and personal values	1.5	3.5	1	0.58	0.29	[2.93 - 4.07]	1	4.5	1	0.55	0.22	[4.06 - 4.94]
Q_3_7_40 Manages with balance, objectivity and respect for the individual	20.5	3	2	0.82	0.41	[2.20 - 3.80]	30.5	3.67	3	1.03	0.42	[2.84 - 4.49]
Q_3_7_41 Demonstrates and inspires confidence	9	3.25	1	0.5	0.25	[2.76 - 3.74]	30.5	3.67	3	1.03	0.42	[2.84 - 4.49]
Q_3_7_42 Maintains resiliency to many changes; inputs; or stresses throughout the course of working	9	3.25	1	0.5	0.25	[2.76 - 3.74]	30.5	3.67	3	1.03	0.42	[2.84 - 4.49]

Table 25 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_3_7_43 Displays responsibility for own actions and results	9	3.25	1	0.5	0.25	[2.76 - 3.74]	20	3.83	3	0.98	0.4	[3.05 - 4.62]
Q_3_7_44 Displays versatility and adaptability at many different tasks and processes	31	2.75	2	0.96	0.48	[1.81 - 3.69]	10	3.83	1	0.41	0.17	[3.51 - 4.16]
Q_3_7_45 Displays self-control and keeps disruptive emotions and impulses in check	1.5	3.5	1	0.58	0.29	[2.93 - 4.07]	14.5	3.83	2	0.75	0.31	[3.23 - 4.44]
Q_3_7_46 Demonstrates smart risk-taking in making decisions	31	2.75	1	0.5	0.25	[2.26 - 3.24]	26	3.67	2	0.82	0.33	[3.01 - 4.32]
Q_3_8_47 Organizes and manages work and resources systematically	31	2.75	1	0.5	0.25	[2.26 - 3.24]	38	3.5	2	0.84	0.34	[2.83 - 4.17]
Q_3_8_48 Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	16.5	3	0	0	0	[3.00 - 3.00]	35.5	3.5	1	0.55	0.22	[3.06 - 3.94]
Q_3_8_49 Maintains understanding of technical innovations and uses information technology to align and expedite work	20.5	3	2	0.82	0.41	[2.20 - 3.80]	45	3.33	2	0.82	0.33	[2.68 - 3.99]
Q_3_8_50 Actively identifies and takes advantage of opportunities for learning, (e.g., through benchmarking, leveraging company development opportunities) and applies newly gained knowledge and skill on the job	31	2.75	1	0.5	0.25	[2.26 - 3.24]	49.5	3.33	3	1.21	0.49	[2.36 - 4.30]

Table 25 (continued)

Competency	CSO						FLSM					
	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%	Rank	Mean	Range	Standard Deviation	Standard Error	Confidence Interval @ 95%
Q_3_9_51 Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions	31	2.75	1	0.5	0.25	[2.26 - 3.24]	4	4	2	0.63	0.26	[3.49 - 4.51]
Q_3_9_52 Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others	31	2.75	1	0.5	0.25	[2.26 - 3.24]	43	3.33	1	0.52	0.21	[2.92 - 3.75]
Q_3_9_53 Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding	31	2.75	1	0.5	0.25	[2.26 - 3.24]	22	3.83	3	1.17	0.48	[2.90 - 4.77]
Q_3_9_54 Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message	31	2.75	1	0.5	0.25	[2.26 - 3.24]	24	3.67	1	0.52	0.21	[3.25 - 4.08]
Q_3_9_55 Overcomes objections with skill, using examples, logic, data, or other pertinent information	31	2.75	1	0.5	0.25	[2.26 - 3.24]	10	3.83	1	0.41	0.17	[3.51 - 4.16]

Spearman's rank order correlation coefficient, corrected for tied ranks, was used to determine the degree of agreement among CSO and FLSM respondents regarding perceived competence by competency cluster. Table 26 shows Spearman's rank order correlation for the relationships between paired rankings of the competency clusters. On a scale from 0.00 to +1.00, Spearman's rank order correlation coefficient was determined to be 0.567. The calculation showed a moderate degree of disagreement between CSOs and FLSMs.

Table 26. Spearman's Rank Order Correlation Coefficient for Perceived Competence Cluster Relationships Between CSOs and FLSMs

	<b>Rank Order Correlation Coefficient, <math>r_s</math></b>
<b>CSOs and FLSMs</b>	
	0.567*

\*Statistically significant at the .01 level.

Table 27 shows the rankings by CSOs and FLSMs for each competency cluster, and Table 28 shows the perceive competence cluster rankings for CSOs and FLSMs by mean competence.

Table 27. Perceived Competence Cluster Rankings by CSOs and FLSMs

Competency Cluster	CSO		FLSM	
	Competence Ranking	Mean Competence	Competence Ranking	Mean Competence
Q1_1 Execution and Results Manages the Sales Process	6	2.79	5	3.64
Q1_2 Execution and Results Manages Sales Strategy and Results	8	2.61	6	3.55
Q1_3 Execution and Results Builds and Maintains Relationships	5	2.81	3	3.79
Q2_4 Team Effectiveness Coaches for Sales Results	2	2.95	1	3.87
Q2_5 Team Effectiveness Manages Performance	3	2.88	7	3.53
Q2_6 Team Effectiveness Builds Talent	9	2.55	9	3.3
Q3_7 Personal Effectiveness Manages as a Leader	1	3.08	2	3.85
Q3_8 Personal Effectiveness Develops Self to Achieve Goals	4	2.88	8	3.42
Q3_9 Personal Effectiveness Influences to Achieve Goals	7	2.75	4	3.73

Table 28. Perceived Competence Cluster Rankings for CSOs and FLSMs by Mean Competence

CSO			FLSM		
Competency Cluster	Competence Ranking	Mean Competence	Competency Cluster	Competence Ranking	Mean Competence
Q3_7 Personal Effectiveness Manages as a Leader	1	3.08	Q2_4 Team Effectiveness Coaches for Sales Results	1	3.87
Q2_4 Team Effectiveness Coaches for Sales Results	2	2.95	Q3_7 Personal Effectiveness Manages as a Leader	2	3.85
Q2_5 Team Effectiveness Manages Performance	3	2.88	Q1_3 Execution and Results Builds and Maintains Relationships	3	3.79
Q3_8 Personal Effectiveness Develops Self to Achieve Goals	4	2.88	Q3_9 Personal Effectiveness Influences to Achieve Goals	4	3.73
Q1_3 Execution and Results Builds and Maintains Relationships	5	2.81	Q1_1 Execution and Results Manages the Sales Process	5	3.64
Q1_1 Execution and Results Manages the Sales Process	6	2.79	Q1_2 Execution and Results Manages Sales Strategy and Results	6	3.55
Q3_9 Personal Effectiveness Influences to Achieve Goals	7	2.75	Q2_5 Team Effectiveness Manages Performance	7	3.53
Q1_2 Execution and Results Manages Sales Strategy and Results	8	2.61	Q3_8 Personal Effectiveness Develops Self to Achieve Goals	8	3.42
Q2_6 Team Effectiveness Builds Talent	9	2.55	Q2_6 Team Effectiveness Builds Talent	9	3.3

Analysis of rankings by CSOs and FLSMs for importance and competence is shown in Table 29. Spearman's rank order correlation coefficient was used to determine the degree of agreement between perceived importance and competence for CSOs and FLSMs by competency cluster.

Table 29. Rankings by CSOs and FLSMs for Importance and Competence

Competency Cluster	CSO				FLSM			
	Importance Ranking	Mean Importance	Competence Ranking	Mean Competence	Importance Ranking	Mean Importance	Competence Ranking	Mean Competence
Q1_1 Execution and Results Manages the Sales Process	6	4.03	6	2.79	7	4.1	5	3.64
Q1_2 Execution and Results Manages Sales Strategy and Results	8	3.81	8	2.61	9	3.79	6	3.55
Q1_3 Execution and Results Builds and Maintains Relationships	5	4.06	5	2.81	5	4.16	3	3.79
Q2_4 Team Effectiveness Coaches for Sales Results	1	4.5	2	2.95	2	4.5	1	3.87
Q2_5 Team Effectiveness Manages Performance	3	4.33	3	2.88	4	4.25	7	3.53
Q2_6 Team Effectiveness Builds Talent	4	4.17	9	2.55	6	4.15	9	3.3
Q3_7 Personal Effectiveness Manages as a Leader	2	4.48	1	3.08	1	4.63	2	3.85
Q3_8 Personal Effectiveness Develops Self to Achieve Goals	9	3.71	4	2.88	8	3.94	8	3.42
Q3_9 Personal Effectiveness Influences to Achieve Goals	7	3.93	7	2.75	3	4.45	4	3.73

On a scale from 0.00 to +1.00, Spearman's rank order correlation coefficient was determined to be 0.567 for CSOs for importance and competence by cluster. The calculation showed a moderate degree of disagreement. On a scale from 0.00 to +1.00, Spearman's rank order correlation coefficient was determined to be 0.683 for FLSMs for importance and competence by cluster. The calculation showed a moderate degree of agreement. See Table 30.

Table 30. Spearman's Rank Order Correlation Coefficient for Perceived Importance and Competence Clusters by CSOs and FLSMs

CSO	Rank Order Correlation Coefficient, $r_s$	
	FLSM	
0.567*	0.683*	

\*Statistically significant at the .01 level.

### Research Question Five

What uses of a competency model for frontline sales managers are perceived to be most important by frontline sales managers and chief sales officers (CSOs)?

Respondents were asked what they would do with a document containing the critical knowledge and skills necessary for success as a frontline sales manager. Many of the respondents (64%) agreed that they would use the competency model for coaching purposes or they would pass it on to the sales training organization (36%). CSOs rated use as a coaching tool as the highest (67%) and rated benchmark themselves and provide it to the recruiting organization as the lowest (17%). FLSMs rated benchmark my skills as the highest (75%) and rated recommend someone else benchmark themselves, recommend it to hiring managers, and provide it to the recruiting organization as the

lowest (12%). Table 31 depicts how CSOs and FLSMs would use a competency model for frontline sales managers.

**Table 31. How CSOs and FLSMs Would Use a FLSM Competency Model**

<b>Use of the Model</b>	<b>All Data%</b>	<b>CSO%</b>	<b>FLSM%</b>
1 Benchmark my skills	50	17	75
2 Recommend someone else benchmark themselves	21	33	12
3 Give it to my sales training organization	36	50	25
4 Use it as a coaching tool	64	67	62
5 Recommend it to hiring managers	7	0	12
6 Provide it to the recruiting organization (HR)	14	17	12
7 I would do nothing with it	0	0	0
Other, please specify			
Assess current managers with this lens	7	17	0

### **Summary of the Data Analysis**

This chapter presented the analysis of data collected through the three round Delphi study. Of the 55 competency statements in nine clusters and three categories identified by the panel in Round One, 34 competency statements in eight clusters and three categories reached consensus and congruity as essential for exemplary performance by frontline sales managers. For the purposes of this study, consensus was defined as statements rated by at least 75% of the panel members as 5 (Essential) or 4 (Very Important) in Round Two. There were 38 statements that met this criterion. To reach further level of congruity, statements with a mean of less than 4.0 and/or range of greater than 2 were disqualified, resulting in the elimination of four additional statements. Statements were organized in rank order by mean (largest to smallest) and range (smallest to largest) to reflect competencies most often cited as being essential to

exemplary performance by frontline sales managers. In the category of Execution and Results, two clusters and six competencies remained after Round Two. The consensus reflected 33% of the original 21 competencies. In the category of Team Effectiveness, three clusters and 13 competencies resulted in consensus or 81% of the original 16 competencies. In the Personal Effectiveness category, three clusters and 15 competencies gained consensus, or 83% of the original 18 competency total.

In a test of the research question regarding the level of agreement in the rankings of the 55 competencies, Spearman's rank order correlation coefficient of .784 showed agreement across the CSO and FLSM respondents. See Appendix J for the recommended competency model for frontline sales managers based on the analysis.

In Round Three, the expert panel were asked to rate the competency statements from 5 (Exceptional Proficiency) to 1 (Very Little Proficiency) for frontline sales managers. The competency mean was 3.32, with the competency clusters that ranked highest and second highest in importance for frontline sales managers also ranked highest and second highest in perceived competence. Similarly, the competency clusters that ranked least and second least in importance for frontline sales managers also ranked least and second least in perceived competence. According to Spearman's rank order correlation coefficient of .225, the perceptions deviated to strong disagreement when comparing perceived competence by groups. CSOs had an average mean perceived competence of 2.82, whereas FLSMs had an average mean perceived competence of 3.65, showing that CSOs had less confidence in the competence of FLSMs than the FLSMs themselves.

Finally, analysis in how respondents would use a competency model designed for learning and development purposes, resulted in the top three uses for such a document, i.e., (a) use the competency model for coaching purposes, (b) use it as a benchmarking or assessment tool, and (c) pass it on to the sales training organization.

## CHAPTER V

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

This chapter presents a summary of the purpose of the study, research procedures and methods, and results. In addition, conclusions and recommendations are reported.

#### Summary of the Study

New models of selling demand new skill sets and with little research investigating managerial competency needs and even fewer studies in the sales context, the sales profession has not kept pace with other occupations' advancement in human resource development. Salespeople play a critical role in organizations in delivering customer value, and the way they fulfill this role is directly influenced by sales managers, the most critical element in a productive sales force (Babakus et al., 1996; Guest & Meric, 1989; Piercy et al., 2009). However, increasingly manager competence proves challenging because companies tend to promote salespeople to first-line manager positions based on strong performance in the individual contributor role. In fact though, the skills inherent to and displayed by effective managers differ from those of high-performing salespeople given the role is multi-faceted with unique needs that require aligning competencies (Deeter-Schmelz et al., 2001; Dubinsky & Ingram, 1983; Sujan et al., 1988; Zallocco et al., 2009). Despite the potential for sales managers to influence salesperson performance in the evolving sales model given visibility into their employees' daily workflow, research focusing on sales manager selection, and performance is limited. In Lambert's 2009 competency model for entry-level sales professionals, the competencies were primarily concerned with sales process and

influence and secondarily concerned with relationship, performance, and product and industry competencies. Conversely, the competencies in this frontline sales manager model were primarily concerned with team and personal effectiveness and secondarily concerned with sales process.

The purpose of this study was to identify the competencies considered essential for frontline sales managers in for-profit organizations and to assess the level of importance assigned to each competency by frontline sales managers (FLSM) and Chief Sales Officer (CSO) that could assist in establishing priorities regarding knowledge and skills perceived to be important for success in frontline sales management. Additionally, an effort was made to identify perceived levels of competence, and to ascertain what relationships exist (if any) between frontline sales managers and CSOs regarding competencies believed to be important and perception of levels of competence for frontline sales managers in for-profit organizations. Lastly, this study was to provide recommended uses of the competency model that could serve as a guide for human resources initiatives to increase levels of sales force effectiveness. It was hypothesized that through the examination of role-based competencies and the delineation of competency significance, a role-specific conceptual framework could be developed that could serve as a benchmark for frontline sales manager selection, performance, and development purposes. For the purposes of this study, frontline sales managers were defined as individuals who often have their own sales and account responsibilities and manage mainly non-managerial sales personnel, and CSOs are responsible for all

sales/revenue within an organization or business unit (Cron & DeCarlo, 2009; Dubinsky & Ingram, 1983).

The Delphi technique was chosen as the research method for this study given several factors. First, current research on the topic is limited, yet the demand for informed practice is great. Second, individuals most knowledgeable about the subject are widely dispersed across organizations and geography. Consequently, a systematic approach to inquiry was needed to collect informed opinions in a timely manner, transcend organization and geographic boundaries in a cost-effective manner, and examine the data in a pragmatic manner. Through a process of nominations from for-profit organizations for CSOs and FLSMs having considerable knowledge of selling methods, a panel of 35 experts was selected to participate in the study. Information about competencies was obtained through responses gathered from three rounds of data collection with an expert panel using the Delphi technique.

In Round One, a structured questionnaire of 22 competency statements in four clusters and two categories was used based on review of the literature. Twenty panelists, reflecting the response rate of the 35 invited to participate, were instructed to use their position as thought leaders in their area of expertise to ensure that all competencies required for the exemplary performance of a frontline sales manager were represented by providing input, asking for clarification, and making recommendations. Using the constant comparative method of data analysis, Round One resulted in identifying 55 statements in three categories and nine clusters essential to exemplary performance by frontline sales managers (Merriam, 1998).

In Round Two, an expert panel of 14 responded, ranked the competencies in order of importance, and reached consensus regarding the competencies perceived to be important for exemplary performance for frontline sales managers. For the purposes of this study, consensus was defined as statements rated by at least 75% of the panel members as 5 (Essential) or 4 (Very Important) in Round Two. There were 38 statements that met this criterion. To reach a further level of congruity, statements with a mean of less than 4.0 and/or range of greater than 2 were disqualified, resulting in the elimination of four additional statements. This resulted in 34 prioritized competencies in three categories and eight clusters. Six of eight (75%) clusters were in the Team or Personal Effectiveness categories, and 28 of 34 competencies (82%) were in these two categories.

Further, the one cluster that ranked in the top six of eight clusters (75%) that fell in the sales process category was Builds and Maintains Relationships, including competencies specific to customer relationships. The two clusters that ranked seventh and eighth, in the lower 25% were Execution and Results – Manages the Sales Process and Personal Effectiveness – Develops Self to Achieve Goals, respectively. There was only one competency in Personal Effectiveness – Develops Self to Achieve Goals that made the final model, which included knowledge of product and industry and incorporating it into work. In determining the degree of agreement among CSO and FLSM respondents regarding competencies, on a scale from 0.00 to +1.00, Spearman's rank order correlation coefficient was 0.784, showing agreement between CSOs and FLSMs. In Round Two, the panel also recommended uses of a competency model for

learning and development purposes, which resulted in the top three uses for such a document, i.e., (a) use the competency model for coaching purposes, (b) use it as a benchmarking or assessment tool, and (c) pass it on to the sales training organization.

In Round Three, an expert panel of 10 ranked the 55 competencies by the perceived level of frontline sales manager proficiency in each competency, rating the competency statements from (5) Exceptional Proficiency to (1) Very Little Proficiency for frontline sales managers. The competency mean was 3.32, with the competency clusters that ranked highest and second highest in importance for frontline sales managers also ranked highest and second highest in perceived competence. Similarly, the competency clusters that ranked least and second least in importance for frontline sales managers also ranked least and second least in perceived competence. When comparing by groups, CSOs had an average mean perceived competence of 2.82, whereas FLSMs had an average mean perceived competence of 3.65, showing that CSOs had less confidence in the competence of FLSMs than the FLSMs themselves. Spearman's rank order correlation coefficient was 0.225, showing strong disagreement in perceived competence between CSOs and FLSMs.

It has been established that though Delphi is a useful tool for identifying consensus, it is not without its limitations. Despite attempts to minimize attrition, participants dropped out at each stage of the study, with the greatest attrition between the point of agreeing to participate in the study and responding to the first round of the Delphi questionnaire. However, after this, the rate of attrition was distributed equally in each round among the two groups of CSOs and FLSMs and met the recommended

attrition rate of no more than 70% each round. The early attrition could, therefore, be considered as a reflection of recruitment rates. The sample size could be considered a limitation of this study. Though the final round comprised the recommended minimum of 10 participants, with 6 FLSMs and 4 CSOs, had group consensus not been achieved in Round Two for competencies determined to be important, the split of the CSO and FLSM populations might have posed a greater limitation. It was concluded though, due to the agreement, CSOs and FLSMs would be considered one group. Future work will establish the reliability, feasibility and value of the competencies identified for exemplary performance for FLSMs. Specifically, the relative contribution of the competencies and assessments in evaluating exemplary performance in FLSMs and predicting future outcome requires further investigation.

### **Conclusions**

Based on the findings of this study, conclusions were drawn to include the following:

1. Respondents support that exemplary performance in frontline sales managers requires competence in maintaining team and personal effectiveness, and more specifically competence in developing and sustaining inter- and intrapersonal skills excellence as compared to the functional selling skills required for high individual contributor performance. This further supports the conclusion that the skills inherent to and displayed by effective frontline sales managers differ from those of high-performing salespeople.

2. The research findings indicated agreement in how CSOs and FLSMs perceive competency importance.
3. The research findings indicated strong disagreement in how CSOs and FLSMs perceive FLSM competence. CSOs had less confidence in the competence of FLSMs than the FLSMs themselves.
4. Both groups, CSOs and FLSMs, report they would use the FLSM Competency Model as a coaching tool. This was the first choice for CSOs and second choice for FLSMs.
5. FLSMs noted the primary use of the competency model would be to benchmark their skills.

The conclusions lead to multiple implications for how sales leadership and HR organizations should consider selection, performance, and development for frontline sales managers. A contribution of this research was the creation of a competency model for human resource development purposes. Through identifying the competencies necessary for exemplary performance in frontline sales managers, this study contributes to the construct of human competence, a component of expertise, which lies at the core of HRD (Swanson & Holton, 2001). Appendix K provides the set competencies that CSOs and FLSMs agree upon when rating the importance of competencies for frontline sales manager success in for-profit organizations. These highly important and agreed upon competencies are organized by the prioritized three categories, eight clusters, and 34 competencies derived from the analysis.

## **Recommendations**

Recommendations follow for further research, practice, and theory.

### **Further Research**

The following recommendations are made for further research in the area of frontline sales manager competency:

1. A study should be conducted to determine any correlation between leadership capabilities required for exemplary performance in frontline sales managers as compared to frontline managers. This might allow for determining leadership development priorities and programs for frontline managers.
2. A study should be conducted to examine what behavioral capabilities lead to exemplary performance in team and personal effectiveness competencies. This might allow for predictive analysis in identifying and developing sales representatives for future sales management.
3. A similar study should be conducted with other management levels, e.g., middle, and senior/top levels to determine if there are consistencies among management levels regarding competency importance.
4. A similar analysis should be conducted in other countries to determine whether frontline sales manager competencies required in different countries and cultures are similar to the United States.
5. A study should be conducted that will examine what effects institutional settings, professional experience, and leadership development have based on

the competencies needed for exemplary performance for frontline sales managers.

6. Further study should be conducted to explore the disagreement between CSOs and FLSMs in perceived competence and identify the potential implications for HRD and the sales profession.
7. Expand on McClelland's 1973 individual competency construct and determine if competency testing frontline sales managers can predict occupational success.
8. Leveraging Ven and Chuang's (2005) study, conduct a comparative study of the competency statements using Bloom's cognitive taxonomy to align action verbs in the primary and secondary competencies to the classification model.

### **Practice**

HRD practitioners could use the specific results of this study for organization development, training, performance consultation, and/or individual coaching, thus recommendations for practice in the area of frontline sales manager competency are organized by selection, performance, and development.

### **Selection**

1. Use the model to construct a position description for recruiting purposes.
2. Create an interview guide using a behavioral approach. Break questions into eight sections, with each representing a competency cluster that is essential to frontline sales manager performance.

**Performance**

3. Create a competency-based assessment that can be used (a) to benchmark skills, to highlight and reinforce areas of strength, and to plan development in key areas and/or (b) for multi-rater feedback against the competencies (Appendix L).
4. Create a Role Guide designed to (a) help the frontline sales manager understand the eight Competency Clusters and the 34 Competencies he/she is expected to demonstrate in the role, (b) serve as a tool to help assess capabilities using the competencies, and (c) support development planning.
5. Use the model to identify top talent and plan for succession.
6. Share the model with sales leadership and operations to ensure frontline sales manager objectives and compensation plans are competency aligned for performance management and retention purposes.

**Development**

7. Create a development planning tool that includes (a) Quick Tips – brief, simple suggestions to help enhance the level of capability as it relates to the competency; (b) Developmental Tips – suggested activities, exercises, experiences, external workshops, and on-the-job assignments that an individual can pursue to facilitate development in specific competency areas; and (c) Readings – recommended books and articles for additional information.

8. Diagnose the organization's training content aimed at frontline sales manager (Appendix M and Appendix N).
9. Structure a frontline sales manager curriculum or modify existing curricula for courses related to increasing competence.
10. Create a coaching and mentoring guide for sales leaders to use with frontline sales managers.
11. Using Lambert's 2009 study of competencies for entry-level salespeople to create a coaching and mentoring guide for frontline sales managers to use with their sales representatives.

### **Theory**

Up to this point, the HRD profession has not had clear scholarly literature defining competence and expertise for frontline sales managers, thus the following implications for theory emerged from this study.

1. Theory-building research can be further conducted and expedited leveraging this study and Lynham's (2002) five phases of the general method of applied theory-building research.
2. HRD practitioners and scholars may find utility in expanding the theoretical insight advanced by this study and engaging in the theory-building process through grounded theory research as described by Egan (2002).
3. Becker's (1993) classic human capital theory study could be leveraged in a theory-building study on the economic effects of investment in frontline sales manager competence.

4. The model could be used to determine implications for human performance technology theory in application to frontline sales managers.
5. Given its practical implications, the competency model can be leveraged using the case study research approach to continue testing and building theory as described by Dooley (2002).

Traditional manager promotions have commonly been based on tenure and selling ability, yet there is a new demand for additional skill sets due to an ongoing evolution in the sales landscape. Frontline sales managers are the most important factor in achieving and sustaining success for an organization. They are the power behind transformations; and in the face of an ever-evolving selling landscape, effective sales managers must evolve from the historical super sales performers to business strategists and coaches (Babakus et al., 1996; Cron & DeCarlo, 2009; Hodge & Schachter, 2006). Traditional manager career paths, once commonly based only on the ability to sell, now demand additional skill sets, with frontline sales management playing a critical role in organizations. Sales managers have two primary responsibilities that are to achieve the organization's goals and develop the people reporting to them. Managers lead a team, respond to customers, continually improve products and services, and turn policies into action. As the demands of a frontline sales manager differ from those of a sales executive, so too must the composition of the respective competency models. Understanding the knowledge and skills necessary for success as a frontline sales manager can assist in improving individual, team, and organizational performance, resulting in gaining competitive advantage.

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**APPENDIX A**  
**LIST OF ORGANIZATIONS FROM WHICH NOMINATIONS FOR**  
**PANELISTS WERE REQUESTED**

**List of Organizations from Which Nominations  
for Panelists Were Requested**

1. Dell
2. ES Research Group
3. Google
4. Growth and Associates
5. Pitney Bowes, Inc.
6. Hewlett-Packard
7. IBM
8. Ingersoll-Rand
9. Kimberly-Clark Corporation
10. Liberty Mutual Group
11. NCR
12. Richardson Company

**APPENDIX B**  
**RECRUITMENT EMAIL**

From: Busch, Tina K.

To: [Potential Panelist]

Subject: Request for Participation: Frontline Sales Manager Competency Survey

[Potential Panelist]:

You have been identified as a potential participant in a research study to determine competencies critical for exemplary performance by frontline sales managers.

You were selected to be a potential participant because you are considered an expert possessing specific knowledge on and in-depth experience with the topic being researched.

This study is being conducted in partial fulfillment of doctoral requirements in HR Development and is sponsored by Texas A&M University. It is expected that the research will inform HR and/or sales programs to improve individual, team and/or organizational performance. As a participant, you would receive a copy of the final research, which includes a competency model for frontline sales managers.

If you agree to participate in this study, it will take approximately two hours of your time, requiring completing a total of four surveys over about a two-month period, beginning in Q1 2011.

Attached is an information sheet that provides additional details about the research as well as a research overview.

The first survey tool will be sent to you via Zoomerang for your response. If you are willing to participate, please complete the survey by 6/24/2011.

Thank you for your consideration.

Tina Busch  
Telephone Number  
Email

[Attachments – Information Sheet; Sales Manager Competency Research Overview]

## INFORMATION SHEET

Research Title: Determining Competencies for Frontline Sales Managers  
in For-Profit Organizations

### **Introduction**

The purpose of this form is to provide you (as a prospective research study participant) information that may affect your decision as to whether to participate in this research.

You have been asked to participate in a research study regarding frontline sales manager competency. The purpose of this study is to propose an inventory of competencies for frontline sales managers who work in business-to-business selling in for-profit organizations. You were selected to be a possible participant because you are a frontline sales manager or CSO and considered an expert possessing specific knowledge on and in-depth experience with the topic being researched. This study is being sponsored/funded by Texas A&M University.

### **What will I be asked to do?**

If you agree to participate in this study, it will take approximately two hours of your time over approximately a two-month period. There are two parts of this research, as follows:

#### Part One:

You will be asked to complete an initial survey rating an inventory of competencies for frontline sales managers by level of importance. The ratings collected from you and your fellow expert panelists will be synthesized, and through two additional survey rounds, consensus will be reached on competencies determined as most critical to frontline sales managers.

Based on the competencies identified by the panel, the experts will be asked to think about the level of proficiency of frontline sales managers in their organization, completing a final survey rating the perceived level of proficiency for each competency for frontline sales managers.

#### Part Two:

Based on the competencies identified in Part One, you will be asked to think about the level of proficiency of frontline sales managers in your organization, completing a final survey rating the perceived level of proficiency by competency for frontline sales managers.

### **What are the risks involved in this study?**

The risks associated with this study are minimal and are not greater than risks ordinarily encountered in daily life.

**What are the possible benefits of this study?**

The possible benefits of participation are receiving a final copy of the critical competencies identified in this study for frontline sales managers in for-profit organizations and levels of competency proficiency identified by the expert panel for frontline sales managers. This information can help inform HR and/or sales programs to improve individual, team and/or organizational performance.

**Do I have to participate?**

No. Your participation is voluntary. You may decide not to participate or to withdraw at any time without your current or future relations with Texas A&M University being affected.

**Who will know about my participation in this research study?**

This study is confidential and the records of this study will be kept private. No identifiers linking you to this study will be included in any sort of report that might be published. Research records will be stored securely and only Tina Busch, Principal Investigator, will have access to the records.

**Whom do I contact with questions about the research?**

If you have questions regarding this study, you may contact Tina Busch, telephone number and email.

**Whom do I contact about my rights as a research participant?**

This research study has been reviewed by the Human Subjects' Protection Program and/or the Institutional Review Board at Texas A&M University. For research-related problems or questions regarding your rights as a research participant, you can contact these offices at (979) 458-4067 or [irb@tamu.edu](mailto:irb@tamu.edu).

**Participation**

Please be sure you have read the above information, asked questions and received answers to your satisfaction. If you would like to be in the study, please click the survey link [to insert link], which will open the first survey tool for your response. Thank you for your consideration.

**APPENDIX C**

**ROUND ONE CORRESPONDENCE AND QUESTIONNAIRE**

Dear Sales Competency Expert:

Thank you for your willingness to be part of an expert panel for a very important study on frontline sales manager competency. The attached survey is a survey that will serve as the foundation for future research, articles, and thought leadership—and it all starts with you and your fellow expert panelists!

The ultimate purpose of this study is to construct a reliable and statistically valid model for the most important frontline sales manager competencies in for-profit business-to-business selling. Not only can this model be applied here in the U.S., but it can also be validated and used in other countries.

The competency statements were developed from an extensive review of the literature, including trade publications, textbooks and academic journal articles related to professional selling. Being an exemplary sales manager or CSO, your assistance is vital to the completion of the first part of this three-part process.

By completing this process, you will be contributing your expertise to the business-to-business selling profession.

To begin, please click the survey link, which will open the first survey tool for your response.

Thank you very much for your support and assistance!

Best Regards,

Tina Busch  
Telephone number  
Email

## Round One: Frontline Sales Manager Competency Survey

<http://www.zoomerang.com/Survey/WEB22BZ8TNMNDM/>

**Overview:** The survey is divided into four parts:

1. Demographics – where we ask for background information to enable meaningful analysis of survey data;
2. A speculative set of competencies that were generated from a variety of sources. You will need to rate each statement based on your expert opinion of the competencies most important for an exemplary frontline sales manager;
3. Competency validation for input on missing or incomplete competency clusters and/or statements;
4. Expert panel critique form for input of survey ease of use.

From your responses, we will be able to provide a better final model intended for a larger audience – so thank you for your diligence in answering!

### Objectives:

- You will need to rate each statement based on your expert-opinion of the competencies most important for an exemplary frontline sales manager
- You are provided with open-ended comments boxes to suggest changes in wording or grouping of competencies for inclusion in the final model. As you think about each competency, please feel free to:
  - Indicate improperly stated or inadequately grouped competencies,
  - Indicate if certain competencies should be collapsed into one
  - Suggest any other skills or knowledge you feel should be included,
  - Indicate if any of the competencies should be eliminated (with an explanation),
  - Provide input into any competencies we have missed for frontline sales managers

### Important Notes:

- All of the survey responses are required (except for comment boxes).
- The competency statements within each competency cluster are in no particular order.
- The competency clusters are derived from functional competencies and are visible and define the work. Behavioral competencies, which are not visible or specific to a job but are applicable to the business setting as a whole, are *not* included in this research, as they are typically defined at the enterprise level, e.g., leadership capabilities.

**Important Definitions:**

- **Business-to-Business Salesperson.** An individual engaged in the process of personally representing a selling organization while uncovering and satisfying the needs of individuals within a buying organization to the mutual, long-term benefit of both firms (UPSA, 2002).
- **Chief Sales Officer (CSO).** Responsible for all sales/revenue within an organization or business unit (Cron & DeCarlo, 2009).
- **Coaching.** Continual, constructive reinforcement of selling behavior (Zallocco et al., 2009, p. 609)
- **Competency.** Observable or measurable knowledge, skills, and attitudes (KSA) which underlie effective job performance (McLagan, 1980).
- **Competency Identification.** The process of identifying job competencies (Rothwell & Lindholm, 1999).
- **Competency Model.** Decision tools which describe the key capabilities required to perform a job (McLagan, 1980).
- **Consensus.** General agreement or a tendency toward group solidarity on an issue or belief.
- **Frontline Sales Manager.** Individual managing mainly non-managerial sales personnel who often have their own sales and account responsibilities (Dubinsky & Ingram, 1983).
- **Exemplary Performer.** A person who is exceptionally talented and outstandingly competent at their work (Dubois & Rothwell, 2004, p. 33).
- **Sales Manager.** Individuals responsible for generating sales that meet corporate objectives through the process of planning, staffing, training, directing, and controlling the efforts of sales people (Futrell, 1988).
- **Skill.** The ability to perform a certain physical or mental task (Spencer & Spencer, 1993).

**PART 1: DEMOGRAPHICS**

1. Which of the following roles best characterizes your current job (select only one)?
  - Sales Executive (management/oversight of sales management and associated resources)
  - Sales Manager (management of people & budget; resource & personnel alignment, etc.)
  - Other \_\_\_\_\_
  
1. Which of the following markets do you primarily sell to?
  - Business markets (B2B)
  - Consumer markets (B2C)
  - Government markets
  - Other \_\_\_\_\_
  
2. How many years have you been in your profession?
  - Less than 1 year
  - Between 1 and 3 years
  - Between 3 and 5 years
  - Between 6 and 10 years
  - Between 11 and 15 years
  - More than 15 years
  
3. In which geography are you based? (select only one)
  - Asia/Pacific (including China, SE Asia, India and Australia/New Zealand)
  - Europe (including EU and Russia)
  - Middle East/Africa
  - Central and Latin America
  - North America (including Canada and US)
  
4. What is your organization's industry?
  - Advertising, Marketing
  - Aerospace and Defense
  - Airlines
  - Apparel
  - Automotive Retailing, Services
  - Beverages
  - Chemicals
  - Commercial Banks
  - Computer Peripherals
  - Computer Software
  - Computers, Office Equipment
  - Construction and Farm Machinery
  - Diversified Financials

- Diversified Outsourcing Services
- Electronics, Electrical Equipment
- Energy
- Engineering, Construction
- Entertainment
- Financial Data Services
- Food and Drug Stores
- Food Consumer Products
- Food Production
- Food Services
- Forest and Paper Products
- General Merchandisers
- Health Care: Insurance and Managed Care
- Health Care: Medical Facilities
- Health Care: Pharmacy and Other Services
- Home Equipment, Furnishings
- Hotels, Casinos, Resorts
- Household and Personal Products
- Industrial Machinery
- Information Technology Services
- Insurance
- Internet Services and Retailing
- Mail Package, and Freight Delivery
- Medical Products and Equipment
- Metals
- Mining, Crude-Oil Production
- Miscellaneous
- Motor Vehicles and Parts
- Network and Other Communications Equipment
- Oil and Gas Equipment Services
- Packaging, Containers
- Petroleum Refining
- Pharmaceuticals
- Pipelines
- Publishing, Printing
- Railroads
- Scientific, Photographic, and Control Equipment
- Securities
- Semiconductors and Other Electronic Components
- Specialty Retailers
- Telecommunications
- Temporary Help
- Tobacco
- Transportation and Logistics

- Trucking, Truck Leasing
  - Utilities: Gas and Electric
  - Waste Management
  - Wholesalers: Diversified
  - Wholesalers: Electronics and Office Equipment
  - Wholesalers: Food and Grocery
  - Wholesalers: Healthcare
  - Other\_\_\_\_\_
5. Educational Background (select the highest level of formal education achieved)
- High school diploma
  - Some trade/business school training
  - Two-year degree
  - Some university/college education
  - University/college graduate
  - Some post-graduate education
  - Master's degree
  - Advanced graduate or professional degree (e.g., doctorate)
  - None of the above
6. Age (select one)
- 29 or less
  - 30 - 39
  - 40 -49
  - 50 - 59
  - 60 or above
7. Gender
- Female
  - Male
8. If you had immediate access to the final competency model and it contained the critical knowledge, skills, and attributes necessary for frontline sales managers, what are the top two actions you would take?
- Benchmark my skills
  - Recommend someone else benchmark themselves
  - Give it to my sales training organization
  - Use it as a coaching tool
  - Recommend it to hiring managers
  - Provide it to the recruiting organization (HR)
  - I would do nothing with it
  - Other\_\_\_\_\_

## PART 2: COMPETENCIES

<b>KEY: Importance Rating</b>		
<b>Scale</b>	<b>Level of Importance</b>	<b>Description</b>
<b>1</b>	<b>Unnecessary</b>	It has little to no importance to the success of frontline sales managers
<b>2</b>	<b>Slightly Important</b>	It has some importance to the success of frontline sales managers
<b>3</b>	<b>Moderately Important</b>	It has a moderate level of importance to the success of frontline sales managers
<b>4</b>	<b>Very Important</b>	It is very important to the success of frontline sales managers
<b>5</b>	<b>Essential</b>	It is essential to the success of frontline sales managers

**Instructions:** As an expert, please rate the competency statements below from (1-unnecessary) to (5-essential) for frontline sales managers.

### Sales/Deal Related Activities

#### Managing the Sales Process

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Invests time in strategic planning to best position the team for success	1	2	3	4	5
Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	1	2	3	4	5
Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	1	2	3	4	5
Strategically inserts self into the sales process where one can best influence deal outcomes	1	2	3	4	5
Leverages in-depth knowledge of entire product portfolio to influence solutions integration	1	2	3	4	5
Other (please add comments)					

## Non Sales/Deal Related Activities

### Managing Sales Strategy and Results

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Aligns tactical activities to larger organizational strategies (sets priorities, measures progress to plan)	1	2	3	4	5
Establishes, monitors, and controls costs that impact sales margins	1	2	3	4	5
Aligns resources with opportunities, leveraging colleagues and technology to ensure optimum opportunity coverage and determining resource allocation to establish pursuit priorities in area of control (e.g., account importance, win probability, opportunity size, etc.)	1	2	3	4	5
Screens administrative demands and troubleshoots back-office operations to minimize sales disruptions	1	2	3	4	5
Conducts territory/coverage plan tracking, analysis, and reporting	1	2	3	4	5
Develops partnerships and identifies and mines new business opportunities across channels and markets	1	2	3	4	5
Ensures accurate forecasting while monitoring performance to metrics	1	2	3	4	5
Other (please add comments)					

## Coaching for Sales Results

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	1	2	3	4	5
Balances corrective with positive feedback to ensure optimum guidance and performance improvement	1	2	3	4	5
Motivates individuals to enable sales performance	1	2	3	4	5
Links expected behaviors to strategic sales-related outcomes	1	2	3	4	5
Demonstrates expected sales behaviors and mentors individuals on how to achieve these	1	2	3	4	5
Identifies support programs or training (formally and informally) to expand and enrich new learning	1	2	3	4	5
Other (please add comments)					

## Building Talent

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Hires, promotes, and terminates to improve sales performance and address capability gaps	1	2	3	4	5
Champions on-boarding activities	1	2	3	4	5
Creates/prepares rep development plans	1	2	3	4	5
Pursues self-development and continuing education	1	2	3	4	5
Other (please add comments)					

### **PART 3: COMPETENCY VALIDATION**

1. The competency clusters used in this survey are as follows:

- Managing the Sales Process
- Managing Sales Strategy and Results
- Coaching for Sales Results
- Building Talent

Do you believe any competency clusters are missing? If yes, please explain in as much detail as possible:

2. Do you believe any competencies are missing? If yes, please explain in as much detail as possible:

### **PART 4: EXPERT PANEL CRITIQUE FORM**

As an expert panel member, please answer the following questions about the survey.

1. As an expert, please rate how easy the competency statements were to understand:

The competency statements were:

- a. Very Difficult to Understand
- b. Difficult to Understand
- c. Neutral
- d. Easy to Understand
- e. Very Easy to Understand

2. Any comments on the competency statements overall?

3. As an expert, please rate how easy the survey directions were to understand:

The directions were:

- a. Very Difficult to Understand
- b. Difficult to Understand
- c. Neutral
- d. Easy to Understand
- e. Very Easy to Understand

4. Any comments overall regarding the survey directions?

5. Other (please add any additional comments)

**APPENDIX D**  
**ROUND ONE REMINDER EMAIL MESSAGE**

From: Busch, Tina K

To: [Panelist]

Subject: You've Received the Frontline Sales Manager Competency Survey

[Panelist]:

You have been invited to participate in this survey as a member of an expert panel. Your feedback is important and will inform a competency model for exemplary frontline sales manager performance.

Thank you in advance for your participation, which will take ~15-20 minutes of your time.

Please click the link below to begin the survey.

Best Regards,

Tina Busch  
Telephone Number  
Email

**APPENDIX E**

**ROUND TWO CORRESPONDENCE AND QUESTIONNAIRE**

From: Busch, Tina K

To: [Panelist]

Subject: You've Received the Frontline Sales Manager Competency Survey #2

[Panelist]:

Thank you for your feedback in Round One. Five competency clusters have been added per your feedback. In addition to the five new clusters, there are several new competency statements added and/or revised to further address feedback.

Attached is the draft model based on feedback from Round One. The objectives of Round Two are to refine the competency model to prepare a final draft and to stack rank the competency clusters by importance to exemplary performance by front line sales managers.

This survey will take approximately 15-20 minutes of your time.

Please click the link below to begin the survey.

Best Regards,

Tina Busch  
Telephone Number  
Email

[Attachment – Draft Model R2 07-2011]

## Round Two: Frontline Sales Manager Competency Survey

<http://www.zoomerang.com/Survey/WEB22CUFZ99KGG/>

**Overview:** The survey is divided into five parts:

1. Demographics – where we ask for background information to enable meaningful analysis of survey data;
2. A speculative set of competencies that were generated from a variety of sources. You will need to rate each statement based on your expert opinion of the competencies most important for an exemplary frontline sales manager;
3. Competency validation for input on missing or incomplete competency clusters and/or statements;
4. Competency cluster rank ordering for exemplary performance;
5. Expert panel critique form for input of survey ease of use.

From your responses, we will be able to provide a better final model intended for a larger audience – so thank you for your diligence in answering!

### Objectives:

- You will need to rate each statement based on your expert-opinion of the competencies most important for an exemplary frontline sales manager
- You are provided with open-ended comments boxes to suggest changes in wording or grouping of competencies for inclusion in the final model. As you think about each competency, please feel free to:
  - Indicate improperly stated or inadequately grouped competencies,
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  - Suggest any other skills or knowledge you feel should be included,
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### Important Notes:

- All of the survey responses are required (except for comment boxes).
- The competency statements within each competency cluster are in no particular order.
- The competency clusters are derived from functional competencies and are visible and define the work. Behavioral competencies, which are not visible or specific to a job but are applicable to the business setting as a whole, are *not* included in this research, as they are typically defined at the enterprise level, e.g., leadership capabilities.

**Important Definitions:**

- **Business-to-Business Salesperson.** An individual engaged in the process of personally representing a selling organization while uncovering and satisfying the needs of individuals within a buying organization to the mutual, long-term benefit of both firms (UPSA, 2002).
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- **Skill.** The ability to perform a certain physical or mental task (Spencer & Spencer, 1993).

**PART 1: DEMOGRAPHICS**

1. Which of the following roles best characterizes your current job (select only one)?
  - Sales Executive (management/oversight of sales management and associated resources)
  - Sales Manager (management of people & budget; resource & personnel alignment, etc.)
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2. Which of the following markets do you primarily sell to?
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3. How many years have you been in your profession?
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  - Between 1 and 3 years
  - Between 3 and 5 years
  - Between 6 and 10 years
  - Between 11 and 15 years
  - More than 15 years
  
4. In which geography are you based? (select only one)
  - Asia/Pacific (including China, SE Asia, India and Australia/New Zealand)
  - Europe (including EU and Russia)
  - Middle East/Africa
  - Central and Latin America
  - North America (including Canada and US)
  
5. What is your organization's industry?
  - Advertising, Marketing
  - Aerospace and Defense
  - Airlines
  - Apparel
  - Automotive Retailing, Services
  - Beverages
  - Chemicals
  - Commercial Banks
  - Computer Peripherals
  - Computer Software
  - Computers, Office Equipment
  - Construction and Farm Machinery
  - Diversified Financials

- Diversified Outsourcing Services
- Electronics, Electrical Equipment
- Energy
- Engineering, Construction
- Entertainment
- Financial Data Services
- Food and Drug Stores
- Food Consumer Products
- Food Production
- Food Services
- Forest and Paper Products
- General Merchandisers
- Health Care: Insurance and Managed Care
- Health Care: Medical Facilities
- Health Care: Pharmacy and Other Services
- Home Equipment, Furnishings
- Hotels, Casinos, Resorts
- Household and Personal Products
- Industrial Machinery
- Information Technology Services
- Insurance
- Internet Services and Retailing
- Mail Package, and Freight Delivery
- Medical Products and Equipment
- Metals
- Mining, Crude-Oil Production
- Miscellaneous
- Motor Vehicles and Parts
- Network and Other Communications Equipment
- Oil and Gas Equipment Services
- Packaging, Containers
- Petroleum Refining
- Pharmaceuticals
- Pipelines
- Publishing, Printing
- Railroads
- Scientific, Photographic, and Control Equipment
- Securities
- Semiconductors and Other Electronic Components
- Specialty Retailers
- Telecommunications
- Temporary Help
- Tobacco
- Transportation and Logistics

- Trucking, Truck Leasing
  - Utilities: Gas and Electric
  - Waste Management
  - Wholesalers: Diversified
  - Wholesalers: Electronics and Office Equipment
  - Wholesalers: Food and Grocery
  - Wholesalers: Healthcare
  - Other\_\_\_\_\_
6. Educational Background (select the highest level of formal education achieved)
- High school diploma
  - Some trade/business school training
  - Two-year degree
  - Some university/college education
  - University/college graduate
  - Some post-graduate education
  - Master's degree
  - Advanced graduate or professional degree (e.g., doctorate)
  - None of the above
7. Age (select one)
- 29 or less
  - 30 - 39
  - 40 -49
  - 50 - 59
  - 60 or above
8. Gender
- Female
  - Male
9. If you had immediate access to the final competency model and it contained the critical knowledge, skills, and attributes necessary for frontline sales managers, what are the top two actions you would take?
- Benchmark my skills
  - Recommend someone else benchmark themselves
  - Give it to my sales training organization
  - Use it as a coaching tool
  - Recommend it to hiring managers
  - Provide it to the recruiting organization (HR)
  - I would do nothing with it
  - Other\_\_\_\_\_

**PART 2: COMPETENCIES (55)**

<b>KEY: Importance Rating</b>		
<b>Scale</b>	<b>Level of Importance</b>	<b>Description</b>
<b>1</b>	<b>Unnecessary</b>	It has little to no importance to the success of frontline sales managers
<b>2</b>	<b>Slightly Important</b>	It has some importance to the success of frontline sales managers
<b>3</b>	<b>Moderately Important</b>	It has a moderate level of importance to the success of frontline sales managers
<b>4</b>	<b>Very Important</b>	It is very important to the success of frontline sales managers
<b>5</b>	<b>Essential</b>	It is essential to the success of frontline sales managers

**Instructions:** As an expert, please rate the competency statements below from (1-unnecessary) to (5-essential) for frontline sales managers.

**Execution and Results (21)****Manages the Sales Process (6)**

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Invests time in strategic planning to best position the team for success	1	2	3	4	5
Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	1	2	3	4	5
Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	1	2	3	4	5
Strategically inserts self into the sales process (e.g., initial presentation and deal closure) where one can best influence deal outcomes	1	2	3	4	5
Leverages in-depth knowledge of entire product portfolio to influence solutions integration	1	2	3	4	5
Recognizes applicable corporate policies and accuracy of records and other documents in sales interactions	1	2	3	4	5
Other (please add comments)					

**Manages Sales Strategy and Results (7)**

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Aligns tactical activities to larger organizational strategies, balancing short term requirements with long term results	1	2	3	4	5
Establishes, monitors, and controls costs that impact sales margins	1	2	3	4	5
Aligns resources with opportunities, leveraging colleagues and technology to ensure optimum opportunity coverage and determining resource allocation to establish pursuit priorities in area of control (e.g., account importance, win probability, opportunity size, etc.)	1	2	3	4	5
Screens administrative demands and troubleshoots back-office operations to minimize sales disruptions	1	2	3	4	5
Conducts territory/coverage plan tracking, analysis, and reporting	1	2	3	4	5
Synthesizes team data for reporting purposes, ensuring accurate forecasting while monitoring performance to metrics	1	2	3	4	5
Monitors competitive activity in territory, creating counter competitive strategies while blocking future competitor inroads	1	2	3	4	5
Other (please add comments)					

**Builds and Maintains Relationships (8)**

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust	1	2	3	4	5
Develops partnerships and identifies and mines new business opportunities across channels and markets	1	2	3	4	5
Seeks to build a functional extended team both inter and intra-organizationally, effectively engaging and influencing cross-boundary resources within the organization and with supplier, partner organizations to achieve respective goals	1	2	3	4	5
Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making	1	2	3	4	5
Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs	1	2	3	4	5
Maintains current understanding of customer's business, using this knowledge to widen the breadth and depth of account penetration and achieve exposure to business planning	1	2	3	4	5
Protects and expands accounts, ensuring that all contractual deployment or fulfillment obligations are met and customer satisfaction is achieved; monitors account activity to minimize rogue selling and disruptive marketing; monitors competitive activities in accounts and appropriately counters competitive messages while blocking future competitor inroads	1	2	3	4	5

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Manages deployment readiness and resource alignment, ensuring accurate understanding of requirements derived from closed opportunities (e.g., terms and conditions, service level agreements) and ensuring knowledge is dispersed amongst personnel engaged in post-sale activity (e.g., fulfillment, delivery); where required, facilitate the troubleshooting essential for successfully launching complex initiatives	1	2	3	4	5
Other (please add comments)					

### Team Effectiveness (16)

#### Coaches for Sales Results (5)

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	1	2	3	4	5
Balances corrective with positive feedback to ensure optimum guidance and performance improvement	1	2	3	4	5
Motivates individuals to enable sales performance	1	2	3	4	5
Links expected behaviors to strategic sales-related outcomes	1	2	3	4	5
Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development	1	2	3	4	5
Other (please add comments)					

**Manages Performance (6)**

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Sets clear expectations for conduct, work activity and performance	1	2	3	4	5
Holds regular planning and review sessions	1	2	3	4	5
Compares performance to expectations	1	2	3	4	5
Reinforces efforts and progress using rewards and recognition as appropriate	1	2	3	4	5
Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated	1	2	3	4	5
Adheres to organizations' performance management policies and procedures	1	2	3	4	5
Other (please add comments)					

**Builds Talent (5)**

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Continuously assesses and maps team skills and knowledge to market demand	1	2	3	4	5
Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	1	2	3	4	5
Hires, promotes, and terminates to improve sales performance and address capability gaps	1	2	3	4	5
Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	1	2	3	4	5
Identifies and/or champions support programs or training (formally and informally) to expand and enrich new learning	1	2	3	4	5
Other (please add comments)					

## Personal Effectiveness (18)

### Manages as a Leader (9)

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Is a role model for high performance	1	2	3	4	5
Demonstrates unquestionable business ethics and commitment to company and personal values	1	2	3	4	5
Manages with balance, objectivity and respect for the individual	1	2	3	4	5
Demonstrates and inspires confidence	1	2	3	4	5
Maintains resiliency to many changes; inputs; or stresses throughout the course of working	1	2	3	4	5
Displays responsibility for own actions and results	1	2	3	4	5
Displays versatility and adaptability at many different tasks and processes	1	2	3	4	5
Displays self-control and keeps disruptive emotions and impulses in check	1	2	3	4	5
Demonstrates smart risk-taking in making decisions	1	2	3	4	5
Other (please add comments)					

### Develops Self to Achieve Goals (4)

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Organizes and manages work and resources systematically	1	2	3	4	5
Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	1	2	3	4	5
Maintains understanding of technical innovations and uses information technology to align and expedite work	1	2	3	4	5
Actively identifies and takes advantage of opportunities for learning, (e.g., through	1	2	3	4	5

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
benchmarking, leveraging company development opportunities) and applies newly gained knowledge and skill on the job					
Other (please add comments)					

### Influences to Achieve Goals (5)

	Unnecessary	Slightly Important	Moderately Important	Very Important	Essential
Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions	1	2	3	4	5
Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others	1	2	3	4	5
Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding	1	2	3	4	5
Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message	1	2	3	4	5
Overcomes objections with skill, using examples, logic, data, or other pertinent information	1	2	3	4	5
Other (please add comments)					

### **PART 3: COMPETENCY VALIDATION**

The competency clusters required for exemplary performance by frontline sales managers used in this survey are as follows:

1. **Manages Sales Process:** Competencies required to identify, engage, move, close, and protect sales opportunities.
  2. **Manages Sales Strategy and Results:** Competencies required to set priorities, align territories to maximize sales effectiveness and/or technical and functional resource allocation, and synthesize team data for reporting purposes.
  3. **Builds and Maintains Relationships:** Competencies required to identify, build, and sustain key business relationships both internally and externally.
  4. **Coaches for Sales Results:** Competencies required to draw out the best performance of the individual or group through ongoing observation, motivation, and developmental feedback.
  5. **Performance Management:** Competencies required in managing individual and team outputs to proactively and continuously improve sales results.
  6. **Builds Talent:** Competencies required to continuously assess team capability and capacity, managing hiring, promotion, and termination to improve sales performance.
  7. **Manages as a Leader:** Competencies required to build credibility and trust, achieve aspirations, maintain an appropriate attitude, and lead teams and other individuals.
  8. **Develops Self to Achieve Goals:** Competencies required to stay current, manage time and technology to expedite work, and identify and take advantage of development opportunities to achieve personal and professional goals.
  9. **Influences to Achieve Goals:** Competencies required to effectively listen, speak, persuade, question, and write within appropriate business norms based on a solid understanding of needs, using whatever medium is most appropriate.
- 
1. Do you believe any competency clusters are missing? If yes, please explain in as much detail as possible.
  2. Do you believe any competencies are missing? If yes, please explain in as much detail as possible:

#### **PART 4: COMPETENCY CLUSTER RANK ORDERING for EXEMPLARY PERFORMANCE**

In the following section, you will be presented with a description of 9 groupings of competency statements. These “competency clusters” contain all the statements you just rated.

Please rank order the competency clusters from 1 to 9, with 1 being the most important for exemplary performance by Front Line Sales Managers and 9 being the least important for exemplary performance.

\_\_\_\_\_ Sales Process Competency Cluster: Competencies required in order for exemplary frontline sales managers to identify, engage, move, close, and protect sales opportunities.

\_\_\_\_\_ Sales Strategy and Results Competency Cluster: Competencies required in order for exemplary frontline sales managers to set priorities, align territories to maximize sales effectiveness and/or technical and functional resource allocation, and synthesize team data for reporting purposes (e.g., sales forecasts, team progress, delivery, project results).

\_\_\_\_\_ Builds and Maintains Relationships Competency Cluster: Competencies required in order for exemplary frontline sales managers to identify, build, and sustain key business relationships both internally and externally.

\_\_\_\_\_ Coaches for Sales Results Competency Cluster: Competencies required in order for exemplary frontline sales managers to draw out the best performance of the individual or group through ongoing observation, motivation, and developmental feedback.

\_\_\_\_\_ Performance Management Competency Cluster: Competencies required in managing individual and team outputs to proactively and continuously improve sales results.

\_\_\_\_\_ Builds Talent Competency Cluster: Competencies required in order for exemplary frontline sales managers to continuously assess team capability and capacity, managing hiring, promotion, and termination to improve sales performance.

\_\_\_\_\_ Manages as a Leader Competency Cluster: Competencies required in order for exemplary frontline sales managers to build credibility and trust, achieve aspirations, maintain an appropriate attitude, and lead teams and other individuals.

\_\_\_\_\_ Develops Self to Achieve Goals Competency Cluster: Competencies required in order for exemplary frontline sales managers to stay current, manage time and technology to expedite work, and identify and take advantage of development opportunities to achieve personal and professional goals.

\_\_\_\_\_ Influences to Achieve Goals Competency Cluster: Competencies required in order for exemplary frontline sales managers to effectively listen, speak, persuade, question, and write within appropriate business norms based on a solid understanding of needs, using whatever medium is most appropriate.

#### **PART 4: EXPERT PANEL CRITIQUE FORM**

As an expert panel member, please answer the following questions about the survey.

6. As an expert, please rate how easy the competency statements were to understand:

The competency statements were:

- f. Very Difficult to Understand
- g. Difficult to Understand
- h. Neutral
- i. Easy to Understand
- j. Very Easy to Understand

7. Any comments on the competency statements overall?

8. As an expert, please rate how easy the survey directions were to understand:

The directions were:

- f. Very Difficult to Understand
- g. Difficult to Understand
- h. Neutral
- i. Easy to Understand
- j. Very Easy to Understand

9. Any comments overall regarding the survey directions?

10. Other (please add any additional comments)

## DRAFT Competency Model for Front Line Sales Managers

Execution and Results	Team Effectiveness	Personal Effectiveness
<ul style="list-style-type: none"> <li>•Manages the Sales Process</li> <li>•Manages Sales Strategy &amp; Results</li> <li>•Builds &amp; Maintains Relationships</li> </ul>	<ul style="list-style-type: none"> <li>•Coaches for Sales Results</li> <li>•Manages Performance</li> <li>•Builds Talent</li> </ul>	<ul style="list-style-type: none"> <li>•Manages as a Leader</li> <li>•Develops Self to Achieve Goals</li> <li>•Influences to Achieve Goals</li> </ul>

### Execution and Results

*Sales Process Competency Cluster:* Competencies required in order for exemplary frontline sales managers to identify, engage, move, close, and protect sales opportunities.

*Sales Strategy and Results Competency Cluster:* Competencies required in order for exemplary frontline sales managers to set priorities, align territories to maximize sales effectiveness and/or technical and functional resource allocation, and synthesize team data for reporting purposes (e.g., sales forecasts, team progress, delivery, project results).

*Builds and Maintains Relationships Competency Cluster:* Competencies required in order for exemplary frontline sales managers to identify, build, and sustain key business relationships both internally and externally.

### Team Effectiveness

*Coaches for Sales Results Competency Cluster:* Competencies required in order for exemplary frontline sales managers to draw out the best performance of the individual or group through ongoing observation, motivation, and developmental feedback.

*Performance Management Competency Cluster:* Competencies required in managing individual and team outputs to proactively and continuously improve sales results.

*Builds Talent Competency Cluster:* Competencies required in order for exemplary frontline sales managers to continuously assess team capability and capacity, managing hiring, promotion, and termination to improve sales performance.

### Personal Effectiveness

*Manages as a Leader Competency Cluster:* Competencies required in order for exemplary frontline sales managers to build credibility and trust, achieve aspirations, maintain an appropriate attitude, and lead teams and other individuals.

*Develops Self to Achieve Goals Competency Cluster:* Competencies required in order for exemplary frontline sales managers to stay current, manage time and technology to expedite

work, and identify and take advantage of development opportunities to achieve personal and professional goals.

*Influences to Achieve Goals Competency Cluster:* Competencies required in order for exemplary frontline sales managers to effectively listen, speak, persuade, question, and write within appropriate business norms based on a solid understanding of needs, using whatever medium is most appropriate.

**APPENDIX F**  
**ROUND TWO REMINDER EMAIL MESSAGE**

From: Busch, Tina K

To: [Panelist]

Subject: You've Received the Frontline Sales Manager Competency Survey #2

[Panelist]:

Thank you for your time investment in completing survey #1. To arrive at consensus and complete the process, we need a few more respondents to survey #2. This survey will take ~20 minutes of your time. I hope to close this survey by next week and complete round three by end of September – the next round promises to go quicker than either 1 or 2.

Thanks again for your time investment in helping create a validated Frontline Sales Manager Competency model.

Please click the link below to begin the survey.

Best Regards,

Tina Busch  
Telephone Number  
Email

**APPENDIX G**  
**ROUND THREE CORRESPONDENCE AND QUESTIONNAIRE**

From: Busch, Tina K

To: [Panelist]

Subject: You've Received the FINAL Frontline Sales Manager Competency Survey

[Dear Expert Panel Member]:

You have received the final in a series of three surveys. Thank you in advance for your participation, which will take ~10 minutes of your time.

Your feedback is important and will inform a competency model for exemplary frontline sales manager performance.

Please click the link below to begin the survey.

Best Regards,

Tina Busch

Telephone Number

Email

**Round Three: Frontline Sales Manager Competency Survey**  
<http://www.zoomerang.com/Survey/WEB22DKJUHCP8C/>

**Overview:** The survey is divided into two parts:

5. Demographics – where we ask for background information to enable meaningful analysis of survey data;
6. Competency Assessment – using the final set of competencies, you will rate each statement based on your expert opinion of the level of proficiency most frontline sales managers exhibit in this competency. The purpose for this last survey is to identify any trends in perceived capability gaps, which could inform prioritization of development tools and processes.

**Important Notes:**

- All of the survey responses are required (except for comment boxes).
- The competency statements within each competency cluster are in no particular order.
- The competency clusters are derived from functional competencies and are visible and define the work. Behavioral competencies, which are not visible or specific to a job but are applicable to the business setting as a whole, are *not* included in this research, as they are typically defined at the enterprise level, e.g., leadership capabilities.

**Important Definitions:**

- **Chief Sales Officer (CSO).** Responsible for all sales/revenue within an organization or business unit (Cron & DeCarlo, 2009).
- **Competency.** Observable or measurable knowledge, skills, and attitudes (KSA) which underlie effective job performance (McLagan, 1980).
- **Competency Model.** Decision tools which describe the key capabilities required to perform a job (McLagan, 1980).
- **Frontline Sales Manager.** Individual managing mainly non-managerial sales personnel who often have their own sales and account responsibilities (Dubinsky & Ingram, 1983).

## PART 1: DEMOGRAPHICS

10. Which of the following roles best characterizes your current job (select only one)?

- Sales Executive (management/oversight of sales management and associated resources)
- Sales Manager (management of people & budget; resource & personnel alignment, etc.)
- Other \_\_\_\_\_

## PART 2: COMPETENCIES (55)

<b>KEY: Importance Rating</b>		
<b>Scale</b>	<b>Level of Proficiency</b>	<b>Description</b>
<b>1</b>	<b>Very Little Proficiency</b>	Possesses general understanding of key principles and is capable of discussing this competency with others.
<b>2</b>	<b>Limited Proficiency</b>	Possesses a solid understanding of key principles and is able of to perform this competency with help (from reference material or other people) as required.
<b>3</b>	<b>Consistent Proficiency</b>	Possesses a comprehensive understanding of key principles and is capable of working without assistance regarding the application of this competency.
<b>4</b>	<b>Advanced Proficiency</b>	Possesses substantial knowledge and expertise and can both troubleshoot complex situations and teach others the application of this competency.
<b>5</b>	<b>Exceptional Proficiency</b>	Possesses extraordinary knowledge and expertise and can both troubleshoot at a national or regional level and devise innovative applications of this competency.

**Instructions:** As an expert, please rate the competency statements below from (1-very little proficiency) to (5-exceptional proficiency) for frontline sales managers.

### **KEY: Capability Rating**

1. **Very Little Proficiency** Possesses general understanding of key principles and is capable of discussing this competency with others.
2. **Limited Proficiency** Possesses a solid understanding of key principles and is able of to perform this competency with help (from reference material or other people) as required.
3. **Consistent Proficiency** Possesses a comprehensive understanding of key principles and is capable of working without assistance regarding the application of this competency.
4. **Advanced Proficiency** Possesses substantial knowledge and expertise and can both troubleshoot complex situations and teach others the application of this competency.

5. **Exceptional Proficiency** Possesses extraordinary knowledge and expertise and can both troubleshoot at a national or regional level and devise innovative applications of this competency.

**Instructions:** As an expert, please rate the competency statements below from (1-very little proficiency) to (5-exceptional proficiency) for frontline sales managers.

### Execution and Results (21)

#### Manages the Sales Process (6)

	Very Little	Limited	Consistent	Advanced	Exceptional
Invests time in strategic planning to best position the team for success	1	2	3	4	5
Validates sales representatives have adequate working business pipeline to consistently achieve sales goals	1	2	3	4	5
Troubleshoots pipeline aberrations, focusing rep time on highest-value activities	1	2	3	4	5
Strategically inserts self into the sales process (e.g., initial presentation and deal closure) where one can best influence deal outcomes	1	2	3	4	5
Leverages in-depth knowledge of entire product portfolio to influence solutions integration	1	2	3	4	5
Recognizes applicable corporate policies and accuracy of records and other documents in sales interactions	1	2	3	4	5
Other (please add comments)					

**Manages Sales Strategy and Results (7)**

	Very Little	Limited	Consistent	Advanced	Exceptional
Aligns tactical activities to larger organizational strategies, balancing short term requirements with long term results	1	2	3	4	5
Establishes, monitors, and controls costs that impact sales margins	1	2	3	4	5
Aligns resources with opportunities, leveraging colleagues and technology to ensure optimum opportunity coverage and determining resource allocation to establish pursuit priorities in area of control (e.g., account importance, win probability, opportunity size, etc.)	1	2	3	4	5
Screens administrative demands and troubleshoots back-office operations to minimize sales disruptions	1	2	3	4	5
Conducts territory/coverage plan tracking, analysis, and reporting	1	2	3	4	5
Synthesizes team data for reporting purposes, ensuring accurate forecasting while monitoring performance to metrics	1	2	3	4	5
Monitors competitive activity in territory, creating counter competitive strategies while blocking future competitor inroads	1	2	3	4	5
Other (please add comments)					

**Builds and Maintains Relationships (8)**

	Very Little	Limited	Consistent	Advanced	Exceptional
Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust	1	2	3	4	5
Develops partnerships and identifies and mines new business opportunities across channels and markets	1	2	3	4	5
Seeks to build a functional extended team both inter and intra-organizationally, effectively engaging and influencing cross-boundary resources within the organization and with supplier, partner organizations to achieve respective goals	1	2	3	4	5
Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making	1	2	3	4	5
Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs	1	2	3	4	5
Maintains current understanding of customer's business, using this knowledge to widen the breadth and depth of account penetration and achieve exposure to business planning	1	2	3	4	5
Protects and expands accounts, ensuring that all contractual deployment or fulfillment obligations are met and customer satisfaction is achieved; monitors account activity to minimize rogue selling and disruptive marketing; monitors competitive activities in accounts and appropriately counters competitive messages while blocking future competitor inroads	1	2	3	4	5

	Very Little	Limited	Consistent	Advanced	Exceptional
Manages deployment readiness and resource alignment, ensuring accurate understanding of requirements derived from closed opportunities (e.g., terms and conditions, service level agreements) and ensuring knowledge is dispersed amongst personnel engaged in post-sale activity (e.g., fulfillment, delivery); where required, facilitate the troubleshooting essential for successfully launching complex initiatives	1	2	3	4	5
Other (please add comments)					

### Team Effectiveness (16)

#### Coaches for Sales Results (5)

	Very Little	Limited	Consistent	Advanced	Exceptional
Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement	1	2	3	4	5
Balances corrective with positive feedback to ensure optimum guidance and performance improvement	1	2	3	4	5
Motivates individuals to enable sales performance	1	2	3	4	5
Links expected behaviors to strategic sales-related outcomes	1	2	3	4	5
Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development	1	2	3	4	5
Other (please add comments)					

**Manages Performance (6)**

	Very Little	Limited	Consistent	Advanced	Exceptional
Sets clear expectations for conduct, work activity and performance	1	2	3	4	5
Holds regular planning and review sessions	1	2	3	4	5
Compares performance to expectations	1	2	3	4	5
Reinforces efforts and progress using rewards and recognition as appropriate	1	2	3	4	5
Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated	1	2	3	4	5
Adheres to organizations' performance management policies and procedures	1	2	3	4	5
Other (please add comments)					

**Builds Talent (5)**

	Very Little	Limited	Consistent	Advanced	Exceptional
Continuously assesses and maps team skills and knowledge to market demand	1	2	3	4	5
Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	1	2	3	4	5
Hires, promotes, and terminates to improve sales performance and address capability gaps	1	2	3	4	5
Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	1	2	3	4	5
Identifies and/or champions support programs or training (formally and informally) to expand and enrich new learning	1	2	3	4	5
Other (please add comments)					

## Personal Effectiveness (18)

### Manages as a Leader (9)

	Very Little	Limited	Consistent	Advanced	Exceptional
Is a role model for high performance	1	2	3	4	5
Demonstrates unquestionable business ethics and commitment to company and personal values	1	2	3	4	5
Manages with balance, objectivity and respect for the individual	1	2	3	4	5
Demonstrates and inspires confidence	1	2	3	4	5
Maintains resiliency to many changes; inputs; or stresses throughout the course of working	1	2	3	4	5
Displays responsibility for own actions and results	1	2	3	4	5
Displays versatility and adaptability at many different tasks and processes	1	2	3	4	5
Displays self-control and keeps disruptive emotions and impulses in check	1	2	3	4	5
Demonstrates smart risk-taking in making decisions	1	2	3	4	5
Other (please add comments)					

### Develops Self to Achieve Goals (4)

	Very Little	Limited	Consistent	Advanced	Exceptional
Organizes and manages work and resources systematically	1	2	3	4	5
Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	1	2	3	4	5
Maintains understanding of technical innovations and uses information technology to align and expedite work	1	2	3	4	5
Actively identifies and takes advantage of opportunities for learning, (e.g., through benchmarking, leveraging company development opportunities) and applies newly gained knowledge and skill on the job	1	2	3	4	5
Other (please add comments)					

**Influences to Achieve Goals (5)**

	Very Little	Limited	Consistent	Advanced	Exceptional
Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions	1	2	3	4	5
Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others	1	2	3	4	5
Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding	1	2	3	4	5
Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message	1	2	3	4	5
Overcomes objections with skill, using examples, logic, data, or other pertinent information	1	2	3	4	5
Other (please add comments)					

**APPENDIX H**  
**ROUND THREE REMINDER EMAIL MESSAGE**

From: Busch, Tina K

To: [Panelist]

Subject: You've Received the FINAL Frontline Sales Manager Competency Survey

[Dear Expert Panel Member]:

You have received the final in a series of three surveys. Thank you in advance for your participation, which will take ~10 minutes of your time.

Your feedback is important and will inform a competency model for exemplary frontline sales manager performance.

Please click the link below to begin the survey.

Best Regards,

Tina Busch  
Telephone Number  
Email

**APPENDIX I**  
**LISTING OF COMPETENCIES**

Competency Cluster	Number	Competency
<p align="center"><b>Q1_1 Execution and Results</b></p> <p><b>Manages the Sales Process</b> - Competencies required in order for exemplary frontline sales managers to identify, engage, move, close, and protect sales opportunities.</p>	Q1_1_1	Invests time in strategic planning to best position the team for success
	Q1_1_2	Validates sales representatives have adequate working business pipeline to consistently achieve sales goals
	Q1_1_3	Troubleshoots pipeline aberrations, focusing rep time on highest-value activities
	Q1_1_4	Strategically inserts self into the sales process where one can best influence deal outcomes
	Q1_1_5	Leverages in-depth knowledge of entire product portfolio to influence solutions integration
	Q1_1_6	Recognizes applicable corporate policies and accuracy of records and other documents in sales interactions.
<p align="center"><b>Q1_2 Execution and Results</b></p> <p><b>Manages Sales Strategy and Results –</b> Competencies required in order for exemplary frontline sales managers to set priorities, align territories to maximize sales effectiveness and/or technical and functional resource allocation, and synthesize team data for reporting purposes (e.g., sales forecasts, team progress, delivery, project results).</p>	Q1_2_7	Aligns tactical activities to larger organizational strategies, balancing short term requirements with long term results
	Q1_2_8	Establishes, monitors, and controls costs that impact sales margins
	Q_1_2_9	Aligns resources with opportunities, leveraging colleagues and technology to ensure optimum opportunity coverage and determining resource allocation to establish pursuit priorities in area of control (e.g., account importance, win probability, opportunity size, etc.)
	Q_1_2_10	Screens administrative demands and troubleshoots back-office operations to minimize sales disruptions
	Q_1_2_11	Conducts territory/coverage plan tracking, analysis, and reporting
	Q_1_2_12	Synthesizes team data for reporting purposes, ensuring accurate forecasting while monitoring performance to metrics
	Q_1_2_13	Monitors competitive activity in territory, creating counter competitive strategies while blocking future competitor inroads
<p align="center"><b>Q-1_3 Execution and Results</b></p> <p><b>Builds and Maintains Relationships</b> - Competencies required in order for exemplary frontline sales managers to identify, build, and sustain key business relationships both internally and externally.</p>	Q_1_3_14	Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust
	Q_1_3_15	Develops partnerships and identifies and mines new business opportunities across channels and markets

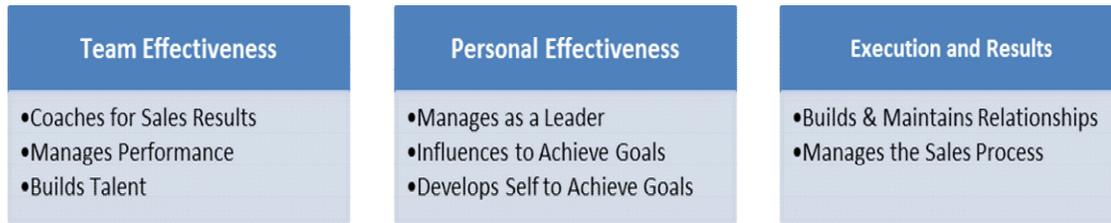
Competency Cluster	Number	Competency
	Q_1_3_16	Seeks to build a functional extended team both inter and intra-organizationally, effectively engaging and influencing cross-boundary resources within the organization and with supplier, partner organizations to achieve respective goals
	Q_1_3_17	Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making
	Q_1_3_18	Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs
	Q_1_3_19	Maintains current understanding of customer's business, using this knowledge to widen the breadth and depth of account penetration and achieve exposure to business planning
	Q_1_3_20	Protects and expands accounts, ensuring that all contractual deployment or fulfillment obligations are met and customer satisfaction is achieved; monitors account activity to minimize rogue selling and disruptive marketing; monitors competitive activities in accounts and appropriately counters competitive messages while blocking future competitor inroads
	Q_1_3_21	Manages deployment readiness and resource alignment, ensuring accurate understanding of requirements derived from closed opportunities (e.g., terms and conditions, service level agreements) and ensuring knowledge is dispersed amongst personnel engaged in post-sale activity (e.g., fulfillment, delivery); where required, facilitate the troubleshooting essential for successfully launching complex initiatives
<p data-bbox="383 1381 613 1409"><b>Q2_4 Team Effectiveness</b></p> <p data-bbox="272 1432 722 1556"><b>Coaches for Sales Results</b> - Competencies required in order for exemplary frontline sales managers to draw out the best performance of the individual or group through ongoing observation, motivation, and developmental feedback.</p>	Q2_4_22	Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement
	Q2_4_23	Balances corrective with positive feedback to ensure optimum guidance and performance improvement
	Q2_4_24	Motivates individuals to enable sales performance
	Q2_4_25	Links expected behaviors to strategic sales-related outcomes
	Q2_4_26	Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development
<p data-bbox="383 1682 613 1709"><b>Q2_5 Team Effectiveness</b></p> <p data-bbox="272 1732 722 1808"><b>Manages Performance</b> - Competencies required in managing individual and team outputs to proactively and continuously improve sales results.</p>	Q2_5_27	Sets clear expectations for conduct, work activity and performance
	Q2_5_28	Holds regular planning and review sessions
	Q2_5_29	Compares performance to expectations

Competency Cluster	Number	Competency
	Q2_5_30	Reinforces efforts and progress using rewards and recognition as appropriate
	Q2_5_31	Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated
	Q2_5_32	Adheres to organizations' performance management policies and procedures
<p data-bbox="383 680 613 705"><b>Q2_6 Team Effectiveness</b></p> <p data-bbox="272 730 724 848"><b>Builds Talent</b> - Competencies required in order for exemplary frontline sales managers to continuously assess team capability and capacity, managing hiring, promotion, and termination to improve sales performance.</p>	Q2_6_33	Continuously assesses and maps team skills and knowledge to market demand
Q2_6_34	Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level	
Q2_6_35	Hires, promotes, and terminates to improve sales performance and address capability gaps	
Q2_6_36	Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate	
Q2_6_37	Identifies and/or champions support programs or training (formally and informally) to expand and enrich new learning	
<p data-bbox="370 1129 630 1155"><b>Q3_7 Personal Effectiveness</b></p> <p data-bbox="272 1180 724 1297"><b>Manages as a Leader</b> - Competencies required in order for exemplary frontline sales managers to build credibility and trust, achieve aspirations, maintain an appropriate attitude, and lead teams and other individuals.</p>	Q3_7_38	Is a role model for high performance
Q3_7_39	Demonstrates unquestionable business ethics and commitment to company and personal values	
Q3_7_40	Manages with balance, objectivity and respect for the individual	
Q3_7_41	Demonstrates and inspires confidence	
Q3_7_42	Maintains resiliency to many changes; inputs; or stresses throughout the course of working	
Q3_7_43	Displays responsibility for own actions and results	
Q3_7_44	Displays versatility and adaptability at many different tasks and processes	
Q3_7_45	Displays self-control and keeps disruptive emotions and impulses in check	
Q3_7_46	Demonstrates smart risk-taking in making decisions	
<p data-bbox="370 1514 630 1539"><b>Q3_8 Personal Effectiveness</b></p> <p data-bbox="272 1564 724 1707"><b>Develops Self to Achieve Goals</b> - Competencies required in order for exemplary frontline sales managers to stay current, manage time and technology to expedite work, and identify and take advantage of development opportunities to achieve personal and professional goals.</p>	Q3_8_47	Organizes and manages work and resources systematically
Q3_8_48	Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work	
Q3_8_49	Maintains understanding of technical innovations and uses information technology to align and expedite work	

Competency Cluster	Number	Competency
	Q3_8_50	Actively identifies and takes advantage of opportunities for learning, (e.g., through benchmarking, leveraging company development opportunities) and applies newly gained knowledge and skill on the job
<p data-bbox="370 657 626 678"><b>Q3_9 Personal Effectiveness</b></p> <p data-bbox="264 705 732 848"><b>Influences to Achieve Goals</b> - Competencies required in order for exemplary frontline sales managers to effectively listen, speak, persuade, question, and write within appropriate business norms based on a solid understanding of needs, using whatever medium is most appropriate.</p>	Q3_9_51	Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions
	Q3_9_52	Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others
	Q3_9_53	Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding
	Q3_9_54	Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message
	Q3_9_55	Overcomes objections with skill, using examples, logic, data, or other pertinent information

**APPENDIX J**  
**FRONTLINE SALES MANAGER COMPETENCY MODEL**

## Frontline Sales Manager Competency Model



### Team Effectiveness

*Coaches for Sales Results Competency Cluster:* Competencies required in order for exemplary frontline sales managers to draw out the best performance of the individual or group through ongoing observation, motivation, and developmental feedback.

#### *Competencies:*

- Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement
- Balances corrective with positive feedback to ensure optimum guidance and performance improvement
- Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development
- Motivates individuals to enable sales performance
- Links expected behaviors to strategic sales-related outcomes

*Manages Performance Competency Cluster:* Competencies required in managing individual and team outputs to proactively and continuously improve sales results.

#### *Competencies:*

- Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated
- Sets clear expectations for conduct, work activity and performance
- Compares performance to expectations
- Reinforces efforts and progress using rewards and recognition as appropriate
- Adheres to organizations' performance management policies and procedures

*Builds Talent Competency Cluster:* Competencies required in order for exemplary frontline sales managers to continuously assess team capability and capacity, managing hiring, promotion, and termination to improve sales performance.

*Competencies:*

- Hires, promotes, and terminates to improve sales performance and address capability gaps
- Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate
- Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level

**Personal Effectiveness**

*Manages as a Leader Competency Cluster:* Competencies required in order for exemplary frontline sales managers to build credibility and trust, achieve aspirations, maintain an appropriate attitude, and lead teams and other individuals.

*Competencies:*

- Demonstrates unquestionable business ethics and commitment to company and personal values
- Displays responsibility for own actions and results
- Manages with balance, objectivity and respect for the individual
- Demonstrates and inspires confidence
- Is a role model for high performance
- Displays self-control and keeps disruptive emotions and impulses in check
- Demonstrates smart risk-taking in making decisions
- Maintains resiliency to many changes; inputs; or stresses throughout the course of working
- Displays versatility and adaptability at many different tasks and processes

*Influences to Achieve Goals Competency Cluster:* Competencies required in order for exemplary frontline sales managers to effectively listen, speak, persuade, question, and write within appropriate business norms based on a solid understanding of needs, using whatever medium is most appropriate.

*Competencies:*

- Overcomes objections with skill, using examples, logic, data, or other pertinent information
- Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding
- Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message

- Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others
- Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions

*Develops Self to Achieve Goals Competency Cluster:* Competencies required in order for exemplary frontline sales managers to stay current, manage time and technology to expedite work, and identify and take advantage of development opportunities to achieve personal and professional goals.

*Competencies:*

- Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work

## **Execution and Results**

*Builds and Maintains Relationships Competency Cluster:* Competencies required in order for exemplary frontline sales managers to identify, build, and sustain key business relationships both internally and externally.

*Competencies:*

- Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs
- Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust
- Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making

*Sales Process Competency Cluster:* Competencies required in order for exemplary frontline sales managers to identify, engage, move, close, and protect sales opportunities.

*Competencies:*

- Validates sales representatives have adequate working business pipeline to consistently achieve sales goals
- Invests time in strategic planning to best position the team for success
- Troubleshoots pipeline aberrations, focusing rep time on highest-value activities

**APPENDIX K**  
**COMPETENCY MODEL FOR FLSMs IN FOR PROFIT ORGANIZATIONS**

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### **Category One: Team Effectiveness**

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#### **Cluster One: Coaches for Sales Results**

---

*Primary Competencies:*

1. Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement
2. Balances corrective with positive feedback to ensure optimum guidance and performance improvement
3. Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development

*Secondary Competencies:*

4. Motivates individuals to enable sales performance
  5. Links expected behaviors to strategic sales-related outcomes
- 

#### **Cluster Two: Manages Performance**

---

*Primary Competencies:*

1. Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated

*Secondary Competencies:*

2. Sets clear expectations for conduct, work activity and performance
  3. Compares performance to expectations
  4. Reinforces efforts and progress using rewards and recognition as appropriate
  5. Adheres to organizations' performance management policies and procedures
- 

#### **Cluster Three: Builds Talent**

---

*Primary Competencies:*

1. Hires, promotes, and terminates to improve sales performance and address capability gaps
2. Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate

*Secondary Competencies:*

3. Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level
- 

### **Category Two: Personal Effectiveness**

---

#### **Cluster One: Manages as a Leader**

---

*Primary Competencies:*

1. Demonstrates unquestionable business ethics and commitment to company and personal values
2. Displays responsibility for own actions and results

- 
3. Manages with balance, objectivity and respect for the individual
  4. Demonstrates and inspires confidence
  5. Is a role model for high performance
  6. Displays self-control and keeps disruptive emotions and impulses in check

*Secondary Competencies:*

7. Demonstrates smart risk-taking in making decisions
  8. Maintains resiliency to many changes; inputs; or stresses throughout the course of working
  9. Displays versatility and adaptability at many different tasks and processes
- 

**Cluster Two: Influences to Achieve Goals**

---

*Primary Competency:*

1. Overcomes objections with skill, using examples, logic, data, or other pertinent information

*Secondary Competencies:*

2. Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding
  3. Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message
  4. Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others
  5. Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions
- 

**Cluster Three: Develops Self to Achieve Goals**

---

*Secondary Competency:*

1. Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work
- 

**Category Three: Execution and Results**

---

**Cluster One: Builds and Maintains Relationships**

---

*Primary Competency:*

1. Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs

*Secondary Competencies:*

2. Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust
  3. Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making
-

---

**Cluster Two: Sales Process**

---

*Primary Competency:*

1. Validates sales representatives have adequate working business pipeline to consistently achieve sales goals

*Secondary Competencies:*

2. Invests time in strategic planning to best position the team for success
  3. Troubleshoots pipeline aberrations, focusing rep time on highest-value activities
-

**APPENDIX L**  
**COMPETENCY-BASED ASSESSMENT**

**Instructions:** Rate the competency statements below from (1-very little proficiency) to (5-exceptional proficiency).

**SCALE:**

1. **Very Little Proficiency** Possesses general understanding of key principles and is capable of discussing this competency with others.
2. **Limited Proficiency** Possesses a solid understanding of key principles and is able of to perform this competency with help (from reference material or other people) as required.
3. **Consistent Proficiency** Possesses a comprehensive understanding of key principles and is capable of working without assistance regarding the application of this competency.
4. **Advanced Proficiency** Possesses substantial knowledge and expertise and can both troubleshoot complex situations and teach others the application of this competency.
5. **Exceptional Proficiency** Possesses extraordinary knowledge and expertise and can both troubleshoot at a national or regional level and devise innovative applications of this competency.

Self  
Direct Report  
Manager  
Peer

Team Effectiveness					
Coaches for Sales Results	1. Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement				
	2. Balances corrective with positive feedback to ensure optimum guidance and performance improvement				
	3. Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development				
	4. Motivates individuals to enable sales performance				
	5. Links expected behaviors to strategic sales-related outcomes				
Manages Performance	1. Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated				
	2. Sets clear expectations for conduct, work activity and performance				
	3. Compares performance to expectations				
	4. Reinforces efforts and progress using rewards and recognition as appropriate				
	5. Adheres to organizations' performance management policies and procedures				
Builds Talent	1. Hires, promotes, and terminates to improve sales performance and address capability gaps				
	2. Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate				
	3. Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level				
Personal Effectiveness					

**Instructions:** Rate the competency statements below from (1-very little proficiency) to (5-exceptional proficiency).

**SCALE:**

1. **Very Little Proficiency** Possesses general understanding of key principles and is capable of discussing this competency with others.
2. **Limited Proficiency** Possesses a solid understanding of key principles and is able of to perform this competency with help (from reference material or other people) as required.
3. **Consistent Proficiency** Possesses a comprehensive understanding of key principles and is capable of working without assistance regarding the application of this competency.
4. **Advanced Proficiency** Possesses substantial knowledge and expertise and can both troubleshoot complex situations and teach others the application of this competency.
5. **Exceptional Proficiency** Possesses extraordinary knowledge and expertise and can both troubleshoot at a national or regional level and devise innovative applications of this competency.

Self  
Direct Report  
Manager  
Peer

Manages as a Leader	1. Demonstrates unquestionable business ethics and commitment to company and personal values				
	2. Displays responsibility for own actions and results				
	3. Manages with balance, objectivity and respect for the individual				
	4. Demonstrates and inspires confidence				
	5. Is a role model for high performance				
	6. Displays self-control and keeps disruptive emotions and impulses in check				
	7. Demonstrates smart risk-taking in making decisions				
	8. Maintains resiliency to many changes; inputs; or stresses throughout the course of working				
	9. Displays versatility and adaptability at many different tasks and processes				
Influences to Achieve Goals	1. Overcomes objections with skill, using examples, logic, data, or other pertinent information				
	2. Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding				
	3. Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message				
	4. Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others				
	5. Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions				
Develops Self to Achieve Goals	1. Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work				

**Instructions:** Rate the competency statements below from (1-very little proficiency) to (5-exceptional proficiency).

**SCALE:**

- 1. **Very Little Proficiency** Possesses general understanding of key principles and is capable of discussing this competency with others.
- 2. **Limited Proficiency** Possesses a solid understanding of key principles and is able of to perform this competency with help (from reference material or other people) as required.
- 3. **Consistent Proficiency** Possesses a comprehensive understanding of key principles and is capable of working without assistance regarding the application of this competency.
- 4. **Advanced Proficiency** Possesses substantial knowledge and expertise and can both troubleshoot complex situations and teach others the application of this competency.
- 5. **Exceptional Proficiency** Possesses extraordinary knowledge and expertise and can both troubleshoot at a national or regional level and devise innovative applications of this competency.

Self  
Direct Report  
Manager  
Peer

Execution and Results					
Builds and Maintains Relationships	1. Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs				
	2. Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust				
	3. Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making				
Sales Process	1. Validates sales representatives have adequate working business pipeline to consistently achieve sales goals				
	2. Invests time in strategic planning to best position the team for success				
	3. Troubleshoots pipeline aberrations, focusing rep time on highest-value activities				

**APPENDIX M**  
**FRONTLINE SALES MANAGER TRAINING DIAGNOSTIC**

**Instructions:** Using the scale provided, rate whether your frontline sales manager training adequately covers the necessary content for exceptional frontline sales manager competence. Add up your ratings design and delivery methods. When completing the diagnostic, think about the impact each of the content areas has on the sales team. Is the content adequate to meet the needs of your stakeholders? When you have completed rating the content, use Table 35 to interpret your results.

**Design** – Indicates the quality of the content

**Delivery Methods** – Indicates how broadly you can distribute learning based on various learning modalities, e.g., ILT, CBT, WBT

The design is...

The delivery methods are...

**SCALE:**

1. **Unacceptable**
2. **Weak**
3. **Acceptable**
4. **Very Good**
5. **Excellent**

Rate your sales training content related to...

Team Effectiveness			
Coaches for Sales Results	1. Observes sales behavior to identify strengths, weaknesses, and opportunities for improvement		
	2. Balances corrective with positive feedback to ensure optimum guidance and performance improvement		
	3. Demonstrates expected behaviors to achieve results, providing instruction, positive models, and opportunities for observation in order to help skill development		
	4. Motivates individuals to enable sales performance		
	5. Links expected behaviors to strategic sales-related outcomes		
Manages Performance	1. Manages underperformance by providing a clear understanding of what is needed to improve and the consequences of failing to do so with the confidence that the person has been fully heard and fairly treated		
	2. Sets clear expectations for conduct, work activity and performance		
	3. Compares performance to expectations		
	4. Reinforces efforts and progress using rewards and recognition as appropriate		
	5. Adheres to organizations' performance management policies and procedures		
Builds Talent	1. Hires, promotes, and terminates to improve sales performance and		

**Instructions:** Using the scale provided, rate whether your frontline sales manager training adequately covers the necessary content for exceptional frontline sales manager competence. Add up your ratings design and delivery methods. When completing the diagnostic, think about the impact each of the content areas has on the sales team. Is the content adequate to meet the needs of your stakeholders? When you have completed rating the content, use Table 35 to interpret your results.

**Design** – Indicates the quality of the content

**Delivery Methods** – Indicates how broadly you can distribute learning based on various learning modalities, e.g., ILT, CBT, WBT

The design is...

The delivery methods are...

**SCALE:**

1. **Unacceptable**
2. **Weak**
3. **Acceptable**
4. **Very Good**
5. **Excellent**

Rate your sales training content related to...

	address capability gaps		
	2. Ensures enough capacity on the team to achieve objectives, negotiating for talent as appropriate		
	3. Seeks to fill talent gaps through collaboration with team members to create and execute developmental plans at the team and individual level		
<b>Personal Effectiveness</b>			
Manages as a Leader	1. Demonstrates unquestionable business ethics and commitment to company and personal values		
	2. Displays responsibility for own actions and results		
	3. Manages with balance, objectivity and respect for the individual		
	4. Demonstrates and inspires confidence		
	5. Is a role model for high performance		
	6. Displays self-control and keeps disruptive emotions and impulses in check		
	7. Demonstrates smart risk-taking in making decisions		
	8. Maintains resiliency to many changes; inputs; or stresses throughout the course of working		
	9. Displays versatility and adaptability at many different tasks and processes		

**Instructions:** Using the scale provided, rate whether your frontline sales manager training adequately covers the necessary content for exceptional frontline sales manager competence. Add up your ratings design and delivery methods. When completing the diagnostic, think about the impact each of the content areas has on the sales team. Is the content adequate to meet the needs of your stakeholders? When you have completed rating the content, use Table 35 to interpret your results.

**Design** – Indicates the quality of the content

**Delivery Methods** – Indicates how broadly you can distribute learning based on various learning modalities, e.g., ILT, CBT, WBT

The design is...

The delivery methods are...

**SCALE:**

1. **Unacceptable**
2. **Weak**
3. **Acceptable**
4. **Very Good**
5. **Excellent**

Rate your sales training content related to...

Influences to Achieve Goals	1. Overcomes objections with skill, using examples, logic, data, or other pertinent information		
	2. Demonstrates active listening, paying close attention to what is being said and using questioning techniques effectively to probe and clarify in pursuit of accurate understanding		
	3. Determines the appropriate communication format for the situation and ensures that verbal/written communications, and group presentations convey information and ideas in a clear, concise, accurate, and persuasive manner that engages the audience and helps them understand and retain the message		
	4. Ensures responsive communication by making sure inquiries are addressed and expedited to facilitate the needs of others		
	5. Attains persuasive communication, influencing perceptions and using sound reasoning to achieve desired responses or decisions		
Develops Self to Achieve Goals	1. Maintains current business, industry, customer, competitive, and financial acumen, and incorporates into work		
<b>Execution and Results</b>			

**Instructions:** Using the scale provided, rate whether your frontline sales manager training adequately covers the necessary content for exceptional frontline sales manager competence. Add up your ratings design and delivery methods. When completing the diagnostic, think about the impact each of the content areas has on the sales team. Is the content adequate to meet the needs of your stakeholders? When you have completed rating the content, use Table 35 to interpret your results.

**Design** – Indicates the quality of the content

**Delivery Methods** – Indicates how broadly you can distribute learning based on various learning modalities, e.g., ILT, CBT, WBT

The design is...

The delivery methods are...

**SCALE:**

1. **Unacceptable**
2. **Weak**
3. **Acceptable**
4. **Very Good**
5. **Excellent**

Rate your sales training content related to...

Builds and Maintains Relationships	1. Cultivates and develops trusted advisor status, by ensuring that product or service value propositions align and resonate with customer needs		
	2. Actively nurtures, protects and develops relationships to higher levels of confidence and collaboration among stakeholders at all levels, based on personal integrity and trust		
	3. Advocates for the customer, representing customer interests within company business planning, and ensuring that a customer-oriented perspective is the touchstone for decision making		
Sales Process	1. Validates sales representatives have adequate working business pipeline to consistently achieve sales goals		
	2. Invests time in strategic planning to best position the team for success		
	3. Troubleshoots pipeline aberrations, focusing rep time on highest-value activities		

**APPENDIX N**  
**INTERPRETING THE RESULTS OF THE FRONTLINE SALES**  
**MANAGER TRAINING DIAGNOSTIC**

<b>Total</b>	<b>Recommendations for Design</b>	<b>Recommendations for Delivery</b>
34 – 68: Needs Work	<ul style="list-style-type: none"> <li>• Prioritize a design review by the competency importance and/or prioritize a design review by frontline manager competence</li> <li>• Given many of the competencies are related to leadership capabilities, identify if your organization has general leadership development that could be leveraged for the frontline sales team, e.g., coaching capability</li> <li>• If there is a sales community of practice (CoP) in your organization, identify if there is content/vendors available for economies of scale</li> </ul>	<ul style="list-style-type: none"> <li>• Identify how much time your FLSMs spend (or are willing to spend) in training annually and ensure content delivery methods support work habits</li> <li>• Identify why the delivery methods needs work</li> <li>• If there is a sales community of practice (CoP) in your organization, identify if there is content/vendors available for economies of scale</li> </ul>
69 – 103: Acceptable	Your content is sufficient to meeting the needs of your frontline sales team – see above for additional recommendations	Your delivery methods are adequate but not optimal – see above for additional recommendations
104 – 138: Great	Your content is contributing to your competitive advantage – see above for additional recommendations	Your delivery methods synchronize with how your learners learn within the constraints they have – see above for additional recommendations
139 – 170: Best Practice	Your content is helping the organization drive results – see above for additional recommendations	Your delivery is helping your organization drive results – see above for additional recommendations

## VITA

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### EDUCATION

- 2012                    Doctor of Philosophy, Educational Human Resource Development  
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- 2001                    Master of Arts, Teaching  
The University of Texas at Tyler, Tyler, Texas
- 1994                    Bachelor of Arts, Anthropology  
Baylor University, Waco, Texas

### EXPERIENCE

- 2010 – Present        Kimberly-Clark Corporation, Roswell, Georgia  
Director, Global Learning and Development
- 2008 – 2010          Pitney Bowes, Peachtree City, Georgia  
Vice President, Learning and Performance
- 2006 – 2008          Pitney Bowes, Peachtree City, Georgia  
Director, Employee Development and Performance
- 2004 – 2006          Pitney Bowes, Stamford, Connecticut  
Manager, Instructional Design
- 1999 – 2004          Tyler Junior College, Tyler, Texas  
Director, Corporate Services
- 1997 – 1998          University of North Texas, Denton, Texas  
Instructor
- 1995 – 1996          Coastal Carolina Community College, Jacksonville, NC  
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This dissertation was typed and edited by Marilyn M. Oliva at Action Ink, Inc.