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<b>Title</b>	Exploring salesperson learning in the client relationship nexus
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<b>Publication date</b>	2006-06
<b>Publication information</b>	Turley, Darach, and Susi Geiger. "Exploring Salesperson Learning in the Client Relationship Nexus." Emerald, June 2006. <a href="https://doi.org/10.1108/03090560610657886">https://doi.org/10.1108/03090560610657886</a> .
<b>Publisher</b>	Emerald
<b>Item record/more information</b>	<a href="http://hdl.handle.net/10197/5366">http://hdl.handle.net/10197/5366</a>
<b>Publisher's statement</b>	This article is (c) Emerald Group Publishing and permission has been granted for this version to appear here <a href="http://dx.doi.org/10.1108/03090560610657886">http://dx.doi.org/10.1108/03090560610657886</a> . Emerald does not grant permission for this article to be further copied/distributed or hosted elsewhere without the express permission from Emerald Group Publishing Limited.
<b>Publisher's version (DOI)</b>	10.1108/03090560610657886

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# **Exploring Salesperson Learning in the Client Relationship Nexus**

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# Exploring Salesperson Learning in the Client Relationship Nexus

## Abstract

**Purpose of this paper:** This paper investigates the characteristics and parameters of salesperson learning within client relationships, thereby filling a noticeable gap in the knowledge of individual learning in a sales context. It also aims at advancing the discussion on the nature of learning and knowledge in sales and marketing.

**Approach:** A grounded theory approach is used to investigate salesperson learning in a relational context. Data collection methods include interviews with 36 business-to-business sales personnel, reflexive exercises and field observations.

**Findings:** The investigation shows that salesperson relational learning is personal, that it occurs in action, that it is contextual, natural, open-ended, and often unconscious. Antecedents of learning are personal dispositions such as openness to changing contexts and situated learning mechanisms; consequences of relational learning are personal methods of knowledge transfer as well as the transformation of the learner and the client relationship. Thus, a framework of salesperson relational learning is proposed.

**Practical Implications:** Sales managers should emphasise the continuity of learning, train people *in situ* and minimise turnover of sales personnel. They might also do well to acknowledge how these alternative modes can complement traditional, more formal sales management methods.

**Value of the paper:** This paper presents a grounded model that aids both researchers and practitioners in understanding salesperson learning in client relationships, thus advancing a new theoretical perspective on learning in sales and marketing.

**Keywords:** salesperson learning, relationship selling, grounded theory, situated learning

**Category:** Research paper

## **Introduction**

It is widely acknowledged that sales organisations operate in an increasingly turbulent environment where market contexts and client relationships are constantly changing (Jones *et al.*, 2004; Ottesen and Grønhaug, 2004). In this environment, organisations as well as individuals have to be ready to change in tune with the marketplace and be willing to continuously learn about their clients if they want to remain successful (Chonko *et al.*, 2002). However, with the notable exception of Chonko and colleagues (Chonko *et al.*, 2002; Chonko *et al.*, 2003; Jones *et al.*, 2004), sales research has as yet neglected much of the impact of environmental change on both individual and organisational learning. Crucially, much of the research on salespeople learning and knowledge has been conducted in the 1980s within the so-called cognitive selling literature. This body of literature has laid minimal emphasis on aspects of salespeople's learning from a process-oriented perspective (Morgan and Stoltman, 1990; Macintosh *et al.*, 1992). In other words, it has focused primarily on knowledge content and structure – what the salesperson knows – rather than how knowledge emerges and develops in and through the sales interaction.

In an effort to redress this gap, the present study proposes a framework of salespeople learning that is arguably more suited to today's turbulent sales environment by positing a dynamic rather than a static understanding of salespeople's knowledge

acquisition. An exploratory study is presented that investigates how salespeople learn about their customers and how this learning functions within the client relationship. Finally, implications for research and sales professionals are drawn from this proposed framework of salesperson learning.

## **Cognition and learning in personal selling**

### ***The cognitive selling paradigm***

Sales researchers have emphasised the importance of salespeople's knowledge as early as the nineteen sixties (Webster, 1965). The first empirical investigation of salespeople's cognition (Weitz and Wright, 1978) set the tone for subsequent studies in the emerging 'cognitive selling paradigm' by adopting a schema-theoretical perspective. In this perspective, customer knowledge is seen as schematic, consisting of two different knowledge structures: knowing about things, or declarative knowledge such as customer categories, and knowing how, or procedural (script) knowledge such as how to proceed through sales calls (Szymanski, 1988).

This dual knowledge, it is contended, allows salespeople to adapt their sales approach to the different clients and sales situations they encounter (Weitz and Wright, 1978). As an example, Weitz *et al.* (1986) claim that salespeople's knowledge structures should be a critical factor for adaptive selling in a complex, dynamic sales environment. This claim, however, has not always been borne out in subsequent empirical work. For example, Park and Holloway (2003) demonstrate that there is no conclusive evidence of a relationship between salespeople's schematic knowledge and adaptive selling and sales success. Similarly, Porter and Inks (2000)

problematise a direct relationship between differences in schematic knowledge and successful sales adaptation and crucially go on to propose that the relationship may be an indirect one, mediated through salesperson learning. In other words, the complexity of salespeople's knowledge structures impacts on their willingness to learn and update customer knowledge, and this in turn may affect sales success. Macintosh *et al.* (1992) also recommend moving away from an emphasis on static knowledge structures in favour of greater emphasis on the interactive nature of customer encounters. As an example, in a social situation such as the sales encounter, even a very intricate cognitive script can be ineffective if it is not flexible enough to accommodate changes in the evolution of the interaction. In the same vein, Morgan and Stoltman (1990) criticise schema and script models for overlooking the existence of clients who “perceive back” (p. 50) and thus trigger a process of mutual cognitive adaptation – or learning. So, the truly successful sales professional may not be the one with the most complex knowledge structures, but the one who possesses ‘sensitive’ knowledge structures, or the greatest capacity “to learn, read and react quickly” (ibid). In a word, this body of authors clearly advocates that the traditional emphasis on what salespeople know needs to be complemented by a fresh research trajectory that seeks to explore how salespeople learn and update client knowledge in a dynamic selling environment.

### ***Salespeople's learning***

Over the past decade, research has started to develop this trajectory and promote the importance of learning in the sales literature. However, this research has been somewhat fragmentary in nature, typically focusing on isolated dimensions and variables. One such variable has been salespersons' learning orientation, which has

been shown to affect adaptive selling (Sujaan *et al.*, 1994; Park and Holloway, 2003) and customer orientation (Harris *et al.*, 2005). A number of individual and organisational antecedents of salesperson learning have also been investigated (Kohli *et al.*, 1998; Wang and Netemeyer 2002). Despite these advances, this research does not yet form a coherent body of knowledge. Chonko *et al.* (2003) have recently formulated a research agenda for a systematic investigation of learning in the sales force. Central to this agenda is individual salesperson learning. While learning ultimately needs to occur at an institutional level, sales organisations can only learn through the experiences of their individual members. At the core of a learning sales organisation lies the individual salesperson who is in daily contact with the firm's customer base (Harris *et al.*, 2005). Individual salesperson learning is of particular importance in industries where long-term relationship building with clients is more important for success than transactional selling (Beverland, 2001). In such an environment, if the salesperson is both able and willing to update their customer knowledge continuously and to externalise and disseminate it in the sales organisation (Camus and Cova, 2002), environmental change can be successfully negotiated and long-term client relationships fostered.

While reflections on salespeople's learning have succeeded in directing attention away from static conceptualisations of salesperson cognition toward the more process-oriented view of salesperson learning, they have failed to include a conceptual discussion on the nature of learning and knowledge – a discussion that has been conducted at length in cognate areas such as organisational behaviour (e.g. Nonaka and Takeuchi, 1995; Davenport and Prusak, 1998). However, a direct translation of these learning theories into the sales realm may be problematic. Central

to this paper is the belief that much of what salespeople learn involves learning about relationships, and not just about relationships in general, but a specific type of relationship that is shot through with both commercial and strategic agendas. An understanding of the theoretical nature of individual salesperson learning within client relationships is not only of academic interest, but will also help to shed a clearer light on the processes of learning in a sales context: how salespeople learn about their clients, how such learning impacts on the client relationship and how this relational knowledge can be transferred from its relational nexus to the wider sales organisation.

## **Methodology**

The remit of this paper is to investigate the nature and characteristics of salesperson learning in client relationships. Rather than investigating abstract thought and then linking it back to behaviour through constructs such as adaptive selling or customer orientation, this paper sets out to explore salespeople's learning and knowledge in the context of their use through a combination of reflective and observational protocols. The method of choice for this investigation was the grounded theory method. A number of considerations informed this decision. First, from its inception, grounded theory has shown itself to be particularly suited to the study of processes and social interactions even more so than other interpretive approaches (Glaser and Strauss, 1967). Second, as Chonko *et al.*'s study (2003) illustrates, individual salesperson learning represents relatively uncharted theoretical waters; indeed, to the knowledge of the authors no study specifically looked at the characteristics of salesperson learning in client relationships. Third, as Locke (2001) points out, grounded theory researchers also have an inherent interest in the impact of their studies on the life world of participants, a concern that this paper shares. In recent years, the grounded

theory method has started to obtain a high level of recognition in marketing research (for example Flint *et al.*, 2002; Ulaga, 2003). It has also recently been described in detail in the marketing literature (Goulding, 1998; Flint *et al.*, 2002; Geiger and Turley, 2003).

### ***Sampling***

Sampling evolved in line with Glaser and Strauss' (1967) recommendation of moving from a broad initial sample to a more focused one in the later research stages. Companies from a range of product and service industries with different sizes and organisational structures were solicited to participate. All companies were approached either through individual staff members known to the researchers or through formal contact with senior management and were assured of anonymity and confidentiality. In line with Glaser and Strauss' (1967) postulate that external variables have to earn their way into the analysis, both company characteristics and respondents' demographic details were kept on record and drawn into the comparison of incidents whenever considered necessary. An explicit effort was made to ensure that the spread of companies featuring in the sample represented a spectrum of market turbulence and volatility. For instance, the sample included fast moving consumer goods salespeople as well as representatives from more stable industries such as building supplies (see table I). Sales representatives, sales managers, national account managers and sales directors were interviewed and, where access was granted, observed in their client interactions. Thus, as in most grounded theory studies, data from multiple sources were utilised (Ashill *et al.*, 2003). An overview of the research participants, their companies and respective industries is presented in table I.

-----TAKE IN TABLE I ABOUT HERE-----

### ***Data collection and data analysis***

No *a priori* hypotheses or theoretical framework were used to guide the investigation; in the grounded theory spirit, any concepts or theoretical models had to emerge from the data gathered in the field (Glaser and Strauss, 1967). An interview guide was designed to incorporate a range of questions inviting salespeople to reflect on their customer interactions and learning. For instance, questions featured in the interview guide were: ‘What do you know about client A?’ ‘How did you find this out?’ ‘If you compare how you deal with this client now and at the start of your relationship, what has changed?’, ‘How does client A differ from client B?’, ‘How do you know?’ etc. This interview guide was used as loosely as possible: the interview participant was to determine the course of the interview so that the data reflect their everyday realities rather than echoing pre-formulated questions (Douglas, 1985).

In addition to the reflective interviews, field observations during sales calls and subsequent ‘auto-driving’ exercises (Heisley and Levy, 1991) querying the sales reps on their observed interactions were carried out where access was permitted. All data were transcribed verbatim by one of the researchers and checked for completeness.

A three-stage coding process was adopted (Strauss and Corbin, 1998). During the first open coding stage, data were coded separately by the two authors and coding schemes compared in joint recoding sessions. Where disagreements arose, data were recoded afresh until consensus was reached. During this stage, research diaries were drafted and, where applicable, the interview guide for subsequent interviews was adjusted accordingly. In this manner, analysis immediately informed further data collection.

Axial and selective coding (Strauss and Corbin, 1998) of the data were used in the second and third stages of the process to advance understanding of the emerging concepts until a clear, dense and parsimonious picture of salespeople's learning within the client relationship nexus emerged. As advocated by Glaser and Strauss (1967) 'member checks' were conducted during the final data analysis phase to verify and complement the emerging analytical framework. This member check also served the added purpose of ensuring that the analytical framework remained 'grounded' in the life world of the participants.

## **Results**

Our investigation of the nature of salesperson learning in client relationships shows that this learning has a number of core dimensions. Figure 1 illustrates these core dimensions of salespeople's relational learning together with a number of relevant antecedents and consequences. This framework represents a summary of the data analysis and is thus an *a posteriori* model; it is presented at this juncture on the understanding that it is an outcome, rather than a starting point, for the investigation. The emergent concepts featuring in this framework will now be discussed in turn.

### ***Learning as Personal***

Perhaps the most vivid and overarching feature of learning as experienced by our participants was its inherently personal character. The term "personal" bore a number of connotations. First, learning was personal in the sense that it was typically portrayed as learning about another person, the client. Put another way, the learning that took up much of their professional lives was predominantly inter-personal in nature. Salesperson learning was also personal in the sense that it was seen as

something that was essentially an individual matter. Salespersons could not really be taught; they could only be self-taught.

This guy Steven starting on the 22nd of March will go through a whole training program. A lot of that will be product training obviously, and also we'll do 'sitting next to Nelly', which is he will go out with the sales team and he'll get an idea what it's like, how this job is different from his previous job, and he'll be introduced to a few of his customers, but other than that he will be going in introducing himself for the first time. And the person really should be able to do that. He won't have anyone bringing him in saying: 'This is Steven, he is going to be looking after you'. No-one is going to create that relationship for him. He has to go in: 'Hi, I am Steven... I am going to be looking after you from now on'. So that will be up to him. And every sales person had to do that. (Pharmaceutical wholesale)

There seems to be a prescriptive subtext underpinning this verbatim, that learning *should* be a personal matter. The rationale for this prescription appeared to lie in the perceived non-portability of personal learning. Learning that has grown out of the dyadic interaction between unique individuals cannot be transferred unproblematically to some third party parvenu, no matter how eager and accomplished. Learning is personal precisely because of its embeddedness in this idiosyncratic relationship between individual salesperson and client:

Now in truth, what makes [salespersons] really successful is partly the information they have, partly the way they use it. If you did get all that very special information a salesperson has and gave it to another salesperson, there is no guarantee that they'd be equally successful. Because the behavioural dynamics, the salesperson interacting with the customer or the client, that's that indefinable thing that would make one relationship work and another one fail. (Telecommunications)

One pragmatic upshot of this non-portability of learning was that any attempt to transplant it from one salesperson to another would prove misguided and ultimately counterproductive. One participant working in the advertising sector recounted what happened when a well-meaning colleague sought to pass on "second-hand" learning by warning her of the temperamental vagaries of a marketing manager in a client company.

The chief lady, the marketing manager of the company in question, is a very tough lady, and [*my work colleague*] made me quite aware of that. In a way it

was worse because when I met that lady for the first time I was very very nervous of her. My first exposure to her - even though it was only second-hand – was quite negative, and I often wonder if I hadn't been warned about her would I have just wandered in and been myself? (Advertising)

If learning was personal in the sense of being non-portable it was also personal in the sense of personal ownership. The salespersons participating in this study typically work clearly demarcated sales territories, each comprised of a closely guarded and coveted client base. In such a competitive environment, it should come as no surprise to discover that for some participants, their accumulated learning represented a prized personal resource. Such learning may have been effected over many years and may equally have exacted a high cost in terms of time and psychological effort. Given such a mindset, a certain possessive *leitmotif* was perhaps to be expected.

Salespersons guard their knowledge very jealously and that they wouldn't let anybody else have it, be it other salesperson or their boss, because they would feel that if I gave you that information you would be able to do the same thing, and in fact you wouldn't. Because having that information is not the same as being able to use it. In other words, two salespersons given the exact same background information on a customer, you won't have the same results. (Telecommunications)

Apart from portraying an acquisitive subtext this verbatim, almost despite itself, betrays a sober realisation that in the final analysis any rivalry between competing sales staff for what each has learnt is misplaced. In so doing, it captures much of the polysemy of learning as personal. If learning is simultaneously self-taught and non-portable, then the need for defensive posturing over what has been learnt is vitiated. Put bluntly, stealing and appropriating what another salesperson has already learnt is both a pragmatic and an epistemological non-starter.

This feature of learning as personal has clear ramifications for the training of new sales staff. These will be discussed later in greater detail. However, for present

purposes it should be evident that depicting salesperson training solely as an unproblematic, once-off transfer of accumulated company learning is misguided. Participants in this study held resolutely to the view that learning is likely to be more incremental, osmotic and self-driven.

### ***Learning-in-Action***

A related though distinct dimension of learning was that it was always viewed as learning-in-action. Salespersons could only learn what they need to learn by doing. Whatever learning was, it certainly was light years removed from memorising an abstract body of information or a set of standardised selling techniques. In fairness to our participants, none of them dismissed such traditional formal training out of hand; however, they were unanimous in underscoring its inherent shortcomings. One seasoned salesperson working in the grocery sector made this point to good effect by pointing out that the only realistic way to learn to handle an irate storeowner was to go in and actually face one.

Can you train somebody to do it? You can give them ideas, but I think they need to go through the process. First to find out for themselves. If a guy comes in shouting and roaring and attacking you very aggressively no matter what you learnt before going to that meeting you have to go through that process a number of times before you are comfortable enough. You come out of college and you go into that; it is very hard to cope with. Over a period of time you have experienced it on a regular basis, you are far better in responding to it. So yes, it can be taught, but it has to be developed. (Grocery)

### ***Learning as Contextual***

When prompted to proffer examples of learning about clients, our participants invariably furnished accounts of specific situations in which they deemed learning to have taken place. These accounts were often accompanied by a vivid reflexive awareness that this learning was inextricably tied to the situation or context in which

it had occurred. Normative generalities of selling practice and procedure had their place but, as discussed earlier, learning was properly grounded in a specific dyadic salesperson-client relationship and such relationships, as with all relationships, are co-constituted by both parties. Learning is in this sense fundamentally context-bound.

And again if we had a contract rep to whom you said: ok, this is such-and-such a customer, this is the way with this customer, just give you a little bit of background, I don't know if that's necessarily a good thing. Because you are with me. You are behaving towards me in a way that if there was somebody else, you might behave in a different way. The relationship that you build up with somebody is so unique, you can't expect somebody to go in and replicate that same thing. It has to be started from the very beginning by themselves. (Pharmaceutical wholesale)

One upshot of the radical contextuality of salespersons' learning is that planning predicated on predictability becomes problematic. Overly rigid sales protocols or strategies could easily mitigate against learning to engage with and absorb the heterogeneity and contingencies that characterise their working lives. A preoccupation with trying to predict and forestall possible eventualities could prove both a distraction and counterproductive. In this sense, the requisite competencies for salesperson learning may be more dispositional than intellectual.

On the day you have to call the shots. You can't predict everything that is going to come up in a meeting but you have a reasonably good idea going in. But as to how to actually form those strategies, I don't know if there is such a thing really in any particular situation. You read a lot and get recommended a lot, but mostly it is really coming down to common sense and intuition, a lot of common sense, tuning into people. (Groceries)

The notion of "tuning in" to clients may well represent the core element of learning as contextual. The unpredictability and variability of sales contexts is such that the most critical aspect to sales learning may lie in the ability to read rather than predict or classify them. The rules of selling may well function as the rules of football do. Broad behavioural and social parameters may be operative; however, no two games are ever

identical. Creative flexibility will probably carry the day. This is doubly so in the turbulent life of the sales executive where variability and unpredictability apply not only between clients but also within individual client relationships. Perceptive salespersons may well have to “read” their clients afresh on each successive encounter.

Because I am in a certain mood today, I might be in a different mood tomorrow. The same buyers as well, you can't really read them. You don't know going in. You have a measure with them, how to be a certain way with them. But you really don't know until you actually go in there. And that's why they are sales people. That they can go in and they can read a situation at that moment in time.

Q: So you play it by ear?

You play it by ear, but having said that there is an aspect where you still have an idea of what that person is about at the same time. But you have to be flexible, because they may be in a different form that day. (Pharmaceutical wholesale)

### ***Learning as Natural***

A noteworthy feature of all participants' accounts of learning about clients was that this learning mirrored both the pace and framing of ordinary lived social interaction. In this sense, it was quintessentially natural. Learning about clients should both reflect and synchronise with the rhythm of normal interpersonal encounters and relationships. Indeed, if such natural learning was the preferred option of salespersons it was also perceived to approximate more closely with what clients themselves felt comfortable with.

It's not as if I was going out looking to make friends, but you want to be seen as a normal human person that has outside interests, and it's good to have that. If you deal with somebody lots over time, well then yes they will find out about my wife and kids or whatever and I will find out about what interests they have. Maybe. Maybe not. It tends to happen though that you get to talk to people and you explain your own background to them and you find out about their background. It just happens, it is just human nature that you want to talk about things that interest you. (Advertising)

Implicit in the foregoing verbatim is an appreciation for the fact that learning about

client details and interests need not be exclusively for overtly strategic ends. It can also serve at a deeper level to regulate the pace of the growing salesperson-client relationship in such a way that the salesperson feels more assured that what he or she has learnt is more reliable and trustworthy. The rate of learning has been optimal precisely because it has mirrored the ebb and flow of a normal, “natural” relationship, a sentiment echoed by another participant working in the grocery sector.

You generate and build up the knowledge of the customer week after week or month after month or year after year, as the case may be. It is by interacting with him and knowing how he reacted to this at this stage and knowing how he reacted to it at another stage and confirming as you go along. (Grocery)

A corollary of this inherently organic, developmental approach to learning, “as you go along”, is an aversion to any forcing or short-circuiting of the learning process. Except where they were explicitly prompted to do so, participants typically chose not to volunteer instances where learning about clients had been productively fast-forwarded through formal training programmes. Such programmes were not dismissed out of hand of course; they were seen to serve a purpose. However, in the overall scheme of things, they served more as “hygiene” factors in the client learning process.

If forcing the process led to questionable and unreliable learning, it could also run the risk of disconcerting potential clients. Customers could be justifiably unsettled and resentful if the pace of mutual learning and disclosure became overly lopsided or forced.

But you have to remember that there is something eerie about somebody coming in and talking for the first time to you and having a chat with you and the next time they come back and they know everything about you. I would let it happen naturally. If I knew them for years, it comes as a matter of course that you know what their wife’s names are or what their kids’ names are or what they’re doing in school. You mightn’t be that interested but you’d know.... A lot of sales trainers tell you that you have to know this and you have to know that, I’d consider that eerie. If somebody came into me and I only met him once, if he remembered my first name I would think, he is good with names, if

he remembered my girlfriend's and my grandmother's name, I tell you what! I wouldn't tell him anything anymore! (Building machinery)

This synchronicity between learning and normal social interaction was a key dimension of its naturalness. However, a second dimension to naturalness was also in evidence. Learning ideally took place *in situ*, where the client could be observed and interacted with in some natural setting. In some cases this setting was a golf course or pub where salesperson-initiated socialising took place (Geiger and Turley, 2005); more typically however it involved the client's workplace. Clients were likely to have appropriated and personalised their offices and workplaces in such a way that they felt more at ease there coupled with the fact that these settings could afford a privileged access to their personalities and foibles.

Offices can tell thousands of things about people, thousands of things. You can look for pictures on the wall from his children, you can look at the way he dresses and the way he sits, a man's or a woman's office will tell you thousands of things about him. (Groceries)

### ***Learning as open-ended***

If salesperson learning in customer relationships adopts a natural rhythm, then it follows that, as with the relationships from which it emanates, learning itself is never complete. Participants repeatedly emphasised that in their opinion, learning about customers is never 'done', and knowing about a customer is never static. Customers change; there will always be new, unforeseen situations even with the same customers, and as learning is embedded in both the relationship and the sales situation, there will always be something 'new' or something more to learn:

Q: Do you have the feeling that you know these people?  
I think we like to think that we do, but I think it's funny, no matter how long you are in the business you ALWAYS learn more, you ALWAYS learn more.

(Drinks)

Q: Is there anything else you could think of in this whole area?  
You never stop learning about your client. You never stop striving to learn more about the client (Financial services)

Many of our research participants derived great enjoyment from the fact that their job in getting to know the customer was never done. They prided themselves in being able to remain sensitive to changes in the client relationship or in the context in which it is situated; indeed some thought it was necessary to be aware of the fact that learning about clients is never 'done' in order to prevent the relationship from getting stale. Thus, just as in other interpersonal relationships, salespeople are aware that there never is a point where one knows everything about one's counterpart.

### ***Learning - unconscious or deliberate?***

In the recent management literature, much thought has been given to the fact that not all knowledge is explicit and not all learning happens at a conscious level (Baumard, 1999). Pursuing this issue in the present research, the authors found that salesperson learning in the relationship nexus can happen both at a conscious, deliberate level as well as at an unconscious, instinctive level. Salespeople are generally socialised into a mindset where 'knowledge is power'; they are frequently prompted both by their managers and by information systems to collect and pass on certain details about their clients. In this climate, many respondents were aware of the strategic role of such conscious learning about the customer and endeavoured to gather customer details in a deliberate manner:

Q: You just said that you have to get to know which buttons to press. How would you go about finding that out?  
Yeah, that's difficult. I suppose the obvious one is to ask questions. If you know the right questions to ask then you will get the right answers. [...] But there's some very smart people out there and they know what you are trying to do. But how can you have a friendly relationship with somebody and try that

sort of thing? It's not possible, is it? (Building machinery)

While this respondent employs very well thought-out strategies to learn about 'the buttons to press' with individual clients, he is also aware that such a studied approach to accumulating customer knowledge is fraught with danger. It may well be that a strategic approach to client learning contravenes the implicit rules of an organic build-up of customer knowledge, as discussed previously. Many salespeople seem aware of this conflict and do not attempt to overtly 'study' their clients beyond gathering the most basic client details such as their birthday, their wives' names or their sporting interests. This, incidentally, is also frequently the type of client information that is stored in customer databases.

In contrast, much of the relational learning, or how to engage with a particular individual, seems to happen on an unconscious level, as the following respondent indicates:

And I can't quite express to you how it is that you accumulate all that body of knowledge that then comes out when you are dealing with these people. But I suppose it's by elimination, that over the years I have learned by my own mistakes and by the mistakes of others that there are certain dos and don'ts in dealing with these people. (Building materials)

This respondent alludes to learning about clients in a manner reminiscent of Polanyi's (1966) discussion of tacit knowing, which has served as a point of departure for many psychologists and management researchers investigating unconscious learning in organisational practices. If much of what salespeople learn about their clients is learnt unconsciously through everyday relationship work, then sales firms may have to ensure that salespeople become aware of what they know through more reflective activities (Schön, 1983). It is only in this way that unconscious learning can be externalised and shared with others. This process is reminiscent of mechanisms of lower- and higher-level learning as suggested by Chonko *et al.* (2003) in their agenda

for research on sales learning.

### ***Antecedents of salesperson learning in client relationships***

As mentioned above, the burgeoning literature on learning in a sales context has started to investigate a number of antecedents and consequences of salesperson learning. While the purpose of this paper is primarily to explore the characteristics and mechanisms of salesperson learning in client relationships, there seem to be a number of specific issues arising from the type of learning described in this paper that warrant further attention. Some of the antecedent variables of salesperson learning in Chonko *et al.*'s (2003) framework may apply more appropriately to specific dimensions of salespersons' learning. For example, the antecedent 'reliance on organisational memory' could plausibly be seen to affect learning about products or solutions; however, it may have limited applicability in the sphere of relational learning. Our data show that the most important antecedents of salesperson relational learning, as shown in figure 1, are salespeople's characteristics and/or dispositions such as empathy, listening behaviours and openness on the one hand, and situated teaching mechanisms such as mentoring on the other.

In terms of personal dispositions, in the eyes of practitioners, relational learning seems to be more a skill than something that can be inculcated:

No, well, you can be trained to be less bad at [learning about the client], but I don't think you can be trained to be good at it. I think you either are good at it or you just are not good at it. .... Where the training comes in is where you, they can enforce you to recognise that relationships are important, they can enforce you to stop at the client and talk to people, it's important to get back to people, all sorts of tasks that people can change. But you can never - I think it's actually a skill. You might get better at it over time, you may learn, you may pick up the nuances of how people are operating and you make a scratching of being better at it. But unless you start off being reasonably good at it you will never be good at it long term. (Financial services)

This respondent, as with many other participants, claims that relational learning only happens if salespeople have a certain predisposition that includes a general inquisitiveness, a willingness to empathise with the client and a desire to ‘take on the role of the other’ (Prus, 1989). Thus, relational learning seems as much dependent on what Weitz and Bradford (1999) call ‘relational competency’ as it is on general learning orientation.

Related to this point is the observation that many of our respondents do not believe in formal training sessions to ‘teach’ salespeople how to learn about their customers. If relational learning, as it has been described above, is primarily experiential, individual and contextual, it follows that training the relational learner has to be experiential rather than classroom-based as well:

So I don’t think it was a conscious learning, I don’t think anybody ever sat me down and said: you have to learn that, I think you just pick it up as you go along. And I think for people teaching younger people about this, I think it’s like driving a car, you get into a car, you know you can drive a car, but if you try to teach somebody that skill, if you try to break it down, it can be very difficult, you don’t know how you do it, you just do it. (Advertising)

It is evident that sales organisations cannot always rely on individuals ‘just doing it’, as the last respondent put it. Some of the respondents describe mentoring episodes as learning mechanisms they have personally benefited from. Such apprenticeship-style education is not new to the sales domain. There is a vast amount of both practitioner and academic literature both on peer mentoring (for example Fine and Pullins, 1998) and sales coaching (for example Rich, 1998). Among other issues, this research points out that mentoring or coaching relationships are helpful in imparting technical job skills to new incumbents. Even though relational learning is not directly a ‘technical’ skill, its embedded and unconscious qualities render it ideally suited for transfer through such apprenticeship-style processes. In mentoring relationships, the novice

sales person learns the ‘craft’ of learning about and relating to clients through observation, imitation and tuition. It is a form of training that combines both practical and theoretical knowledge and that literally ‘situates’ the learning experience within the client interaction:

Q: So in some way it really is a trial and error process that you go through?  
Yes it is. I was very lucky because I had a fantastic mentor in my first six months in here, and without her I probably wouldn’t be an account manager now. Because I got promoted account manager in a very short period of time and I attribute a lot of that to the way she trained me and to the way she taught me how to interact with clients and things like that. (Advertising)

Thus, in the case of experiential learning, the right choice of a teaching and learning source is vital – situated learning cannot be taught in a decontextualised classroom format, and it can only be taught based on certain attitudinal and personal predispositions such as empathic listening (Comer and Drollinger, 1999).

### ***Consequences of salesperson learning in client relationships***

The situated, embedded and organic nature of salespeople’s learning about clients also has an impact on the way in which this accumulated knowledge can be stored, transferred and made use of by others, as evident in figure 1. Many of our respondents were somewhat sceptical about the value of sharing what they learnt in the client interaction with others. One respondent was asked what she knew about a particular client and, after struggling with the answer for a while, recognised that ‘you have to meet them to understand’. Respondents were equally sceptical about the idea of externalising their client learning through customer databases or sales force information systems. The observational data collected as part of this study showed that while salespeople may not be willing or able to externalise their client knowledge to others through IT systems, they often do so in the more informal and personal context of team meetings.

The authors of this paper witnessed several instances where salespeople who operated their territory individually went through great effort to meet up with their colleagues or managers for informal lunches or coffee breaks. Such a regular informal team encounter seems to provide salespersons with a learning environment and a mental frame for their learning experience. Observations of sales teams' interactions in a variety of firms suggests that these are the occasions where talk about customers is considered to be 'off the record' and thus personal knowledge is exchanged more freely. At these occasions, sales representatives seem to learn about the clients of other reps and their idiosyncrasies; they get to know the problems attached to some accounts and the best ways to resolve them. Through informal more than through formal knowledge sharing processes, the sales team becomes a customer knowledge repository and cognition becomes 'distributed' in the sales organisation:

You wouldn't find out a lot of information on personalities in a sales meeting, you get hard information on what sales or what prospects there are, but when you meet them informally, when you are just talking to somebody in the course of your work, you find out very quickly how well they are rated or how poorly they are rated and regarded. [...] Plus I suppose we got informal coffee breaks, that's the whole process of when people sit down and talk and share their ideas around. If you don't have that in an organisation then the poorer for it because how do you engender these communication channels formally? (Financial services)

Thus, from an organisational perspective, informal fora such as lunch meetings represent an invaluable opportunity for sharing customer knowledge and fostering salespeople's learning. These meetings take on the role of what the Japanese call 'ba', that is a place or facility where individuals interact to exchange ideas and share knowledge (Bennett, 2001). The relevance that respondents of this study attribute to informal information sharing in their sales teams ties in with the notion that relational learning is intrinsically personal, and that the knowledge emanating from it is

predominantly tacit. If customer knowledge is created in the relationship between a sales person and a client, such knowledge can best be imparted to others in a highly unstructured context that allows for the creation and sharing of metaphors and rich descriptions (Baumard, 1999). Thus, this study would suggest that informal methods of transferring customer knowledge may be more successful than formal ones.

Another interesting consequence of relational learning, which is displayed in the framework in figure 1, seems to be the transformation of the learner and the learning context in the process. If a salesperson invests the psychological energy and time to develop a deep understanding of his clients, this investment is not only likely to change the relational dynamics between buyer and seller but also the learner's self-perception. As mentioned above, if a salesperson endeavours to really understand the client, he will most likely display a certain amount of empathy. This empathic understanding, in turn, can lead to a feeling of 'oneness' with the client that is not entirely unproblematic:

[O]ne of the major currencies of a good sales person is that they create a tremendous EMPATHY with the customer. They have this thing that they are almost on the customer's side against the company in some ways. [...] Almost as if they are able to sort of come along and put the arm around the customer's shoulder and share his problems in some way. (Telecommunications)

Such a high degree of empathy, even if highly rewarding at a personal level, can be immensely taxing on the sales person and underscores the often precarious nature of the boundary role they occupy (Haytko, 2004). Some managers admitted that there could be a situation where a salesperson understands the client too well – potentially preventing him from objective judgment and maybe even impinging on his sales performance.

On a positive note, a deep mutual understanding is also likely to create a long-lasting

and close relationship between buyer and seller, a fact that has been acknowledged for a long time in the relationship selling literature (Dwyer *et al.*, 1987). Thus, while on the one hand relational learning could involve the salesperson with the client to a point where his actual sales performance may diminish, it is a prerequisite for a close, satisfying and successful client relationship. It seems that the relational learner needs to be made aware of both the potential advantages and dangers of his efforts and how to balance these outcomes through higher-level learning.

## **Discussion**

The earlier literature review noted that salespersons' knowledge has had ample coverage to date – most of it from a schematic/script perspective – but that salesperson learning has received scant attention. The emerging literature in this area has failed to engage in a discussion on the nature of learning in a sales context at a theoretical level. At best findings have been piecemeal and fragmented. This paper has sought to redress this lacuna by proposing a framework outlining the main parameters of client learning as experienced by a cross-section of Irish business-to-business salespeople. In summary, these parameters suggest that salesperson learning occurs primarily in a way that is intrinsically personal, naturally paced, non-portable, open-ended and is best characterised as an ability to read the 'lie of the land', to 'tune in' to the client at any given moment. While there were instances where learning took place in a studied and deliberate fashion - usually of client details - in most cases relational learning took place in a non-reflective and almost unconscious manner.

Overall, our findings display marked theoretical resonances with the situated action framework (Clancey, 1997). This framework lays particular emphasis on individual

learning in social and interactive situations (Clancey, 1993), situations that are typically unpredictable and unstable (Norman, 1993). They also emphasise the relationship between knowledge and action more so than previous cognitive frameworks. Learning, in this view, is “a pervasive, embodied activity involving the acquisition, maintenance, and transformation of knowledge through processes of social interaction” (Contu and Willmott, 2003, p. 285). This new conception of learning further portrays it as inherently individual and situational as opposed to static, portable and codifiable (Orlikowski, 2002).

This altered theoretical perspective should signal significant changes for the manner in which salesperson learning is fostered and utilised within commercial organisations. From a traditional viewpoint, salespeople learn by gathering information (Rentz *et al.*, 2002) and are trained to collect client information that can then be fed back to the company, usually in the form of entries in information technology systems (Campbell, 2003). This perspective maintains that information gathering and dissemination are a linear process, that information gathered is ‘portable’, that it is easily externalised and codified and that its use is independent of the social relationship from which it derives. In contrast, the emergent perspective evidenced by our participants suggests that salespeople learn about their clients in an ongoing, osmotic process as part of the interpersonal interaction with clients. This learning is unconscious and relational, that is, ‘built into’ and grounded in the client relationship.

Our study also uncovered a number of significant antecedents that facilitate this form of learning, as illustrated in the proposed framework in figure 1. First, success in

learning may be predicated more on dispositional rather than intellectual capability. The requisite dispositions point to a salesperson who is in tune with the client as they are now and sufficiently flexible and sensitised to ‘unlearn’ what may have happened during the last encounter and respond accordingly. Second, relational learning, as described in this study, has to happen *in situ*, that is in the physical as well as social context of the client interaction. Thus, our framework suggests that situated teaching and learning mechanisms such as mentoring rather than decontextualised training formats may be more productive in fostering such learning.

A number of learning consequences also feature in figure 1. First among these is learning transfer. Our findings highlight the personal and non-portable dimensions of relational learning and thereby question the capacity of formalised procedures and systems such as client databases to exhaustively absorb and communicate it. It may well be that the most appropriate way such situated learning can be externalised is through social interaction with other sales personnel in what have been termed communities of practice (Wenger, 1998). A second consequence is that relational learning may well exacerbate the natural tensions that go with occupying a boundary-spanning role. As a salesperson becomes more attuned to the client, they may find their personal and organisational sympathies and allegiances increasingly drawn into conflict. Third, over-reliance on an accumulated body of client detail could lull a salesperson into the mistaken belief that they have learnt all there is to know about a client. Our final outcome, transformation of client relationships, suggests that as with all relationships open-ended learning is a feature of the relational trajectory, to the point that when learning ceases, the relationship has probably died.

### ***Managerial Implications***

Our study has supported the view that the successful relational seller is likely to be the one with the most flexible rather than the most complex cognitive structure (Morgan and Stoltman, 1990). From a recruitment perspective, this signals that managers may be well advised to broaden the occupational base that they typically draw upon in hiring new staff. The critical importance of a flexible disposition suggests that those with a proven ability to succeed may be found in dynamic social environments outside the traditional marketing sphere such as waiting or nursing. As mentioned earlier, our study also suggests that due consideration be given to alternative mechanisms such as mentoring and on-the-job coaching both for initial and ongoing training.

On foot of relational learning's intrinsic open-endedness, sales managers may be well advised to emphasise to staff that learning about their clients is never complete. This can be done in a number of ways. One possibility is to have salespersons prompted to volunteer anything they have learned about a client each time they switch on their computer. Another option for sales managers is to probe their sales staff in regular debriefings about their client interactions. This will not only act as a reminder for the individual salesperson that learning is ongoing, but should also assist in eliciting the more unconscious elements of their client knowledge.

If client learning is inherently personal and non-transferable, minimising staff turnover is clearly of critical importance. That said, departures are inevitable and, when they do occur, handovers have to be managed judiciously. Our findings suggest that excessive priming beyond essential account details by the departing employee, however well-meaning, can prove counter-productive and can mitigate against the

new incumbent initiating his own relational journey with clients – to cite one seasoned sales manager who participated in this study: ‘There is no mid-point you can start a relationship with anybody from’.

### ***Recommendations for future research***

This research focused almost exclusively on the perceptions and experiences of practising salespersons by prompting them to reflect upon their relational learning with clients. Their accounts suggest that privileging traditional formal training systems may have drawbacks and that alternative, less structured options may prove more productive and enduring. To this end, future research might usefully seek to explore in a more dedicated and focused manner how options such as mentoring, on-the-job coaching, and informal social gatherings act as catalysts and drivers of client learning. Further research might also seek to incorporate relationship stage into respondent selection process in a more explicit fashion such that new, developing, and more mature client relationships could be contrasted with each other. In a similar vein, a longitudinal design might furnish a more comprehensive understanding of the course of individual client learning.

### **Conclusions**

In the past, extensive research has been conducted delineating the structures and outcomes of salespersons’ knowledge of their clients. This research agenda has perhaps occluded the anterior process of how such knowledge is acquired in the first place. As part of an attempt to redress this oversight, the present study sought to outline the main parameters of client learning of a cross-section of business-to-business salespersons. To this end, it proposed a model incorporating both the

dimensions of such learning together with a number of its antecedents and consequences. Taken in the round, findings support the view that client learning is indeed a distinctive mode of relational learning and that this distinctiveness in turn warrants a tailored and specialised repertoire of supports and interventions on the part of those charged with fostering and managing it.

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Table I: Interviewees and their industries

Industry	Number of participating companies	Number of interviews carried out	Observations
Services			
Advertising and media	4	9	No
Financial services	1	8	Yes
Telecommunications	1	1	No
Real estate	1	1	No
Products			
Food and drink	5	9	Yes
Pharmaceutical industry	2	5	No
Building and hardware	3	3	No
<b>TOTAL</b>	<b>17</b>	<b>36</b>	

Table I: Interviewees and their industries

Figure 1: A Framework of Salesperson Relational Learning

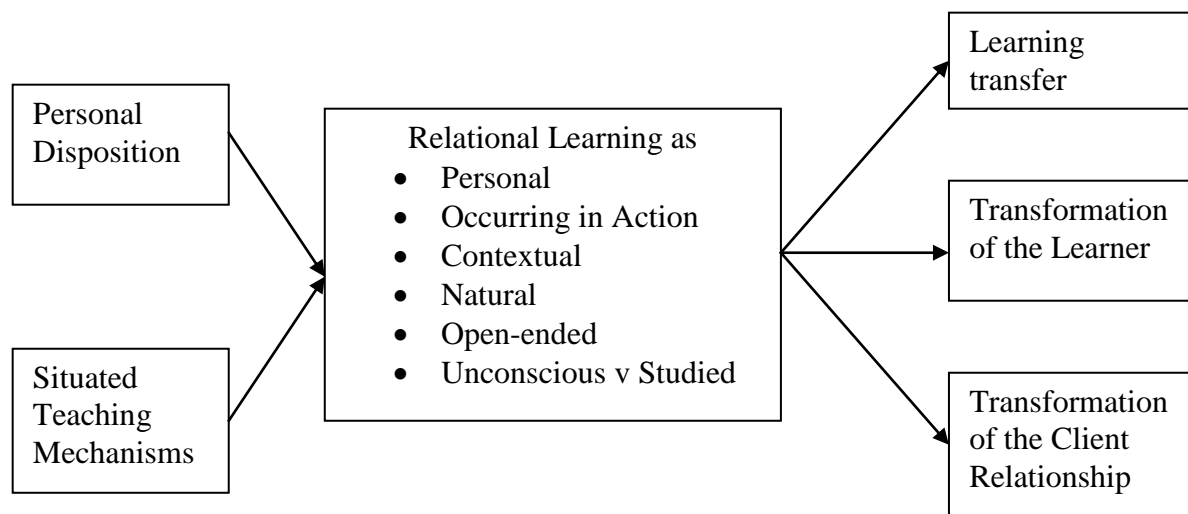


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